



**Velosio**<sup>®</sup>  
What's your next?

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# Digital Transformation

Client Pitch Deck



**01** Introduction to Velosio

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**02** Digital Transformation Proposal Review

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**03** Open Discussion

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**04** Next Steps

# Velosio at a glance...



## Microsoft

### Microsoft Dynamics

- Dynamics 365 Finance
- Dynamics 365 Supply Chain Management
- Dynamics 365 BC

- Dynamics 365 CRM
- Dynamics GP
- Dynamics NAV
- Dynamics SL

### Productivity & Analytics

- Microsoft 365
- Power Apps / Power Virtual Agents
- Power Automate
- Power BI

### Cloud

- Azure Services
- Managed Services
- Security Services
- Cloud Migration

### Microsoft Certified

- ISV Development Center

## Solution and Services

### Solution Highlights

- **AXIO** Enhanced Framework for Dynamics 365 Finance
- **AXIO** Advanced Projects for Dynamics 365 Finance
- **AXIO** Distribution for Dynamics 365 Finance
- **Progressus** Advanced Projects for Dynamics 365 Business Central

### Services Highlights

#### Packaged Migration Services

- Fixed-Price Upgrade and Migration from Dynamics OnPrem to Cloud
- Dynamics GP, NAV or SL to D365 BC

#### Power Platform Quick Start

- Rapid, fixed price solution development
- Accelerate your Power Apps, Power Automate or Power BI solution build and deployment

## Competency Certifications

Microsoft Partner



- |                             |                                     |
|-----------------------------|-------------------------------------|
| Application Development     | Communications                      |
| Application Integration     | Data Analytics                      |
| Cloud Business Applications | Enterprise Resource Planning        |
| Cloud Platform              | Project and Portfolio Management    |
| Cloud Productivity          | Small and Midmarket Cloud Solutions |
| Collaboration and Content   | Windows and Devices                 |

## Industry & Expertise

### Industry

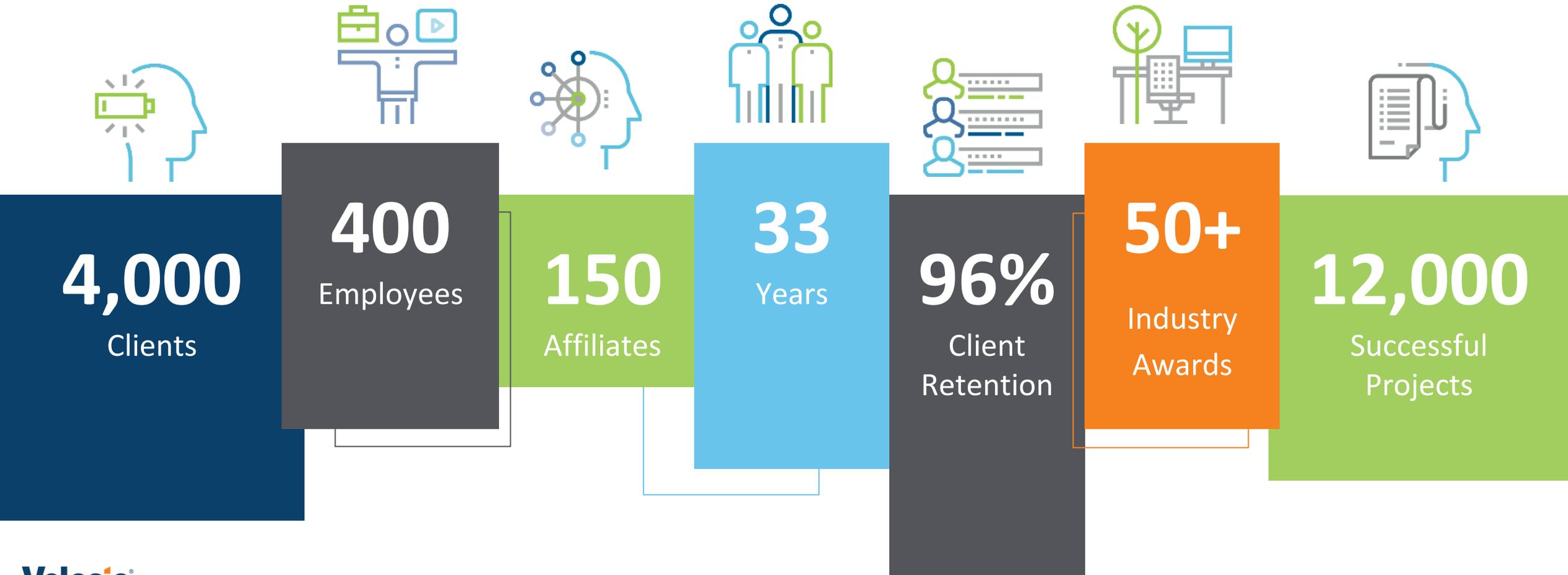
- Project-Driven; Professional Services
- Greenhouse Growers and Horticulture
- Industrial Equipment
- Distribution
- Commercial HVAC
- Non-Profit and Membership

