



POWERED BY  DUG

**DYNAMICS CON**

**LIVE**

**MAY 2024**

# **Dynamics 365: As we build it, it builds us.**

*Understanding our relationship with Dynamics 365*



Hi, I'm Nick Hance!  
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Nick Hance  
Owner  
Reenhanced

- Software Developer since 1999
- Founded Reenhanced in 2005
- Reenhanced products serve 250,000+ Dynamics 365 users every week.
- Our best-selling product connects WordPress forms to Power Automate.

*Interesting fact: I like running! I ran my first 100 mile race in 2023.*



# ⚠️ DISCLAIMER ⚠️

The following slides have not been evaluated by the FDA.  
These slides may contain more questions than answers.  
You may experience a questioning of purpose, Dynamics 365,  
your lunch or dinner choices, or other existential crises.  
You may be uncomfortable with some of the questions you ask yourself.  
If this happens, you may stop thinking, but do that at your own risk.

This should be a fun session



*Let us answer the following questions*

**What do we want from Dynamics 365?**

**What does Dynamics 365 want from us?**



# Before we begin...

What is Dynamics 365?



# Dynamics 365 is...

- A way to organize your company's data.  
*(Relational Database)*
- A way to automatically perform tasks.  
*(Process Automation platform)*
- But really, it's just a tool to do the things the company needs to do with less effort and fewer mistakes.



# What is it that we want from Dynamics 365?

- Better Data?
- Automated Processes?
  
- Why are we using (or considering) Dynamics 365?
- What is it we are really trying to get? What outcomes?

*Attention Extroverts! Shout out your wants now!*

*(Introverts: no need for panic. I won't call on you. 😁)*





# How do we get what we want?

Can we work backward from the outcomes we hope to achieve?



The way we want to  
use Dynamics 365

The way Dynamics 365  
wants us to use it

*What's in here?*



**Hold up...**  
**Why is there a difference?**



# Dynamics 365 doesn't know who we are

When we are young, we see the world as it ought to be.

We think:

“The world is This Way™, but it should really be This Other Way™”

Then we meet the real world.



# Your organization has a history.

When you implement Dynamics 365, it doesn't know your story.

“The way we do things here” has a reason.

Do you know your story?



# You'll hear terms like "Digital Transformation"

*Couldn't someone have come up with a better term?*

What does this actually mean?

What questions are answered by the words "Digital Transformation?"



# But Seriously, “Digital Transformation” has a meaning..

It means we have new tools available.

It means we can use the tools to do things we couldn't do before.

The new capabilities provided by a properly implemented Dynamics 365 system **change what we can do.**

Can it change who we are?



# Can we think about what this actually means?

- Like, really think about it.
- New tools + New Abilities + Our Company History = A Brighter Future?
- Is there time to do this thinking?
- Whose responsibility is this?

This thinking will require focus.





# Focus demands time and space.



- Does leadership have this?
- Does leadership understand what is possible with Dynamics 365?

If you are constantly putting out fires, can you grow in a purposeful way?



# “The way we do things” has a reason.

With Dynamics 365, will it change the reasons for “how we do things here”?

Can we leave behind what isn't working?

Dynamics 365 offers us an opportunity to change our future, so that it does not look like our past.



# Do we know where we want to go?

*What can we do if software removes (some of) our limitations?*



*Let us answer the following questions*

**~~What do we want from Dynamics 365?~~**

**What does Dynamics 365 want from us?**



# Dynamics 365 is...

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# Many companies look similar

Microsoft has nearly half a century of experience building software that powers businesses.

 Microsoft thinks your organization looks like other organizations.

 Are they right?



# If yes, you are in luck

Dynamics 365 provides a generic structure for “a company”

- Accounts, Contacts, Leads, Opportunities, etc.



If you can fit your organization data into the provided boxes, you gain some amazing benefits.



Industry Accelerators offer a way to enhance the Dynamics experience by following The Dynamics Way



# ⚙️ Dynamics tables are like Standardized Parts

*Do you remember when cell phones all had different charging cables?*

Dynamics wants you to standardize certain concepts of your business.

**Account:** A company you work with. Covers both vendors and customers.

**Contact:** A person. Can belong to an account. Not a user of Dynamics.

**Opportunity:** A chance to do business with a contact or an account.

**Lead:** An idea or question that has potential to turn into an Opportunity.





If you can fit into the boxes Dynamics gives you  
**You are immediately compatible with a  
wide range of software**





# Common Data Model

- A published set of standards for different organizations to format data in the same way.
- Provides a data model target for you to adapt to and others to build towards.
- “Industry Accelerators” are starter-apps that can help you get started quickly:
  - Automotive
  - Education
  - Government
  - Media & Entertainment
  - Nonprofit
  - Telecommunications

# The less you change the out-of-the-box config the more compatible you are!

In other words:

- If we can look like other organizations
- We can gain “standardized parts” type advantages
- This creates a potential for “plug and play” type of growth
- When we grow into new requirements, we can just plug-in new modules to meet them!

💡 But... is this a risk?



Probably a question you should explore

**What if what makes us unique is also  
what makes us successful?**



# Your organization has a history.

When you implement Dynamics 365, it doesn't know your story.

"The way we do things here" has a reason.

Do you know your story?

We are attached to the way we see things!  
Is there a good reason for it?  
What do we lose if we give that up?  
Change is S-C-A-R-Y 🎃



# OK so Dynamics asks us to change.

## PRO:

- We gain “standardized parts” type efficiencies if we can see our organization the way Microsoft wants us to.
- We can “grow into” new requirements and plug-and-play new capabilities.
- Maybe we don’t screw it up because others have found a path here that works.

## CON:

- Do we lose what makes us unique?
- Is that uniqueness important to us?
- What if what makes us unique is also what makes us successful?



