


## Improving productivity across Dynamics 365 activities with a personalized snapshot for on-the road or frontline employees

Veldara's Dynamics 365 integration with Viva Connections provides staff a **personalized snapshot** of activity related to across **Dynamics 365** in the last 24hour, directly from within Microsoft Teams and/or the corporate Intranet via mobile phone or tablet. **On-the-road employees** can **quickly and effectively stay up-to date** with new opportunities coming in. **Frontline employees** can spend less time behind the screens and more time with clients delivering better **customer experiences**.

### Why Velrada?

Velrada is one of Microsoft's most awarded partners with an extensive track record in improving business performance by integrating Dynamics 365 and Viva Connections. Constant changes take place across Dynamics 365 activities ranging from new or updates to accounts, leads, opportunities, tasks or cases that are assigned to staff which can be overwhelming. With the support of our team, we will work with you to understand your culture, priorities, challenges and design of the Dynamics 365 integration with Viva Connections to provide your staff a personalized snapshot of activity and ensure they are always kept up-to date.



Get started today with **Velrada's Dynamics 365 and Viva Connections integration**

- **Dynamics 365 activity feed** directly through Teams and SharePoint
- **Increase the engagement** with all staff in your organization regardless of location.
- Ensure staff are **always up-to date** with changes taking place in Dynamics 365.
- **Deliver relevant content to people in your organization** through the applications they are comfortable with.

## How Velrada's Dynamics 365 integration with Viva Connections will ensure staff are always up-to date with changes taking place in Dynamics 365.



### PLAN & DESIGN

- **Understand** how Viva Connections works and what's possible.
- **Discover key requirements** for the Viva Connections.
- **Identify users** that will benefit from Viva Connections.
- Plan and design **cards** for the dashboard.

### BUILD & DEPLOY

- **Setup and configure** tenant, permissions and deployment.
- **Configure and deploy** Dashboard to Teams and the corporate Intranet.
- Deploy and configure the **Dynamics 365 integration with Viva connections**.

### TRAIN & ADOPT

- **Train and upskill** your people.
- Guide **adoption & communications**.
- Document and **transfer knowledge** to manage and maintain.
- **Rollout** to whole organization.



## Services Overview: 3week engagement



### Plan & Design: 1 week

#### Plan

- Understand how Viva Connections works and what's possible
- Define the required cards to present within the Dashboard
- Identify Dynamics 365 to integration point
- Stakeholder and impact mapping
- Analyze current engagement

#### Design

- Define the functionality Viva Connections Dashboard will perform
- Design and wireframe properties of the Dynamics 365 integration



### Build & Deploy: 1 week

#### Build

- Setup and configure tenant settings and deployment of Viva Connections
- Creation of all Viva Dashboard components
- Deployment of Dynamics 365 integration
- Testing of Viva connections and Dynamics 365 integration

#### Deploy

- Adding the Viva Connections app in the Teams Admin centre
- Creation of the Teams App Setup Policies to control the pinning of Viva Connections within Teams



### Train & Adopt: 1 week

#### Training

- Dedicated training session
- Provide an Admin guide
- Provide an end user quick reference guide

#### Adoption

- Provide communication templates which can be adjusted and circulated across the business
- Expand to new scenarios, stakeholders, users and sources
- Compare engagement after roll out