



MCA  
CONNECT

# Drive Actionable Insights with Consolidated Data

Dag Calafell, III



# The MCA Connect Difference

## Global Reach

Think big. Act fast.

**1k+**

implementations

**50+**

countries

## Industry Expertise

20+ years in complex manufacturing and supply chain

2023  
US Winner

**Microsoft Partner of the Year**

Dynamics 365  
Supply Chain

2023  
US Finalist

**Microsoft Partner of the Year**

Automotive, Mobility  
and Transportation

2023  
Global Finalist

**Microsoft Partner of the Year**

Dynamics 365  
Supply Chain

## End-to-End Capabilities

From strategy to execution to support



## 100% Microsoft

Latest innovations from a leading partner

**13x**  
Microsoft Partner of the Year



# Serving Customers End-to-End

## Modern Platform Management

Proactive support, intelligent insights, and an optimized modern platform.

## Business Intelligence

Prediction and prescription with a connected enterprise powered by industry 4.0 capabilities.



## Business Strategy

Expert guidance delivering actionable insights, a path for continuous improvement, and P&L results.

## Connected Applications

Execute against your strategic roadmap with Microsoft Business Application implementations and integrations.



# Beat the Competition – Unlock the Value of Your Data

**74%**

Rely on legacy systems and spreadsheet<sup>1</sup>

**3%**

Can get answers in seconds<sup>2</sup>

**50%**

Cite data science resource shortage as hinderance to AI<sup>3</sup>

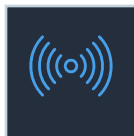
*Advanced analytics can improve supply forecast accuracy by*

**20% to 60%**



# Most Companies only analyze 12% of their data

- Complexity, effort
  - Many sources
  - Many formats
- Where to start?



Sensor



Sales



Energy  
Consumption



Supply  
Chain



Usage &  
OEE



Process



Maintenance and  
Predictive Analytics

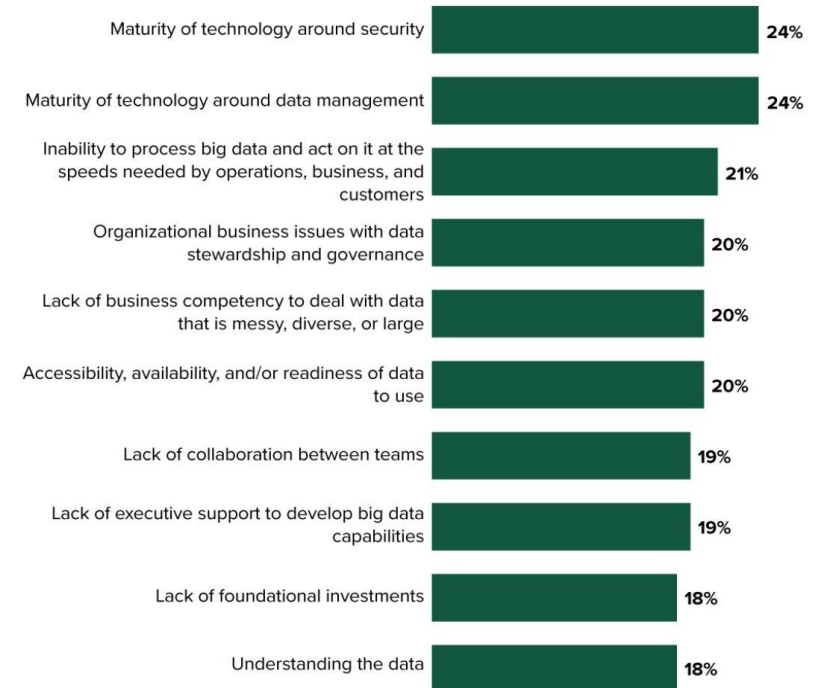


More

Figure 1

Data Management And Data Security Headline Main Challenges For Organizations

“What are/were the biggest challenges in executing your vision for data, data management, data science, and analytics?”



Note: Only top 10 responses are shown.

Base: 3,627 data and analytics decision-makers

Source: Forrester's Data And Analytics Survey, 2022

Source: Forrester Research, Inc. Unauthorized reproduction, citation, or distribution prohibited.





# Data Analysis Needs

<u>REPORT CATEGORY</u>	<u>INFORMATION REQUIRED</u>
<b>Executive</b> Senior executives	Targeted reporting and analytics to support strategic decision making
<b>Management</b> Executives and senior managers	Targeted reporting to support management of the business
<b>Statutory and regulatory</b> External auditors and third parties	Specific reports to satisfy auditors, government, and third parties
<b>Operational</b> Managers and employees within specific areas of each business function	Business area-specific reports providing performance information





# Data Analysis in Dynamics 365

Operational, statutory, regulatory



- Embedded Dashboards
- Formatted Printouts
- Workspaces
- Lists
- Queues
- Saved Views
- Alerts
- Management Reporter
- + Business Performance Planning
- + Business Performance Analytics
- + Microsoft Copilot

The screenshot displays two overlapping Dynamics 365 Finance and Operations dashboards. The top dashboard, titled "Purchase order receipt and follow-up", shows a summary of pending and upcoming work, including delayed receipts by vendor and pending receipts by vendor. It also features a table of purchase orders with columns for purchase order number, vendor account, and vendor name. The bottom dashboard, titled "Manage customer credit and collections", provides a comprehensive overview of customer credit and collections. It includes a summary of key metrics such as DSO 30 days (Blank), Customers past due (57), Amount past due (9.88M), Customers over credit limit (6), and Amount over credit limit (386.11K). The dashboard also features a "BALANCES" section with a bar chart showing aged balances (Current, 90 days, 60 days, 30 days, 180 and over) and a "COLLECTIONS" section with a pie chart showing collection status amounts (Promised to pay, Collection status amounts). A "PAYMENT DETAILS" section shows write-off by reason. A "Map" section displays balance due by region (Atlantic Ocean, EUROPE, ASIA, SOUTH AMERICA, AFRICA, Indian Ocean). A "Filters" sidebar is visible on the right. A detailed "Open transactions" table is overlaid on the bottom right, showing customer account, date, voucher, invoice, description, due date, currency, amount in transaction currency, balance, accounting currency, and collection letter code.

