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Header # 2

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General Information

[Contact](#)
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[Clarification Request](#)

Procurement Folder: 1528690

Procurement Type: Central Master Agreement

Vendor ID:

Legal Name: ONACTUATE CONSULTING US INC

Alias/DBA:

Total Bid: \$75,000.00

Response Date:

Response Time:

Responded By User ID:

First Name:

Last Name:

Email:

Phone:

SO Doc Code: CRFQ

SO Dept: 0705

SO Doc ID: LOT2500000003

Published Date: 12/17/24

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Solicitation Description:

Total of Header Attachments: 2

Total of All Attachments: 2



Department of Administration
Purchasing Division
2019 Washington Street East
Post Office Box 50130
Charleston, WV 25305-0130

State of West Virginia
Solicitation Response

Proc Folder: 1528690
Solicitation Description: Microsoft Dynamics and Technology Implementation Services
Proc Type: Central Master Agreement

Solicitation Closes	Solicitation Response	Version
2025-01-09 13:30	SR 0705 ESR01022500000004192	1

VENDOR
VS0000043431
ONACTUATE CONSULTING US INC

Solicitation Number: CRFQ 0705 LOT2500000003
Total Bid: 75000
Response Date: 2025-01-02
Response Time: 17:23:13
Comments:

FOR INFORMATION CONTACT THE BUYER
Brandon L Barr
304-558-2652
brandon.l.barr@wv.gov

Vendor
Signature X **FEIN#** **DATE**

All offers subject to all terms and conditions contained in this solicitation

Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Ln Total Or Contract Amount
1	Microsoft Dynamics and Technology Implementation Services				75000.00

Comm Code	Manufacturer	Specification	Model #
43231500			

Commodity Line Comments:

Extended Description:

See Attached Specifications Section 4.1.1 and Exhibit - A Pricing Page for details
 Cost To Include Planning & Design, Configuration, Data Migration and Implementation of Interfaces, Training and Testing.

Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Ln Total Or Contract Amount
2	Support and Maintenance	0.00000	HOUR	150.000000	0.00

Comm Code	Manufacturer	Specification	Model #
43231500			

Commodity Line Comments:

Extended Description:

See Attached Specifications Section 4.1.2 and Exhibit - A Pricing Page for details

Microsoft Dynamics and Technology
Implementation Services

West Virginia Lottery

CRFQ0705LOT2500000003

January 9, 2025



OnActuate Consulting US Inc.
10900 NE 4th St, Unit 2300
Bellevue, WA 98004

Contact: Gregory Allgrim
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Executive Summary

OnActuate Consulting US Inc. (OnActuate) appreciates the opportunity to respond to the Request for Quotation (CRFQ) from West Virginia Lottery (Lottery) to provide Microsoft Dynamics and Technology Implementation Services.

OnActuate is a globally recognized Information Technology and Consulting Firm. We are a certified Microsoft Solutions Partner for Business Applications focusing on the Public Sector. We are pleased to propose a portfolio of highly skilled consultants as the Lottery embarks on projects related to Dynamics 365 and Power Platform. We are grateful for the opportunity to deliver a successful Microsoft Dynamics 365 Business Central project, and we are excited to share our track record of service excellence with the Lottery as your organization modernises your application environment. In support of this proposal, we have provided a portfolio of highly skilled consultants, many with Public Sector experience, at a competitive hourly rate to be utilized by the Lottery to accelerate time to value on upcoming technology projects.

About OnActuate:

- **Who we are:** We are a certified Microsoft Solutions Partner for Business Applications. We are system integration specialists. Our extensive experience with Microsoft and related technologies has enabled us to refine our integration skills and tools and provide seamless access to information in other systems while meeting our clients' requirements.
- **What we do:** We have experience implementing full-stack Microsoft solutions such as Power Platform, Dynamics 365 CRM including Customer Insights – Journeys, Customer Service, Sales, 365 Finance & Supply Chain Management, and Azure Services. We also provide implementation services for Dayforce.
- **Our Focus:** We focus on supporting the Public Sector in North America with tailored business and data solutions to meet the needs of our diverse clients. Our experienced team's collaborative approach has helped many organizations reimagine their operations in the digital age.
- **Our Services:** Our broad range of services includes Business Consulting, Technology Consulting, Project and Program Management, Training, and Ongoing Technical Support, Software Systems Integration Services, Seamless AI integration, Solution Development, and more.

We understand from the RFP document that Lottery is seeking access to a pool of qualified and experienced consultants to address a variety of Microsoft Dynamics 365 business applications projects. We are pleased to provide our pool of consultants who can meet your requirements.

OnActuate is dedicated to staying at the forefront of technological innovation, and we appreciate the opportunity to present our firm's qualifications and the Microsoft solution. We look forward to engaging with the West Virginia Lottery (Lottery) and supporting this project further while presenting our proposed solutions and services.

Sincerely,

A handwritten signature in black ink, appearing to read "G Allgrim", with a stylized flourish at the end.

Gregory Allgrim | Account Executive – Public Sector
OnActuate Consulting US Inc.
gregory.allgrim@onactuate.com | +1.305.905.1169



DESIGNATED CONTACT: Vendor appoints the individual identified in this Section as the Contract Administrator and the initial point of contact for matters relating to this Contract.

(Printed Name and Title) Gregory Allgrim, Account Executive

(Address) 10900 NE 4th St Unit 2300 | Bellevue WA 98004

(Phone Number) / (Fax Number) 305-905-1169

(email address) gregory.allgrim@onactuate.com

CERTIFICATION AND SIGNATURE: By signing below, or submitting documentation through wvOASIS, I certify that: I have reviewed this Solicitation/Contract in its entirety; that I understand the requirements, terms and conditions, and other information contained herein; that this bid, offer or proposal constitutes an offer to the State that cannot be unilaterally withdrawn; that the product or service proposed meets the mandatory requirements contained in the Solicitation/Contract for that product or service, unless otherwise stated herein; that the Vendor accepts the terms and conditions contained in the Solicitation, unless otherwise stated herein; that I am submitting this bid, offer or proposal for review and consideration; that this bid or offer was made without prior understanding, agreement, or connection with any entity submitting a bid or offer for the same material, supplies, equipment or services; that this bid or offer is in all respects fair and without collusion or fraud; that this Contract is accepted or entered into without any prior understanding, agreement, or connection to any other entity that could be considered a violation of law; that I am authorized by the Vendor to execute and submit this bid, offer, or proposal, or any documents related thereto on Vendor's behalf; that I am authorized to bind the vendor in a contractual relationship; and that to the best of my knowledge, the vendor has properly registered with any State agency that may require registration.

By signing below, I further certify that I understand this Contract is subject to the provisions of West Virginia Code § 5A-3-62, which automatically voids certain contract clauses that violate State law; and that pursuant to W. Va. Code 5A-3-63, the entity entering into this contract is prohibited from engaging in a boycott against Israel.

OnActuate Consulting US Inc.

(Company)

(Signature of Authorized Representative)

Gregory Allgrim, Account Executive

December 6, 2024

(Printed Name and Title of Authorized Representative) (Date)

305-905-1169

(Phone Number) (Fax Number)

gregory.allgrim@onactuate.com

(Email Address)

Revised 8/24/2023



ADDENDUM ACKNOWLEDGEMENT FORM
SOLICITATION NO.: CRFQ LOT25*03

Instructions: Please acknowledge receipt of all addenda issued with this solicitation by completing this addendum acknowledgment form. Check the box next to each addendum received and sign below. Failure to acknowledge addenda may result in bid disqualification.

Acknowledgment: I hereby acknowledge receipt of the following addenda and have made the necessary revisions to my proposal, plans and/or specification, etc.

Addendum Numbers Received:

(Check the box next to each addendum received)

<input checked="" type="checkbox"/> Addendum No. 1 Add 1 12/6/2024	<input type="checkbox"/> Addendum No. 6
<input checked="" type="checkbox"/> Addendum No. 2 Add 2 12/17/2024	<input type="checkbox"/> Addendum No. 7
<input checked="" type="checkbox"/> Addendum No. 3	<input type="checkbox"/> Addendum No. 8
<input type="checkbox"/> Addendum No. 4	<input type="checkbox"/> Addendum No. 9
<input type="checkbox"/> Addendum No. 5	<input type="checkbox"/> Addendum No. 10

I understand that failure to confirm the receipt of addenda may be cause for rejection of this bid. I further understand that any verbal representation made or assumed to be made during any oral discussion held between Vendor's representatives and any state personnel is not binding. Only the information issued in writing and added to the specifications by an official addendum is binding.

OnActuate Consulting US Inc.

Company


Authorized Signature
2 January 2025

Date

NOTE: This addendum acknowledgment should be submitted with the bid to expedite document processing.
Revised 6/8/2012



About OnActuate

About OnActuate

OnActuate is a globally recognized Information Technology and Consulting firm holding Microsoft certification as a Solutions Partner for Business Applications. We are a Cloud Solution Provider (CSP), and Value-added Reseller (VAR) for Microsoft Dynamics, across the US, Canada, India, LATAM, and Singapore, and a Dayforce System Integrator partner. We have experience implementing full-stack Microsoft solutions such as Dynamics 365 Sales, Sales, Customer Service, Customer Insights, Power Platform, Finance, Supply Chain Management, Business Central, Azure Services, SharePoint, and related technologies globally. OnActuate's unmatched, tailored business and data solutions, coupled with its experienced global team's collaborative approach to implementation and support, have helped many Public Sector, Private Sector, and Non-Profit organizations, reimagine and support their businesses in the digital age.

Being a global organization, we have offices in various locations Seattle, Vancouver, Toronto, Panama, Singapore, Delhi, and Mumbai. OnActuate is led by 3 key people – a consummate visionary, a technology pioneer, and a master project navigator – each with almost 25 years of experience. We have a strong team of over 140+ consultants involved in multiple successful implementations and managed support services projects.

Despite dealing with complex data, our objective is to equip all users and stakeholders with essential skills for efficient task execution. We, as a Microsoft Solutions Partner for Business Applications, have access to Microsoft updates earlier than other partners which helps us stay one step ahead and help the customers better. We work closely with the Microsoft community in the United States and other regions. Our consultants attend various webinars/events conducted by Microsoft announcing new features so that they are better equipped to handle any customer requests should they occur.

OnActuate adheres to a 'People-First' approach with a broad array of services to support enhancing client productivity while keeping their employees and trading partners satisfied, motivated, and driven to achieve results. Our focus and experience in the Public Sector enable us to better meet clients' needs while minimizing risk, lowering implementation costs, and promoting a successful project.

Our broad range of services includes but is not limited to Training, and Ongoing Technical Support, Global Solution Rollouts, Provision of Experienced Consultants for Team Augmentation, Software Systems Integration Services, Seamless AI integration, Solution Development, Business Consulting, Technology Consulting, Services throughout the Product Lifecycle, and Project and Program Management.



