



# Winning the Strategize & Plan Phase for Microsoft Partners

How D365 Partners Protect Margin, Accelerate Sales Cycles,  
and Scale Delivery with BPC in Mavim

# Executive Summary

Most D365 partners focus on optimizing implementation.

Fewer look closely at the **phase that determines whether the project will actually be profitable**: Strategize & Plan.

In many organizations, this early phase:

- Consumes senior consultant time
- Is partly non-billable
- Delays estimation
- Leaves room for scope ambiguity
- Erodes margin before the SOW is signed

The issue is usually not your methodology.

The issue is how much manual effort it takes to execute it consistently.

Microsoft Business Process Catalog (BPC) in Mavim helps partners structure and standardize this phase. It provides a D365-aligned process foundation, supports requirement mapping, and reduces the effort between discovery and estimation.

Your framework remains intact.

Your execution becomes lighter and more predictable.

## The Hidden Cost of the Plan Phase

In most D365 organizations, the Strategize & Plan phase is:

- Consultant-heavy
- Documentation-heavy
- Manual
- Dependent on senior expertise

Typical hidden costs include:

- Multiple workshop cycles
- Manual consolidation of notes
- Comparing requirements to standard processes by hand
- Rework due to inconsistent documentation
- Delays between discovery and estimation

By the time the project formally starts, significant effort has already been invested.

Yet this phase determines:

- Scope clarity
- Fixed-price risk
- Resource forecasting
- Delivery predictability

If planning is inconsistent, that inconsistency carries into delivery.

## Why Planning Determines Profitability

Profitability in D365 projects is influenced by:

- Scope accuracy
- Early gap visibility
- Controlled customization
- Estimation precision
- Reduced ambiguity

Manual planning introduces variability. Variability introduces risk. Risk reduces margin. High-performing partners reduce variability early.

The most scalable partners treat planning as a structured, repeatable capability — not a craft exercise dependent on individual consultants.

### Why BPC matters in the plan phase

The plan phase usually includes several steps that require manual work, such as reviewing requirements, organizing workshops,

and capturing decisions. Each step introduces delays because teams gather information from various sources and then translate it into a structured view of the customer's process landscape.

BPC in Mavim gives you:

- A predefined catalog of D365 aligned processes you can start using immediately.
- A consistent structure for documenting decisions, assumptions, and requirements.
- A central place to prepare, run, and capture workshops.

This means your team spends less time preparing and can move directly into conversations that matter to the customer.

# The Traditional Mapping Problem

Today, many partners still rely on:

- Workshop notes in Teams or OneNote
- Requirements tracked in Excel
- Process flows created in PowerPoint
- Manual mapping to Microsoft standard processes
- Offline gap documentation

The result:

- Fragmented information
- Consultant dependency

- Slow turnaround
- Repeated interpretation

Even strong methodologies become heavy when executed manually.

The problem is not the framework. It is the friction in applying it.



# From Craft-Based Planning to Catalog-Driven Planning

BPC in Mavim introduces a catalog-driven planning model. Instead of starting from a blank page, you start with:

- A predefined D365-aligned process library
- Structured documentation standards
- Centralized requirement capture
- Linked process-to-requirement mapping

This changes planning from:  
Manual reconstruction to Structured orchestration

Your consultants no longer rebuild process understanding from scratch. They refine and align against an established reference model.

That shift alone reduces time, variability, and risk.

## How requirement mapping works in Mavim

Today, most partners map workshop outputs to standard D365 processes manually. It varies between organizations, but typically involves:

- Reviewing workshop notes.
- Comparing them to Microsoft's standard processes.
- Manually matching requirements to process flows.
- Documenting gaps, decisions, and follow-ups.

BPC in Mavim replaces this with a structured, guided approach. You can capture workshop inputs, associate them with default processes, and create a clear process requirement map without reinventing your methodology.



# AI as a Force Multiplier — Not a Replacement

AI within Mavim supports consultants during the Strategize & Plan phase.

## Live Workshop Support

AI can:

- Summarize discussions in real time
- Suggest relevant standard processes
- Group related requirements
- Highlight incomplete inputs

Consultants stay focused on facilitation rather than documentation.

## Requirement Analysis

You can input:

- Requirement lists
- Workshop summaries
- Legacy documentation

AI assists by:

- Suggesting mappings to default processes
- Identifying duplicates
- Highlighting inconsistencies
- Accelerating gap analysis

This reduces the manual mapping effort that typically slows the plan phase.