Customer account	Name								
AC-002	Apartment Complex 2								
Date	Voucher	Invoice	Description	Due date	Currency	Amount in transaction currency	Balance	Accounting currency	Collection letter code
4/16/2023	INV-10000718	INV-00000719		5/1/2023	USD	123.90	123.90	123.90	None
AC-006	Apartment Complex 6								
Date	Voucher	Invoice	Description	Due date	Currency	Amount in transaction currency	Balance	Accounting currency	Collection letter code
4/17/2023	INV-10000715	INV-00000716		5/17/2023	USD	948.13	948.13	948.13	None
NA-001	National Account 1								
Date	Voucher	Invoice	Description	Due date	Currency	Amount in transaction currency	Balance	Accounting currency	Collection letter code
4/16/2023	INV-10000716	INV-00000717		5/1/2023	USD	1.48	1.48	1.48	None
4/17/2023	INV-10000717	INV-00000718		5/17/2023	USD	123.90	123.90	123.90	None
US-001	Costco Retail San Diego								
Date	Voucher	Invoice	Description	Due date	Currency	Amount in transaction currency	Balance	Accounting currency	Collection letter code
1/21/2017	FTV-30000201	FTI-00000202		1/31/2017	USD	268.13	268.13	268.13	Collection letter 2
5/16/2017	ARPA000813	000020		5/16/2017	USD	-268.13	-268.13	-268.13	None
5/22/2017	CLV-50000003	000020		7/23/2017	USD	20.00	20.00	20.00	Collection letter 2
6/10/2017	FTV-30000208	FTI-00000209		6/10/2017	USD	321.75	321.75	321.75	Collection letter 2
US-003	Forest Wholesale								
Date	Voucher	Invoice	Description	Due date	Currency	Amount in transaction currency	Balance	Accounting currency	Collection letter code
12/27/2016	INV-10000714	INV-000715		2/7/2017	USD	67,814.18	67,814.18	67,814.18	Collection letter 2
5/22/2017	CLV-50000004	000021		8/26/2017	USD	20.00	20.00	20.00	Collection letter 2



# Data Enables AI



## Microsoft 365

- Bing Copilot
- M365 Copilot
- Teams Copilot
- Outlook Copilot
- Excel, Word, PowerPoint Copilot



## Azure Capabilities

- Azure OpenAI
- Azure Cognitive Services
- Azure Machine Learning
- Azure AI Studio
- AI Builder



## Sales

- Recap sales meetings
- Craft customer emails
- AI assisted record maint.
- Live call coaching



## Finance

- Cash flow forecasting
- Customer payment predictions
- Intelligent budget proposals
- Intelligent OCR for employee expenses and vendor invoices



## Supply Chain

- PO risk response
- Demand forecasting
- Planning optimization



Dynamics 365 Copilot

*List not exhaustive*





# Data May Hinder AI Adoption

The best CEOs know that, while not glamorous, fixing data shortcomings is an essential priority for competitive advantage.