Our Solutions and Services:

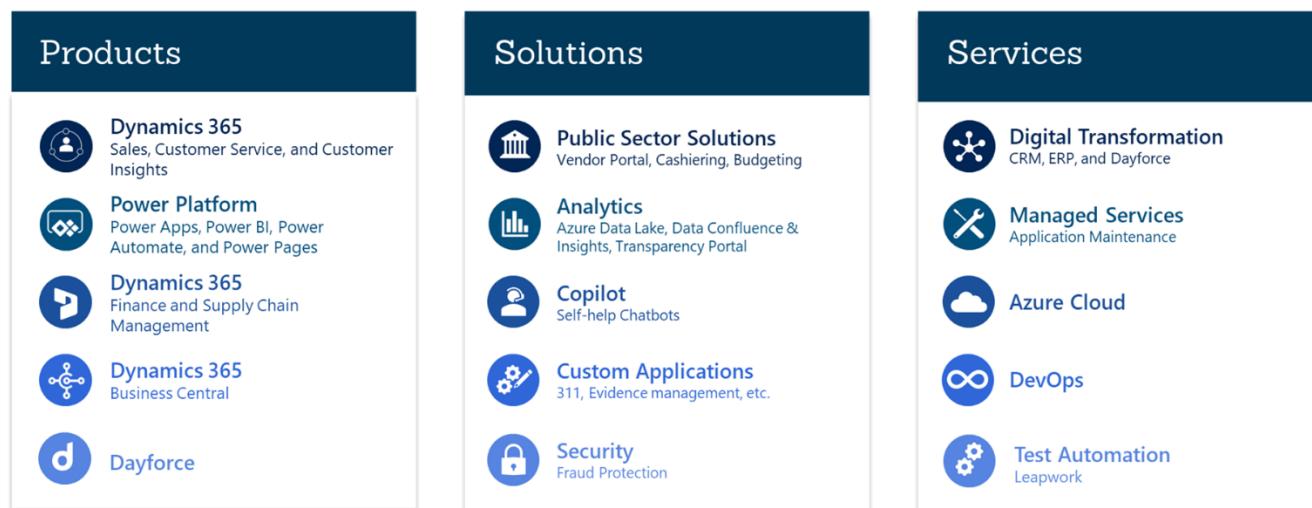


Figure: Our Solutions and Services

Why OnActuate

- We are a globally recognized Information Technology and Consulting Firm holding Microsoft certification as a Solutions Partner for Business Applications. We are a Cloud Solution Provider (CSP), and Value-added Reseller (VAR) for Microsoft Dynamics, with experience in the public sector.

Note on Microsoft Partner Score: Microsoft issues a new partner score monthly and as such, the number can fluctuate based on a variety of factors Microsoft recently determined. OnActuate as recently as November had a partner score of 94. We believe this score has since fluctuated due to the seasonality of Net New Customer Additions. We are happy to provide more details on our partner score but would like to emphasize that any firm with a score in the that meets the minimum requirement to be a Solution Advisor for Biz Apps would be deemed highly qualified by Microsoft.

- We have experience in implementing full-stack Microsoft solutions such as Dynamics 365 Business Central, Customer Insights – Journeys and Data, Sales, Customer Service, Power Platform, Finance, Supply Chain Management, Azure Cloud solutions, Azure Communication Services, SharePoint, and related technologies across the globe.
- We have been supporting the Public Sector in North America with our tailored solutions to meet the specific needs of our state and local government agency clients similar to Lottery since our inception in 2012.
- We are system integration specialists. Our extensive Microsoft and other business application experience with Azure cloud services have enabled us to refine our integration skills and tools and provide seamless access to information in other systems as required by our clients.
- Our process-driven implementation lifecycle is managed in Azure DevOps, simplifying application management.
- We have a strong integration framework that helps connect partner systems with our solution, and our robust Data Migration Template and Mock Migration Toolkit help to successfully migrate data in a complex environment.



- Training and Ongoing Maintenance Support are our two other focus areas that enable your business community to embrace the solution without any roadblocks and bottlenecks. Our training methodology is designed in such a way that the user community is familiar with the new solution early in the process.
- We also offer Managed Services that complement the Microsoft-provided product support. Our Managed Services model allows for an organization to work with our team on all aspects of application lifecycle management, including managing product defects (break/fix), deploying updating, implementing new functionality, engaging in follow-on training, and more.
- OnActuate (OA) Labs is a dedicated team of engineers and architects that help our clients accelerate their build and deployment of Azure DevOps tools, Power Platform apps, Microsoft Dynamics, and a set of pre-built reusable Azure components.
 - OA Labs brings together a team of innovators who develop creative ideas for products and services by adapting new technologies to serve our clients. OA Labs team members have developed solutions and delivered projects utilizing technologies such as Copilots, IVR solutions using Azure Communication Services, Microsoft Cognitive Services, Identity verification and facial recognition with biometrics, Automated testing, and Azure Data Services – Drawing intelligence from legacy data.
 - We work closely with Microsoft's product development team and continue to develop industry-specific solutions such as remote process automation solution for a trading company in association with a bank, a power portal-based vendor collaboration tool that allows numerous suppliers to register, view, and keep track of the RFPs released by the organization, cyber security solution for identity and account protection, etc. We continuously enhance these solutions to accommodate the changing needs of the clients and collaborate with Microsoft to develop new ones as required.
 - The labs team are dedicated to helping our enterprise customers strike the right balance between a fully custom code vs COTS (Configured off the shelf), and the flexibility to integrate across multiple platforms beyond Microsoft, such as Salesforce and other applications. All our solutions are on Microsoft Ecosystem such as Dynamics 365 platform, Power Platform, Azure AI, etc., and are being used by some of our customers currently. Some of our developed solutions are also listed on Microsoft AppSource.
- Apart from solution development and enhancements, we also focus on handholding organizations as they undergo a digital transformation from their legacy systems to more robust, scalable, and secure solutions such as the Dynamics 365 application suite.



Project Experience

We have a strong public sector presence in the US with key clients such as the New Mexico Office of Broadband Access and Expansion, Los Angeles County, West Virginia Lottery, Select Wines, Impala, the City of Columbus (Ohio), Truckee Meadows Water Authority, Prosper Portland, Pinellas County Tax Collector (Florida), and Washington State Employment Security Department.



We understand that each client has specific requirements, we utilize Data Analytics to enhance our capacity by making data-driven decisions, automating tasks such as data entry, fraud detection, etc., and personalizing and customizing users' experience. Our Microsoft-powered digital technology services ensure that AI and Machine Learning (AI/ML) can be integrated into the client's system for greater speed, scale, and transparency.

We have successfully extended and configured the core D365 suite to meet the evolving needs of Public Sector clients with unique solutions such as 311 Citizen Service and Case Management, Data Confluence and Insights, Transparency Portal, Vendor Collaboration, Cashiering, City in a Box, Budgeting and forecasting, and Fraud Protection. As a dedicated Public Sector partner, we collaborate closely with Dynamics Public Sector SLG group and Microsoft SLG to advance the solution's evolution for the public sector.

In addition to Public Sector solutions, we have leveraged Microsoft's D365 Copilot to optimize our clients' experiences. D365 Copilot, powered by AI, accelerates idea and content generation, automates tasks, and provides insights and next best actions through natural language. With the help of OnActuate's AI experts and Data Scientists, we have developed numerous Copilots, particularly for Public Sector and Manufacturing Industries. Our Copilots, constructed with enterprise-grade AI Models utilizing Generative AI, offer limitless possibilities to enhance productivity, enhance customer experience, and streamline operations. Examples include Sales Forecasting, Product Recommendations, Self Help Bots, and Field Service Support, among others.



OnActuate Accelerators / Solutions

We at OnActuate strive for continuous innovation and build high-impact solutions to solve real-world problems. Using different Microsoft technologies across Azure, Dynamics 365, Data & AI, and Power Platform we have developed solutions like Data Confluence, Vendor Portal, IVR agents, Asset tracking etc. The details of some of our solutions are described below:

Asset Tracking & Case Management – Power Platform, Dynamics 365 Customer Service

The Asset Tracking & Case Management solution provides the following functionality:

- Creation and assignment of Assets to employees.
- Manage Employee details, creation & update to the employee information.
- Set up training calendar and manage training requests.
- Case lifecycle management related to the assets.
- Register for training scheduled through a training calendar.
- AI Copilot for queries and case registration.



Figure: Screenshot from Asset Tracking & Case Management Solution

Evidence Tracking & Case Management – Power Platform

The Evidence Tracking & Case Management solution provides the following functionality:

- Track Intake, Disposal, Release and manage inventory.
- Provide a web based and mobile app interface providing real time information.
- Manage different property locations and the inventory status.
- Manage Chain of command for all the evidences, including digital evidences.
- Maintain association of cases with the evidences.
- Integrates with Barcode scanners, printers and handheld devices.

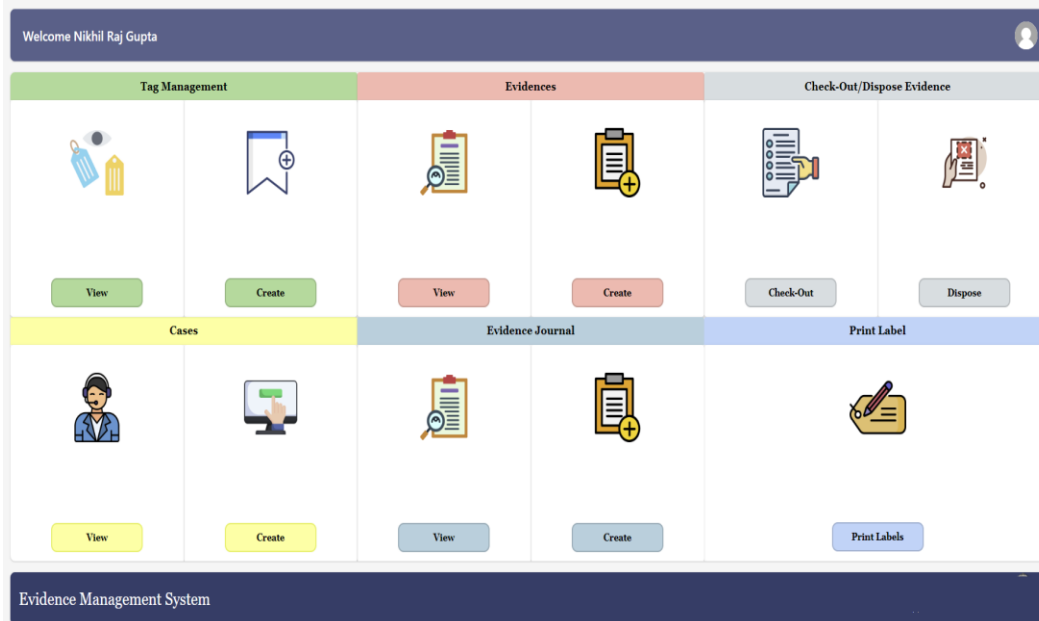


Figure: Screenshot from Evidence Tracking & Case Management Solution

Fleet & Mileage Management – Power Platform

The Fleet & Mileage management solution provides the following functionality:

- Creation of Vehicle master.
- Manage Vehicle Assignment to employees.
- Manage Employee Master data.
- Submit trips for mileage & expense tracking.
- Approval of submitted trip expenses by Finance team.
- Manual Reconciliation with Bank statement.
- Define Asset Maintenance plan & warranties.

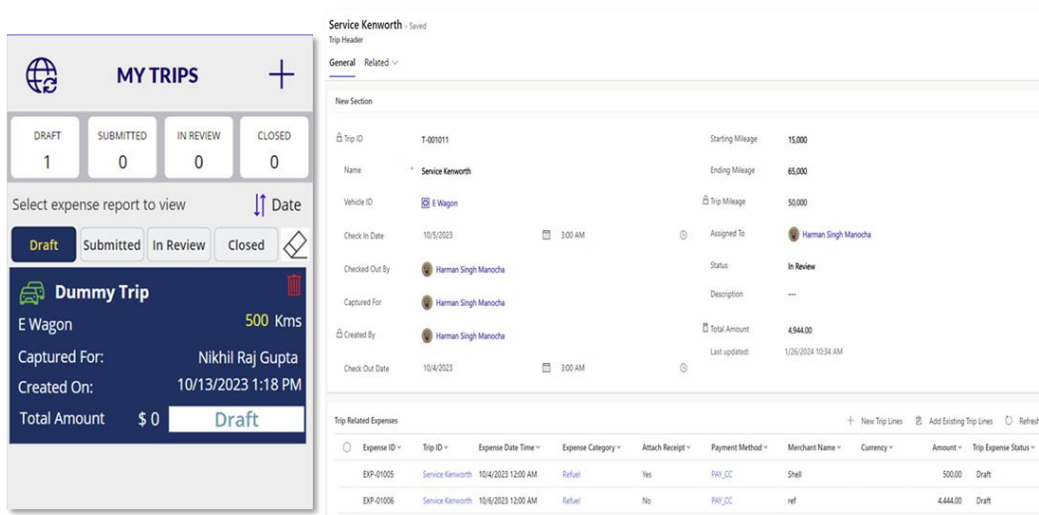


Figure: Screenshot from Fleet and Mileage Management Solution



Citizen Services Portal – Power Pages, D365 Customer Service

The Citizen Services solution provides the following functionality:

- Ability for citizens to register incidents like potholes, noise problems etc.
- Automated routing of incidents to the relevant team.
- Copilot to interact with citizens and create incidents.
- Field Service App for frontline workers to resolve assigned tickets and capture notes and images.
- AI assistance for agents to resolve cases faster and provide quicker insights.