AI does not replace expertise. It amplifies consultant productivity.

## What this changes for partners

You do not need to replace your delivery framework. Instead, BPC and Mavim help you get to the same outcomes faster.

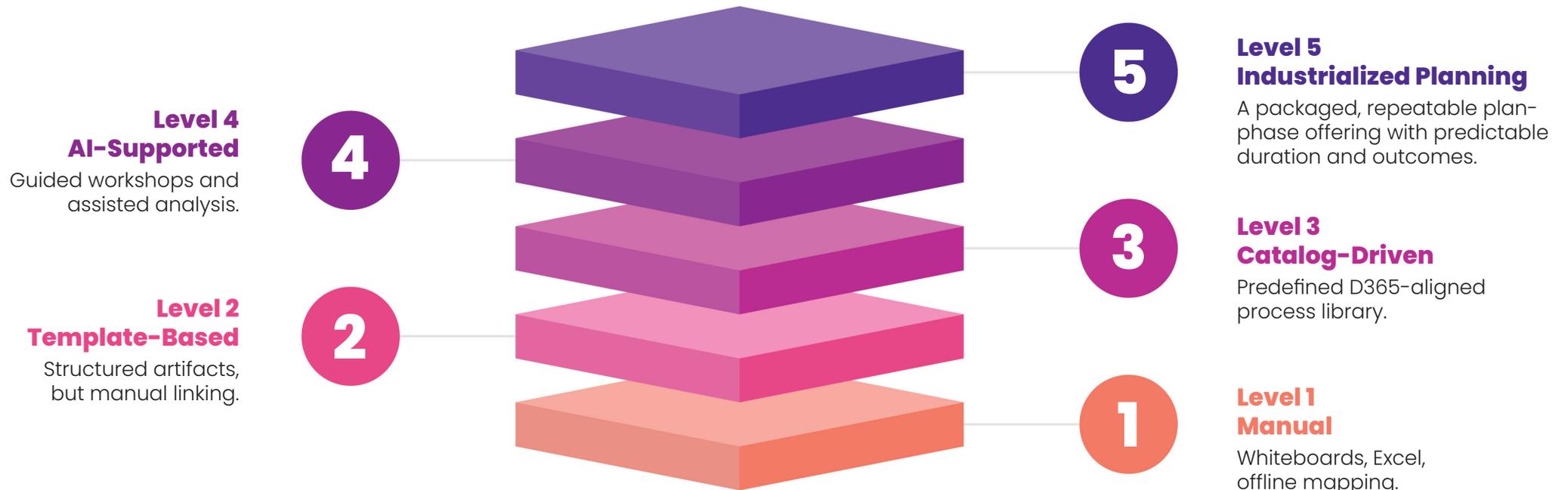
Partners typically see:

- Less time preparing workshops.
- Faster cycles between discovery and estimation.
- A repeatable way to run consistent planphase engagements.
- Better margins in the early project stages.
- A smoother transition from sales to delivery.

Your process stays the same; the effort needed to execute it gets smaller.

# The Partner Planning Maturity Model

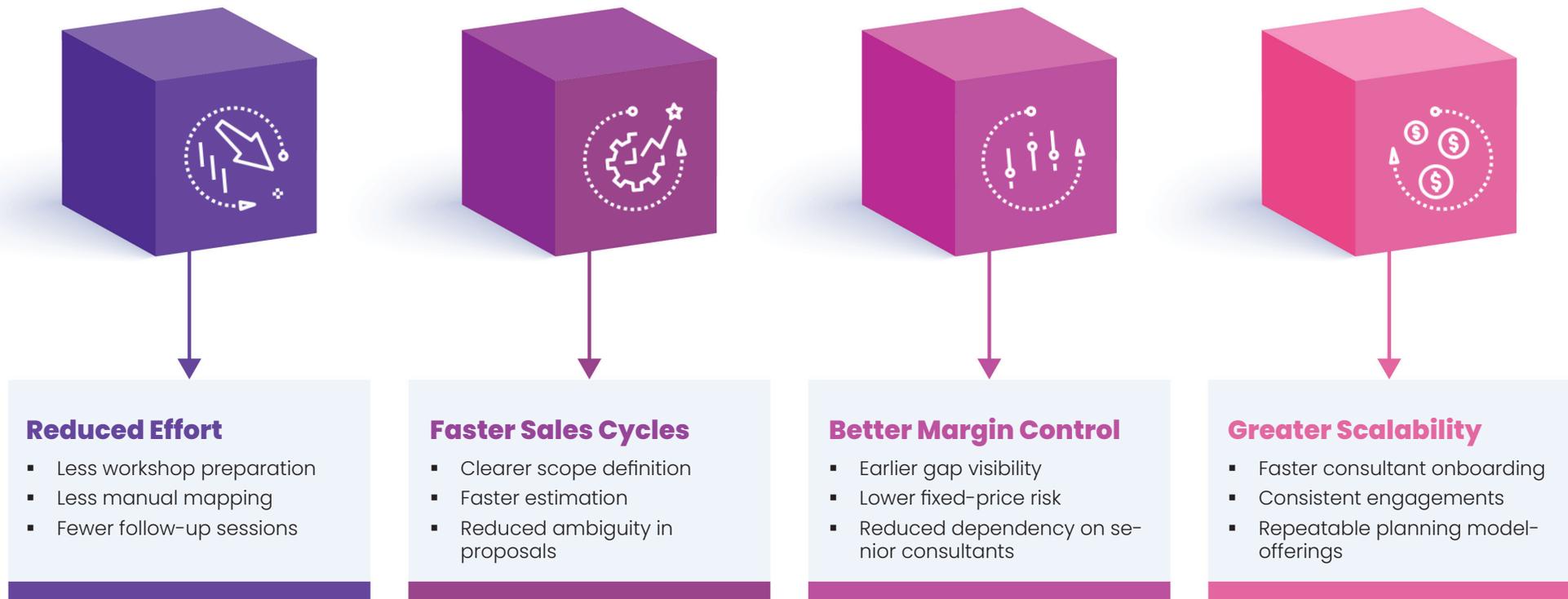
PLANNING MATURITY TYPICALLY EVOLVES THROUGH STAGES:



BPC IN MAVIM ACCELERATES PARTNERS TOWARD LEVELS 3 AND 4, CREATING THE FOUNDATION FOR SCALABLE PLANNING.

# Commercial Impact for D365 Partners

PARTNERS ADOPTING A CATALOG-DRIVEN APPROACH TYPICALLY EXPERIENCE:



**You are not just selling implementation capacity.  
You are offering a structured way to accelerate planning.**

## When to Introduce BPC in the Sales Cycle

When to introduce the BPC in Mavim to a prospect

BPC in Mavim works well at the top of the funnel when:

- A customer needs clarity on scope.
- A partner wants to accelerate a fit-to-standard conversation.
- A project has aggressive timelines.
- Requirements are loosely defined and need structure.
- Multiple business units need alignment.

This lets you demonstrate value early and create momentum for the rest of the engagement.

If you are a D365 partner evaluating accelerators for the early plan phase, the Microsoft BPC in Mavim offers a practical, easy to adopt approach. It supports the way you already deliver, while saving time and protecting margins.

Introducing structured planning early:

- Builds credibility
- Demonstrates maturity
- Creates momentum
- Reduces ambiguity

It positions your firm as modern, scalable, and execution-focused.

## The Strategic Question for Your Practice

Most partners focus on optimizing delivery. Few focus on optimizing the phase that determines:

- Scope clarity
- Risk exposure
- Margin stability
- Consultant efficiency

The question is not whether your framework works. The question is: **How much effort does it take to execute it?**

BPC in Mavim does not replace your methodology. It reduces the friction required to run it.

In an increasingly competitive D365 market, the partners who win are those who:

- Plan faster
- Scope smarter
- Reduce variability
- Protect margin from day one

Your framework remains your differentiator. Structured, AI-augmented planning through process, makes it scalable.

# Conclusion

## Your Framework. Faster.

You do not need a new methodology.  
You need a smarter way to execute the early phase.

BPC in Mavim:

- Speeds up requirement mapping
- Enhances workshops with AI
- Protects margins
- Improves consistency
- Supports your proven delivery model

In a competitive D365 market, the partners who win are not just those who deliver well.

They are the ones who plan faster, scope smarter, and protect margin from day one.

[Read the Strategize Phase of Success by Design | Learn Article ↗](#)

[Learn more about the Strategize Phase of Success by Design with Microsoft Business Process Catalog in Mavim ↗](#)

[Discover how to define requirements for Dynamics implementation: linking business processes for success ↗](#)



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