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Getting the most Out of your Microsoft Investment

Presented by

Bobby Small
Channel Dev &
Alliances Manager
Ellipse Solutions

Michelle Peters
Manager,
Strategic Projects -
Ovintiv

Denver D365 F&O Meet-up Leaders

AGENDA

- Pre-Go Live or NOW
  - Support
  - User Adoption Strategy
  - Resources
- Post- Go Live
  - Organizational Structure
  - Upskilling
  - Partner & ISV Relationships

Let's POLLS for a moment...

SHOW OF HANDS...

- USERS
- Partners
- ISV
- Microsoft
- OTHER

SHOW OF HANDS...

- D365
- AX 2012
- AX 2009
- AXAPTA
- EXCEL

Support Defined

Functional

Technical

Strategic

Developer

Functional

User training
Feature utilization
Best practices

Technical

Strategic

Developer

Functional

User training
Feature utilization
Best practices

Technical

Infrastructure
Integrations
Performance issues
ISV installation

Strategic

Developer

Functional	Technical	Strategic	Developer
User training Feature utilization Best practices	Infrastructure Integrations Performance issues ISV installation	Business alignment Process optimization ROI maximization	

Functional	Technical	Strategic	Developer
User training Feature utilization Best practices	Infrastructure Integrations Performance issues ISV installation	Business alignment Process optimization ROI maximization	Customizations Extensions Third-party integration

Self Support

SELF SUPPORT

IDENTIFY

TRIAGE

FORMALIZE

SELF SUPPORT

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Know your Employees & SME's

Build a culture of learning and cross-training

Empower these folks to gain the knowledge and support the business

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TRIAGE

Workflow for quickest resolution

Department FAQ

Aids in SME creation

Avoid (Solved Issue Tickets)

FORMALIZE

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Empower these folks to gain the knowledge and support the business

TRIAGE

Workflow for quickest resolution

Department FAQ

Aids in SME creation

Avoid (Solved Issue Tickets)

FORMALIZE

Get a formal ticketing system in place

Document the protocol

Create issue videos Task Recorder

Be kind but firm!

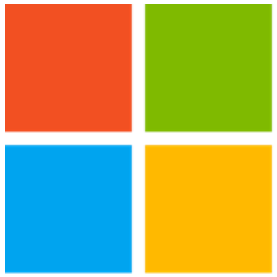
Microsoft Support

Microsoft

STANDARD SUPPORT

PROFESSIONAL DIRECT

UNIFIED EXPERIENCE



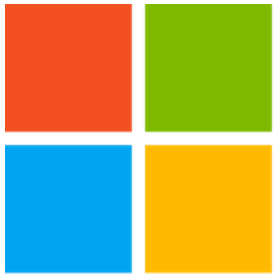
Microsoft

STANDARD SUPPORT

PROFESSIONAL DIRECT

UNIFIED EXPERIENCE

Standard Support is provided at no extra cost with a current license. It includes access to forums, web, and phone support during standard business hours (8-5 weekdays). Customers can utilize self-help resources and receive assistance with break/fix issues for up to one hour, without priority escalation.



Microsoft

STANDARD SUPPORT

PROFESSIONAL DIRECT

UNIFIED EXPERIENCE

Professional Direct is priced at $9 per user per month (minimum 20 users) and offers enhanced features beyond Standard Support. This includes priority routing for faster assistance, the ability to specify service delivery preferences, escalation options for urgent issues, access to webinars, advisory services, and reviews.

Microsoft

STANDARD SUPPORT

PROFESSIONAL DIRECT

UNIFIED EXPERIENCE

Unified Experience, starting at $50,000 to $300,000 depending on user count, offers a more comprehensive suite of services. Customers can opt in to take advantage of on-demand workshops, onsite assistance, remote diagnostics, and specialized training. This level of support features dedicated support engineers familiar with the customer's business.

Third Party Support

3RD PARTY SUPPORT

The Bad

The Good

The Oh Yeah!

3RD PARTY SUPPORT

The Bad

- High cost of entry, long term contracts, & Use or lose it!
- Cumbersome ticketing platform
- Slow or no SLA response times
- 3rd party contractors

The Good

The Oh Yeah!

3RD PARTY SUPPORT

The Bad

The Good

- Break/Fix
- Well-defined SLA by severity level
- Adhering to Best Practices
- Enhanced Self-Serve Portal access

The Oh Yeah!

3RD PARTY SUPPORT

The Bad

The Good

The Oh Yeah!

- Beyond Break/Fix:
- Topography assessment
- Flexibility with unused hours:
- Quality of Resources

USER ADOPTION STRATEGY

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Involvement!

SME > Demo & CRP > User…Partners…Microsoft = EXECS

USER ADOPTION STRATEGY

Testing

Early team creation > Structure > Schedule

USER ADOPTION STRATEGY

Documentation

Turn the testing into DOCS > consider RSAT or Auto Tools

USER ADOPTION STRATEGY

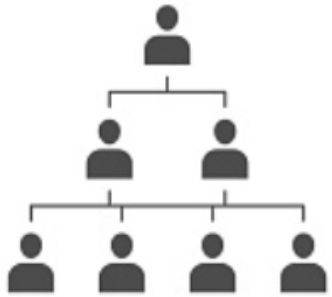
Incentives/Gamification

Plan ahead > Rewards > Competition > Uplift!

GO LIVE AND YOUR DONE!!!

Organizational Structure

- The journey never ends…
  - Release planning
  - Continuous updates
  - Depreciation of features/technology that are being utilized
- Leave space to explore
  - New Features
  - Other Microsoft Products
  - Optimizing processes



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MAY 2024

Organizational Structure

Finance Shared Services

Technical

Power Platform technical work and Data Warehouse support

Project Management

BA/PM/Some technical work

D365 Support

Day to day end users support

Upskilling

Art of the Possible

Our annual hosting of the **"Art of the Possible"** Finance Fair to showcase the innovative work happening across the Finance organization.

Independent Training

Want to get some hands-on learning done without following a more rigorous routine? Try our self-paced training programs! Your own project on your own time.

Think-and-Do Tank

An upskilling opportunity with higher time commitment. Get to propose and actually fulfill your finance ideas!

Citizen Innovator Program

An internally sponsored program that includes training, hands-on experience, mentoring, and a capstone project to be presented to senior leadership. Learn about data, analytics, automation, and more!

Partner & ISV Relationships

Partners

Can be used to help customize for functionality that is not out of the box

Can be used to supplement resources you do not have internally

ISVs

Can be used to supplement functionality that is not out of the box

Can be used to provide expertise that you do not have internally

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Resources

- Right HERE! - Community events: Local and National!
- Microsoft Learn and beyond
- Yammer groups
- Advisory boards (Microsoft, DUG)
- GET INVOLVED!

Denver Meetup Group

https://ellipsesolutions.com/microsoft-dynamics-365-learning-hub/

https://ellipsesolutions.com/community-resources/

Q&A