



PROFESSIONAL SERVICES GLOBAL OFFERINGS

Management Technology Consulting (MTC) is a US headquartered LLC, dedicated exclusively to Microsoft Dynamics 365 / CRM professional services and outsourcing with heavy engineering expertise. MTC is built on optimized delivery technology and globally preferred cost center operations to deliver high-quality superior-value rapidly to all markets around the globe 24 hours a day.



MTC'S SERVICE OFFERINGS

MTC excels in its specialty around “Services” industry needs with focused services and packaged solution products on the Dynamics 365 / CRM platform.

Platform Engineering Services:

Standard platform custom engineering services
Data migration and marketing data handling services
Platform web portal custom development

Custom Engineering Services:

Platform-based solution development services
Microsoft AppSource Onboarding services

Managed Support Services:

Solution support managed services
Solution updates, upgrades, re-deployment, performance optimization

Design and Marketing Services:

Web and marketing design services
Microsoft online storefront and marketplace services

Implementation Services:

Layered professionally-staffed technology-backed project management
Project scope and proof-of-concept development
Sales, marketing, customer services, and project services consulting
Implementation services within Sales, marketing, customer services, and project services
Accounting and financial analysis implementation services

Implementation Methodology:

MTC implements Dynamics CRM projects based on Microsoft Sure Step methodology tailored as per the project needs.

Find below are the phases that we cover during the implementation –

- Requirements phase – gather the clients business processes, user stories/scenarios, attribute/field details etc.
- Conduct Gap Analysis – identify fit gaps, requirements that can be mapped out of the box and those which need customization.
- Design Phase – provide walkthroughs of the UI mockups with business users and take their feedback.
- Configuration/Customization – Configure the OOB requirements and implement the customizations.
- Data migration
- SIT – test the business processes, user stories and scenarios implemented with test cases.
- Training/UAT – user acceptance testing.
- Deployment and “Go Live”
- Maintenance and Support

MTC is proud to Develop in These Technologies:



Build Your Own Efficient Offshore Team that's dedicated for Your Projects:



Full-time or part-time model



Skilled and certified resources



Complete control on your team



Regular scrum meetings



100% IP and data protection



Secured development environment

The following table illustrates typical project involvement of MTC and Client for the various activities as illustrated here as part of the Application Development and Maintenance Methodology table.

Phase	Activity	MTC	Client	Mile-stone
Presales	First customer meetings	●	●	
	Draft quotation	●		
	Review quotation		●	
	Signed contract		●	◆
User Requirements Study	Project Kickoff Meeting	●	●	
	Understand the User Requirements	●	●	
	Requirement Specification Documentation	●		
	Review requirement Specification Document		●	
	Signed requirement Specification Document		●	◆
Functional Analysis	Functional Specification Documentation	●		
	Review Functional Specification Document		●	
	Signed Functional Specification Document		●	◆
Design	Architecture design & document preparation	●		
	Architecture design document review	●		
	Architecture design document sign off		●	
	Technical Design	●		
	Design document preparation	●		
	Design document review		●	
	Design sign off		●	◆
Development & System Integration test	Coding and unit testing	●		
	User Documentation	●		
	User Document Review	●	●	
	System Integration test	●		◆
Delivery Phase	User Acceptance Test		●	
	UAT Sign off		●	
	Deployment and Go live	●	●	◆
System Warranty Period	Bug Report		●	
	Bug Fixing	●		
	Close Bug		●	◆
Maintenance	Bug Report		●	
	Bug Fixing	●		
	Close Bug		●	◆
	Request Raised	●		
	Analyze and submit it to CCB		●	
	CCB approve/Reject the request		●	