## Overall data challenges for the organization

**41%**

Unclear data calculation and reporting across suppliers/partners

**40%**

Difficulty identifying meaningful insights

**40%**

Unclear data calculation and reporting in your organization

**37%**

Inconsistent standards/formats/frequencies across datasets

**36%**

Poor visibility into data sources and quality



# Challenges

*How do I connect my disconnected data?*

*What data do I need, which I don't collect today?*



# Reporting Needs

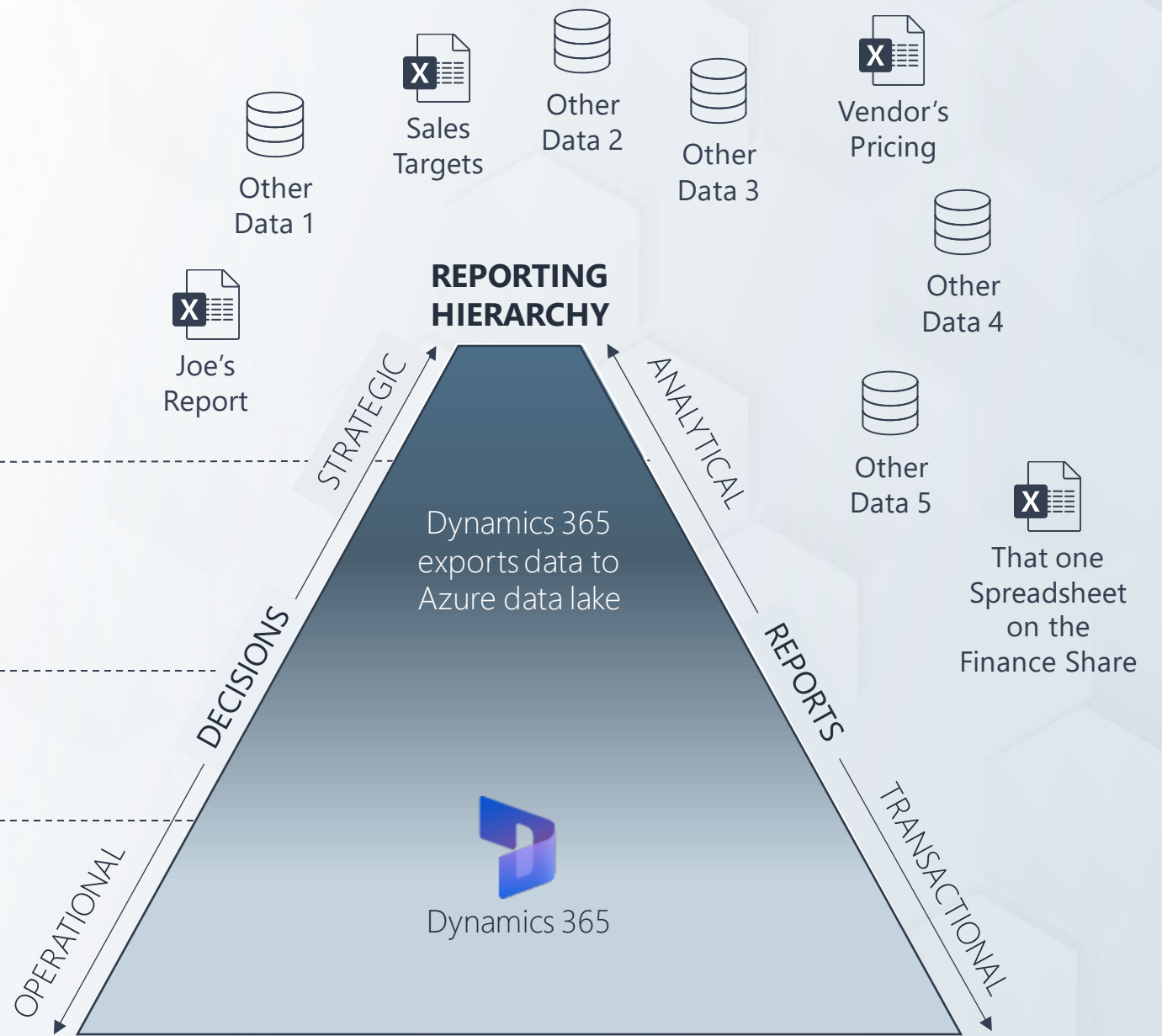
## REPORT CATEGORY

**Executive**  
Senior executives

**Management**  
Executives and senior managers

**Statutory and regulatory**  
External auditors and third parties

**Operational**  
Managers and employees within specific areas of each business function



# The Challenge with Data Collection

## Individual

Personal Productivity



## Team

Small-Team Productivity



## Department

Complex Processes,  
Departmental Policies



## Organization

Organization-Wide IT:  
Finance, Inventory, Projects



# OF USERS

LEVEL OF COMPLEXITY





# The Challenge with Data Collection

## Individual

Personal Productivity



## Team

Small-Team Productivity



## Department

Complex Processes,  
Departmental Policies



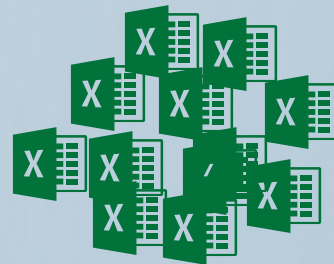
## Organization

Organization-Wide IT:  
Finance, Inventory, Projects



# OF USERS

LEVEL OF COMPLEXITY





# Microsoft Power Platform

*The fastest way to collect or digitize the data you need.*



**Power Apps**

for  
web and mobile  
application  
development



**Power Automate**

for  
process  
or workflow  
automation



**Copilot Studio**

for  
chatbots and  
conversational  
agents



**Power Pages**

for  
building secure,  
data-centric  
business websites



**Power BI**

for  
data exploration,  
analytics and  
reporting



**Data  
connectors**



**AI Builder**



**Microsoft  
Dataverse**



**Managed  
Environments**



# Waste Disposal Management

Waste Disposal Log Out

Check-In    Check-Out


Open Items    Shipped Items

Waste: 001054 Print Label

Waste Category: [Redacted]    Container Type: [Redacted]

Weight: 20    Department: Facility

Reason: Person    Drop off Date: 8/31/2023

Barcode:  001054

Schedule Pickup Date: 12/31/2001

Scheduled

Unscheduled    Scheduled

Waste Number	Waste Category	Container Type	Department	Date Dropped Off	Scheduled Pick Up	Day(s) in Storage
001013	[Redacted]	[Redacted]	[Redacted]	07/19/2023	8/12/2024	43
001022	[Redacted]	[Redacted]	[Redacted]	07/19/2023	7/01/2023	43

Check-Out Check-Out Scan Item(s)

Manual Entry

✓ Waste Number: 001054

Unscheduled

Waste Number	Waste Category	Container Type	Department	Date Dropped Off	Scheduled Pick Up	Day(s) in Storage
001054	Waste Box	400L Red 100	Facility	08/31/2023		0
001031	Waste Box	1000L	Facility	08/15/2023		16
001034	Waste Box	1000L	Facility	08/15/2023		16
001038	Waste Box	1000L	Facility	08/15/2023		16
001039	Waste Box	1000L	Facility	08/15/2023		16
001041	Waste Box	1000L	Facility	08/15/2023		16
001044	Waste Box	1000L	Facility	08/15/2023		16
001047	Waste Box	1000L	Facility	08/15/2023		16
001049	Waste Box	1000L	Facility	08/15/2023		16
001050	Waste Box	1000L	Facility	08/15/2023		16
001030	Waste Box	1000L	Facility	08/15/2023		16

Barcode Reader

Review scanned barcodes

Type: Code 128

UPCA DATA MATRIX CODE\_128

Continue scanning

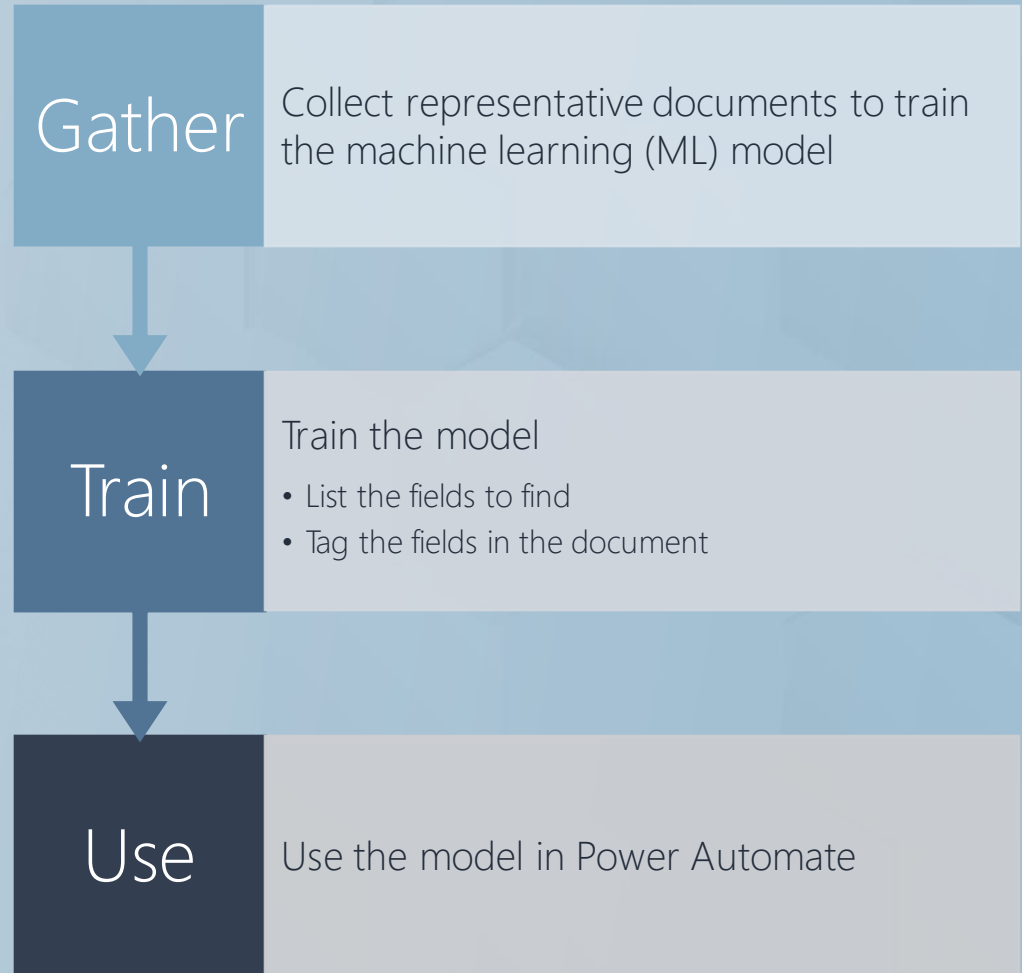


# Document Reading with AI Builder

The screenshot shows the Power Apps AI Builder interface. On the left, there are three main sections: 'Choose information to extract' (8 fields, 1 table), 'Add collections of documents' (2 collections), and 'Tag documents' (11 documents tagged). The main area displays a scanned document titled 'Sunflower Wholesales' with a 'Purchase Order' form. The document content includes a logo, company name, address, and a table of line items. The AI Builder interface has overlaid green boxes on the document to indicate detected fields and tables. On the right, a 'Fields' list shows checked items: Customer Name, PO Number, PO Date, Ship To Address, Ship To City, Ship To State, Ship To Zip, and Line Items Table. A 'Tables' list shows 'Line Items Table' checked. Navigation buttons 'Back' and 'Next' are at the bottom.

