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DYNAMICS CON LIVE

MAY 2024



Dynamics 365 Finance & Operations Implementation Learnings

Presented by:



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Sweet Success

- Who am I?
 - Michelle Peters – Denver, Colorado (Ovintiv)
- Why am I here?
 - Led a 9-month D365 F&O Implementation that went live January 2022
- What do I want to share?
 - Some of our Sweet Successes from our implementation
- Check out more of our story:
 - [Ovintiv Customer Story](#)



Let's do a POLL...

SHOW OF HANDS...

- Are live on D365/AX/BC/GP/Nav
- Currently implementing
- Considering implementing



Agenda

- Ovintiv D365 Journey
- Sweet Successes:
Implementation Learnings
- Go Live – What's next?
- What is Ovintiv working on now?

Ovintiv

- Corporate Offices in Denver, Houston, and Calgary
- ~1,700 Employees
- Annual Gross Revenue over \$10 Billion
- ~700 total D365 Users
 - ~300 core Finance and SMS users

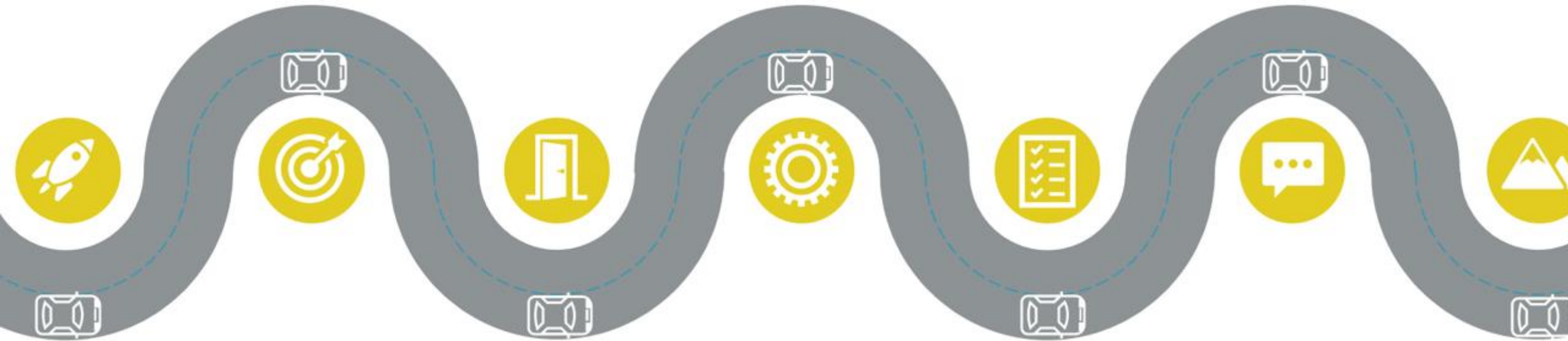


Project Go Live: January 4, 2022

- Modules: F&O + Supply Chain
- 4 ISVs
- Integrations with 10+ Systems
- Data Warehouse

Maturity: 2023/2024

- Release cadence and automation
- Optimizing our Microsoft Platform Investment



Project Kick-Off: April 5, 2021

- MVP Approach

Stabilization and Post Go Live: 2022

- Security
- Support
- MVP Enhancements



Fail Fast (Rolo with it...)

- Change course if it's not working
 - People
 - Modules
 - Reports
 - Other....



- Don't overthink – trust your intuition on making a change



Change Management (Fish out of water)

- Change Management might be as important as the technology you are implementing
- Get your teams comfortable with being uncomfortable
- Find your people



Go Virtual (Be a smartie!)

- Smart use of your time and resources
 - Cost
 - Reduced travel costs
 - Time
 - Efficiencies in moving from meeting to meeting
 - Less socialization, and more work
 - More effective
 - Work is at your fingertips
 - Easy to share documents, demos, or other data
 - Can include more people in a discussion
- Not a long-term solution, but effective for an implementation



ISV vs Customization/Integration (Twix)

- Weigh the pros and cons
 - Time to implement?
 - How will it impact the budget?
 - What does it do to scope?



- Long Term Support should be considered



Celebrate the Wins (Wine!!)

- Implementations are going to push everyone's limits
- Reinforce the progress you want to see (big and small)
- Engage people's hearts and minds



Go Live...What next?

- Microsoft Releases
 - Your first release is going to come faster than you realize!
- Licensing
 - Your security isn't going to be perfect at go-live
 - Look at your contract to determine how long you have to figure it out
- Testing Automation
 - Start thinking about this after you refine your processes



Recap

1. Fail Fast
2. Manage the change
3. Go Virtual
4. Think through ISVs vs Customizations/Integrations
5. Celebrate big and small wins
6. Be ready for post go live


Be yourself – honest and authentic



What is Ovintiv working on now?

- Near Term
 - Upskilling
 - Using Power Platform to fill functional gaps
 - CoPilot (D365, CoPilot Studio, and M365)
 - Invoice Capture
 - Synapse Link
- Keeping our eye on...
 - Sales
 - BPA
 - BPP





Q&A