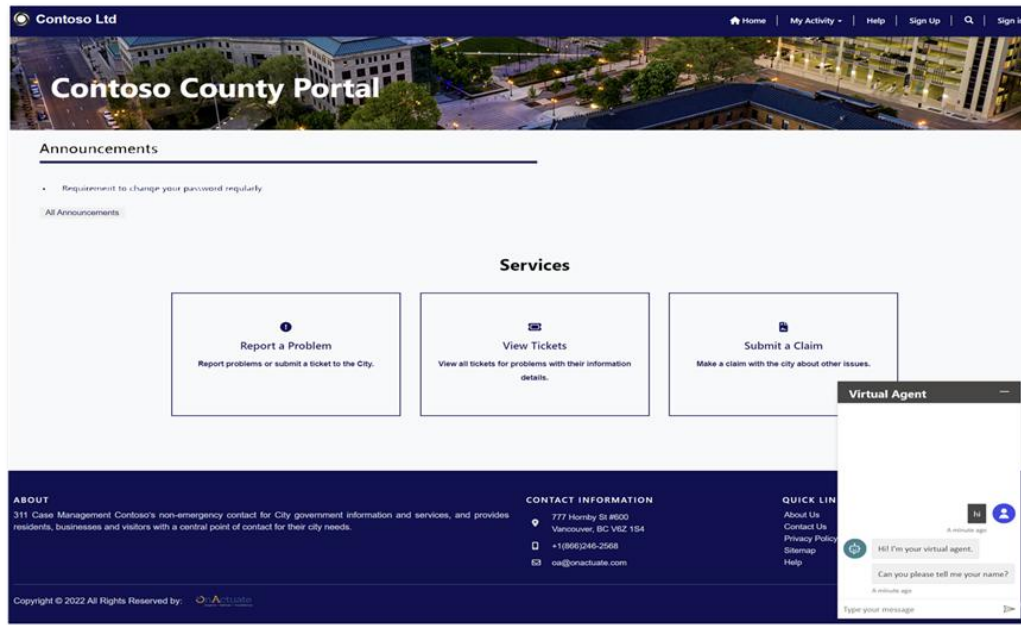


Figure: Screenshot from Citizen Services Portal

Vendor Collaboration Portal – Power Pages, D365 Finance & Operations

The Vendor Portal solution provides a portal for the vendors to collaborate with the agencies. The solution provides the following functionalities:

- Ability for vendors to look at the Open and Closed RFQs.
- Automated Self-registration process to streamline the registration and onboarding of the new vendors.
- Define scoring panel and discreet scoring by panel members.
- Auto-suggest RFQs for vendors to bid based on their registered categories.
- Payments workspace to allow vendors to see the details of the checks issued and their associated invoices and Purchase Orders.
- Ability for vendors to upload and view the status of the invoices.
- Track the Checks payment and trace the invoices and Pos against which they've been paid.
- Ability to define Announcements for mass communication to vendors through the portal.

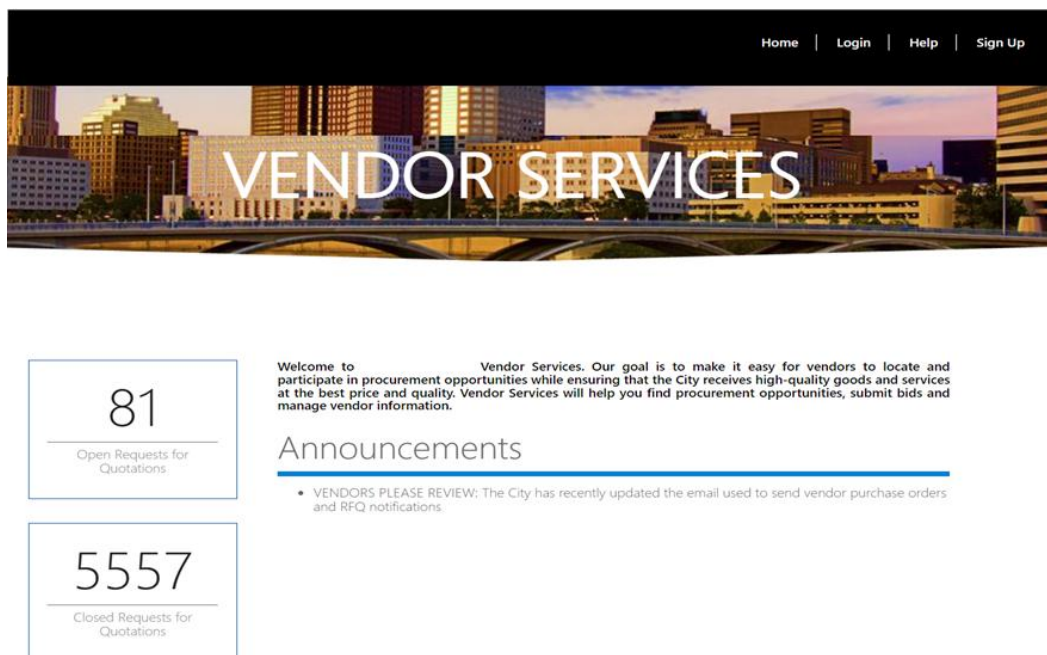


Figure: Screenshot from Vendor Collaboration Portal

Data Confluence & Transparency Platform – Azure Data Lake, Synapse Workspace, Power BI, Power Pages

Data Confluence solution provides the ability to combine data from multiple sources into a single, unified view. It provides features like:

- Ingest data from multiple data sources like, ERP (Business Central, D365 Finance & Operations, SAP etc.), CRM, HCM, Excel/csv files, custom apps etc. and place it in the Data Lake.
- Transform the data into parquet format and have pre-defined views for commonly used data in the reports using Synapse workspace tools.
- Pre-built Power BI reports for displaying the required KPIs based on the data in Data Lake.

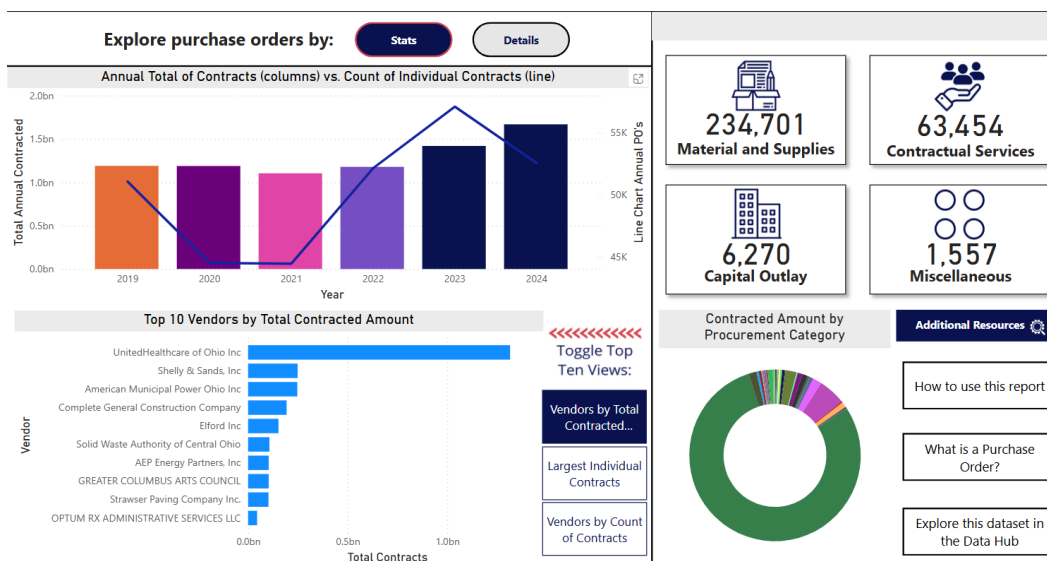


Figure: Screenshot from Data Confluence and Transparency Platform



Copilot Agents – Azure AI, Copilot Studio

The following prebuilt copilots have been curated by OnActuate to address various use cases:



Figure: A few Copilots Curated for our Clients with the corresponding Industry



Our Project Team Resumes

We understand from the CRFQ that the Lottery is looking for Vendors with Microsoft Certified staff to implement and support the mentioned Microsoft technologies and platforms. we have provided the resumes of the staff to meet the needs of the Lottery.

The resources allocated to the project would have the necessary skills, certifications and knowledge to meet the objectives mentioned in this RFP. At the current stage, indicative names and resumes of the proposed project team have been provided. The qualifications of the proposed team are included in the resumes. The resumes of the proposed key personnel working on any upcoming Lottery projects have been provided in the tables below demonstrating the team's professional designation, education and expertise to carry out the current implementation.

How We Will Meet Lottery's Consultant's Requirements

Microsoft Technologies and Platforms	Our Microsoft-certified Staff
D365 Business Central	Tarun Javer Jorge Bulnes Anamika Srivastava Sumit Singh
D365 Customer Service	Ankush Sriharsha Amarjeet Sinha Munna Kumar
D365 Customer Insights	Harman Singh Manocha Srishti Vats
D365 Field Service	Varsha Naithani Ankush Sriharsha
PowerBI	Harman Singh Manocha Srishti Vats Munna Kumar
Power Platform	Harman Singh Manocha Amarjeet Sinha Aayush Garg Srishti Vats Munna Kumar Ankush Sriharsha Priyaroop Singh
Power Apps	Priyaroop Singh Amarjeet Sinha
Power Automate	Aayush Garg Srishti Vats Varsha Naithani
Power Pages	Aayush Garg Harman Singh Manocha



Microsoft Technologies and Platforms	Our Microsoft-certified Staff
Dataverse	Priyaroop Singh Munna Kumar
Co-Pilot	Srishti Vats Amarjeet Sinha Vikash Dwivedi (M365 and Microsoft Security)
Synapse	Priyaroop Singh Harman Singh Manocha Srishti Vats
DataLake	Priyaroop Singh Harman Singh Manocha Srishti Vats
DevOps	Priyaroop Singh Harman Singh Manocha
Azure Communication Services	Priyaroop Singh Munna Kumar
Azure OpenAI	Amarjeet Sinha Harman Singh Manocha Srishti Vats Priyaroop Singh
Azure Machine Learning	Amarjeet Sinha Harman Singh Manocha Srishti Vats Priyaroop Singh
Azure AI Search	Amarjeet Sinha Harman Singh Manocha Srishti Vats Priyaroop Singh
Azure AI Services	Amarjeet Sinha Harman Singh Manocha Srishti Vats Priyaroop Singh
Azure AI Studio	Amarjeet Sinha Harman Singh Manocha Srishti Vats Priyaroop Singh
Azure API Management	Priyaroop Singh Harman Singh Manocha
Azure Functions	Varsha Naithani Amarjeet Sinha Priyaroop Singh
Azure SQL Database	Priyaroop Singh



Microsoft Technologies and Platforms	Our Microsoft-certified Staff
	Harman Singh Manocha
Azure Cosmos DB	Priyaroop Singh Harman Singh Manocha
Microsoft Fabric	Priyaroop Singh Harman Singh Manocha Srishti Vats
M365	Shobheet Mahajan Vikash Dwivedi