Implementation Methodology

MTC uses Microsoft Team Foundation server to manage the Application Lifecycle



Team Foundation Architecture

Data Migration

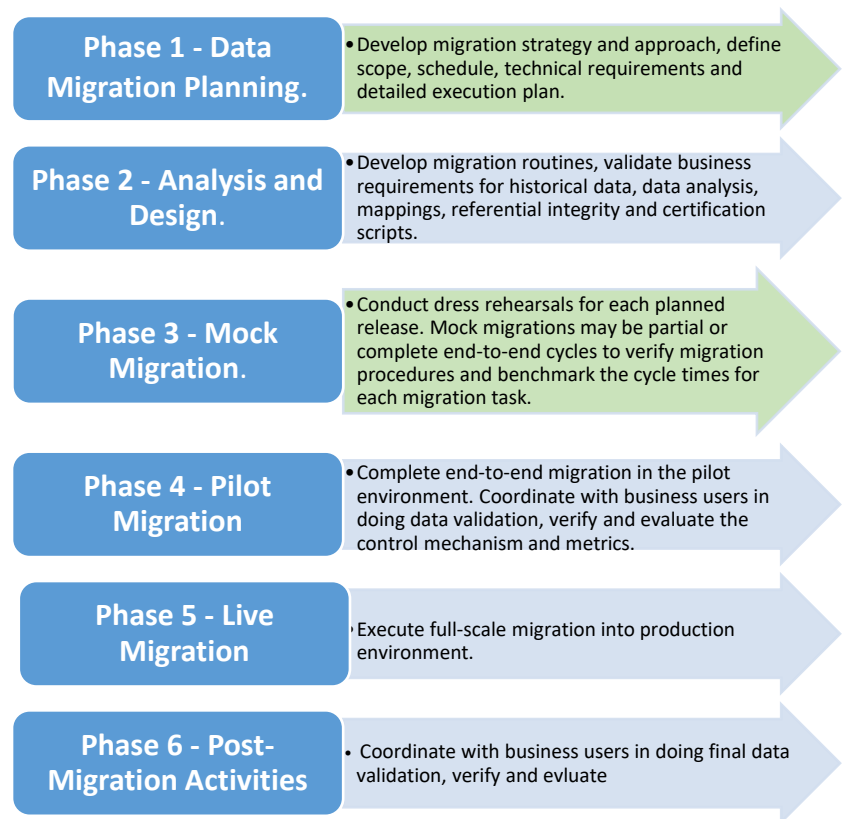
The data from the existing system shall be migrated to the Microsoft Dynamics CRM system. MTC shall ensure that the data integrity and confidentiality is maintained during the process of historical data transformation from existing system to new Microsoft Dynamics CRM system.

Data Migration Approach

MTC follows well-defined phases to execute data migration

Data Migration Phases

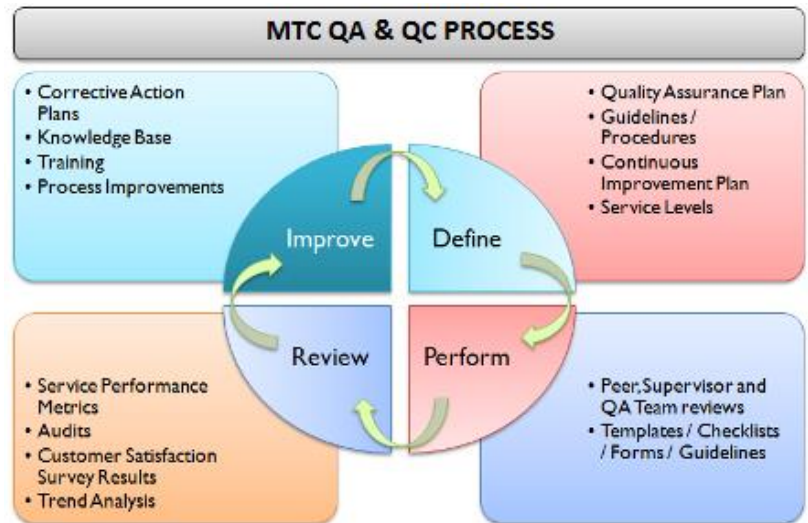
The phases may happen concurrently or in an iterative fashion. Entry and exit criteria should be defined for each phase and milestones should be set to trigger auditing, reviews as well as stakeholder expectation and communication processes.



Quality Assurance & Control Process

MTC Software Quality Assurance Testing Methodology is based on the following steps.