### Expertise

- D365 Finance & Supply Chain Management**
  - Rapid Install, Low Risk, Low TCO
- D365 CE**
  - All workloads with strength in Field Service and Project Operations
- D365 Business Central**



# Velosio *by the Numbers*



# Achievements & Recognition:

## Microsoft Gold Competencies:

- ⦿ Application Development
- ⦿ Application Integration
- ⦿ Cloud Business Applications
- ⦿ Cloud Platform
- ⦿ Cloud Productivity
- ⦿ Collaboration and Content
- ⦿ Communications
- ⦿ Data Analytics
- ⦿ Enterprise Resource Planning
- ⦿ Project and Portfolio Management
- ⦿ Small and Midmarket Cloud Solutions
- ⦿ Windows and Devices



## FY21 EAGLE AWARD

Honoring Business Excellence  
in Microsoft Dynamics 365





# Benefit from an entire ecosystem of *integrated product solutions and technology* designed to support *your* business **end-to-end**.

## Microsoft Dynamics



- Dynamics 365
- Business Central
- Dynamics GP
- Dynamics NAV
- Dynamics SL

## Microsoft Azure Cloud



- Cloud Migration
- Data Sync
- Readiness Assessments
- Cloud Hosting

## Microsoft 365

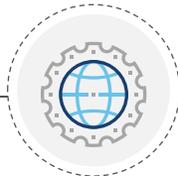


## Power Platform



- Power BI
- Power Automate
- Power Apps
- Power Virtual Agents

## Industry Solutions & ISV Add-ons



- Over 200+ Strategic ISV and Industry Add-on Solutions

## Additional Services



- Managed Services
- Dynamics Migration to Dynamics 365
- Support Services
- Development Services
- Reporting & Analytics
- Digital Transformation Advisory

# Enabling Solutions for Business

A comprehensive range of purpose-built solutions, services, and programs let our clients enjoy the long-term benefit of working with **a partner that knows their business** and has a **personal stake in their success**.



Accounting  
and ERP



Customer  
Relationship  
Management (CRM)



Power Platform  
Data Management  
Enterprise Integration



Talent  
Management



Industry  
Solutions



PSA  
Field Service  
(FSA)



Office  
Productivity

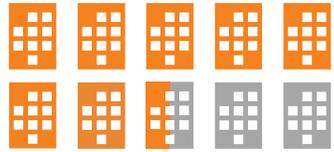


Analytics and  
Business Intelligence



Public, Private and  
Hybrid Cloud Services

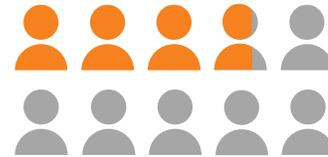
# Four Key Trends, Driving Global Digital Transformation



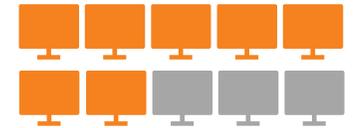
Companies are innovating & leveraging new technology to scale



Benefits from focused tech intensity



Lines between & within industries will blur with the help of Big Data



Corporate culture has shifted

## 73%

of companies report they are currently creating their own first-party intellectual property (IP), using next-generation technologies such as machine learning (39%), IoT (37%), AI (32%), & blockchain (29%).

## >83%

of companies believe they need to embrace tech intensity to be successful in the future.

## 36%

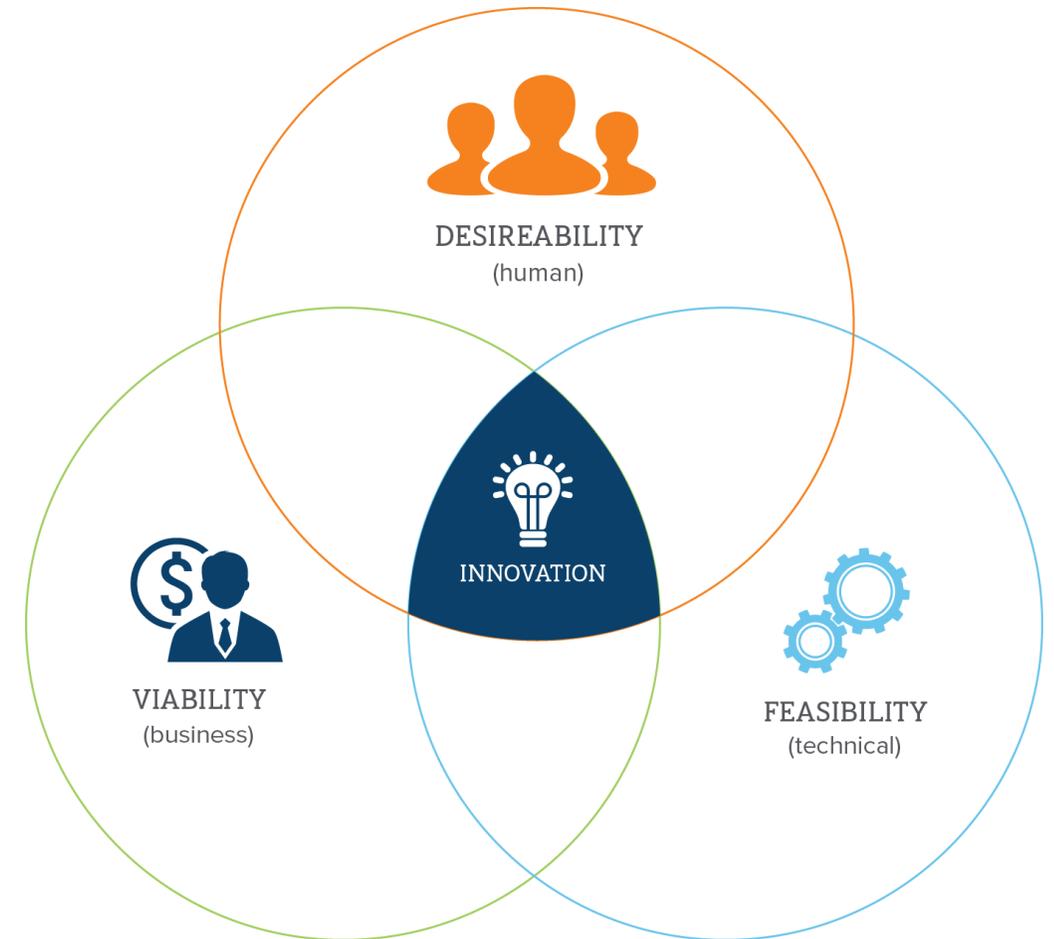
of companies believe digital advancements will make the global economic playing field more level. Advanced data insights reduce competitive barriers.

## 70%

of business leaders believe it is paramount to work for an organization that keeps up with software and application trends.

# Velosio *Digital NEXT* Overview

- A structured & strategic solution, leveraging upgrades in technologies & processes, that drive optimizations within a business & it's customer-base
- Proactive advisory services, with a deeper & more detailed discovery cycle, to create a robust & concrete foundation.
- We provide expert guidance to envision & achieve a technological & process enhancement plan
- We offer an essential foundation to utilizing best-in-class technologies & support services, focusing on business-related outcomes, not just technology improvements
- We deliver a Proposed Solution Roadmap, detailing planned phases of deployments & innovations, along with change management, adoption, and process optimization services.



# The Velosio *Digital Next Roadmap*

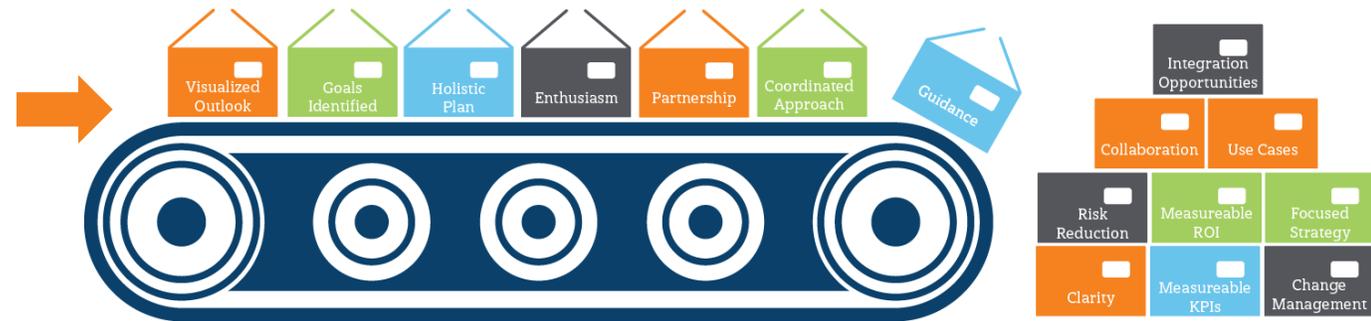
## Client Requirements



## DX Assessment



## Digital Transformation Outcomes



## A collaborative & strategic approach that eliminates siloed solutions

- Key impactors for DX: Focusing on iterative & innovative deployments of technology, that drive the following business outcomes:
  - 1) Better efficiency - workforce enablement
  - 2) Improved productivity, flexibility, & operational agility
  - 3) Improved customer experience & an improved competitive advantage
  - 4) Higher level of security
  - 5) Reduced operating costs
  - 6) Impactful & insightful data analytics & intelligence

2

Design  
(aka Plan)

- Mutually finalize the scope
- Strategic Value Map
- Present additional use cases
- Business Value Assessment
- Cost/Benefit Analysis

1

Inspire  
(aka Discovery)

- Introductions/defining set of objectives & strategy
- Scoping activities
- Shaping goals of the initiative(s)
- Defining key stakeholders
- Data gathering & deep-dive into processes and data

3

Empower  
(aka Execute)

- Solution assessments
- Organize touch-base cadences
- Select path forward
- Develop phased project plan

4

Achieve  
(aka Develop)

- Development of solution
- Demo environments
- Testing

5

Transition

- Change Management
- Adoption
- Go-live
- Monitor

6

Experience

- Optimize
- Augment
- Ongoing Support
  - Technical
  - Functional
  - Strategic
- Innovate to the Next Phase

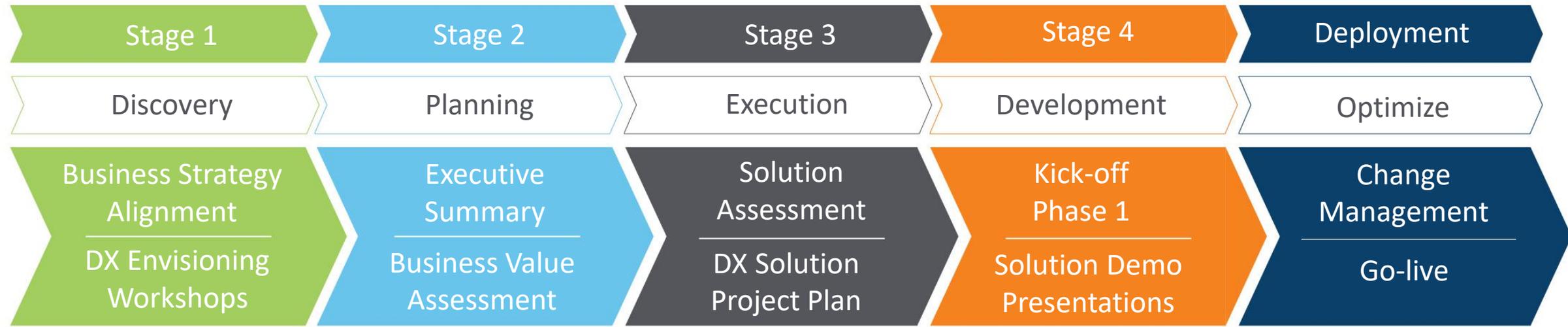


# Velosio *IDEATE* Framework

# Digital NEXT Roadmap: Process



# Digital Next Roadmap: Stages & Outcomes



## Outcomes:



- Key Stakeholders identified
- Daily Operations documented
- Additional use cases defined
- ROI/KPIs identified
- *Strategic Value Map* – goals tied to platform/solution capabilities
- Cost/benefit analysis
- Alignment w/stakeholders
- Benefits-driven *DX Solution Project Plan*, i.e.: current state to future state, project plan, & risk assessment/mitigations
- Alignment w/stakeholders
- Showcase progress on **phased** solution environments
- Demo sessions conducted, as increments are completed
- Collaborative & strategic DX advisory. Process & SOP enhancements. Full change management & adoption support.

# *Digital NEXT Roadmap: Key Outcomes*

- Our DX Assessment is a coordinated & unbiased engagement, that delivers the following assets:



# Why our clients can rely on Velosio

## Depth and Breadth of Mid-Market Solutions

- ERP, CRM, Productivity, BI, and Power Platform
- Entire MS Dynamics portfolio, Microsoft 365 and Azure
- Experience with over 240 Microsoft ISV solutions
- Proprietary Velosio Industry IP

## Stature with Microsoft is unmatched

- Microsoft Inner Circle (26 years)
- Over 40 industry, solution and growth awards from Microsoft
- Only Microsoft Cloud Distributor (iCSP) that specializes in Dynamics 365
- Certified MS Dev Center

## Size, scale and reach means we're there for you

- 400+ professionals
- 4,000+ clients
- Onshore, Nearshore and Offshore Development resources at the ready
- 96% client retention rate

THANK YOU