Dynamics 365 Business Central

Tarun Javer, D365 BC Lead	
<p>Tarun leads the D365 BC team, and apart from being the Lead, he also has over 9 years of experience as a lead consultant in implementing Dynamics-based solutions in the Energy, Manufacturing and Finance sectors. He is a seasoned consulting professional and over the years has enhanced his strategic and innovation capabilities by playing vital roles in leadership and execution roles in external engagements. He has a proven history of working with diverse teams and delivering on complex projects.</p>	
Recent Projects	<p>Tarun led the migration for a leading Wine company in Canada. He has also played the role of a lead consultant for a D365 F&SC implementation for a cooperative financial institution. Apart from this, he also has been involved in providing support for various clients as a Support consultant for the implementation of multiple global instances in the Americas & Asia for one of the largest manufacturers of dry-type transformers. He also has experience working as the Lead consultant for the largest global implementation of Microsoft Navision; for one of the largest Oil & Gas companies in the world (about 50 sites)</p>
Education and Certification	<ul style="list-style-type: none"> • Master's in Business Administration • Bachelor's in Commerce

Jorge Bulnes, D365 BC Functional Consultant	
<p>Jorge has over 9 years of experience in consulting, implementation of Dynamics including manufacturing, fuel and retail sectors, experience of Navision upgrade across LATAM countries and Business Central in US, supporting data migration process, key user training, user acceptance test, go-live and post-go-live support, end to end process, modules Account Payables, Account Receivable, Inventory Management, Procurement, Sales and Marketing. He also has been acting as the key support for clients in the US and Americas, LATAM countries.</p>	
Recent Projects	<p>Jorge has experience working in both implementation and support. He has been part of the Implementation and Support for Great Plain migration to Business Central for West Virginia Lottery, including the analysis and requirements for the design of the integration for importing the files provided for other systems to the Lottery company into BC, configuration of dimensions and new chart of accounts, key user training, go-live and port go-live support, also participated in a new company configuration for payment process of lottery winners by check, in the same BC environment. Support on the AX 2012 to D365 F&SC Upgrade implementation for one of the largest manufacturers of dry-type transformers. He was involved in every phase</p>



Jorge Bulnes, D365 BC Functional Consultant	
	of the deployment plan for the implementation of NAV for one of the largest Oil & Gas companies worldwide. He has also played the role of a Trainer providing data sets for demos, reviewing the training material, ensuring participation of key users in training sessions, and providing a training plan. He also has been a User Acceptance Test (UAT) facilitator, supporting the users in accessing the application, noting evidence of the E2E executed, and completing all the expected scenarios.
Education and Certification	Education Qualifications: <ul style="list-style-type: none"> Bachelor of Science in Engineering, Industrial and Computer Science Certification: <ul style="list-style-type: none"> Microsoft Certified: Dynamics 365 Supply Chain Management Functional Consultant Associate

Anamika Srivastava, D365 BC Technical Consultant	
Anamika has over 13 years of certified professional experience in Microsoft Dynamics NAV. Her skill set encompasses development, upgrades, and the seamless integration of NAV with third-party applications. She has traversed various NAV iterations, including NAV 2009, NAV 2013, NAV 2015, NAV 2017, NAV 2018, and Dynamics 365 Business Central (D365 BC). Anamika exhibits a deep understanding of NAV's latest functionalities, including Events, Extensions, and Workflow. Currently, she serves as the delivery lead for her organization, steering her team toward success.	
Recent Projects	Anamika has also led numerous NAV and BC implementations across diverse industries such as Smart Card Manufacturing and the largest Oil & Gas companies in the world. the Entertainment sector, and the healthcare industry. She has also been handling multiple projects for NAV/BC clients. She has also played the role of Test Lead, Design lead, and Technical consultant for one of the largest Oil & Gas companies.
Education and Certification	Education Qualifications: <ul style="list-style-type: none"> BCA, MCA Certification: <ul style="list-style-type: none"> Microsoft Certified Dynamics 365 Business Central Functional Consultant Associate Microsoft Certified: Dynamics 365 Supply Chain Management Functional Consultant Associate Microsoft Certified: Power Platform Fundamentals

Sumit Singh, D365 BC Functional Consultant	
Sumit possesses eight years of professional experience within the Dynamics ecosystem. He has been engaged in a diverse range of projects, encompassing implementation, upgrade, and support, spanning a broad array of sectors such as trade and service, food & beverages, retail, media, and manufacturing. He has amassed considerable expertise with various product versions and has been involved in global projects.	
Recent Projects	Sumit has served as the lead Functional Consultant in numerous D365 BC project implementations across diverse industries such as Smart Card Manufacturing, the



Sumit Singh, D365 BC Functional Consultant	
	Entertainment sector, and the healthcare industry. Sumit has also acted as a Functional Consultant in a migration project transitioning from NAV 2016 to D365 BC within the Healthcare sector. He has also worked as a support consultant for various industries including Smart Card Manufacturers, Healthcare, Electronics, Oil & Gas, and the Media industry. He has also led the implementation of a new entity creation in the Oil & Gas industry as a Lead Consultant.
Education and Certification	Education Qualifications: <ul style="list-style-type: none"> • BCA, MCA Certification: <ul style="list-style-type: none"> • Microsoft Certified Dynamics 365 Business Central Functional Consultant Associate • Microsoft Certified: Dynamics 365 Supply Chain Management Functional Consultant Associate • Microsoft Certified: Power Platform Fundamentals

Dynamics 365 Customer Service, Customer Insights, Field Service

Nikhil Raj Gupta, CRM Lead	
Nikhil has more than 19 years of expertise in software design, development, and implementation of Microsoft D365. He is proficient in leading teams to deliver successful projects. Nikhil possesses excellent skills in establishing a Center of Excellence (CoE) which facilitates effective governance for Citizen Development. His skills are a testament to his comprehensive understanding and experience in the field.	
Recent Projects	Nikhil is currently leading a D365 Sales implementation for one of our clients. For one of our largest clients in Ohio, Nikhil has worked as a Solution Architect delivering enhanced D365 solutions built on the Power Platform for Public Sector processes such as the Vendor Collaboration portal. He also has experience in conducting workshops to prepare an app backlog for implementation using D365 & Power Platform. He has worked as the Solution Architect for various projects, such as D365 F&O implementations for Public Sector organizations and D365 CRM implementation projects.
Education and Certification	B.Com and DOEACC B Level, Professional Scrum Master 2

Ankush Shriharsha, CRM Lead	
Ankush an enthusiastic SME in Microsoft Dynamics CRM Industry, brings over 11 years of experience in various versions of Dynamics CRM (2011, 2013, 2015, 2016, Online & On-Premise). His expertise in Sales, Marketing, Customer Service, and Field Services has been utilized in various activities such as Pre-Sales, Project Scoping, Budget Estimation, Solution Design & Implementation, and Team Management.	
Recent Projects	Ankush has worked as the Project Lead in one of the projects where he contributed to the Canvas Apps (Power Apps) and Azure DevOps CI/CD Pipeline development along with team management. He is involved across all phases of Implementation as well as ongoing support post-implementation, ensuring the smooth operation of the systems and addressing any issues that may arise. He has also worked as a Project Lead for several Real Estate Sector



Ankush Shriharsha, CRM Lead	
	clients in the MENA Region, ensuring that all aspects of the projects were executed as planned and within the stipulated timelines.
Education and Certification	Bachelor of Engineering in Information Science

Varsha Naithani, CRM Techno-Functional Consultant	
Varsha brings over 7 years of experience in the Dynamics CRM industry working on various versions of Dynamics CRM such as – 2013 On-premise, 2015, 2016, and D365 Online. Starting her career as a Software Trainee, she has progressed into the role of a Senior Functional/Business Consultant. Varsha is also a Leapwork-certified consultant.	
Recent Projects	Varsha has worked with the team on the development of Canvas Apps (Power Apps) and Azure DevOps CI/CD Pipeline for one of our clients. She is responsible for overseeing both the delivery and support aspects of projects. Varsha's experience extends to working with D365 BC-D365 CRM and managing integrations between D365 CRM and other third-party systems, ensuring seamless data synchronization across platforms.
Education and Certification	Education: Master of Computer Application Certifications: <ul style="list-style-type: none"> • Microsoft Certified: Dynamics 365 Sales Functional Consultant Associate • Power Platform Solution Architect Expert • Leapwork - Certified Professional

Munna Kumar, CRM Techno-Functional Consultant	
Munna has over 7 years of experience in implementing and supporting Microsoft Dynamics CRM. His expertise includes configuring and customizing CRM to meet business needs and integrating it with third-party applications. Munna has worked with various versions of Dynamics CRM 2013 to D365 Online. He specializes in using Power Platform tools like Power Automate and Power Apps to streamline workflows and deliver tailored solutions. He is skilled in modules like Sales Management and Marketing, with a focus on AI-driven enhancements for better decision-making. My goal is to provide user-friendly, data-driven CRM systems that drive operational success.	
Recent Projects	Aayush has successfully implemented a dynamic solution using Power Pages, integrating it with D365 F&O for a private sector organization to streamline business processes and improve operational efficiency. Proficient in leveraging Power Platform tools such as Power Apps, Power Automate, Copilot bots, and Power BI customizations, he develops tailored solutions that address diverse organizational needs. His expertise also extends to API integrations, enabling seamless workflows and enhanced system capabilities. Additionally, Aayush has contributed to several presales' activities, showcasing his ability to design and present innovative CRM solutions aligned with business objectives.
Education and Certification	Education <ul style="list-style-type: none"> • Bachelor's degree in Computer Science and Engineering



Munna Kumar, CRM Techno-Functional Consultant	
	Certifications <ul style="list-style-type: none"> • Dynamics CRM Fundamentals • Azure Data Fundamentals • Azure Data Engineer Associate

Amarjeet Sinha, CRM Techno-Functional Consultant	
Amarjeet has experience with the Dynamics CRM suite, demonstrating proficiency in utilizing Power Platform tools such as Power Pages, Power Automate, Power Virtual Agents, API integrations, and Power Apps to develop tailored solutions that cater to diverse organizational needs. He collaborates with clients to understand their requirements and propose suitable solutions. With a strong foundation in CRM modules like Sales, Field Service, and Customer Service Hub, coupled with his exploration into Microsoft Teams Bot Development, Amarjeet exhibits a comprehensive skill set. His expertise and experience in developing advanced applications and incorporating AI functionalities further enhance organizational workflows and outcomes.	
Recent Projects	Amarjeet worked as a Technical Consultant in Royal Enfield and created Canvas Apps for the business use cases. He also worked as a Microsoft Teams Apps developer, creating chatbots connecting endpoints to servers and fetching data for queries according to the users. Proficient in leveraging Power Platform tools like Power Pages, Power Automate and Copilot Studios, API integrations, and Power Apps to develop tailored solutions addressing diverse organizational needs and enhancing operational workflows and worked on several Pre-Sales Activities.
Education and Certification	Education <ul style="list-style-type: none"> • Bachelor of Engineering in Computer Science and Engineering • Diploma in Science and Engineering Certification <ul style="list-style-type: none"> • Microsoft Power Platform Developer Associate • Azure AI Engineer Associate

Power Platform – Power Apps, Power BI, Power Automate, Power Pages, Dataverse, Microsoft Fabric

Harman Singh Manocha, Power Platform Lead	
Harman brings more than 5 years of experience in the Microsoft ecosystem, with a specialty in Data Solutions, and 2 years in Power Platforms. With his skills in Azure Cloud Infrastructure, Azure Data Services, and Azure DevOps, he has been working on multiple Big Data Projects for Public Sector and Retail. Proficient in Power Platform, he has worked on projects starting from presales to enhance productivity and customer experiences.	
Recent Projects	Harman has experience in data transformation with Azure Data Factory for data ingestion from multiple data sources such as Oracle, SQL and ADLS, and fulfilling reporting and analytical requirements with Power BI. He has worked as a Technical Consultant in various implementation projects for Big Data, Power Platform, D365 CRM, Azure Data Services, and support projects for Power BI and internal systems. He has excelled in the Business Intelligence domain with a special focus on DAX optimization for Power BI. During the



Harman Singh Manocha, Power Platform Lead	
	implementations, he is involved in creating visualizations that transform raw data into valuable insights, meeting specific business requirements of the client.
Education and Certification	<ul style="list-style-type: none"> • Bachelor of Information Technology (IT) • Post Baccalaureate Certificate, Data Analysis