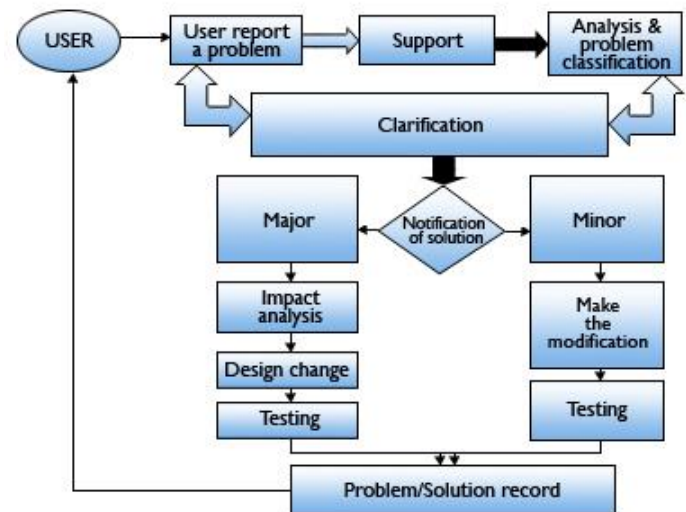
1. Identify Test Cases
2. Identify Sample Inputs
3. Identify Test Results and Outputs
4. Define Test Procedure
5. Define Test Boundary
6. Define Modules to be tested
7. Execute Test Case for Module 1
8. Verify Results
9. Repeat steps 5-8 for other modules
10. Repeat steps 7 and 8 for regression



Defect Management & Tracking Tool

This tool helps to track defect / issues to trace all the defects & issues while completing the work items. The below diagram illustrates the defect management & tracking procedures:

Defect Tracking & Management process →



Change Management Procedure

The Service requests (SR) are in the nature of application enhancements, changes to the source code, database, production jobs, reports, interface formats etc. The support team should be able to clearly differentiate between the support issue that should be resolved through the support process and the ones that would need SR process to be followed.

The development process should be followed for the SR execution as agreed with the customer. This may include any of the elements of the SDLC from requirements gathering and specifications to the user

acceptance testing. The source code control, MTP (Move to Production) and handover to support processes should be clearly defined and followed.

Keynotes:

Definition of SR (Service Request) Enhancement to applications supported by client operations in the following area,

- ✓ Changes to program source code
- ✓ Changes to production jobs
- ✓ Changes to production reports
- ✓ Changes to Database schema
- ✓ Implementation of new programs, interfaces, reports, processing logic and information.

Critical factors in this process

- ✓ Templates for SR and requirements gathering test plans and UAT signoff.
- ✓ Estimation guidelines for the efforts and scheduling of the SRs.
- ✓ Source code control guideline, tool and the definition and control of authority over source code.
- ✓ Testing environment that contains the latest possible data from production.
- ✓ MTP process and handover from development to support.

Communication Plan & Escalation Procedures

Communication Plan –

Audience Group	Deliverable / Description	Owner	Purpose	Channel	Delivery Frequency
All Stakeholders	Project Kick Off	Project Manager	Formal Kick-Off of Project Discuss Project Objectives, Approach, Schedules, Key Activities and Project Organisation	Meeting	Once, at the beginning of the Project
All Stakeholders	Project Plan	Project Manager	Document Project Objective, Background, Schedule, Communications Plan, Budget, Assumptions and Limitations, Project Approach, Project Organization Structure, Roles and Responsibilities	Email Word Document	1) At beginning of the project 2) During subsequent re-base lining
Attendees of Meeting	Minutes of Meeting	Project Manager	Capture discussion points and action items and circulate to all attendees for review	Email Word Document	Latest by next working day
Executive Steering Committee members	Executive Steering Committee meetings	Program Manager	Discussion on Project Status, Issues, Risks and Concerns, Key Checkpoints, changes to be made to the project plan and other items escalated to Steering committee	Meeting Minutes of Meeting and Status Reports MS Office Documents	1) Monthly 2) Ad-hoc
Working Committee members	Working Committee meetings	Project Manager	Discussion on Project Status, Issues, Risks and Concerns, Key Checkpoints	Meeting Minutes of Meeting and Status Reports MS Office Documents	Weekly
Working Committee members	Weekly Status Report	Project Manager	Communicate Project Status, Issues, Risks and Concerns and Key Checkpoints	Email MS Office Documents	Weekly
All Stakeholders	Monthly Status Report	Project Manager	Communicate Project Status, Issues, Risks, Dependencies Key Milestones	Email MS Office Documents	Monthly

The escalation procedure would be as per the below mentioned diagram –

