



The Complete Guide to the  
**Microsoft Cloud**

for Professional Services Firms  
and Project-based Businesses



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[www.sbsgroupusa.com](http://www.sbsgroupusa.com)

888.725.2555

[info@sbsgroupusa.com](mailto:info@sbsgroupusa.com)

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## Executive Summary

Professional services firms and project-based businesses invest in technology to improve employee productivity, streamline operations, improve sales, marketing, and customer engagement, and to get better insights into their businesses to drive continued improvements. Most organizations have, over time, invested in a number of stand-alone point solutions addressing different areas of need; the largest and most successful companies, though, go beyond point solutions by creating a *unified* solution, either through extensive integration of best-of-breed technologies, or standardization on a technology platform such as Oracle or SAP. Until recently, the cost and complexity of implementing such a comprehensive solution was beyond the reach of all but the largest global organizations. With the introduction of Microsoft Dynamics 365 — joining Microsoft Azure, Microsoft Power BI, and Microsoft Office 365 — any size professional services firm or project-based business can deploy a truly unified platform solution providing robust functionality for every business function and employee role.

In this paper, we will detail the business value of platform adoption, examine the specific needs of professional services firms and project-based business, review the elements of the Microsoft Cloud, and demonstrate why the Microsoft Cloud is the superior solution for the services sector.

In the Appendix, we have included a general *Primer on Cloud Computing* for those who need a grounding or refresher on cloud concepts, as well as a review of Microsoft Dynamics 365 and Office 365 components and benefits.

## Introduction- A Platform for Professional Services Firms and Project-based Businesses

Traditionally, enterprises achieved technology automation through the implementation of Enterprise Resource Planning (ERP). ERP is generally defined as an expanded effort to standardize recordkeeping to permit information sharing among different areas of an organization in an effort to manage the business more effectively and efficiently. A successful ERP implementation formalizes and integrates business processes across the organization, leveraging a single, integrated information system platform.

In the manufacturing sector, ERP has been the primary focus of business technology investment, but professional services and project-based businesses have significant technology needs *beyond* the back office. The customer focus of services firms, and the fluid, dynamic nature of services businesses has made Customer Relationship Management (CRM) an equally important part of the technology equation.

TechTarget, a technology research company, defines CRM as:

“The practices, strategies and technologies that companies use to manage and analyze customer interactions and data throughout the customer lifecycle, with the goal of improving business relationships with customers, assisting in customer retention and driving sales growth. CRM systems are designed to compile information on customers across different channels -- or points of contact between the customer and the company -- which could include the company’s website, telephone, live chat, direct mail, marketing materials and social media. CRM systems can also give customer-facing staff detailed information on customers’ personal information, purchase history, buying preferences and concerns.”

In short, where ERP puts the product at the center of the interaction, CRM focuses on the customer.

In many professional services industries, the output of the enterprise’s information workers represents the “product” that customers pay for. As such, the technologies designed to drive higher levels of individual and team productivity as well as the quality of deliverables are often considered a higher investment priority than system technologies. To drive these improvements, businesses typically invest in a myriad of solutions, including productivity suites like Microsoft Office, communications and mobility solutions, document management systems, remote conferencing and collaboration tools.



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Finally, organizations strive for visibility and actionable insight into operations and customer activities to improve services and internal efficiency. Business intelligence (BI) is a technology-driven process for analyzing data and presenting concrete, up-to-date information to help executives, business managers and other end users make more informed business decisions. BI encompasses a wide variety of tools, applications and methodologies that enable organizations to collect data from internal systems and external sources, prepare it for analysis, develop and run queries against the data, and create reports, dashboards and data visualizations to make the analytical results available to corporate decision-makers as well as operational workers.

The vision of the enterprise solution providers — both product-focused companies like Oracle and SAP and global systems integrators such as IBM and Accenture — is to provide their customers with an integrated technology platform on which they can run their businesses from end-to-end. The upside for these enterprises is both short- and long-term, though the short-term returns on an investment often get the most attention because they are (for the most part) more quickly measured. The cost-justification is driven by capital and operational efficiencies, improved customer service, and enhanced decision making capabilities. The longer, term, intangible benefits, however, reward owners by enabling them to continuously transform their business in ways that turn their vision into a reality. In the long term, this translates into measurable enhanced enterprise value as well.

To fully realize these advances, management must integrate the benefits of the platform into their strategic vision. At a high level, these include:

- **Integrated** business processes
- **Formalized** business processes
- **Automated** business processes
- Real-time information available *within* business functions
- Real-time information available *across* business functions
- Optimized **inventory management**
- Optimized deployment of **human capital**
- Accurate and detailed insights into **costs**
- Insightful access to **customer** and **supplier history**
- Rapid response to changing **customer requirements**
- Flexible and adaptable **information systems architecture**



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## The Cloud

The high costs of traditional platform solutions like SAP and Oracle are driven by both large capital investment requirements and significant ongoing expenses. They require costly up-front licensing and complex infrastructure to both run the software and manage ongoing secure access. The recurring costs of software and hardware maintenance are significant as well. In addition, IT organizations must retain a team with specialized training and the proprietary skills and resources to keep these systems running.

Cloud computing allows for a collaborative platform that unifies disparate teams and decentralized information under a single umbrella. There are varying definitions of cloud computing and an array of acronyms (SaaS, PaaS, IaaS), but cloud computing in its most basic form is a means to leverage the Internet as a standardized technology platform linking and sharing Web-based solutions, platforms, and infrastructures across multiple environments. Cloud computing turns the platform equation upside down, by eliminating the need for companies to invest in and maintain complex infrastructure to support their applications.

Because of the short-term impact and minimal support requirements, Software as a Service, or SaaS, is the most popular model for all but the largest professional services firms. The SaaS approach eliminates the need for up-front purchase of software, as well infrastructure. In a recent survey by ITSMA, a leading source for insight, community, and hands-on help for B2B marketers, 74% of respondents indicate they are using SaaS offerings today for office/productivity applications, 66% for email/communications, 50% for financials and 45% for customer relationship management.

For more information on the advantages of cloud computing, refer to Appendix 2, our *Cloud Computing Primer*.

## Business Trends that Make the Case for a Platform Solution

**Upward Trends in International Business** Increasing global trade provides new opportunities for many professional services firms, as more overseas business is handled according to US business standards. Many professional services are today easily transferable to foreign customers. In some cases, US professional services firms can draw both customers and staff from markets where labor and operational costs are lower.



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**Growth of Multi-Service Firms** Some larger professional firms offer a range of services to corporate customers that may include related offerings such as advertising and marketing, architecture and engineering, or management and IT consulting services. Multi-service firms can bundle services to offer “one-stop shopping” and increase profitability. Such firms sometimes involve entities that are distinct for legal or regulatory reasons, but whose work is nevertheless closely coordinated.

**More Work Online** More and more professional services firms are handling a significant part of their engagements online. This often means meeting a customer face to face (if necessary) for only the business analysis phase, some training, and major milestones — but performing as much as 80% of the actual service engagement online and off-site.

**Remote and Mobile Workforces** Professional Services firms have always needed to support the work activities of employees working at away from the office — either at customer locations or otherwise remotely on behalf of clients. Today, more and more employees have no home or branch office presence and work entirely remotely from home offices and on the road.

**Project Modularization** More and more, work is assigned to anyone, anywhere, who can do it better, cheaper and faster. Companies are discovering how to break a project down into mostly decoupled, atomized work components that can be performed by small, independent teams scattered across the globe. These work components are then assembled and blended seamlessly by an integration team to create the final product. Companies can choose to locate these modules inside or through subcontractors outside the enterprise, knowing they integrate easily with other critical business activities and can be reconfigured and optimized as needs change. The rapid and continued modularization of business processes means that companies must focus on and invest in only those world-class processes that create a competitive advantage.

**Project Delivery Innovation** As fierce competition, globalization, and the modularization of business processes and technology force the professional services industry to streamline, clients often require professional services firms to deliver cost-effective services in smaller, fixed price contracts. At the same time, though, they expect highly seasoned professionals equipped to address their most challenging industry-specific process needs.



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To succeed in this environment, professional services firms must continually improve their service delivery methods to increase client value and profitability and lower costs.

**Productization** Professional services firms can deliver services in an ad hoc manner for every client and package them in structured, yet flexible, ways. An example would be a packaged offering including templates, defined methodologies, work plans, and how-to guides. By packaging, pricing, and marketing these individual service offerings together, a professional services firm gains a more profitable and streamlined sales process for both new and existing clients, with more predictable outcomes.

**Value-Oriented Billing** The basic revenue model for professional firms remains hourly billing, but more and more, firms have begun billing according to the *value* of the services they provide. Value-oriented billing is easiest to apply for services where the value is explicit, such as tax savings, damage awards, ad placements, or the size of an acquisition or merger. The phenomenon of value billing can be expected as professional service firms become “advisers” rather than just hourly workers.

**Intensification in the Use of Technology** Because of the close coordination required between firms and their customers (and of course among members of a firm’s own staff), professional firms have made substantial investments in communication and portable computer technology. Furthermore, the entire professional services sector tends to be tech-savvy and staffers want to leverage the more advanced technologies they use as consumers themselves to improve their work productivity.

## The Microsoft Cloud for Business

In November of 2016, Microsoft introduced Dynamics 365, a unified business management platform combining enterprise-class ERP and CRM capabilities with native interoperability with Microsoft’s industry-standard productivity and business intelligence technology. What makes Dynamics 365 unique is that it harnesses the power and unified nature of the Microsoft Cloud. Data has become the new currency; organizations create and access more of it, faster than ever before. The challenge is how to transform this massive, potentially overwhelming resource into intelligence that generates action and drive outcomes. Dynamics 365 allows organizations to adopt individual





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business apps such as Marketing, Sales, Service and Operations, but as organizations adopt more of these apps, they discover that the whole is larger than the sum of its parts as synergies are unleashed in the form 'Intelligent Business Processes'. This fusion will help proactively guide employees and customers to generate optimal outcomes. Dynamics 365 was designed with native interoperability with Office 365 and PowerBI. All these solutions are delivered in a SaaS model, and priced to fit the budget of any organization.

All this means that with the introduction of Microsoft Dynamics 365 — joining Microsoft Azure, Microsoft Power BI, and Microsoft Office 365 in the Microsoft Cloud — any size professional services firm or project-based business can deploy a truly unified platform solution, providing robust functionality for every business function and employee role.

## Overview of the Microsoft Cloud for Business

Microsoft is a global leader in cloud solutions for both consumers and businesses, uniquely positioned to offer a myriad of solutions for the many markets it serves. We define the Microsoft Cloud for Business as the collection of services and products focused specifically on enabling organizations to manage their business operations and serve their customers:

### Microsoft Azure

Microsoft Azure is Microsoft's public cloud computing platform. It provides a range of cloud services, including those for compute, analytics, storage and networking. Users can select from these services to develop and scale new applications, or run existing applications, in the public cloud. Microsoft Azure is widely considered both a "Platform as a Service" (PaaS) and an "Infrastructure as a Service" (IaaS) offering.

These services require robust internal IT and development resources in order to effectively manage. While some of the largest professional services firms may want to invest in these resources to use the IaaS or PaaS services capabilities of Microsoft Azure, the vast majority are looking for the simplicity and more immediate financial benefits of Microsoft's SaaS solutions, Office 365, Power BI and Dynamics 365.



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## Microsoft Office 365

Microsoft Office 365 delivers the power of cloud productivity to businesses of all sizes, helping save time, money, and free up valued resources. Office 365 combines the familiar Microsoft Office desktop suite with cloud-based versions of Microsoft's next-generation communications and collaboration services – including Microsoft Exchange Online, Microsoft SharePoint Online, Office Online, and Microsoft Skype for Business Online – to help users be productive from virtually anywhere they are, even when away from their software.

## Microsoft Business Intelligence

**Power BI** is a cloud-based business analytics service that enables stakeholders to visualize and analyze data with greater speed, efficiency, and understanding. It connects users to a broad range of data through easy-to-use dashboards, interactive reports, and compelling visualizations that bring data to life.

**Cortana Intelligence** is a suite of fully-managed Business Intelligence (BI), Big Data, and Advanced Analytics service offerings. Cortana Intelligence is currently targeted at larger enterprises with advanced analytics needs and resources.

**Azure IOT** is Microsoft's solution for reaping the benefits of the Internet of Things (IoT). Azure IoT enables businesses to securely connect to devices to access, collect, analyze, and act on device data.

## Microsoft Dynamics 365

**Dynamics 365** unifies Enterprise Resource Planning (ERP) and Customer Relationship Management (CRM) into one SaaS service with new, purpose-built apps to manage all your core business functions, including Sales, Customer Service, Finance, Field Service, Operations, Marketing and Project Service Automation. Dynamics 365 features a flexible, extensible platform and uses a common data model with deep integrations to Office 365 to seamlessly connect business apps with collaboration and productivity tools like email, spreadsheets and word processing documents and includes. Dynamics 365 also includes powerful, built-in business intelligence and analytics capabilities.

## ISV AppSource Solutions

Microsoft's applications and services represent a unified platform and core business functionality for every business. Capabilities to support more specialized functions and personalization of the platform to meet individual business requirements are created through a combination of solution configuration and implementation of approved third-party solutions available through Microsoft AppSource. All AppSource solutions must undergo a rigorous approval process, guaranteeing quality performance and compatibility with the platform.

Professional Services firm and project-based businesses will often need robust project accounting and professional services automation capabilities beyond those included in the platform. AppSource solutions such as AXIO for Professional Services (based on Dynamics 365 for Operations) or Progressus (based on Dynamics 365 Financials) extend the platform to meet the needs of these organizations.

## Why the Microsoft Cloud is the Perfect Platform for Professional Services Firms

As a global leader in cloud solutions, the Microsoft Cloud provides all the general benefits that companies expect to see from the adoption of cloud technology, with significant advantages over competing providers when considering quality, security and privacy. Additionally, the design of Microsoft's SaaS solutions for business provides benefits way beyond alternatives.

### General Cloud Benefits

**Cost** Cloud computing eliminates the capital expense of buying hardware and software and setting up and running on-site datacenters: the racks of servers, the round-the-clock electricity for power and cooling, power backup units, data routines, and teams of IT experts for managing this infrastructure. In addition, Microsoft's flexible licensing and subscription models allow for very granular procurement and assignment of access levels, for optimization of your IT costs.

**Speed** Most cloud computing bandwidth and capacity adjustments are provided self-service and on-demand, so even vast amounts of computing resources can be provisioned in minutes, typically with just a few mouse clicks. This yields almost unlimited flexibility and takes the pressure off capacity planning or, worse, downtime.



**IT Productivity** On-site datacenters typically require a lot of “racking and stacking”—hardware set up, software patching, and other time-consuming IT management chores. Cloud computing eliminates the need for many of these routine tasks, so IT teams can spend time on achieving more important forward-thinking business goals. By leveraging familiar tools and technologies for management and administration, IT team members can leverage their knowledge of Microsoft technologies across multiple solutions.

**Performance** The biggest cloud computing services run on a worldwide, distributed network of secure datacenters, which are regularly upgraded to the latest generation of fast and efficient computing hardware. This offers several benefits over a single corporate datacenter, including reduced network latency for applications and greater economies of scale.

**Reliability** Cloud computing makes data backup, disaster recovery, and business continuity easier and less expensive, because data can be mirrored at multiple redundant sites on the cloud provider’s network.

**Mobility** Cloud computing, by definition, is designed for “anywhere access.” Applications and services are architected and built for remote and mobile access, simplifying the delivery of these resources to mobile employees. Additionally, Microsoft SaaS solutions for business were actually developed from the ground up to provide an optimized mobile experience with robust, easy-to-use mobile management and security capabilities.

**Agility** Although the actual spend for approved IT investments is generally “predictable,” the plans do not always align with what is actually needed by the business over the life of that investment. In light of the volatility of markets and rapid advancement of technology, IT infrastructure needs are becoming less and less predictable.

In short, cloud computing delivers improved agility because it has on-demand self-service and rapid elasticity. IT resources can be acquired and deployed more quickly and, once deployed, they can be increased or decreased as needed to meet demand. This means that IT can support the organization and it can innovate, introduce new products and services, enter new markets, and adapt to changing circumstances. Microsoft flexible subscription and licensing models are designed to support this kind of agility.



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## Microsoft-Specific Benefits

### *Simplified Security and User Administration*

All of Microsoft's services and apps leverage the same security and licensing models, considerably reducing the complexity of access management, data security, and licensing compliance.

### *Privacy*

Unlike some alternative solutions, Microsoft is primarily in the business of providing software, technology, and related services to individuals and businesses; their consumer and advertising-related businesses are completely separated from core business services. When you entrust your data to Microsoft, you remain the sole owner of that data: you retain the rights, title, and interest in the data you store. It's Microsoft policy to not mine your data for advertising purposes or use your data except for purposes required to provide you with optimal cloud productivity services.

### *Interoperability and Native Integration*

The apps and services of Microsoft Office 365, Microsoft Dynamics 365, and Microsoft Power BI are all designed to seamlessly connect and work together, enabling a high degree of data integration and cross-application workflow without complex and expensive integration efforts. The common data model of Dynamics 365, in particular, take this concept to its higher level. The common data model is even more than in integration in that all the systems are pulling from the same database. Since there is only one set of data, there is no need for integration.

### *Familiar Technology and Controls*

The SaaS solutions are designed with the goal of a consistent user experience across apps and services. Users can often choose to work through the interface that makes the most sense, based on device and context. For instance, because of the massive popularity of Outlook among information workers, users can access almost all the capabilities of Office 365, Dynamics 365, and Power BI using Outlook as a user interface.

### *Always the Latest Version*

As true SaaS solutions, Microsoft continually updates Office 365, Dynamics 365, and PowerBI with new functionality and service improvement. These updates require no customer effort and are seamless to users. The certification requirements for AppSource solution providers are extremely rigorous to ensure that these solutions are designed to continue to function as the services are updated and enhanced.



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## Industry Functional Requirements

Project-based businesses need full enterprise application suites that provide an end-to-end business process based on projects as the final deliverable to customers. Project-based businesses' unique requirements include:

### *Resource optimization*

Project-based enterprises are by their nature resource-centric. Business efficiency is driven by ensuring the "right" resource is available at the proper time and that resources are utilized to near capacity. Naturally, the proper skillsets must be matched to each project task and project schedule. The ability to forecast demand based on the project pipeline is business critical and a significant factor, both in ensuring profitability and in encouraging repeat business. Project-based businesses must attract, retain, and develop the human capital to meet (but not exceed) demand.

### *Optimizing Project Execution and Delivery*

Project-based businesses succeed or fail based on their ability to manage projects effectively and deliver the work on time and under budget. They must estimate the project accurately during the proposal phase, and then budget and schedule the project in a way that meets the delivery date(s) and the project's internal profit goals. There are varying levels of project complexity depending on the segment of the market. For example, management consulting firms may have small teams that are focused on delivering business optimization recommendations where the deliverable is a presentation to the customer's executive team, while an architecture firm may have large internal/external teams working on a complex project where the deliverable is an intricate building design. These examples illustrate the flexibility and diverse options that project-based businesses require in their project delivery models.

### *Project portfolio optimization*

To effectively forecast and manage a project-based business, managers need visibility into more than the details of a single project. They must manage pipeline, resources, and materials across all active and future projects. This visibility provides access to key performance indicators (KPIs) across the companies' entire business in real time, which in turn provides the stimulus and strategy for sound business decisions.

### *Profit optimization*

Profitability in a project-based business is highly dependent on the intersection of several factors. Optimizing resources (reducing “bench” time, having the correct resource available, etc.) is a piece of the puzzle, but there are other factors that interact to impact profits. Collecting and managing intellectual property can make project delivery more repeatable, which in turn can increase profit. Focusing sales teams on developing business opportunities that play to bench strength can also deliver increased profitability.

### *Optimizing issue resolution*

Logging, tracking, and resolving key project challenges as well as communicating that information to clients are an important part of maintaining a good, ongoing relationship with them; generating repeat business from existing clients is often a key to increasing profitability, as new customer acquisition costs are much higher than developing ongoing business in existing clients.

### *Government Contract Compliance*

Within the project-based market, many companies do business with the United States government. Companies that execute government contracts incur significant government-specific regulatory and accounting scrutiny. The accounting practices of these companies are governed by the rules of Federal Acquisition Regulations (FAR) and Cost Accounting Standards (CAS) and these accounting practices are reviewed in nearly all cases through Government audits performed by the Defense Contract Audit Agency (DCAA). Therefore, companies that do business with the Federal government must implement practices and systems that support compliance with Federal regulations.

### *Document management and knowledge management*

A business providing professional services relies heavily on the knowledge of each individual employee as well as on the company’s collective corporate knowledge. As such, each project has to be properly and systematically documented and stored in a central knowledge base, with any relevant employee with access to that knowledgebase able to obtain the necessary information for his or her project. This knowledge usually consists of the expertise of the service provider—amassed from the combined knowledge of the organization’s professionals—and plays a key role in the provider’s capability to deliver a particular service to its customers. The knowledgebase

should be accessible from any location, well organized, be flexible in its capabilities, have both a simple and advanced search mechanism, and be easy to use to provide practical information to its users.

### *Contract management*

In most cases, the deliverables of a services organization may be difficult to describe and define in exact and quantifiable terms. This often means that the creation of an unambiguous, binding contract and the demonstration of delivery of services as contracted are an ongoing challenge. Additionally, some services providers (such as consultants and providers of investment services) offer no guarantee on the actual value of the services delivered for the price paid. A proper contract management framework – supported by workflows in a document management system - should align the organization's efforts to ensure that service expectations are clearly described, tracked, and delivered in the final contract.

### *Project costing and billing*

Project costing capabilities allow project managers and executives to determine the financial health of a project. The Work Breakdown Structure (WBS) can figure prominently in determining costing rules, as can resource management criteria. Project billing can be delineated on either a milestone basis or a progress basis. As project costs and expenses all reside in the same database, generating invoices using one consistent set of data eliminates the potential for errors from manual re-entry from one system to another.

### *Analytics and reporting*

Professional services firms use an array of tools to gain insight into the state of the services company at any given time; this report data reflects the structure of the company and its projects. For example, the entire WBS becomes a source of project data, and when coupled with resource, costing, and billing information, it can instantly provide a true picture of the health of the business. Live dashboards provide executives with current, actionable information, and comprehensive, customized business intelligence functionality enables effective retrieval and analysis of data at all levels of the organization.



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## Appendix 1 – Components and Benefits

### Microsoft Office 365

Office 365 are subscription plans that include access to Office applications plus other productivity services that are enabled over the Internet (cloud services). Office 365 includes plans for use at home and for business. Office 365 plans for business include services such as Skype for Business web conferencing and Exchange Online hosted email for business, SharePoint Online for document management and collaboration, and additional online storage with OneDrive for Business.

Many Office 365 plans also include the desktop version of the latest Office applications, which users can install across multiple computers and devices. The fully installed applications include: Word, Excel, PowerPoint, OneNote, Outlook, Publisher, and Access. (Publisher and Access are available on PC only.) These can be installed across multiple devices, including PCs, Macs, Android tablets, Android phones, iPads, and iPhones. When you have an active Office 365 subscription that includes the desktop version of Office, automatic updates mean that you always have the most up-to-date version of the applications.

The online-only Office 365 plans are a great choice for certain business needs, and are designed to work with the latest version of Office, Office 2013, and Office 2011 for Mac. Previous versions of Office, such as Office 2010 and Office 2007, may work with Office 365 with reduced functionality. All Office 365 plans are paid for on a subscription basis, monthly or annually.

All kinds of organizations leverage Office 365 for their productivity and collaboration needs because Microsoft provides the stable technology infrastructure that they need.

#### *Reliability*

Users have peace of mind knowing that services are available with a guaranteed 99.9% uptime, with a financially backed service level agreement (SLA).



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#### *Security*

Cutting-edge security practices with five layers of security and proactive monitoring help keep customer data safe. Office 365 is a security-hardened service, designed following the Microsoft Security Development Lifecycle. Microsoft brings together the best practices from two decades of building enterprise software and managing online services to give you an integrated software-as-a-service solution.

At the service level, Office 365 uses the defense-in-depth approach to provide physical, logical, and data layers of security features and operational best practices. In addition, Office 365 gives you enterprise-grade user and admin controls to further secure your environment.

#### *Privacy*

When you entrust your data to Office 365, you remain the sole owner of that data: you retain the rights, title, and interest in the data you store in Office 365. It's Microsoft policy to not mine your data for advertising purposes or use your data except for purposes consistent with providing you cloud productivity services.

#### *Mobility*

Keeping corporate data secure on mobile devices is a top priority. Office 365 helps you meet this challenge by providing built-in security, plus a set of tools to manage access to data across phones and tablets. You can apply device-specific security policies to ensure that data is synced and accessible only on authorized phones and tablets. Setting up and managing your policies is simple. When you need to wipe Office 365 data from selected devices, you can do it remotely.

#### *Simplified Management and Administration*

Deploy and manage Office 365 across your company, no IT expertise required. You can add and remove users in minutes.

#### *Active Directory Integration*

Manage user credentials and permissions. Single sign-on and synchronization with Active Directory.



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*Microsoft Office 365 comes in a variety of plans with increasing levels of functionality for larger organizations or those in need of more robust functionality. Plans can include any or all of Microsoft's Cloud productivity services:*

#### *Email and Calendaring*

Use business-class email through a rich and familiar Outlook experience to access mail from your desktop or from a web browser. Exchange Online provides a 50 GB mailbox per user and the ability to send attachments up to 150 MB.

#### *Advanced Email*

Use archiving and legal hold capabilities, plus unlimited storage, for compliance needs. Use data loss prevention (DLP) policies and policy tips that educate your users for additional compliance enforcement in email.

#### *File Storage and Sharing*

OneDrive for Business gives each user 1 TB of personal cloud storage that can be accessed from anywhere and syncs with their PC/Mac for offline access. Easily share documents with others inside and outside your organization and control who can see and edit each file.

#### *Instant Messaging and Skype Connectivity*

Users can connect with other Skype for Business users via instant message, voice calls, and video calls, and let people know their availability with online status integrated with Outlook calendars. Share presence, IM, and audio calling with Skype users.

#### *Cloud PBX - Telephony*

Make, receive, and transfer business calls in the office, at home, or on the road, using phone, PC, and mobile without the need for a traditional phone system.

#### *Voicemail Integration (Unified Messaging)*

Hosted voicemail support with auto-attendant capabilities. Voicemails are recorded to Exchange Online and users can access them from Outlook, from a web browser, or a compatible mobile phone.



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#### *Online Conferencing*

Skype for Business enables users to host online meetings with audio and video using one-click screen sharing and HD video conferencing.

#### *PTSN Conferencing*

Enable attendees to join Skype for Business from any telephone by dialing a local access number, and dial out from a meeting to add others when needed. The dial-in capability is in addition to single-touch join options on PC, smartphone, and browser, and allows people to join an online meeting even in places with no Internet access. Consumption rates are available.

#### *Chat-based Workspaces*

Microsoft Teams enables users to connect your team in workspaces, where chat, content, people, and tools live together, so your teams have instant access to everything they need.

#### *Corporate Social Network*

Yammer collaboration software and business applications allow your employees to connect with the right people, share information across teams, and organize around projects so they can go further, faster.

#### *Team Sites*

SharePoint Online makes collaborating easy. Users inside and outside the organization can securely access files across multiple devices and edit documents together at the same time.

#### *Office Online*

Users can create and edit Word, OneNote, PowerPoint and Excel documents simultaneously from any browser.

#### *Work Management*

Microsoft Planner makes it easy to create and work with light-weight project plans, organize and assign tasks, share files, and share progress updates.



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#### *Online Scheduling*

Microsoft Bookings provides convenient and flexible online options for smaller organizations that make it easier for your customers to schedule appointments with the business.

#### *Professional Digital Storytelling*

With Sway you can easily create engaging, interactive web-based reports, presentations, newsletters, trainings and more—right from your phone, tablet, or browser. Sways are easy to share and look great on any screen.

#### *Search and Discovery*

Search and discover content across Office 365 based on personalized insights. Office Delve is the first experience to be powered by Office Graph, a collection of analyzed signals or insights derived from each user's behavior and relationships to content, topics, and contacts.

#### *Apps for Office and SharePoint*

New third-party and customer-developed apps work with Office and SharePoint to bring web services right into your documents and sites.

Plans can include any or all of the Microsoft enhanced management and security services.

#### *Advanced Security*

Advanced Threat Protection helps defend users against sophisticated threats hidden in emails, attachments, and links. Customer Lockbox lets you limit data access to only pre-assigned, two-factor-authenticated administrator approvals for greater control and transparency. And the built-in features of Office 365 Advanced Security Management give you enhanced visibility and control of your Office 365 environment.

#### *Compliance Solutions*

With the Compliance Center, you can search in-place across Exchange, Skype for Business, OneDrive for Business, and SharePoint mailboxes. Advanced eDiscovery fully integrates the Equivio machine learning, predictive coding, and text analytics platform to reduce the costs and challenges that come with sorting through large quantities of data for eDiscovery purposes by quickly zeroing in on what is relevant.



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#### *Advanced Information Protection*

Data loss prevention and encryption across Exchange Online, Skype for Business, and SharePoint Online help keep your content safe in email, IM and meetings, and team sites.

#### *Document and Email Access Control*

Rights Management Services enables you to restrict access to documents and email to specific people and to prevent anyone else from viewing or editing them, even if they are sent outside the organization.

#### *Enterprise Management of Apps*

Simplify management of apps in your organization with Group Policy, Telemetry, and Shared Computer Activation.

## Microsoft Power BI

Power BI is a suite of business analytics tools to analyze data and share insights. Power BI dashboards provide a 360-degree view for business users with their most important metrics in one place, updated in real time, and available on all of their devices. With one click, users can explore the data behind their dashboard using intuitive tools that make finding answers easy. Creating a dashboard is simple thanks to over 50 connections to popular business applications, complete with pre-built dashboards crafted by experts that help you get up and running quickly. And you can access your data and reports from anywhere with the Power BI Mobile apps, which update automatically with any changes to your data.

If you are a data analyst delivering reporting and analytics to your organization, Power BI lets you be productive and creative with what you build. Power BI Desktop is a feature-rich data mashup and report authoring tool allowing you to combine data from disparate databases, files, and web services with visual tools that help you understand and fix data quality and formatting issues automatically. With over 20 built-in visuals and a vibrant community of custom visualizations, create stunning reports that communicate your message effectively. With the Power BI service, publish reports securely to your organization and setup automatic data refresh so everyone has the latest information.



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## Dynamics 365

Microsoft Dynamics 365 is Microsoft's next generation of business apps in the cloud – a new approach to end-to-end intelligent business applications in the cloud. Dynamics 365 unifies ERP and CRM into one cloud service with new purpose-built apps to manage all your core business functions: Sales, Customer Service, Finance, Field Service, Operations, Marketing and Project Service Automation.

Dynamics 365 uses a common data model with deep integrations to Office 365 seamlessly connect business apps with popular collaboration and productivity tools like Microsoft Word, Excel, Outlook, etc. With built-in intelligence tools and a flexible, extensible platform, Dynamics 365 enables companies to stay nimble, adapt and innovate in real time. Dynamics 365 applications are:

- Purpose Built: tailored for businesses and its users.
- Productive: directly integrated with familiar Office 365 applications such as Excel and Outlook.
- Intelligent: allow users better insight into their processes and customer data so they can make better decisions.
- Adaptable: start off with what you need and as your business grows, so can Dynamics 365.

## Dynamics 365 Business Edition

Business Edition is best fit for small and mid-sized organizations looking to manage their key Financial, Sales and Marketing processes easier and faster with one cloud solution that gets more done.

### *Dynamics 365 for Financials*

Dynamics 365 for Financials is the Business Edition back office accounting and finance solution. With Dynamics 365 for Financials, small and mid-sized businesses can manage their financials, sales, service, and operations with a business management solution that seamlessly connects people and processes. Business leaders can now make better decisions with Dynamics 365 for Financials and its native integration with Microsoft Power BI.



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### *Dynamics 365 Business Edition Sales*

Dynamics 365 for Sales can help small and mid-sized business maximize opportunities and increase revenues. This business app providing sales force automation, opportunity and contact management, mobile productivity and business insight. Dynamics 365 for Sales enables salespeople to prioritize contacts and opportunities, which leads to more effective selling and an increase in maximum revenue deals.

### Dynamics 365 Enterprise Edition

Enterprise Edition is ideal for larger organizations with multiple business units that require increased advanced financial, ERP and CRM functionalities. Applications including Operations, Sales, Marketing, Field Service, Project Service Automation and Customer Service can be independently deployed and added as needed.

### *Dynamics 365 for Operations*

Dynamics 365 for Operations is a SaaS solution that brings together a complete set of ERP functionality including financials, demand planning, procurement, supply chain, manufacturing, distribution, services industries, public sector and retail. Perfect for large enterprise-level businesses, Dynamics 365 for Operations interacts effortlessly with Office 365 to keep employees more productive while giving business leaders the data they need to make better decisions.

### *Dynamics 365 for Sales*

Microsoft Dynamics 365 for Sales helps enterprise businesses sell effectively by providing the insight, guidance and tools salespeople need to build repeatable processes, focus on the right customers, and win faster by collaborating with colleagues. Dynamics 365 for Sales helps salespeople keep complex buying cycle transactions top of mind, and deliver increased value and deeper engagement that wins business. Salespeople have ownership of their data and activities, encouraging them to optimize their processes and maximize their relationships.

### *Dynamics 365 for Marketing*

Dynamics 365 for Marketing includes functionality to model and manage customer journeys across marketing and sales as well as lead management across marketing and sales. This business app shares the same Dynamics 365 platform as Dynamics 365 for Sales. Some features of Dynamics 365 for Marketing include email marketing, event management, landing pages and lead management. Marketing and Sales will be on the same page, working towards the same goal – better customer relationships and greater revenue.



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#### *Dynamics 365 for Customer Service*

Microsoft Dynamics 365 for Customer Service helps companies deliver amazing experiences, and build trust, loyalty and insight. Dynamics 365 for Customer Service empowers agents within the organization with the right tools and information to meet ever-evolving customer demands and work productively. Increased communication capabilities let agents engage the customer throughout the customer's journey ensuring satisfaction and need fulfillment.

#### *Dynamics 365 for Field Service*

Microsoft Dynamics 365 for Field Service enables organizations to deliver remarkable field service while maximizing customer satisfaction and minimizing costs. Dynamics 365 for Field Service empowers companies to deliver predictive and proactive service to improve customer satisfaction, first-time fix rates and resource productivity through advanced scheduling, resource optimization, and mobile enablement. Features include resource scheduling optimization, scheduling unification, expansive customer communication and effective maps.

#### *Dynamics 365 for Project Service Automation*

Dynamics 365 for Project Service Automation is a SaaS solution that enables project-based businesses to run more productively, profitably and with higher client satisfaction. Dynamics 365 for Project Service Automation enhances each stage of the end-to-end project delivery experience: opportunity management, project planning, resource management, team collaboration, time and expenses, customer billing, analytics and integration.

#### *Dynamics 365 for Customer Insights*

Dynamics 365 for Customer Insights sits on top of the Azure Cloud and Cortana Intelligent data services. The business app connects directly to your Dynamics 365 data and to any other data sources. This helps businesses build a 360 view of the customer in order to better understand and engage with the customer in real-time. By using buyer behavior, purchasing trends and more, Dynamics 365 for Customer Insights tells businesses what the customer wants before they even ask.



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## Appendix 2 — Cloud Computing Primer

Simply put, cloud computing is the delivery of computing services—servers, storage, databases, networking, software, analytics, and more—over the Internet (“the cloud”). Companies offering these computing services are called cloud providers and typically charge for cloud computing services based on usage, similar to how you’re billed for water or electricity at home.

You’re probably using cloud computing right now, even if you don’t realize it. If you use an online service to send email, edit documents, watch movies or TV, listen to music, play games, or store pictures and other files, it’s likely that cloud computing is making it all possible behind the scenes (Gmail, Dropbox, YouTube and other popular sites/services are good examples). Why is cloud computing so popular? Here are 7 common reasons organizations are turning to cloud computing services:

### 1. Cost

Cloud computing eliminates the capital expense of buying hardware and software and setting up and running on-site datacenters—the racks of servers, the round-the-clock electricity for power and cooling, the IT experts for managing the infrastructure.

### 2. Speed

Most cloud computing services are provided self service and on demand, so even vast amounts of computing resources can be provisioned in minutes, typically with just a few mouse clicks, giving businesses a lot of flexibility and taking the pressure off capacity planning.

### 3. Productivity

On-site datacenters typically require a lot of “racking and stacking”—hardware set up, software patching, and other time-consuming IT management chores. Cloud computing removes the need for many of these tasks, so IT teams can spend time on achieving more important business goals.

### 4. Performance

The biggest cloud computing services run on a worldwide network of secure datacenters, which are regularly upgraded to the latest generation of fast and efficient computing hardware. This offers several benefits



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over a single corporate datacenter, including reduced network latency for applications and greater economies of scale.

#### 5. Reliability

Cloud computing makes data backup, disaster recovery, and business continuity easier and less expensive, because data can be mirrored at multiple redundant sites on the cloud provider's network.

#### 6. Mobility

Cloud computing by nature is designed for anywhere access. Applications and services are architected and built for remote and mobile access, simplifying the delivery of these resources to mobile employees.

#### 7. Agility

Although the actual spend for approved projects is “predictable,” what was planned does not necessarily align with what *is actually needed by the business* over the life of that investment. In light of the rapid advancement of technology, IT infrastructure needs are becoming less and less predictable.

Cloud computing delivers improved agility because it has on-demand self-service and rapid elasticity. IT resources can be acquired and deployed more quickly and, once deployed, they can be increased or decreased as needed to meet demand. This means that IT can support the organization and it can innovate, introduce new products and services, enter new markets, and adapt to changing circumstances.

Most cloud computing services fall into three broad categories: infrastructure as a service (IaaS), platform as a service (PaaS), and software as a service (SaaS). These are sometimes called the cloud computing stack, because they build on top of one another. Knowing what they are and how they're different makes it easier to discuss, assess and accomplish your business goals.

#### 1. Infrastructure-as-a-service (IaaS)

The most basic category of cloud computing services. With IaaS, you rent a remote IT infrastructure implementation—servers and virtual machines (VMs), storage, networks, operating systems—from a cloud provider on a pay-as-you-go basis.



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## **2. Platform as a service (PaaS)**

Platform-as-a-service (PaaS) refers to cloud computing services that supply an on-demand environment and tools for developing, testing, delivering, and managing software applications. PaaS is designed to make it easier for developers to quickly create web or mobile apps, without worrying about setting up or managing the underlying infrastructure of servers, storage, network, and databases needed for development.

## **3. Software as a service (SaaS)**

Software-as-a-service (SaaS) is a method for delivering full, ready-to-use software applications over the Internet, on demand, and typically on a subscription basis. With SaaS, cloud providers host and manage the software application and underlying infrastructure, and handle any maintenance, like software upgrades and security patching. Users connect to the application over the Internet, usually with a web browser or custom application “front end” on their phone, tablet, or PC.

Next, there are three different ways to deploy cloud computing resources: public cloud, private cloud, and hybrid cloud.

### **1. Public cloud**

Public clouds are owned and operated by a third-party cloud service provider, who deliver their computing resources like servers and storage over the Internet. Microsoft Azure is an example of a public cloud. With a public cloud, all hardware, software, and other supporting infrastructure is owned and managed by the cloud provider and allocated from a shared pool. You access these services and manage your account using a web browser.

### **2. Private cloud**

A private cloud refers to cloud computing resources used exclusively by a single business or organization. A private cloud can be physically located on the company’s on-site datacenter. Some companies also pay third-party service providers to host their private cloud. A private cloud is one in which the services and infrastructure are maintained on a private network.

### **3. Hybrid cloud**

Hybrid clouds combine public and private clouds, bound together by technology that allows data and applications to be shared between them. By allowing data and applications to move between private and public clouds, hybrid cloud gives businesses greater flexibility and more deployment options.



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888.725.2555

[info@sbsgroupusa.com](mailto:info@sbsgroupusa.com)



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