Srishti Vats, Power Platform Consultant	
<p>With 2 years of experience in the Dynamics CRM suite, Srishti leverages the capabilities of Power Pages, Power Apps, and Power BI to optimize and streamline CRM processes. She has worked on various presales activities for various CRM Modules including Sales management, Field Service and Customer Service Hub. Beyond conventional practices, she has a good understanding of Robotic Process Automation (RPA) and experience in working with Power Virtual Agents (PVA), offering a comprehensive approach to customer relationship management. She has been instrumental in leading the existing client's support and OnActuate's internal CRM system Enhancements.</p>	
Recent Projects	<p>Srishti has implemented a comprehensive customer service module and asset management system for a public sector agency, optimizing operational efficiency and service delivery. Srishti is proficient in leveraging Power Platform tools like Power Pages, Power Automate and Copilot bots, API integrations, and Power BI customizations to develop tailored solutions addressing diverse organizational needs and enhancing operational workflows. She has also worked on several Pre-Sales Activities.</p>
Education and Certification	<p>Education</p> <ul style="list-style-type: none"> • Bachelor's degree in computer applications • Master's degree in computer applications <p>Certifications</p> <ul style="list-style-type: none"> • Power Platform Functional Consultant • Fabric Analytics Engineer Associate

Aayush Garg, Power Platform Consultant	
<p>Aayush has experience working in the Dynamics CRM suite, specializing in leveraging Power Pages, Power Automate, Power Apps, and Power BI to streamline workflows and deliver customized solutions. He has demonstrated expertise across CRM modules such as Sales Management, Project Operations, and Marketing, contributing significantly to presales activities and AI-driven CRM enhancements using Microsoft Copilot Studios. Aayush has played a key role in leading client support initiatives and optimizing OnActuate's internal CRM systems, combining technical expertise with a data-driven, innovative approach to drive operational success.</p>	
Recent Projects	<p>Aayush has successfully implemented a dynamic solution using Power Pages, integrating it with D365 F&O for a private sector organization to streamline business processes and improve operational efficiency. Proficient in leveraging Power Platform tools such as Power Apps, Power Automate, Copilot bots, and Power BI customizations, he develops tailored solutions that address diverse organizational needs. His expertise also extends to API integrations,</p>



Aayush Garg, Power Platform Consultant	
	enabling seamless workflows and enhanced system capabilities. Additionally, Aayush has contributed to several presales' activities, showcasing his ability to design and present innovative CRM solutions aligned with business objectives.
Education and Certification	<p>Education</p> <ul style="list-style-type: none"> • Bachelor's degree in Computer Science and Engineering <p>Certifications</p> <ul style="list-style-type: none"> • Dynamics CRM Fundamentals • Azure Data Fundamentals • Azure Data Engineer Associate

Azure Services – Data Lake, Azure Communication Services, Synapse, DevOps, Azure Open AI, Azure Machine Learning, Azure AI Search, Azure AI Services, Azure Ai Studio, Azure API Mgt., Azure Functions, Azure SQL Database, Azure Cosmos DB, Fabric

Priyaroop Singh – Azure Technical Architect	
<p>Priyaroop Singh is a seasoned professional in the Information Technology field with more than 21 years of experience. He has worked both as a contractor and a full-time employee, providing him wide exposure to various technologies. Priyaroop has extensive experience in software development in Microsoft-centric technologies and Microsoft Azure cloud technologies.</p>	
Recent Projects	<p>Priyaroop has worked with many clients and was involved in Configuration Management, and Environments Management in the Client Service Technology group. He also has extensive experience in software development in Microsoft-centric technologies such as middleware Service Oriented design utilizing Microsoft .Net technology. During projects, Priyaroop is generally involved in Solution conceptualization, Architecture design, implementation, and deployment. He is proficient in various platforms and concepts such as Continuous Integration, Unit and Integration testing, data modelling, Web Services, and Web development/hosting.</p>
Education and Certification	B.E. Computer Science

Microsoft 365

Shobheet Mahajan – IT Lead	
<p>Shobheet has over 19 years of experience in technology and managing infrastructure, environments and platforms for cloud or on-premise services. As an IT lead in infrastructure planning, environment management and security, the team ensures that supported services and systems are operational and compliant with security and other standards. He and his team manage our provision of Microsoft Azure (Cloud) services, a key service along with our Client Support program for our clients.</p>	
Recent Projects	<p>Shobheet is responsible for implementing and leading the technical infrastructure team tasks for the deployment of Azure cloud services leveraging Microsoft tools and technologies. He is engaged in a similar role on the migration project to Azure. He and the team work closely with Microsoft Azure services as the FastTrack program on deployments. In addition,</p>



Shobheet Mahajan – IT Lead	
	Shobheet and his team maintain OnActuate’s Cloud Solution Provider instances on Azure as well as our Client Support (Helpdesk) system for post-production client support.
Education and Certification	Master of Computer Application, India

Vikash Dwivedi – IT Engineer	
Vikash has over 5 years of experience in information technology and managing infrastructure, environments and platforms for cloud or on-premise services. He is proficient in Microsoft Entra ID formally known as Azure AD or Active Directory, Microsoft 365, Microsoft Copilot for Security, Microsoft 365 Copilot, Identity and access management, and security operations management. He is also responsible for managing Microsoft Azure (Cloud) services, a key service along with our Client Support program for our clients. He is passionate about continuously learning and supporting people to solve their technical problems and is committed to delivering top-notch IT solutions while staying updated on industry trends.	
Recent Projects	Vikash manages OnActuate’s internal systems by overseeing upgrades for the servers, hardware and software, reporting on the progress of operational issues, managing financial budgets for IT assets, coordinating with IT vendors and external professionals, managing Enterprise applications, upgrading and managing OnActuate’s overall IT Infra. Vikash also has experience in infrastructure planning, environment management and security, and ensures supported services and systems are operational and compliant with security and other standards.
Education and Certification	Bachelor of Engineering (Electronics & Communication)

Project Management Oversight

Naeem Shafi – Delivery Lead	
Naeem Shafi is a proactive and experienced PMP Certified Project Management professional. He has over 25 years of Project Management and Implementation in various sectors across North America, United Kingdom, and Europe. An enthusiastic and self-motivated individual, he has strong communication, problem-solving, planning and decision-making skills. Naeem has demonstrated the ability to work and execute under pressure while acting as a project and team lead. Naeem joined OnActuate as a partner, visionary, and leader of the North American operation.	
Experience	At the City of Columbus, Naeem has led the transformation project of a broad range of Financials, Procurement/ Vendor Portal - Management, Cashiering, and extended Budgeting/ Reporting. At WA State – Labor & Industries, Naeem was the governance lead and Project Manager responsible for the overall delivery of a comprehensive D365 F&SC implementation including Budgetary Accounting and Planning. At TMWA, Hammond Power Solutions, Volvo, Arbor, and many other clients, Naeem has played a similar role as the Delivery Lead, and Project Sponsor for the entire D365 F&SC / AX 2012 projects covering the product suite, complementary solutions, and integrations.



Naeem Shafi – Delivery Lead

Education and Certification	B Eng. (Honors), England Naeem is PMP certified.
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Vijay Sharma – D365 Project Manager

Vijay has over 19 years of experience in ERP and CRM implementations. He has managed multiple projects as a Delivery Lead responsible for managing the planning, development, testing, and rollout of D365 applications. Vijay has demonstrated his ability to work and execute successful projects involving ERP and CRM implementations with complex integrations across industries. He is proficient in managing delivery teams and business stakeholders for successful implementations.

Experience	Vijay leads the delivery of some of the key public sector projects for D365 F&SC for Prosper Portland, Employment Security Department (leave and care) Washington state, Ontario Teacher's Insurance Plan (OTIP), March of Dimes Canada, Pinellas County Tax Collector. He has led various projects of varying size and scope and is experienced in delivering and managing complex digital transformation D365 F&SC projects. Vijay has also managed stakeholder communications, coordinated with business teams, and Project reporting across different project phases for various clients. In the various implementations, he was responsible for planning and monitoring the progress of the work and deliverables amongst the team, maintaining project documentation, and facilitating communication among team members, stakeholders, and project managers, whilst tracking the project budget and ensuring the project stayed within budget, and developing cutover plan to ensure a seamless transition to D365 F&SC.
Education and Certification	B. Tech. Computer Sci., India

Managed Support Services

Manjit Bhasin – Managed Support Services Lead

Manjit has been a Managed Service Lead/Delivery Lead supporting clients in Microsoft Dynamics projects for over 10 years. He has been engaged in project deliverables, implementation, upgrade, and support for a wide range of public sector as well as commercial sector clients. Over the years, Manjit has specialized in solution led project management and has been involved in delivering mission-critical projects for the customers across multiple geographies. He is experienced in managing projects with teams split into multiple geographies. He has been leading project deliveries with tools such as DevOps, Microsoft Projects, LCS etc.

Experience	Manjit has been the MSS BU Lead in supporting clients in different verticals. These projects include D365 F&SC, D365 Business Central, D365 C&E, and Azure for clients in the Americas and Asia. He has also worked as the Delivery Manager for various D365 F&SC Implementation for public sector clients such as Washington Employment Security division, a tax collection Authority. He has also worked as the Delivery manager for D365 F&O implementation and support for one of the largest property development company around waterfronts. Apart from these, as MSS Lead, Manjit has been supporting D365 product suite for clients spread out globally in various sectors like insurance corporations, water authority, non-profit
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Manjit Bhasin – Managed Support Services Lead	
	organizations, transformers manufacturing industry, film studios, Ministry of Labor, automobile industry, transportation industry etc.
Qualifications and Certifications	Bachelors of Science (Major: Client-Server Technology), Bachelor of Engineering (Honors) Lean Six Sigma and Change Management COM/DCOM technology Patent - Method and apparatus for Biometric Verification of Secondary Authentications

Note: For all of the above-mentioned resources, work for the Lottery will be performed from either the United States or Canada.



Project Implementation Methodology

Implementation Approach

OnActuate is committed to delivering a robust and efficient system solution for Lottery. Our approach is meticulously designed to align with the project deliverables set forth by Lottery in the RFP. We are following Hybrid Approach keeping in mind the agile principles and success by design methodology from Microsoft.

Every project identified for implementation will begin with Planning phase followed by requirements gathering. Upon completion of requirements gathering, the build will be delivered in multiple iterations to incorporate timely feedback. The hybrid approach would allow the project to compartmentalize the different areas of the solution while enhancing collaboration between the delivery team and the client - especially during the development sprints where early and frequent feedback from the client is critical for confirming the solution throughout the project. Our approach has been illustrated through the diagram below -

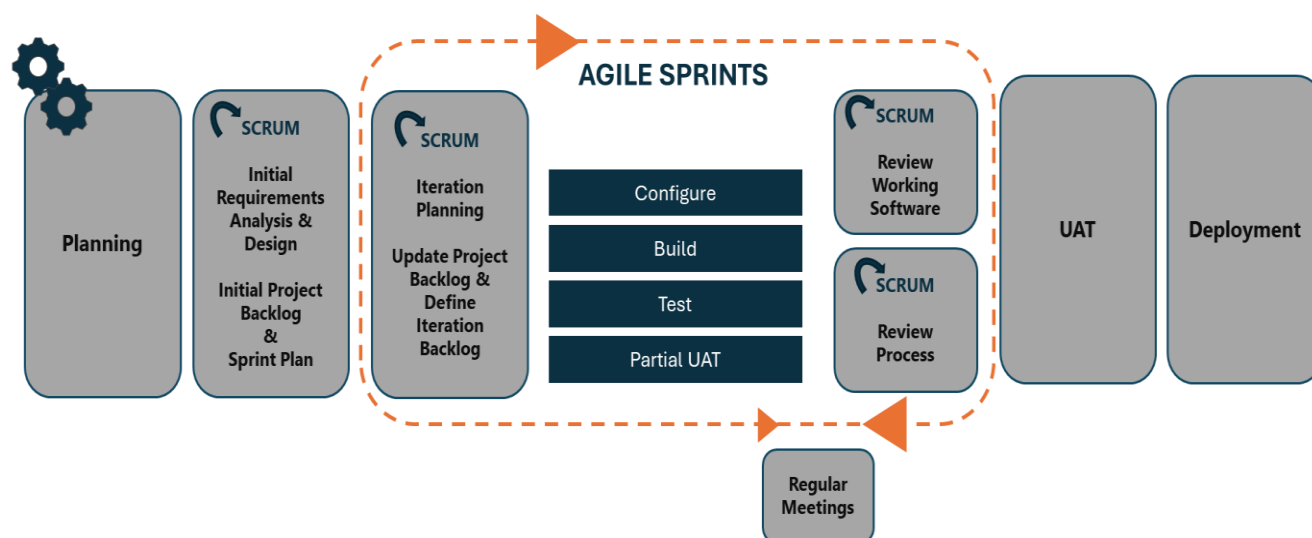


Figure: Sample Project Approach

Our Approach has been briefly explained below:

Project Planning: Prior to starting each identified project, OnActuate will conduct a Project Planning, Implementation Strategy and governance workshop with the Lottery team and review and finalize the scope and Project Plan. We will also conduct a Project Kick-off meeting with relevant stakeholders and a workshop for environment planning and access configuration.

