

# How To Bring New Features Into Your Ongoing Rollout of D365 F&O



Why are F&O consultants great at gardening?







Beau Schwieso  
VP Enterprise Solutions  
Delivery, HOLT Cat

# The Challenge



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## 1

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Adapting workflows to changing businesses

Adapting designs as the business grows (and so do you)





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**3**

Retraining users

Agile project teams

Internal and external development teams



# Understanding Microsoft's Release Cadence



Major updates



Minor updates



Proactive quality updates





# Monitoring / Researching the New

Conferences

(you are here)

Yammer

Dallas DUG (or  
your local DUG  
is fine too)

Youtube

Microsoft docs

Podcasts

(Dynamics After Dark)



7

6

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2

1

# Analyzing the New



7

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## Feature Identification and Relevance Check

# Analyzing the New





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# Impact Analysis

## Analyzing the New

2

1



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# Operational Impact

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# Analyzing the New



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# Business Value Assessment

4

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# Analyzing the New





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# Cost Benefit Analysis

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# Analyzing the New



7

Stakeholder  
Feedback

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**Analyzing  
the New**



Pilot Testing  
And Final Testing

7

6

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1

**Analyzing  
the New**





**Important Note: Check features on  
“Feature Management” in D365**

# Assessing Business Value



ROI Calculation



Performance Metrics  
Improvement



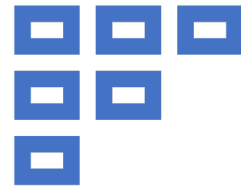
Strategic Alignment



# Impact on Existing Enhancements



Compatibility Review



Adjustment in Scope



Testing Needs



# Testing



Unit



Integration



System



User  
Acceptance



Performance





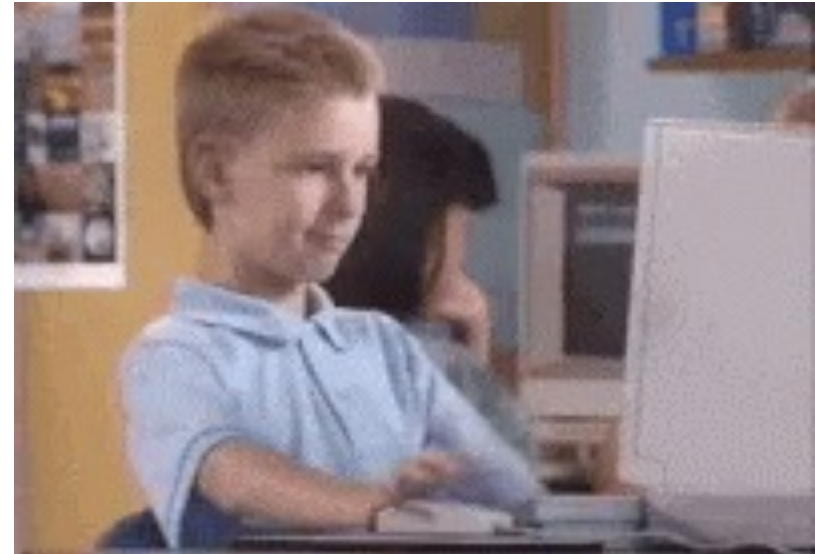
# Training the Users



INTERACTIVE  
WORKSHOPS



E-LEARNING  
MODULES



# Change Management



Identify Stakeholders  
(iterative)



Clear Communication  
Plan



Phased rollout if  
possible



Determine a  
feedback loop



Recognize and  
reward adopters



# Questions?



May 15, 2024





POWERED BY  DUG

# DYNAMICS CON

# LIVE

MAY 2024

The central graphic is a large, multi-colored starburst shape. Inside the starburst, the text "POWERED BY" is in yellow, followed by a small logo consisting of three colored arrows (purple, green, blue) pointing towards each other, and the word "DUG" in yellow. Below this, "DYNAMICS CON" is written in large, bold, yellow, 3D-style block letters with a rainbow gradient. Underneath that, "LIVE" is written in the same style. At the bottom of the starburst, "MAY 2024" is written in yellow. The background of the starburst is a colorful mountain range with snow-capped peaks and a forest of evergreen trees at the base.