## How do we grow in a way...

That doesn't cause us to lose sight of what has made us successful

While also becoming more generic (Looking like every other business)



# I have brought you many questions

- What do we want from Dynamics 365?
- How do we get what we want?
- Who are we? Do we understand our organization's history?
  - Why are things the way they are?
- Do we know where we want to go?
  - What do we want the future to look like?
- Can our organization look like others?
  - Can we adapt our internal identity to fit?
- If we do, will we lose what has made us successful?
- Will it be worth it? What happens if we do nothing?





# Dynamics 365 is...

- A way to organize your company's data.  
*(Relational Database)*
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*(Process Automation platform)*
- But really, it's just a tool to do the things the company needs to do with less effort and fewer mistakes.

It's just a tool!



# Where to go from here?

- You can adapt Dynamics 365 in any way you choose.
- There is a cost associated with doing things your own way.
- It is **up to you to decide** when that cost is worth it.
  
- Dynamics 365 is your tool.
- As long as you are getting what you want from it,
- You aren't using it wrong.
  
- But don't underestimate what you might gain from using the tools the way they're designed. The world works to support "The Dynamics Way"



The background features a stylized landscape with mountains and trees. The sky is a gradient of blue, with numerous thin, light blue lines radiating from the top center towards the bottom. The mountains are depicted in shades of purple and blue, with a row of white, fluffy clouds along their peaks. In the foreground, there are dark blue silhouettes of evergreen trees on a hillside.

You're in luck!  
I've made a lot of mistakes.

25 years of learning things the hard way brings you  
**Lessons I've learned**  
**taking the long way around**



# Technology is seductive.

- You can model everything in your business.
- You can automate everything, if your systems are smart enough.
- You can burn a tremendous amount of time and energy to build amazing things.



# Technology is seductive.

- As an engineer and leader of engineers, I want to build.
- Leadership might want things a certain way.
- I have chased these rabbits down these holes.
- I have seen bottomless pits (they were really fancy! ★)
- You don't want to go here.



# Technology is seductive.

- Always keep your eye on the results you want to get.
- Be open to achieving the results in different ways.
- When you realize you've made a mistake, cut it off asap.
- It's not worth building a system too complex for anyone to use.



# No such thing as temporary.

- “We’ll come back to it later.”
- “It’s just temporary”
- I have temporary code that’s old enough to buy alcohol.





# No such thing as temporary.

- Code owners will ask: “Does it work?”
- “Yes, but ...”
- As long as it works and if the pain isn’t big enough, it won’t get fixed.



# No such thing as temporary.

So everyone pays for it, 6 seconds at a time.

Over years, those 6 seconds add up to real losses.



# No such thing as temporary.

When system lifetime is measured in years, little things matter.

You won't know the lifetime in advance.

- Spend the hour now, save a lifetime of pain.
- As a builder or owner of these systems, quality is what will be recognized over time.

If you can maintain the discipline to keep it!



HOW LONG CAN YOU WORK ON MAKING A ROUTINE TASK MORE EFFICIENT BEFORE YOU'RE SPENDING MORE TIME THAN YOU SAVE?  
(ACROSS FIVE YEARS)

		HOW OFTEN YOU DO THE TASK					
		50/DAY	5/DAY	DAILY	WEEKLY	MONTHLY	YEARLY
HOW MUCH TIME YOU SHAVE OFF	1 SECOND	1 DAY	2 HOURS	30 MINUTES	4 MINUTES	1 MINUTE	5 SECONDS
	5 SECONDS	5 DAYS	12 HOURS	2 HOURS	21 MINUTES	5 MINUTES	25 SECONDS
	30 SECONDS	4 WEEKS	3 DAYS	12 HOURS	2 HOURS	30 MINUTES	2 MINUTES
	1 MINUTE	8 WEEKS	6 DAYS	1 DAY	4 HOURS	1 HOUR	5 MINUTES
	5 MINUTES	9 MONTHS	4 WEEKS	6 DAYS	21 HOURS	5 HOURS	25 MINUTES
	30 MINUTES		6 MONTHS	5 WEEKS	5 DAYS	1 DAY	2 HOURS
	1 HOUR		10 MONTHS	2 MONTHS	10 DAYS	2 DAYS	5 HOURS
	6 HOURS				2 MONTHS	2 WEEKS	1 DAY
1 DAY					8 WEEKS	5 DAYS	

Source: XKCD.com





A lesson I've learned over and over and over...

**No amount of effort can make the  
wrong thing work.**

# Why we stopped building custom software

- I started Reenhanced in 2005 as a full-stack web application development company.
- When iPhone came out, we started building mobile apps too.
- In 2015, we stopped taking new clients for fully custom software



# Why we stopped building custom software

- We didn't get less capable.
- There's still demand for this type of work.
- We have a reputation for quality engineering.

Why would we do this?



# Why we stopped building custom software

- Most code + time passing = liability.
- Maintenance costs grow over time.
- Deferred maintenance grows exponentially.





# Why we stopped building custom software

- While you build something custom, the rest of the world builds too.
- Your foundation is on sand. Everything is moving, shifting, and updating constantly.
- This isn't the experience you should have with Dynamics.



# Why we stopped building custom software

- Be careful with complexity.
- Be careful doing anything custom.

When you go outside the box, it is you who carries the costs.



**What is the most valuable lesson I've learned?**



# Dynamics 365 lets you learn quickly.

- Use the power of Dynamics to build and test ideas *FAST*.
- Find the projects where small efforts produce big results.
- Don't get creative, don't use custom plugins or complicated flows.
- You can own 90%+ of the advantages of custom software and almost none of the maintenance costs. The monthly fees are worth it.





# Q&A

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