Analysis: We will conduct Requirement gathering sessions for the identified project. We will create/update DevOps stories for Product Backlog and prepare master data, test scenarios & security roles templates along with preparing Data Migration Approach Document (if required).

OnActuate will walk Lottery team through the DevOps Requirements, Approach Document, Data Migration Document, TSR, Master Data, and User Role Templates. Once signoff is received from Lottery OnActuate will proceed to Design Phase.



Design: In this phase OnActuate Team will prepare the Solution Blueprint and Process Design Diagrams. OnActuate will present process design diagrams to Lottery for their review and feedback. Upon receiving the feedback, we will update the Design documents based on feedback received.

Build & Configuration: Build and Configuration will be managed using agile sprints where the developers will pick the work items from the Product Backlog and define the Sprint Backlog for an incremental build. As a part of the Build & Configuration the system will be configured and features/Interfaces developed to meet the backlog requirements along with Data Migration activities defined in the Data Migration Approach document. The team will be delivering the solution after initial set of unit testing and Functional testing based on identified test cases. These test cases will be documented on the DevOps for review and feedback by Lottery team. During the sprint review the key business users will be showcased the updated build to gather feedback.

User Acceptance Testing (UAT): OnActuate will set up the UAT environment for Lottery, deploying the solution and loading sample master data and security roles. The OnActuate team will conduct user workshops in the UAT environment, covering areas identified during the Analysis and will incorporate feedback from Lottery's team. Once feedback is integrated, we will conduct a final review session with Lottery stakeholders to secure their signoff before moving to the next phase. During this phase, we will also prepare training materials. After UAT completion, in-person training sessions will be conducted to ensure Lottery's team is fully prepared for Go-Live.

Deployment & Go-Live: Post UAT Stabilization, we will update & socialize the cutover plan and prepare the Go-Live checklist. We will then deploy the solution to Live environment and copy configuration data and security roles to Production Environment and cutover to the new solution. Post Go-live we will provide Hyper Care Support to ensure that the business community seamlessly adopts the new solution, without any major roadblocks.

OnActuate will adhere to the project timeline established with the Lottery, ensuring that each phase is completed on schedule.

Project Governance Model and Project Management

Project Governance Model

At OnActuate, we have a governance model in place to ensure that our delivery is of good quality. We have a 3-layered governance model – Strategic, Tactical, and Operational layer. We will deploy a team that is experienced in the implementation of the solution.

- At the Strategic Level, the leadership team would be setting up a business vision and annual planning and review statuses quarterly.
- At the Tactical Level, the prime focus would be to manage all aspects of the contract, including contract performance and service change requests. The aim would be to provide Operational, Technical, Financial, and General Management oversight.
- At the Operation Level, the Dev Team Leads Manage day-to-day operations, identify continuous improvement opportunities, and deliver to agreed service levels and dependencies.

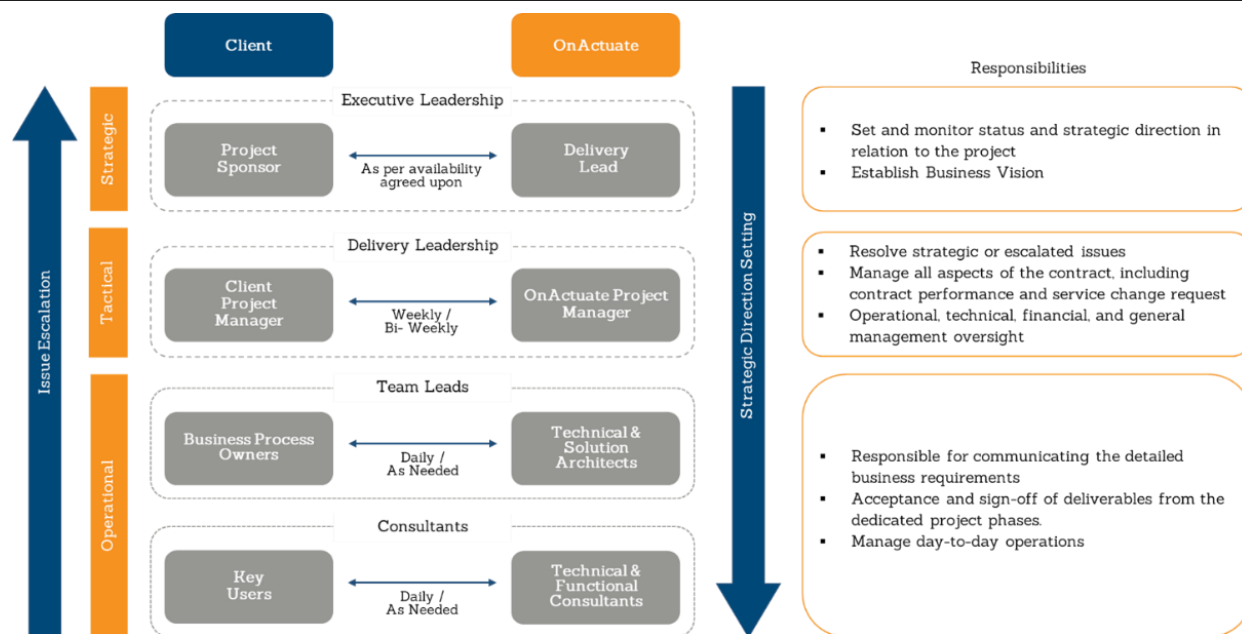


Figure: Project Governance Model

Project Management

We have a Project Management approach in place that mandates projects to be run and managed using Azure DevOps. With Azure DevOps, every single activity and task that is planned in the project is tracked to closure and is accessible on a real-time basis to every member of the project across both organizations. Azure DevOps helps project managers and teams to view, update, and control the project on a real-time basis. This helps the entire project team including the client's organization to have a single version of the truth when it comes to the project life cycle. Some of the most important areas of project management have been explained below:

- **Communication Plan** – The Project Communication Plan identifies and describes the formal and informal communications that are critical throughout the implementation. The Plan includes specific information regarding the type of communication, purpose, scope, objectives, audience, responsibilities, format, and timings. project communication ensures that the correct stakeholders have the right information (at the right time) with which they make well-informed decisions.

A formal process is used by OnActuate to facilitate and ensure that communication is maintained regularly during the project. Following are some of OnActuate's communication tools and protocols.

S No	Description and Purpose	Method	Frequency
1.	Project Governance Board Reports and Meetings Formal meetings held regularly to inform Project Governance Board Members of the project's progress and review Change Requests. If needed, Azure DevOps is referred to view the project status on a real-time basis.	Verbal	TBD with the client
2.	Project Status Reports and Meetings Frequent meetings to provide a report on the status of the schedule, budget, risks, issues, and changes	Reports from Azure DevOps	Weekly / Bi-Weekly



S No	Description and Purpose	Method	Frequency
3.	Deliverable Documents Review and Approval Meetings Meetings held with the client to obtain final acceptance that the deliverables shared to meet the criteria identified. Each of these actions is tracked to closure in Azure DevOps. The documents that must be signed off are also attached to the associated tasks and are maintained in the document management system such as SharePoint.	Verbal	As Needed
4.	Project Team Meetings A meeting involving all team members to discuss the work in progress and to keep the team informed of the project status. This is conducted referring to the real-time status of the tasks and the upcoming milestone in Azure DevOps.	Verbal	Daily / As Needed

Table: OnActuate's Communication Plan

- **Change Request Management** – As a part of Change Request management, we describe basic strategies and common resolution methodologies to effectively manage change within an organization. During the project, the State may request in writing additions, deletions, or modifications to the identified scope of services (“change”). We estimate the impact of the change on the implementation fee and schedule. The estimates are agreed upon in a written Change Request (CR) Form signed by the designated Project Managers from both parties. We then design, develop, and implement the change. The Change Request Process that will be employed is defined below.

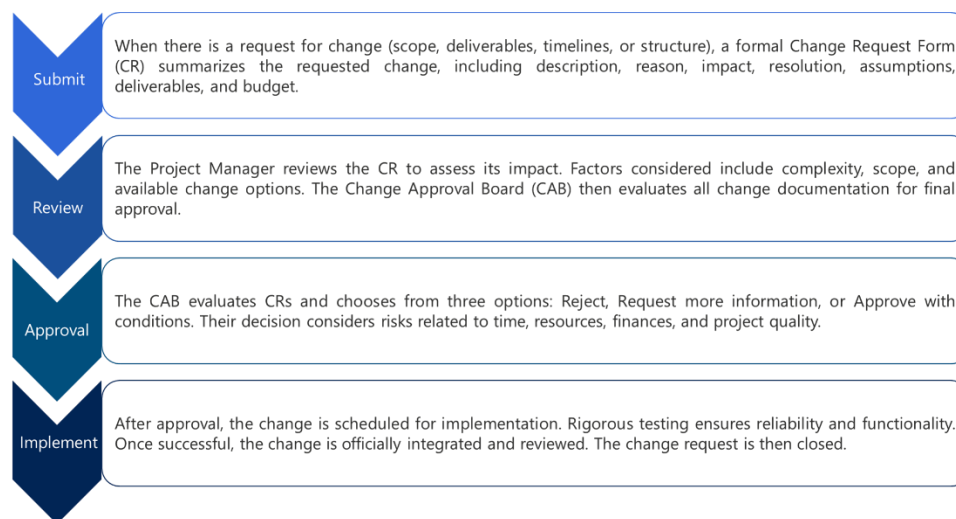


Figure: Change Request Management Process

- **Risk Management Plan** – The goal of the Risk Management Plan is to minimize the impact of events or conditions that are likely to have a strong negative effect and maximize the impact of events or conditions that are likely to have a strong positive effect on project success in terms of time, cost, scope, and quality. Risk Management is a method by which risks to the project (e.g., to the scope, deliverables, timescales, or resources) are formally identified, quantified, and managed during project execution. The process entails completing several actions to reduce the likelihood of occurrence and the severity of the impact of each risk. If the risk is considered by the Project Manager to be ‘related to the project’, then a formal risk is raised in the



Risk Register and a Risk ID is assigned. The Project Manager will assign the level of 'impact' and 'likelihood' based on the risk's severity. We have provided a sample Risk management tracker in the figure below:

