

# Introducing Velosio as your GTM Partner for **Field Services** Opportunities

Presented by **Velosio**

2023

**Velosio**<sup>®</sup>



# Why Velosio

# About Velosio



- 26 Years Inner Circle (Product Direction)
- Among Microsoft's top 1% of Partners
- Part of the Microsoft's Eagle Program
- Microsoft Certified Develop Center & Development Arm
- Monthly Architect calls with Microsoft Product Teams
- Product Train on Behalf of Microsoft to other Partners (Marketing, Customer Service, Field Service, Project Operations, and Customer Insights)

## North Star

Velosio is the leading cloud applications partner for the midmarket companies. Industry-focused deployment models and expert advisors guide our clients to the right solution quickly, transforming their technology investments into competitive advantage.



# One Page for Field Service



## Business Applications Advisory

- Field Service Operational Maturity Assessment
- KPI Health and Center of Excellence from Best Practices
- Process Mapping and Engineering
- Assessment with Roadmap
- Value Creation & ROI Business Case

## Field Service

- Connected Field Service
- Intelligent Customer Care/ Contact Center
- **Industries:** Facility Management, Medical Devices, Commercial HVAC, Home Services, Healthcare, Distribution, Manufacturing, Professional Services, Insurance, High Tech
- Data Architecture
- Quick Starts, Implementation, Upgrades, Migration, System Integrations, Development, Training and User Adoption Services
- Takeovers and Recovery Services
- Support and Managed Services

## Key technologies

D365 Field Service  
D365 Customer Service  
UX Portals and Canvas Apps  
Power Automate for Hyper automation  
Power BI and Analytics  
Customer Insights  
D365 Remote Assist  
D365 Voice of Customer  
Azure IoT

# Betting on Field Service



- Velosio was founded 30 years ago as an ERP focused company. We have **26+ years' industry experience in field service** and business expertise across roles, functions and verticals.
- Our CE clients predominately come from our ERP practice. We specialize in **integrating CE with the clients' ERP**.
- Field service is a mission-critical application since it ultimately operates/runs the business. It's **a perfect fit for Velosio** as our business was built on **mission-critical ERP solutions**.
- We implement Field Services like an ERP implementation – with the discipline for **processes, data, integrations, training, deployment, reporting** and **support**.
- Today, **70%** of our CRM related business is in Field Services.
- Our Track Record, **100%** implementation success, **95%** user adoption, and **100%** client retention, over the last 3 years



# How Velosio Engages

# Our Value Proposition

We believe we are uniquely qualified to help your organization provide the client journeys and desired outcomes you seek...

**Our Capability** We have people who have experience **running** and being part of a Field Service Management Organization within various industries.

We speak your **KPIs** and Language.

**Velosio's Approach** We partner with organizations to create exceptional experiences. We help **transform your processes**, rethink your business, and deploy solutions that can scale. Every engagement starts with **shadowing resources** in the field and **evaluating KPI's** which helps uncover the core challenges you're facing

**Velosio** We continue to be recognized by Microsoft as a **leader** in bringing people and technology together.

**What we Do** What does being a Field Service Management provider mean? For us it's about having the **operational** and **industry** knowledge to address best practices in growing your business and achieving your desired outcomes.

## THE RIGHT EXPERIENCE

- + **86 years** of combined Field Service experience
- **32 years** of combined real-world experience within a field service organization
- **Average** Consultant Experience with the Microsoft Platform = **13 years**
- Team has combined **+250** years of CRM platform experience
- Microsoft **MVP** Certified
- Velosio was ranked 2022 as the **Best Place to Work** for (Woman, Diversity, Culture, and best CEO)
- **IP** that fills product gaps and accelerates your journey



## Velosio

**4,000+** Clients, **+12,000** Successful projects, with an industry leading **96% Client Retention:**

### End-to-End Microsoft Provider

- D365 CRM
- D365 BC
- D365 F&O
- Power Platform
- Office 365
- Teams
- SharePoint
- Cloud Services
- Support Services
- Managed Services
- Change Management
- Project Management
- Licenses



## Velosio RECOGNITION

Gold Microsoft Partner

2022 Business Applications Microsoft Inner Circle (26-Time Award Winner)

Top 1% of Partners MSFT Certified Development Center

Monthly Architect calls with the MSFT Product Teams



## OUTCOMES

Speed to Deployment

Strong User Adoption

Simpler Solution Scaling & Upgradeability

Reduced TCO

Alignment with Broader Roadmap

# Field Service Customer Engagement Model

**Brand Promise:** we guarantee 100% success and stand behind our word

FS Operational Maturity Assessment	Discovery	Analyze & Design	Build and Deploy
<p><b>What We'll Do:</b></p> <ul style="list-style-type: none"> <li>Assess your team's operational maturity level</li> <li>Objectively rate your operations in 5 domains and across 17 competencies using Velosio's proprietary Field Service Operational Maturity Rubric</li> </ul> <p><b>What You'll Get:</b></p> <ul style="list-style-type: none"> <li>Graphical representation of areas of relative strength</li> <li>Identification of opportunities for improvement</li> <li>Articulation of the business impact of improving operational maturity</li> </ul>	<p><b>What We'll Do:</b></p> <ul style="list-style-type: none"> <li>Perform day-in-the-life analysis for a Field Service Technician</li> <li>Evaluate your existing system</li> <li>Identify current process and system gaps that keep you from advancing to the next maturity level in high-value</li> <li>Align Velosio IP to those gaps</li> </ul> <p><b>What You'll Get:</b></p> <ul style="list-style-type: none"> <li>Gap closure inventory</li> <li>Budgetary range for project and price for Functional Analyze &amp; Design phase</li> <li>Recommendations on Approach</li> <li>Project ROI and outcomes</li> <li>Tailored system demonstration</li> </ul>	<p><b>What We'll Do:</b></p> <ul style="list-style-type: none"> <li>Process Mapping</li> <li>Validation of requirements and prioritized backlog</li> <li>Solution Design</li> <li>Tailored system demonstration</li> <li>Craft a change management and deployment plans to ensure system adoption</li> </ul> <p><b>What You'll Get:</b></p> <ul style="list-style-type: none"> <li>Prioritized backlog for future phase releases</li> <li>Comprehensive Functional Design</li> <li>Change management plan</li> <li>Deployment plan</li> <li>Committed estimate and WBS for the balance of the project</li> </ul>	<p><b>What We'll Do:</b></p> <ul style="list-style-type: none"> <li>Start to execute on the change management plan</li> <li>Build the solution based on the Design user stories</li> <li>Conference Room Pilots</li> <li>User acceptance testing support</li> <li>Cut over activities and final data migration</li> <li>Go-live readiness review</li> <li>Go-live support</li> </ul> <p><b>What You'll Get:</b></p> <ul style="list-style-type: none"> <li>Standard operations procedure document</li> <li>Lessons learned review</li> <li>Prep for Phase 2 activities</li> <li>Free recurring 6-month maturity and outcomes review</li> </ul>
<p><b>Cost: Free</b></p>	<p><b>Cost: \$10k</b></p>	<p><b>Cost: TBD</b></p>	<p><b>Cost: TBD</b></p>



# Field Service Intellectual Property

Harvested from our deep experience, Velosio's Deployment Models and Accelerators **manage risk** even as they **reduce project cost** and **accelerate timelines** by up to 20%. Most importantly, they ensure that you realize the **maximum business value** from your Field Service system.