Vendor	Terms	Shipping Method	F.O.B.	Buyer	Tax Registration
33742 CONTOSO ENTERTAINMENT	1.0% 10 NET 30		DEST	DOUG BULLA	43-0669920

Item	Description	Quantity	UOM	Price	Amount
0001	HDMI 6' CABLE	20	Each	\$075	\$1500
0002	HDMI 12' CABLE	20	Each	\$515	\$10300







# What Might Push You Beyond the Prebuilt Dynamics 365 Reports?



## External Data

Portals, IoT,  
legacy systems,  
industry  
forecasts...

## Self Service

Can get  
answers in  
seconds<sup>2</sup>

## AI

Enable advanced  
analytics and machine  
learning

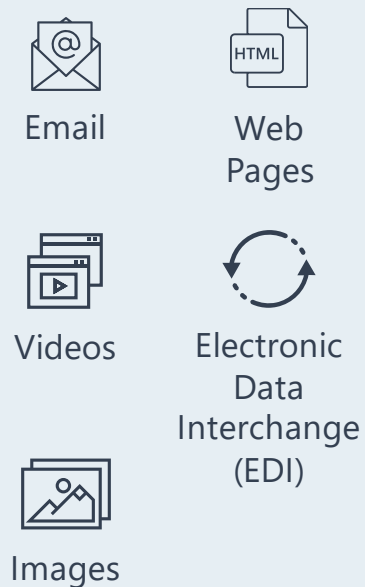


# Data Sources

## ERP Data



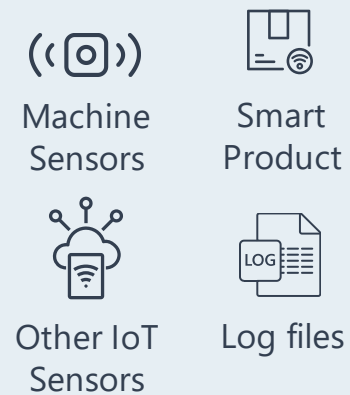
## Semi-structured data



## Other structured data



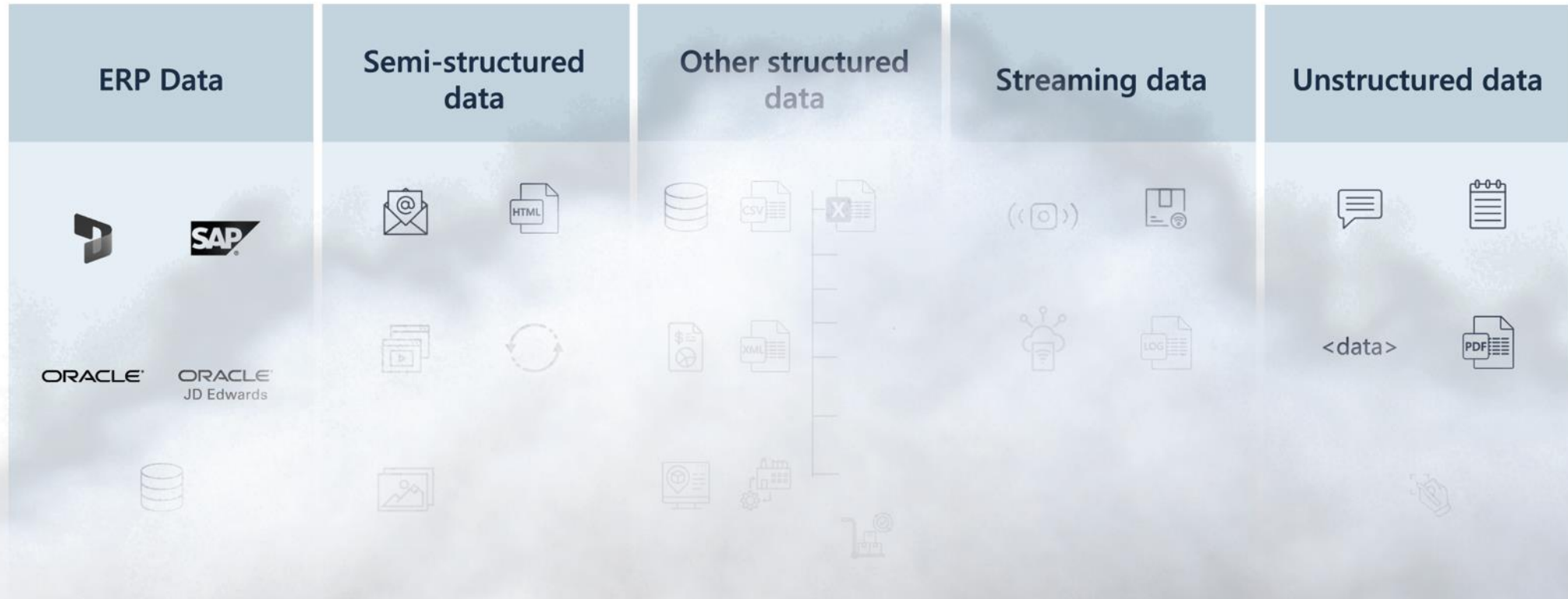
## Streaming data



## Unstructured Data

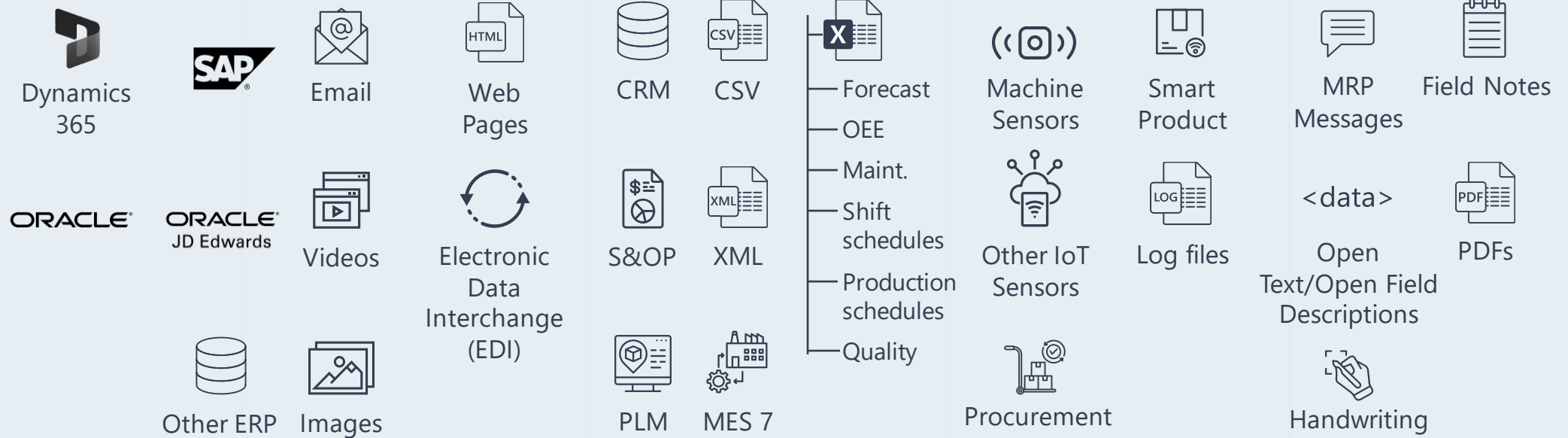


# The fog of silos





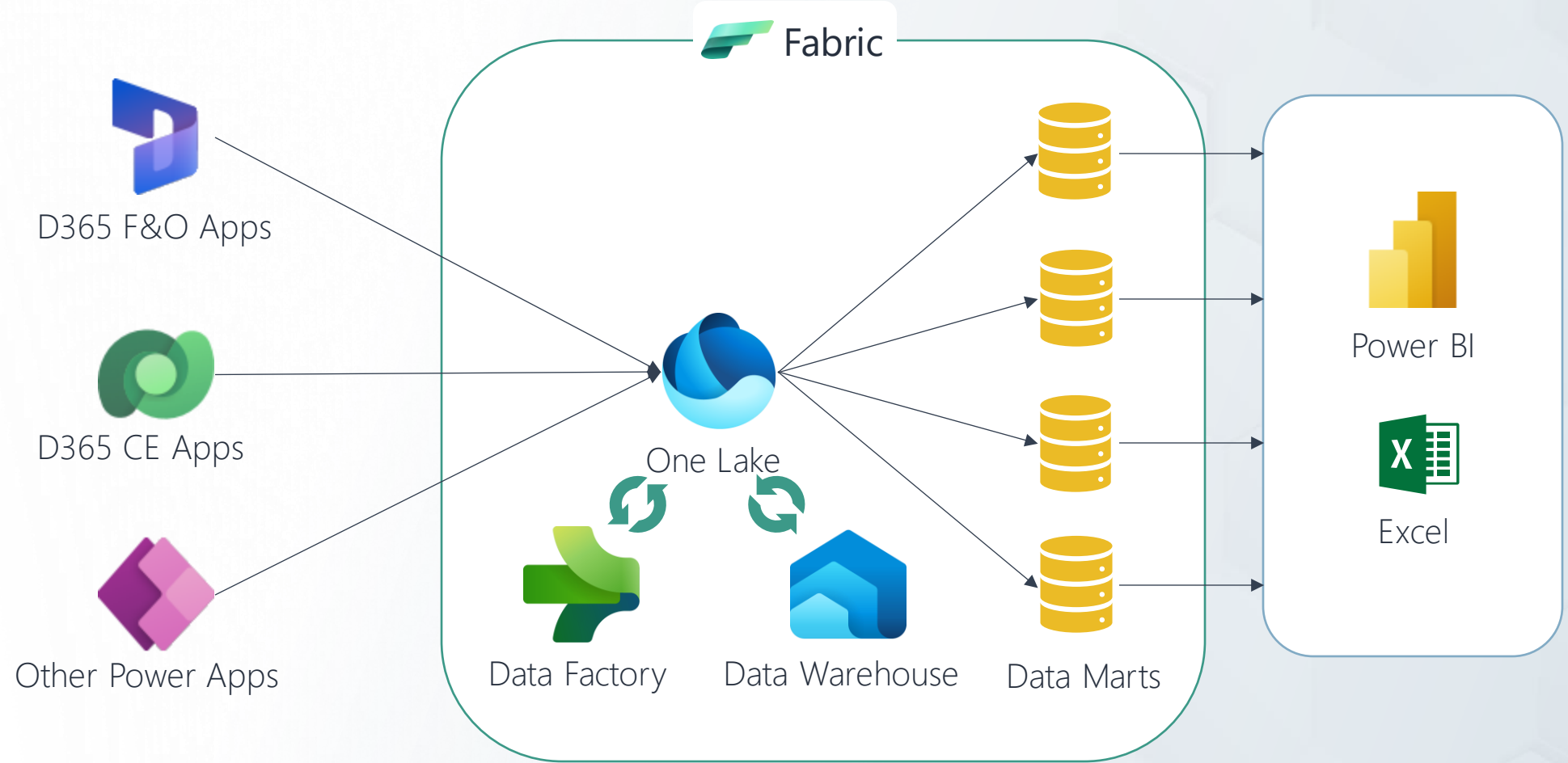
# Pull together data from different sources into a single data model platform







# Export Dynamics 365 Data En Masse



## Operational Reporting

Financial Reports  
Formatted Printouts

## Data Curation

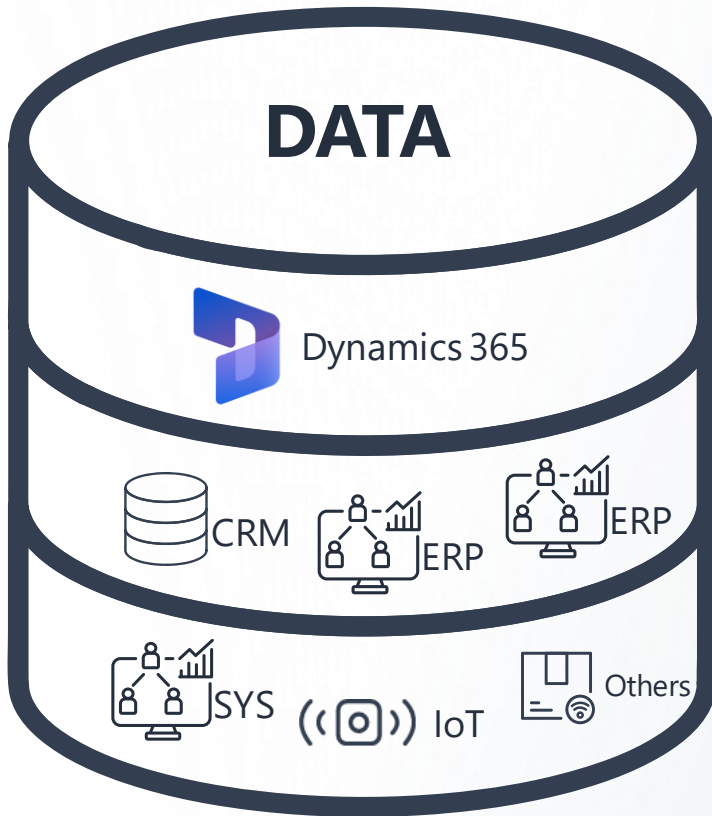
Data Enrichment, Transformation  
Data modeling, Translation  
Security and Privacy Protection  
Machine Learning

## Analytical Reporting

Trends & KPIs  
Managerial Reports  
Strategic Reports



# Data Consolidation in the Cloud: ERP



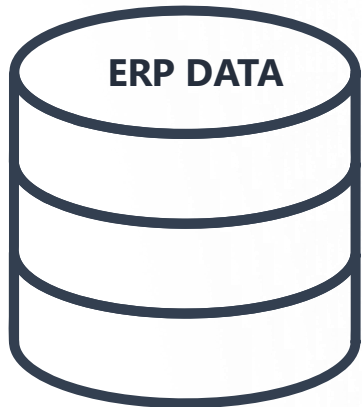
MCA Connect

# INSPIRE

# PLATFORM™



# Data Consolidation in the Cloud: ERP



MCA Connect

**INSPIRE**  
PLATFORM™

**Keep a pulse on demand and adapt in real-time**  
with predictive demand planning and machine learning to align procurement, smooth production, optimize inventory, and reduce waste

**Increase sales and mitigate customer churn**  
with line-of-sight into customer buying patterns and sales quota performance by rep, team, and geo to share best practices

**Maximize performance of your most profitable products**  
with real-time visibility into product and category sales performance trends, detailed cost-drivers, and gross margin

**Reduce technical debt and empower business leaders**  
with a modern analytics foundation that enables self-service, reduces IT bottlenecks, and unlocks ongoing innovation



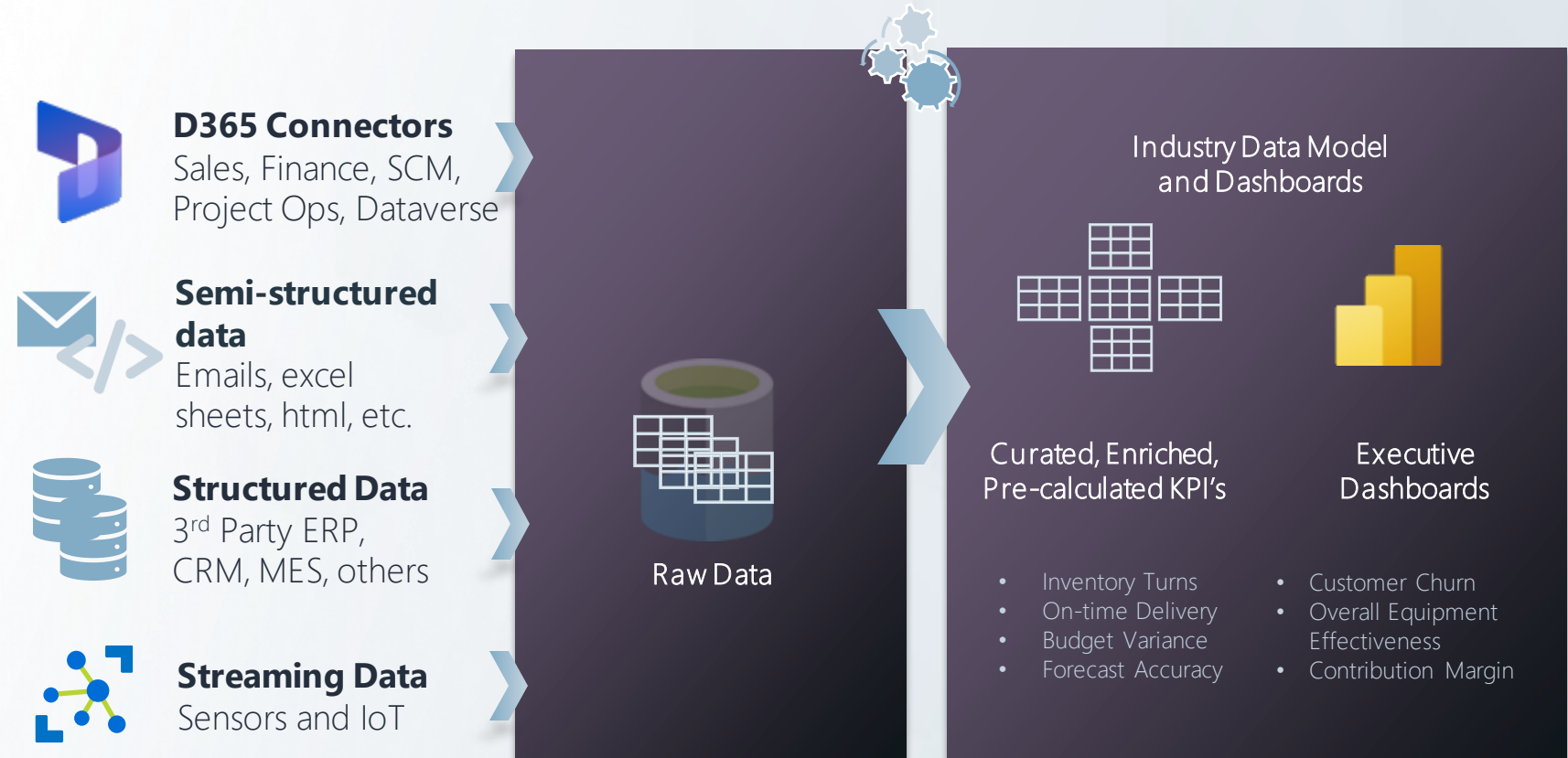
MCA Connect's

# INSPIRE PLATFORM™

Break down data silos across divisions, geographies, and data sources to gain full visibility from a single, reliable source.

## Unite critical data

WITHIN A SINGLE RELIABLE SOURCE





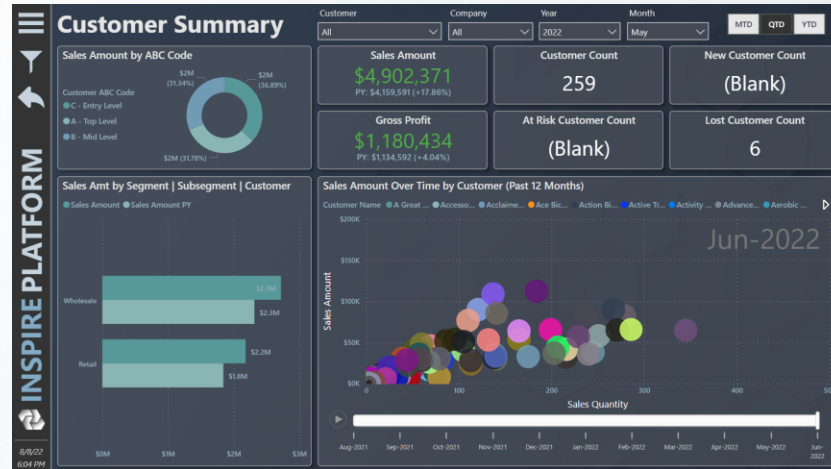
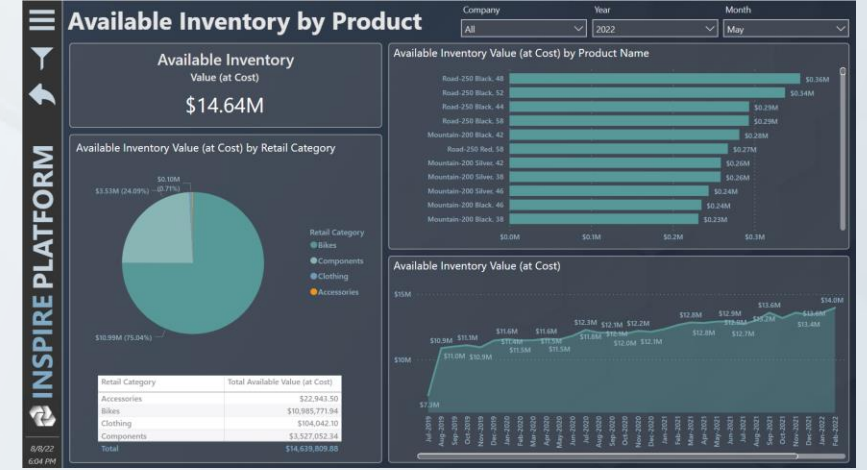


MCA Connect's

# INSPIRE PLATFORM™

Get real-time insights on your own with analytics, out-of-the-box reporting, and industry-standard KPIs without relying solely on IT.

## Access real-time insights WITHOUT SOLE RELIANCE ON I.T.



### Inventory Position Detail

Company: All | Year: 2022 | Month: May

Item	Deducted Value (at Cost)	Revised Value (at Cost)	Physical Available Quantity	Ordered Value (at Cost)	Ordered Reserved Value (at Cost)	Total Available Value (at Cost)
8.02	\$1,257,789	\$1,275,400	92,000	\$382,622	\$419,066	\$2,896,784
8.00	\$2,391,099	\$3,537,099	909,000	\$738,000	\$738,000	\$6,566,098
8.00	\$12,315,400	\$11,641,776	71,000	\$2,238,200	\$3,558,200	\$24,850,446
7.04	\$11,417,800	\$13,432,800	86,000	\$4,029,840	\$4,253,720	\$31,143,240
4.56	\$15,213,840	\$17,238,720	84,000	\$4,253,720	\$4,253,720	\$32,746,240
9.32	\$14,904,444	\$16,929,320	909,000	\$3,382,000	\$3,382,000	\$33,949,040
9.08	\$10,089,520	\$15,167,600	96,000	\$3,382,000	\$3,382,000	\$32,842,400
8.25	\$17,909,250	\$14,523,500	90,000	\$3,748,000	\$3,382,000	\$33,029,240
4.25	\$14,902,200	\$16,363,250	82,000	\$4,019,250	\$4,019,250	\$33,497,250
8.25	\$17,568,750	\$18,276,500	89,000	\$4,276,500	\$3,748,000	\$37,008,400
7.75	\$17,568,750	\$16,387,500	81,000	\$5,422,000	\$5,387,750	\$34,903,250
8.00	\$18,276,500	\$17,568,750	97,000	\$4,485,000	\$4,485,000	\$37,015,250
8.00	\$22,312,500	\$18,203,750	71,000	\$6,001,250	\$6,001,250	\$41,792,400
7.75	\$21,375,000	\$18,822,270	78,000	\$5,104,000	\$6,380,600	\$46,475,390
8.06	\$22,312,500	\$18,184,271	57,000	\$6,001,250	\$5,742,540	\$33,412,440
7.03	\$15,589,500	\$14,494,441	66,000	\$4,747,290	\$4,747,290	\$34,196,240
8.00	\$22,312,500	\$18,203,750	71,000	\$6,001,250	\$6,001,250	\$41,792,400
8.07	\$18,184,271	\$18,822,270	96,000	\$6,822,000	\$7,731,270	\$46,927,890
8.00	\$18,822,270	\$17,737,290	50,000	\$8,186,500	\$9,551,000	\$47,755,400
8.47	\$24,904,800	\$27,208,000	61,000	\$6,387,240	\$6,822,000	\$47,755,000
8.46	\$10,681,500	\$17,436,900	194,000	\$32,927,000	\$30,911,100	\$281,982,170
8.32	\$10,566,460	\$10,358,227	196,000	\$17,234,420	\$13,747,590	\$281,918,500
8.08	\$12,343,300	\$10,706,900	157,000	\$29,844,500	\$33,539,500	\$276,013,100
8.28	\$146,407,400	\$101,097,400	160,000	\$56,078,000	\$54,641,900	\$256,493,000
8.55	\$12,841,000	\$10,546,890	163,000	\$19,000,000	\$13,480,000	\$258,747,400
8.56	\$12,150,480	\$10,862,400	141,000	\$17,415,200	\$18,601,740	\$243,792,400
8.70	\$10,242,400	\$10,187,000	42,000	\$17,730,000	\$15,868,000	\$47,755,400
8.35	\$160,707,000	\$154,716,000	46,000	\$18,719,000	\$17,710,000	\$167,714,000
4.40	\$6,029,650	\$5,104,400	71,000	\$10,195,700	\$18,713,100	\$157,227,900
7.05	\$53,374,350	\$37,702,000	49,000	\$30,195,700	\$17,310,000	\$120,500,000
8.40	\$3,716,800	\$49,430,000	39,000	\$15,988,000	\$17,438,000	\$104,433,200
8.00	\$17,125,000	\$16,448,000	68,000	\$17,438,000	\$16,292,000	\$148,295,400
Total	\$181,125,000	\$174,000,000	1,000,000	\$1,044,160,000	\$1,035,000,000	\$14,638,929,880

# INSPIRE PLATFORM™

## Empowering Data Driven and Inspired Companies

*Get information quickly and efficiently with self-service analytics, out-of-the-box reporting, and precalculated KPIs.*

1

2

3

4

Row Labels	Customer Count
<b>Specialty Bike Shop</b>	
Australia	11
Canada	32
Central	24
France	12
Germany	9
Northeast	11
Northwest	26
Southeast	26
Southwest	35
United Kingdom	12
<b>Value Added Reseller</b>	
Australia	12
Canada	35
Central	21
France	9
Germany	11
Northeast	19
Northwest	30
Southeast	29
Southwest	38
United Kingdom	11



## Typical challenges with Legacy Data Warehouses

- Delayed implementation due to lack of time and in-house experts across a variety of roles
  - Engagement is critical from: business analyst, business expert, data modeler, dashboard writer, change champion
- Difficulty gathering data and curating it in a way that enables true self-service
- Increased maintenance cost over time
- Risk of creating analytics model that will need significant rework
- Aged technology and capability
- Must find hard-to-staff skillsets to support Azure, SQL, DAX, Spark, data security, data modeling, and much more

## INSPIRE PLATFORM™

- Expedited implementation due to team of industry and analytics experts, out of the box data model, and reports
- True self-service by avoiding common pitfalls like great data modeling and poor adoption, or good adoptions but poor data model and quality
- Careful consideration to ensure you get flexible, industry-specific analytics model that lasts
- Extend existing skillsets with training or staff from MCA Connect.
- Annual subscription cost less than one BI Developer



# Demo







# Demand Prediction

## Inventory Replenishment Projections: Evaluating Accuracy of Models for Predicting Quantity Next Week

	MIN	MAX	RANGE	MEAN	STD DEV	IMPACT
Branch: All	-20.6%	11.5%	32.1%	0.9%	6.7%	\$7.2M
Route: All	-28.7%	14.7%	32.6%	1.6%	7.3%	\$8.3M
Item Classification: All	-17.3%	18.8%	36.1%	2.6%	8.0%	\$9.7M
Item Category (L2): All	-28.7%	154.1%	182.8%	6.9%	31.5%	\$21.0M
Item: All						

Accuracy for 1 WOS over Time (Rolling 52 Weeks)

● Qty % 1 Wk -4 Wks ● Qty % 1 Wk -8 Wks ● Qty % 1 Wk -12 Wks ● Qty % 1 Wk 4CY1PY

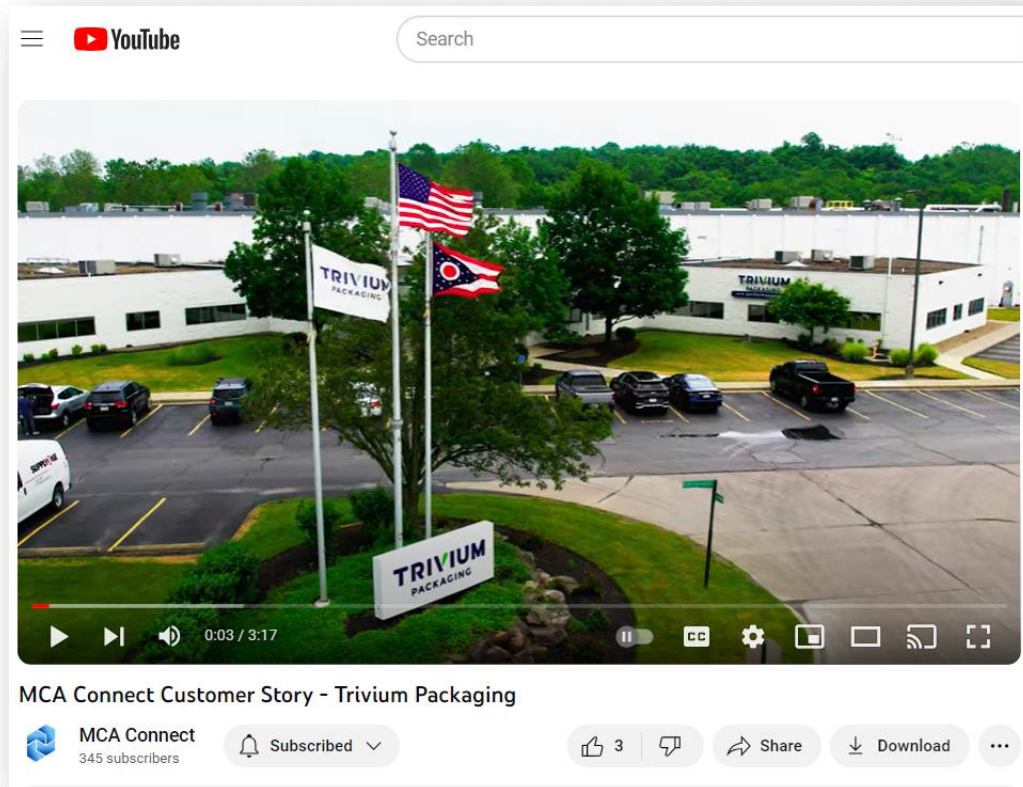






# Can AI help me make real-time shop floor decisions?

## TRIVIUM PACKAGING

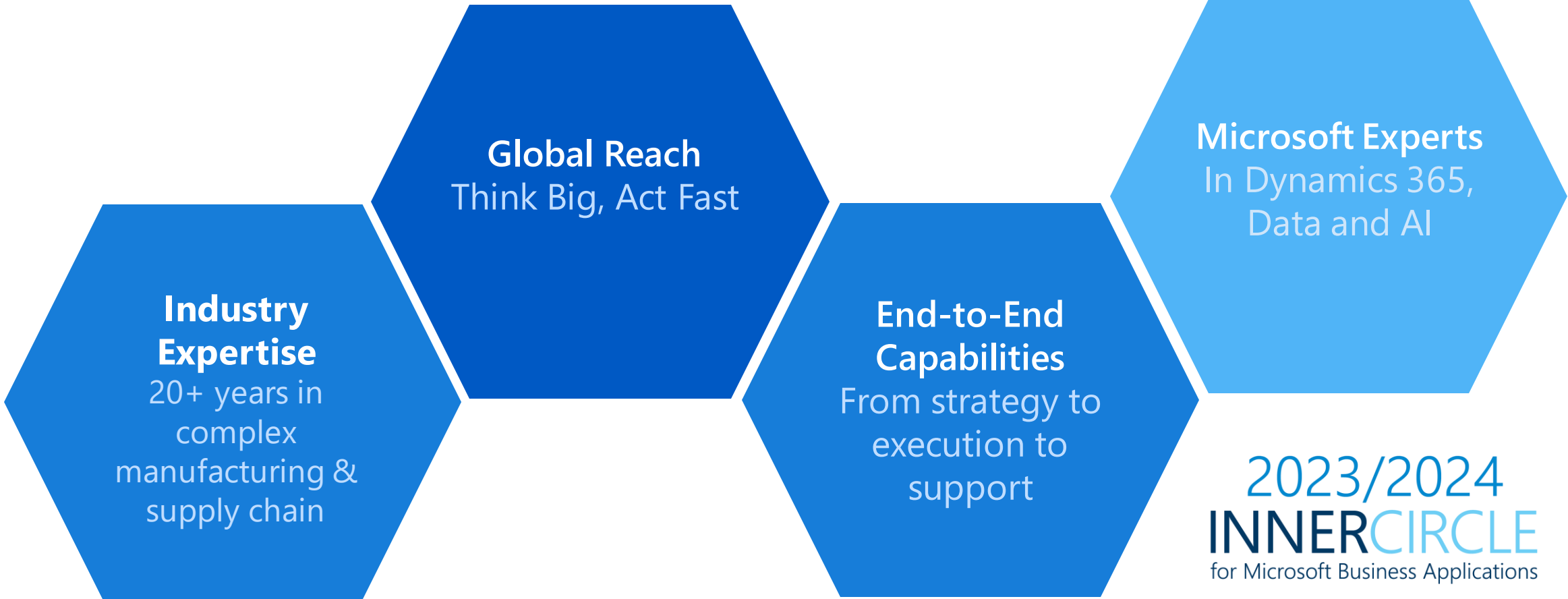


↓ **99.77%** reduction in lead times and waste + achieved OEE targets with reduced work force post-COVID

↓ **77%** production planning time – from 90-minute, manual, cross-functional discussion to a brief review/validation of recommended production plan



MCA  
CONNECT



2023/2024  
**INNERCIRCLE**  
for Microsoft Business Applications



## Engage With Us

Come Visit Us at Booth 71

**\$** Don't Miss  
PUTT FOR CASH!

MCA Connect

**INSPIRE  
PLATFORM™**

Learn more and see a demo  
[mcaconnect.com/InspirePlatform](https://mcaconnect.com/InspirePlatform)

**DATA VALUE  
ASSESSMENT™**

Learn more  
[mcaconnect.com/Data-Value-Assesement](https://mcaconnect.com/Data-Value-Assesement)

Connect with us on LinkedIn

[www.linkedin.com/company/mcaconnect](https://www.linkedin.com/company/mcaconnect)



# Wrap Up

- Did you like what you heard?
- What is a takeaway from today's session?



MCA  
CONNECT

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