Risk Description	Impact Description	Probability	Impact Scale (1-10)	Risk Score (C*D)	Mitigation Plan	Contingency Plan	Risk Owner
Delay in Business Sign off of Deliverables	Project schedule delays & Cost increase	20%	8	1.6	Show & Tell sessions & working prototypes will be planned with the business users of the WIP solution. Play environment will be provided. Proper schedule will be informed earlier.	We will jointly (Business/OA) proceed with some assumptions and caveats and define mutually agreed positions.	Steering Committee
Team turnover	Impact on Schedule, Effort & Cost	10%	6	0.6	Backup resources will be created for each critical resource. Knowledge documents will be maintained for the smooth knowledge transition. Key resources retention strategy would be put in place. MS Teams meetings will be recorded for important meeting for easy reference. Hiring pipeline will be maintained.	New resource will be onboarded. Prospective candidates will be offered early joining bonus & notice period buy out. KT will be fast tracked to another resource by leveraging Project knowledge assets such as documents, prototypes, recorded sessions and training.	OA Project Manager
Vendor/Third Party issues	Project schedule & cost over run due to problems in contract, team, solutions, integration strategy, collaboration, etc	50%	10	5	Integrated Project Plan will be developed in consultation with Clients & Third Parties. Periodic Governance Meetings will be setup for assessing Program Health. A Test environment will be created to test the Integration touch Points/Develop service virtualization strategy. Need assessment for Licenses. SLAs & Escalation matrix between all parties will be agreed for response aligned with the Project needs and schedule.	Strong governance will be practiced by the Steer Co.	Cleint; Steering Committee
Scope Creep, Requirements changes & lack of focus on Non Functional Requirements & Cut Over strategy	New business requirements; Gap in requirement analysis and understanding causing change in Schedule and cost.	30%	7	2.1	Change Control Board will be established to approve & prioritize all the new requirements on the basis on Business Value. Peer reviews of Requirements to validate all business requirements are translated to System Requirements and solution follow the best practices. OA Solutioning Capability Center will be leveraged for reviews. Review the Non Functional Requirements (performance, archival strategy, security configurations, UX) & include same in requirements acceptance criteria	Monthly meeting of Change Control board to review and approve the new requirements as part of Project Backlog. Requirements will be prioritized as "Must Have" for Go Live or Development in Subsequent Phases. Project schedule & resource plan will be reviewed every month to incorporate approved changes.	OA Project Team, Client

Figure: Risk Management Tracker

- Issue Management** – If a risk is not mitigated on time, it becomes an issue. In Issue Management, we manage issues that affect the project to produce the required deliverables or tasks. The process entails completing a variety of review techniques to assess the impact level of the issue on the project and then undertaking a range of actions to resolve or reduce the issue as appropriate. Prioritized issues are identified on each Project Status Report and discussed at Project Status Meetings. It is the role of the Project Managers to resolve these issues at the Project Team level. All high-priority issues (significant impact on the project duration) with no identified resolution will be raised at Project Governance Board Meetings before they become urgent. If a high-priority issue becomes urgent then an escalation will be carried out in the form of an extraordinary Project Governance Board Meeting.

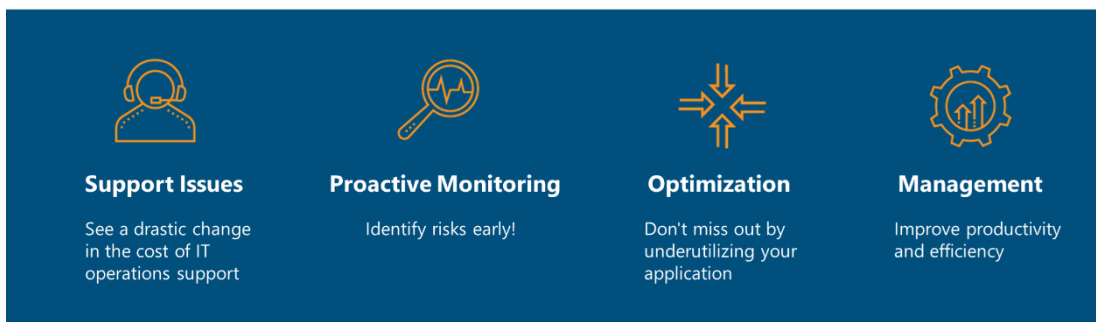
Issue Management Process is very similar to Risk Management Process where an issue is raised, documented in issue register, is assigned an action plan based on the priority and the actions are implemented to ensure that the issue is mitigated. The success of each completed action is then communicated to the team during project status meetings and Project Governance Board meetings.



Managed Support Services

As Microsoft's Certified Partner, Value Added Reseller, and Cloud Solution Provider (CSP) in the US and Canada for D365 and other related technologies, we provide additional managed services to complement what Microsoft provides as part of direct support services. Our Client Support Program emphasizes industrializing application maintenance services.

OnActuate's Managed Services Program



This is important for any maintenance service as continuous process improvement helps the support team to proactively address changing business scenarios, move towards stabilizing the support issues mainly around user training issues, and ensure that the software is updated with the latest version that OEMs and ISVs provide to the business community.

Our Client Support Program is tied to a separate Service Agreement and allows our client to pre-purchase a bank of support hours typically valid for a year (e.g., 100 hours a year). Once these pre-purchased hours are completely utilized, the Lottery can continue to buy additional bank of support hours based on their need. The additional support hours can be pre-purchased at any time with the ability to execute a subsequent agreement for the following term.

The services offered are provided during the Support Services Time (SST) – the period between 9:00 hours and 18:00 hours local time on Monday to Friday excluding Public Holidays. A help desk service is provided during these hours, with systems engineering and consultancy support available to resolve any system delivery or support problems that may arise. Apart from help desk support, we also have telephone and email support through which the Lottery team can raise any issues with their solution in post-production.

Our support factory is developed based on the ITIL support framework and we leverage the D365 Customer Service to provide support case incident submission and management via our [Client Self-Service Support portal](#) on our website. We provide access to client users to utilize our service management tool so that they can raise their support issues through this portal. Once the issues are raised, they are resolved by our support engineers as per the agreed SLA. The screenshot below is a sample incident submission using our support portal.



Home > Support > **Open a New Case**
 Open a New Case

Issue Title *
 Change Request in Reporting

Customer *
 Lottery

Project Allocated *
 Implementation

Submitted By *
 John Doe

Issue Description *

Attach a File
 Browse

Business Priority *
 High

Business Area Impacted *
 Reporting

Issue Category *
 Change Request

Additional Remarks (If Any)

Submit Cancel

Figure: Screenshot of OnActuate's Support Portal

Upon onboarding the client to OnActuate support, we provide the required cross-training and knowledge transfer to the assigned client's internal resources who may manage support internally and forward incident requests to our support desk. This allows clients to quickly submit their case incidents to promote efficient case resolution. These Support services include functional and technical support case management to resolution. This support program includes the services for multiple helpdesk tier levels as described herein.

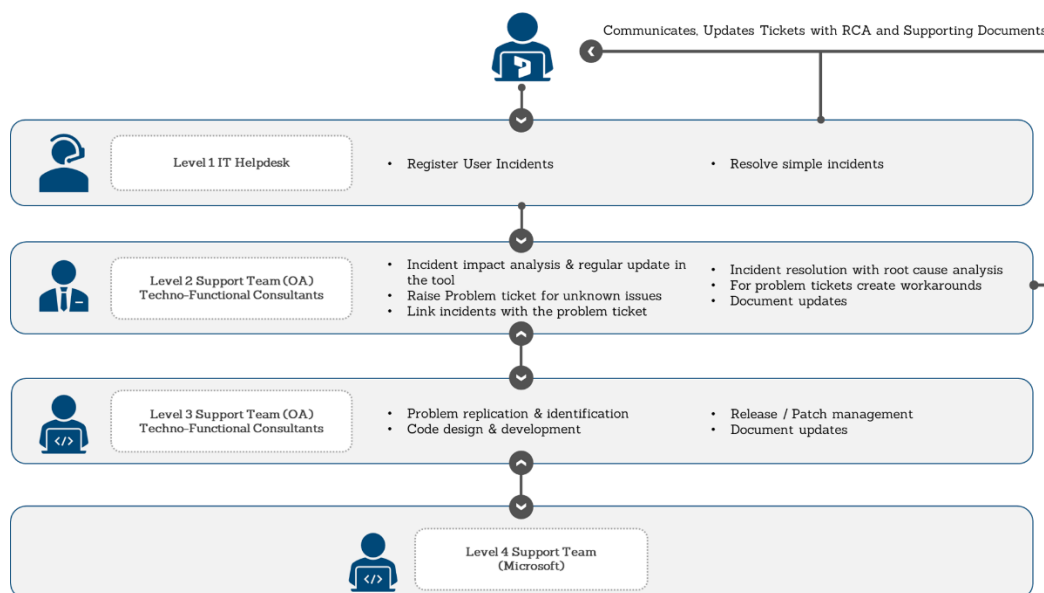


Figure: OnActuate's Support Structure

Cases are assigned and acted upon based on severity level with a determined response and estimated resolution timeframes. There is an escalation protocol. Business-critical support will initiate a rapid response to address urgent needs such as system failure and the application of urgent fixes. As required, we provide breaks/fixes and apply Microsoft hotfixes with causal troubleshooting and analysis. Other technical support services include release, patch and upgrade analysis, code promotion, installation, system monitoring, minor development, operation support, system errors, performance analysis, and tuning. We provide specific support incident follow-



up communications. For clients with broader usage, we schedule sessions on an ongoing basis on the status of support and incident follow-up.

Our support model meets the clients' SLAs with the assigned support team consultants being very experienced in the Microsoft application and the assigned support task. We also propose our standard service level agreement for support projects. However, we can discuss the current service level agreements that Lottery would like us to follow in the subsequent phases.

Our standard SLA definition and corresponding Resolution Time are mentioned in the tables below:

Code	Priority Description	Example
P1	<u>Mission CRITICAL</u> The total failure of a system for a user group result in the complete disruption of the business process, and no alternative bypass is available.	<ul style="list-style-type: none"> • Business-critical process interruption with major financial impact and there is no possibility to replace the functionality with the temporary bypass. • Solution not accessible to one or more users • Unable to update Customer Data/Cases not getting registered/Integration not working. • Any channel for customer interaction is not functioning completely.
P2	<u>HIGH</u> Total high failure of a System for a user group, which causes serious disruption to the business process but for which contingency measures and/or bypass are possible. Incidents that would otherwise be considered severity level 1 but that have an acceptable alternative or bypass available will be designated a severity level 2.	<ul style="list-style-type: none"> • Notifications /Alerts not working. • Problem with Collaboration/Copilot.
P3	<u>MEDIUM</u> Non-time critical function or procedure, unusable or hard to use & having an operational impact but with no direct impact on the direct impact on service availability.	<ul style="list-style-type: none"> • Admin and User management tickets • Reporting related issues
P4	<u>LOW</u> "How-to" issues.	<ul style="list-style-type: none"> • How to access the solution • The user is unaware of how a specific process works in the solution

[Table: OnActuate's Standard SLA Definition](#)



Code	Description	Acknowledgment	Target Resolution Time	Root Cause Analysis
P1	Mission Critical	30 Minutes	4 – 5 Working Hours	Within 24 Hours
P2	High	60 Minutes	8 – 16 Working Hours	Within 48 Hours
P3	Medium	-	24 – 40 Working Hours	Within 5 Working Days
P4	Low	-	Best Effort	Within 7 Working Days

[Table: OnActuate's Resolution Time](#)



References

We have provided references for our clients where we have performed similar proposed solutions' implementations. The references are a mix of completed projects and ongoing projects. Should Lottery wish to speak to any of our references for more details, please contact Gregory Allgrim at gregory.allgrim@onactuate.com or 305-905-1169.