## Deployment Models

Field Service Foundational  
*Best Practices*

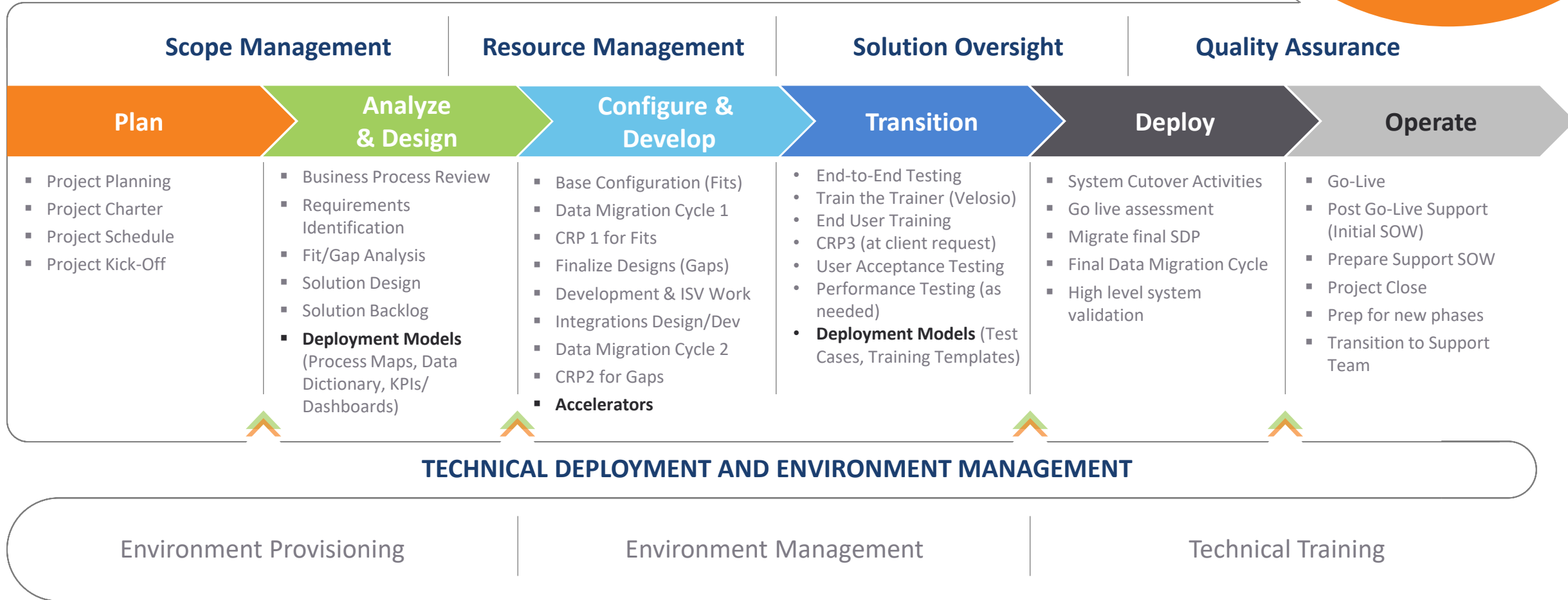
- Business Process Maps
- Domain Data Dictionary
- KPI/Dashboards
- Baseline UAT Test Cases
- Training Templates

## Accelerators

Tools and Technology  
*Speed to Value*

- Data Migration Framework
- Configuration Accelerator
- Common Component Library
- Common Workflow Library
- Baseline Security Profiles

# RightPath Implementation – Methodology



STANDARD TEMPLATE LIBRARY

# Strong User Adoption

Effective change management to set expectations, create change advocates and manage the change journey is essential to the success of this initiative and to create the momentum for scaling.



## Training and Support

- Velosio creates and delivers training activities that are short, consistent, frequent, and engaging
- White-glove approach

## Communication and Engagement

- Focuses on delivering the right content to the right audience at the right time
- Tailored communication

## Change Network

- Successful change programs activate a group of sponsors, ambassadors, and business counterparts that foster support and ownership of changes
- Long-term sustainability planning

# Just a few of our Field Service Stars



**Jason  
Wietharn**

**Practice Director**  
26+ years Industry & CRM Consulting, Power Platform, Enterprise Technology

Areas of Focus: D365 CE, Digital Transformation, Sales and Service Operation Management

Bachelor's Degree, Pre-Law with minors in Finance & Computer Science, Saint Vincent College

**Bill  
McGibony**

**Consulting Manager**  
15 years CRM Consulting, Power Platform Customer Service Certified

Areas of Focus: Salesforce, SMB Sales, ERP Integrations, Tibco Scribe, Project Management, Business Analysis, Field Service, Customer Service

Bachelor's Degree Information Systems, Wake Forest University

**Dave  
Sigler**

**Principal Consultant**  
26+ years of Field Service Experience with 8+ yrs of CRM Consulting

Lean Process Trained D365 Field Service Certified

Areas of Focus: Business Analysis Solution Design Field Service Customer Service Sales Power Automate

Telecommunication, Medical Device, Security X-Ray, Life Sciences Field Service Industry Experience

**Nina  
Bowers**

**Senior Consultant**  
22+ years Implementation of Microsoft Business Applications

D365 Field Service Certified D365 Sales Certified

Areas of Focus: Field Service Customer Service Power Automate Power Apps Business Analysis Process Improvement

Bachelor of Science, Criminal Justice and Business Administration

**Nelson  
Johnson**

**Principal Consultant /Solutions Architect**  
40+ years Software Industry Consulting

16yr Microsoft CRM Consulting D365 Sales Certified

Areas of Focus: Field Service Power BI Accounting Power Automate Sales

Master of Business Administration, University of Wyoming B.S., MIS and Decision Science, George Mason University

**Erica  
Ellis**

**Principal Consultant**  
24+ years Software Industry Consulting

D365 Field Service Certified D365 Customer Engagement Certified, D365 PSA Certified, D365 Project Operations Certified,

Areas of Focus: Solution Design Field Service Customer Service Project Operations Click Dimensions

BA, Marketing, University of Georgia

**Heather  
Racine**

**Senior Consultant**  
17+ years Implementation of Microsoft Business Applications

D365 Field Service Operations D365 Marketing Certified D365 Sales Certified Click Dimensions Certified

Areas of Focus: Field Service Sales Marketing Click Dimensions Power Automate Business Analysis

Bachelor of Science, Computer Information Systems, Devry University Texas

**Todd  
Fleming**

**Principal Consultant /Solutions Architect**  
30+ years Software Industry Consulting

15yr Microsoft CRM Consulting D365 Field Service Certified

Areas of Focus: Field Service Marketing Power Apps Data Architecture Power Automate Sales

Master of Business Information Systems, Univ of North Carolina Bachelor of Science, Marketing, East Carolina

**Casey  
Hendriks**

**Senior Consultant**  
9+ years D365 CRM Consulting

D365 Field Service Certified and Operations experience D365 Marketing Certified Click Dimensions Certified

Areas of Focus: Field Service Sales Marketing Power Automate Project Management

BA Saint Mary's University Computer Information Programming, NSIT

**Kandarp  
Vaishnav**

**Senior Consultant**  
12+ years Microsoft Technology and Systems Analyst, 4+ yrs D365 CRM Consulting, Power Platform, D365 Sales and Power Platform Certified

Areas of Focus: Field Service Power Automate Data Analytics Sales, Customer Service

Bachelor of Engineering, LD College of Engineering, Gujarat University

**Tian  
Wang**

**Functional Consultant**  
10+ years Business Analysis

5+Yrs D365 CRM Experience D365 Sales and Power Platform Certified

Areas of Focus: Field Service Power Automate Customer Service Sales

Masters, Technology Economics and Management, Sichuan University Bachelors, Electronic Information Engineering, Taiyuan University of Science and Technology

**Ashish  
Rana**

**Principle Consultant**  
11+ years in Microsoft Dynamics Consulting

Microsoft Certified MVP

Areas of Focus: Field Service Project Operations Marketing

Bachelor's Degree in Technology Shri Ram College of Engineering and Management MBA in Business Management Symbiosis International University



# Contact Velosio

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