Dynamics 365 Business Central

Reference 1	
Client name: Select Wines Merchants Ltd.	Contact Person details: Provided upon request
<p>Services Provided / Date(s) of Service:</p> <p>Select Wines, a leading player in the wine distribution industry, completed a strategic initiative to optimize their D365 BC by migrating to the Microsoft Cloud and implementing OnActuate's Data Confluence & Insights Solution. Select Wines aimed to enhance their scalability by streamlining systems, improving integration, and establishing comprehensive documentation. They also sought to simplify their customizations for better operational efficiency and improve access to real-time data on sales, inventory, and other key business areas to drive overall effectiveness.</p> <p>To address these issues, and to prepare the company to be more agile in an increasingly competitive market environment, OnActuate migrated Select Wine's current on-premises D365 BC to the safe, reliable and performance enhanced Azure Cloud. The company also focused on streamlining operations by leveraging advanced supply chain and process automation within their existing system, including implementing OnActuate's Data Confluence & Insights Solution, an innovative data integration and analytics platform.</p> <p>By partnering with OnActuate, Select Wines found a partner that brought the industry expertise and knowledge needed to successfully carry out the digital transformation. Select Wines can now utilize the current status of sales, inventory, logistics, purchases, and other data, for improved decision-making and strategic drivers for added growth and success.</p> <p>This optimization not only improved integration and documentation but also ensured that Select Wines can continue to grow and meet the demands of changing consumer tastes within a competitive Canadian retail environment.</p> <p>Project duration: April 2024 to June 2024</p>	

Reference 2	
Client name: West Virginia Lottery	Contact Person details: Provided upon request
<p>Services Provided / Date(s) of Service:</p> <p>West Virginia's home for Powerball, MegaMillions, Keno, Daily 3, Daily 4, Cash 25, video lottery, table games and scratch-offs. The West Virginia Lottery produces sales of more than \$1.1 billion annually and generates more than \$520 million a year for the people of West Virginia.</p> <p>West Virginia Lottery (WVL) was looking to have a modern-day SaaS solution to replace their 2013 Great Plains ERP migrated onto D365 Business Central. Besides core financial processes, the project includes importing lottery and game data from multiple third-party sources for consolidation and posting. They will also be shifting</p>	



Reference 2

as many disparate database storage business processes which are a fit for Business Central, such as basic inventory management for promotional items.

Project duration: February 2024 to July 2024

Reference 3

Client name: DZ Card

Contact Person details: Provided upon request

Services Provided / Date(s) of Service: DZ Card is a leading end-to-end smart card solution provider in Southeast Asia and Africa. DZ card was using different applications at each of its locations leading to three main business challenges that impacted internal efficiencies like lack of control over procurement requests, calculating actual profit at the sales level, and production operation time captured outside of the system leading to difficulty in accessing real-time data.

To overcome these challenges DZ Card selected OnActuate as its global implementation partner to implement D365 Business Central for their Thailand entity. DZ Card was impressed by our services and partnered with us to also perform rollouts for their India, and Philippines entities. OnActuate will be implementing BC in Morocco soon as well. Our implementation approach involved finalizing Business Requirement Analysis, designing and developing business needs, internal testing before conducting UAT, and end-user training. We also developed Power BI reports to address their analytics needs. Key Improvements included utilizing automated features, capturing required sales information directly into the system to get desired profitability information, and capturing the production operation time directly in the system to ensure transparency with departments and management.

Apart from implementation services, we also continue to provide Azure Managed Services and support the system in production. For more details refer to [dzcard - Customer Success Story | OnActuate](#).

We recently migrated DZ Card Thailand to the cloud from on-prem in October 2024.

Dynamics 365 Customer Relationship Management

Reference 1

Client name: The New Mexico Office of Broadband Access and Expansion (NM OBAE)

Contact Person details: Provided upon request

Services Provided / Date(s) of Service:

New Mexico OBAE is responsible for Broadband access and expansion in New Mexico. They are dedicated to driving broadband solutions to bridge the digital divide and enhance connectivity for all residents in New Mexico.

NM OBAE was looking to improve efficiency, vendor communication and data management within their department. OnActuate is implementing Microsoft Dynamics 365 Sales to streamline document management through a SharePoint integration, automate forms about Pilot programs and integrate with Outlook to transition from Excel spreadsheets. The project timeline is April 2024 to August 2024.

[Table: Reference 1](#)



Reference 2	
Client name: Los Angeles County Department	Contact Person details: Provided upon request
<p>Services Provided / Date(s) of Service:</p> <p>One of LA County's Department needed an enterprise-grade solution to streamline its Body-Worn Cameras (BWC) asset management and tracking system. It was also expected that the solution should be able to handle the associated cases and RMA requests raised by the users and training requirements. This will help them to automate their manual process and provide a self-service chatbot to address common user queries, thus leading to transparency and efficiency. OnActuate was engaged to deliver this solution based on the Microsoft Power Platform, which is an extension of D365 CRM.</p> <p>Their solution stack consists of D365 and Power Platform (Canvas app for Field Officers, D365 for Backoffice and Power Automate for automation). The implementation started in December 2023. A successful pilot has been completed to provide a wireframe to the LA County department to envision the future solution. This LA County Department is currently working to go live with this new solution across the entire department.</p>	

[Table: Reference 2](#)

Reference 3	
Client name: Tacoma Pierce County Health Department (TPCHD) – ongoing project	Contact Person details: Provided upon request
<p>Services Provided / Date(s) of Service:</p> <p>TPCHD sought an enterprise solution to enhance efficiency in its processes for pharmacy partners and long-term care facilities, optimizing inventory management to better serve their residents. During our discussions, we were able to identify TPCHD's problem, speak on it in a simplified manner, and build a relationship with the customer. We are currently implementing the following components for TPCHD:</p> <ul style="list-style-type: none"> ○ Power Automate: To manage the automated creation of emails/notifications to different teams/customers. ○ D365 Customer Service: D365 CS is the AI-driven solution that will be used to manage the relevant information about care facilities, pharmacies, contacts, define outreach programs and articles. It will provide intelligent insights and single place to track all the communication being done with Long Term Care facilities by various teams in TPCHD. 	

[Table: Reference 3](#)

Reference 4	
Client name: Health Care District of Palm Beach County (HCDPBC) – ongoing project	Contact Person details: Provided upon request
<p>Services Provided / Date(s) of Service:</p> <p>HCDPBC uses out-of-date technology to manage forms processing as part of their complex business. These forms need re-imagining on a modern platform, in this case the Microsoft Power Platform. HCDPBC manages hundreds of forms and needed consulting expertise to analyze these forms and come up with a migration plan. HCDPBC chose OnActuate based on our understanding of how Microsoft technology can modernize their environment.</p>	



Reference 4	
<p>Our flexible nature in working with the client's contracting process was an additional plus. Currently, as a part of this initial engagement, we will conduct detailed interviews with the stakeholders of these forms. As a result of this analysis, we will provide HCDPBC a roadmap for modernizing these forms which will incorporate both recommended technical solutions and needed consulting effort. This assessment will be the basis for HCDPBC to execute on their vision for having a more modern and efficient business operations.</p>	

Table: Reference 4

Reference 5	
Client name: City of Columbus – Vendor Portal and Transparency Website -	Contact Person details: Provided upon request
<p>Services Provided / Date(s) of Service: August 2019 – April 2023 (This involves the implementation of multiple solutions throughout the duration)</p> <p>In one of the largest Microsoft Dynamics rollouts in the U.S. Public Sector, the City of Columbus partnered with OnActuate to increase overall system performance and response time with upgraded Business Applications. Facing operational challenges from an outdated, manual, and inefficient on-premises ERP system, the City recognized the need for transformation. The city entered into a strategic collaboration with OnActuate to improve efficiency, transparency, and intelligence. Empowered by the Microsoft Dynamics 365 platform, a modern cloud-based ERP solution, and OnActuate's expertise with technology implementations for government, the city embarked on a digital transformation journey.</p> <p>Leveraging D365 F&SC and Commerce, alongside OnActuate's innovative solutions such as Cashiering for expanded point-of-sale for 7+ departments, Power Platform-based Vendor Collaboration for seamless management of 7,000+ vendors, and the Transparency Platform for self-service citizen access to public data and reports, the city bid farewell to legacy systems and embraced a unified, intelligent cloud ERP solution.</p> <p>This project improved the City's service delivery, employee satisfaction, and operational prowess. The future holds exciting promise as the City of Columbus continues to harness technology for even greater efficiency, transparency, and impact through its partnership with OnActuate. The City is also leveraging OnActuate's Client Support Program to manage its solution in production. Please find the link to the Case study posted on Microsoft's website of our experience with the City of Columbus for D365 F&SC and extensions implementation: Microsoft Customer Story-The City of Columbus elevates finance, purchasing, commerce, and budget planning with Dynamics 365.</p> <p>City of Columbus Transparency Portal: Home - [CoC Transparency Portal]</p>	

Table: Reference 5

Managed Support Services

Reference 1	
Client name: Waterfront Toronto	Contact Person details: Provided upon request
Services Provided / Date(s) of Service:	



Reference 1	
<p>Managed Support Services</p> <p>For Waterfront Toronto, we helped the client by providing support for their issues within the given timeframe and worked on the anticipated change requests with the ongoing process and structure. We worked with the client's business groups to gather information, plan, and provide solutioning for the same. As a part of our support, we also took part in user end-to-end training sessions.</p> <p>Project duration: 2022 to Present</p>	

Reference 2	
Client name: Prosper Portland	Contact Person details: Provided upon request
<p>Services Provided / Date(s) of Service:</p> <p>Managed Support Services</p> <p>Prosper Portland (Prosper), the dynamic economic and urban development agency for the vibrant City of Portland, Oregon, is committed to fostering an equitable economy. Their extensive mandate encompasses a diverse array of economic development programs, ranging from empowering small businesses and facilitating workforce training access to creating job opportunities for the city's residents and supporting racial equity. Prosper migrated from Dynamics AX to Dynamics 365 Finance and Supply Chain (D365 F&SC) on Microsoft Azure with OnActuate's support. The migration included replacing 3rd party extensions, updating the load disbursement interface, and navigating Government Cloud (GCC) onboarding. OnActuate worked closely with Prosper and Microsoft to ensure smooth integration and introduced BYOD (Bring Your Own Database) for improved external reporting and data extraction.</p> <p>Prosper, with a team of 68 active users, issues 350+ purchase orders annually, engaging with approximately 2,300 vendors. Prosper partnered with OnActuate for ongoing D365 F&SC support after going live in Aug 2022 and continues to use our Managed Services offering.</p>	

Reference 3	
Client name: Pinellas County Tax Collector's (PCTC)	Contact Person details: Provided upon request
<p>Services Provided / Date(s) of Service:</p> <p>Managed Support Services</p> <p>Pinellas County Tax Collector's (PCTC) Office is a government agency responsible for the administration and collection of various taxes and fees and providing driver license and motor vehicle registration within Pinellas County, Florida. PCTC was on Dynamics GP and was looking to move to a more modern system to meet their goals. OnActuate completed the D365 Finance implementation to enable the Office to better manage their financial systems to serve its constituents effectively and efficiently by accelerating business processes and boosting productivity. PCTC partnered with OnActuate for ongoing D365 F&SC after going live in Apr 2024 and continues to use our Managed Services offering. They are on the US Government Community Cloud (GCC) environment.</p>	

Pricing

We have provided pricing in our response to "Exhibit A - Pricing Page Microsoft Dynamics LOT" with this response.

EXHIBIT A – Pricing Page

Section	Description	Unit of Measure	Quantity	Unit Cost	Extended Cost
4.1.1	Microsoft Dynamics and Technology Implementation Services	Hours	500	\$ 150.00	\$ 75,000.00
4.1.2	Support and Maintenance	Hours	100	\$ 150.00	\$ 15,000.00
Overall Total Cost				\$	90,000.00

Please note: *This information is being captured for auditing purposes. The estimated volume for each item represents the approximate volume of anticipated purchases only. No future use of the Contract or any individual item is guaranteed or implied.

Any product or service not on the Agency provided Pricing Page will not be allowable. The state cannot accept alternate pricing pages, Vendor must complete the Pricing Page in full as failure to complete the Pricing Page in its entirety will result in Vendor's bid being disqualified. A no bid will result in Vendor's bid being disqualified.

Vendor should type or electronically enter the information into the Pricing Page to prevent errors in the evaluation.

BIDDER /VENDOR INFORMATION:

Vendor Name:	OnActuate Consulting US Inc.
Address:	10900 NE 4th St, Unit 2300
City, St. Zip:	Bellevue, WA 98004
Phone No.:	+1 305 905 1169
Email Address:	gregory.allgrim@onactuate.com


Vendor Signature:

December 6, 2024

Date: