



# DYNAMICS CON

POWERED BY  
**DUG**

20-23 Sept 2021  
[DynamicsCon.com](https://DynamicsCon.com)

**Dynamics 365 Finance & Supply  
Chain (F & SC) Implementation  
Success:  
Methodology is Key**

# Presenting Today

- **David Bowles**

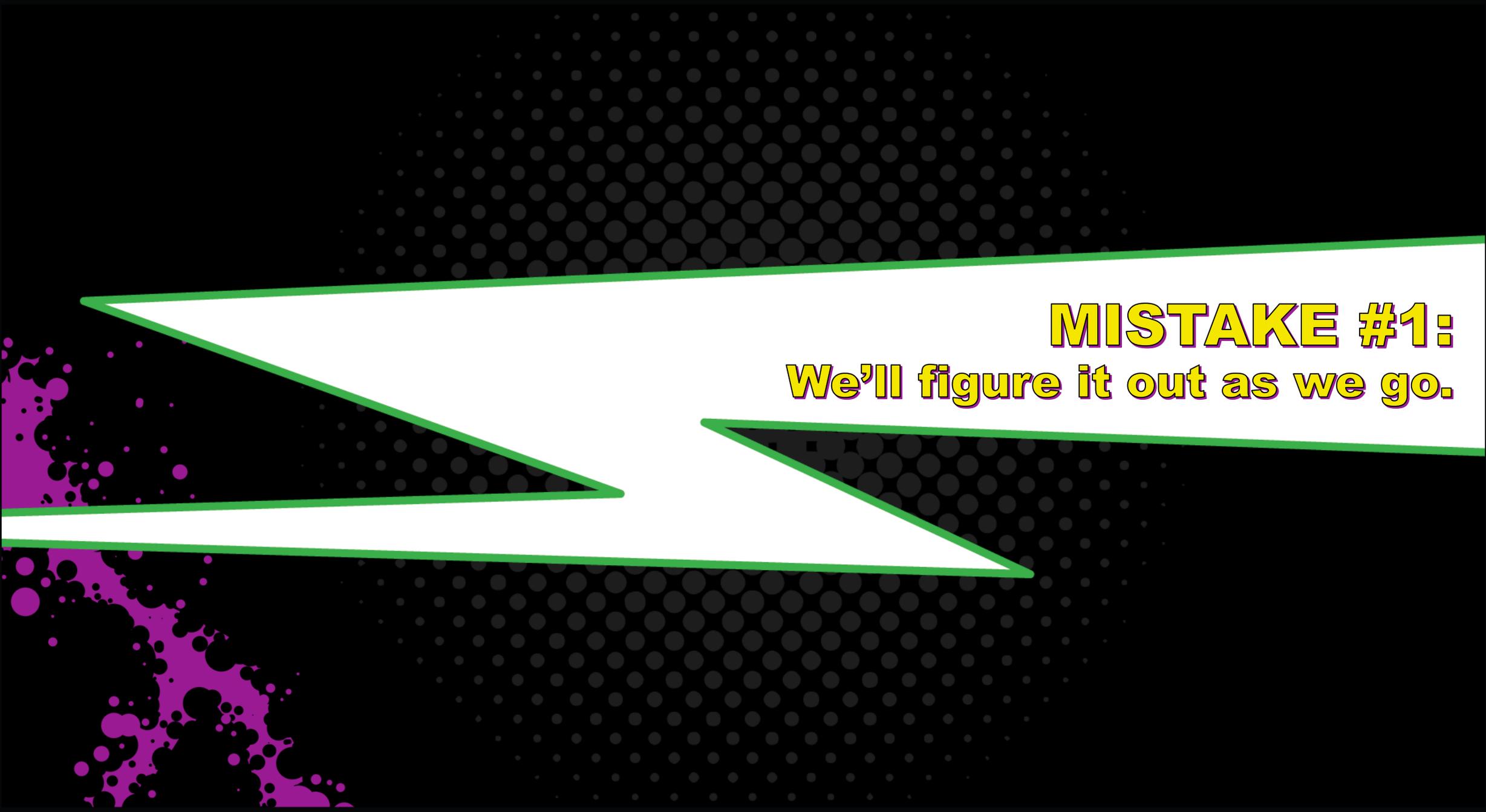
- Leading Consulting and Business Operations focused on driving great client outcomes and experiences
- Has worked extensively in the Microsoft Dynamics and Dynamics AX/F & SC community since 2004

- **Perry Prescott**

- Senior Solutions Architect with more than 20 years experience in the custom software design world and Microsoft ERP
- Defined Pre-Sales and Delivery methodologies, including Rapid Start Templates to drive faster implementations in Core Financials and Supply Chain

# What You Will Discover Today

- **Why is the methodological approach to implementing D365 F & SC important?**
- **Common mistakes customers make when implementing D365 F & SC**
- **What methodology factors will improve your chances of success when implementing D365 F & SC, and why?**
  - Design
  - Team
  - Templating
  - Workstreams
  - Processes
  - Training & UAT
  - Workflow
  - Data Management
  - Integrations
  - Business Intelligence
  - Change Management
  - And more!



**MISTAKE #1:**

**We'll figure it out as we go.**

# Planning Methodology Components

## Planning & Preparing for F & S C

Carefully considering your approach and all the components that make up success in the project is a key first step before you put any effort into beginning the implementation!

**“If you fail to plan, you are planning to fail!”**

– Benjamin Franklin

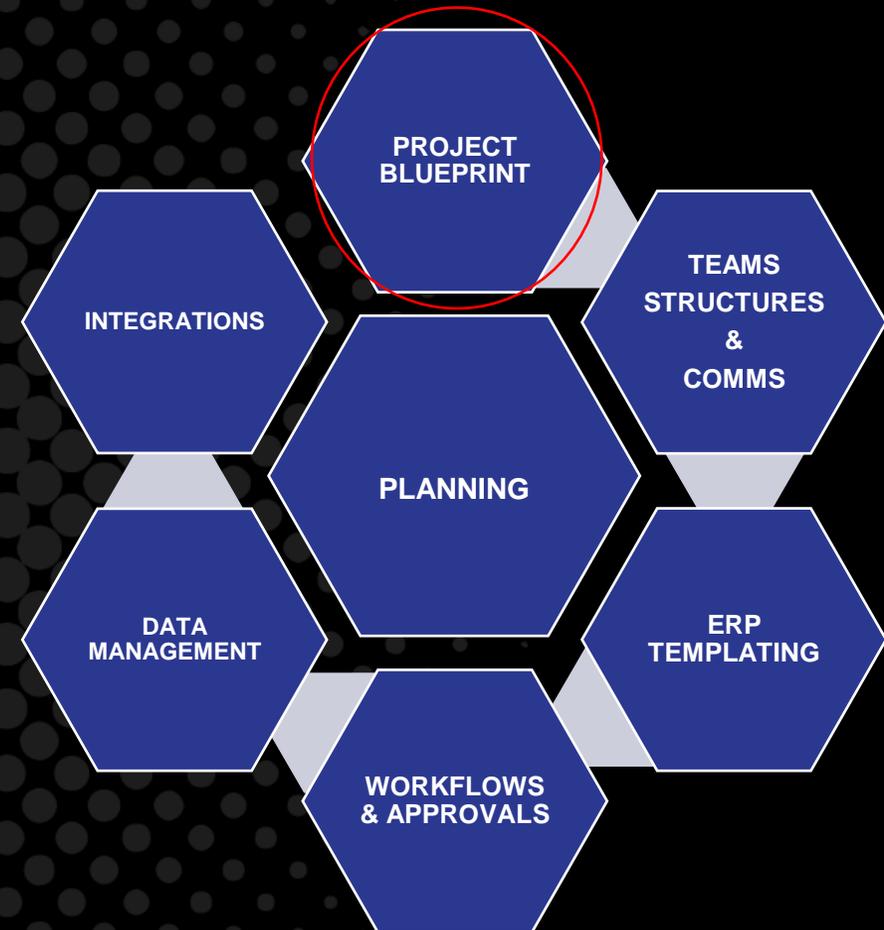


# Project Blueprint

## Know Before You Build!

### Why do you need a BLUEPRINT of your project?

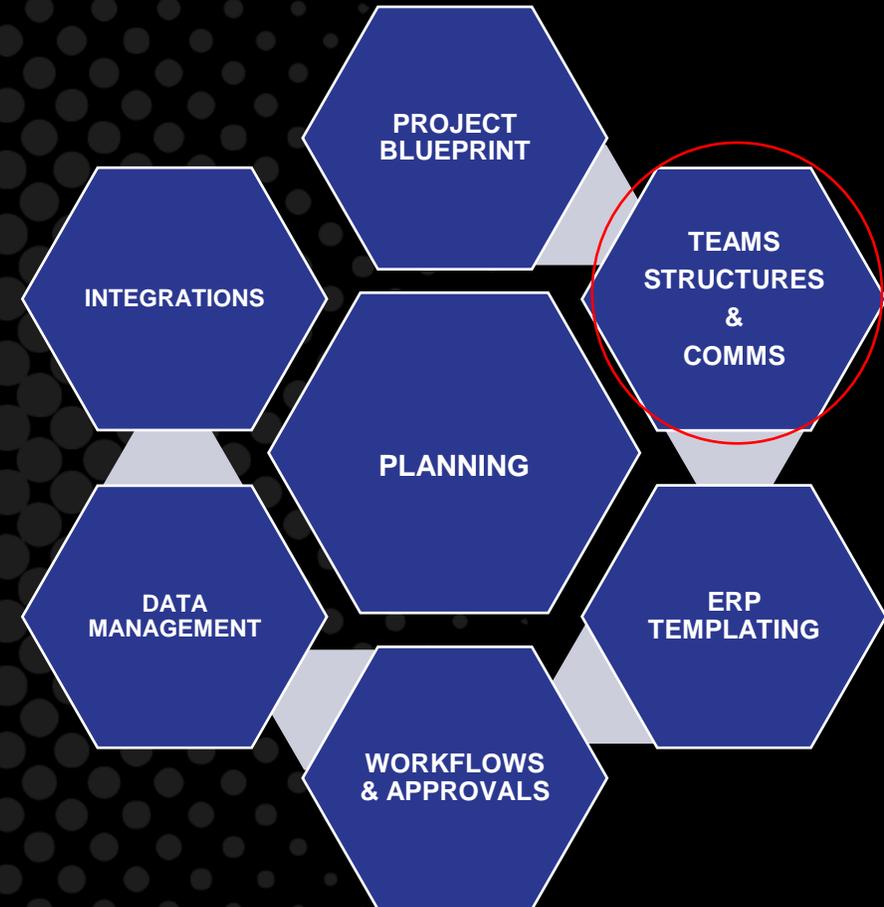
- Define core business processes required.
- Define the exact set of configurations needed.
- Define data imports, history and readiness.
- Set expectations for clear deliverables.
- Understand integrations.
- Define user experience needs. Mobility?
- Understand the level of effort to build.



# Team Structures

## Define Who and How

- Define a key contact for each team.
- Daily stand-ups stop bad assumptions.
- Weekly status keeps all on the same page.
- Monthly leaderships meetings a MUST!
- Keep open and honest communication.
- Good, bad and the ugly. ... Don't hide!
- Who will break a tie?
- Start a plan and keep it relevant – don't stop.
- Have milestones, goals and victories – often!

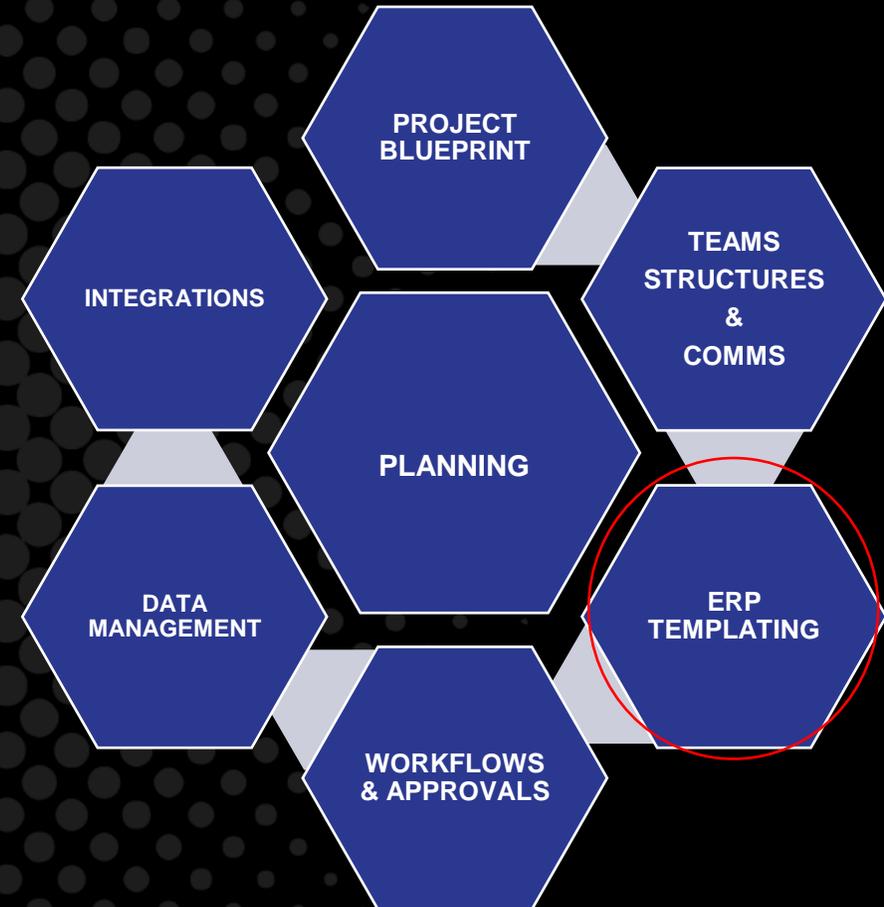


# Rapid Starts

## Save Time and Money

### What is a Rapid Start template?

- A RAPID START TEMPLATE is a pre-configuration of a core ERP platform.



# Workflow

## Automate the Manual

### Workflows and Approvals

- ERP Based Workflows for AP, GL
- MS FLOW for control of major areas
- Define approvers and hierarchy
- Define time limits and next approver
- Set conditions



# Data Management

## Is Your Data Ready?

### Data is most IMPORTANT!

- How much data to move
- Will formatted data import to D365 F & SC?
- Use of formatted data templates
- Historical data? Risks and options
- How can we be sure?
- How do we manage changes?
- To Archive or NOT to Archive



# Integrations

Tie It All Together!

Does ERP play well with others?

Fast checklist of common integrations:

- Payroll
- Tax
- CRM
- EDI
- CPQ
- BI & Reporting
- E-Commerce
- POS/Retail
- TMS



# Planning is CORE!

Know Before You Build

## What is there to plan?

- Start, stop, delays?
- Teams and roles
- Communication
- Testing and test cases
- Training
- Data management
- Integration work, testing and deployment
- Go-live planning
- Post go-live support

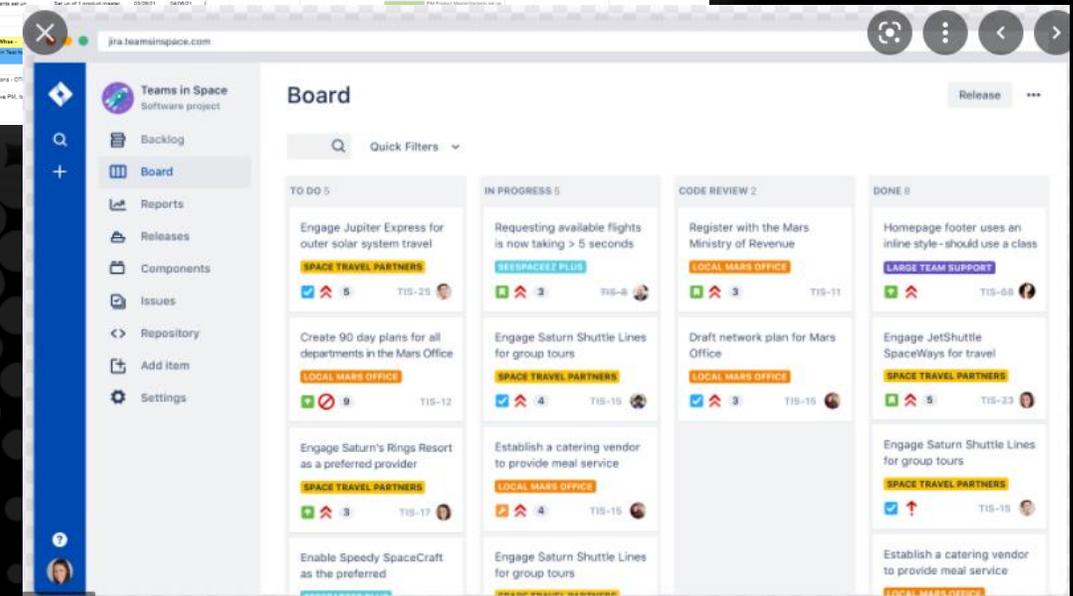
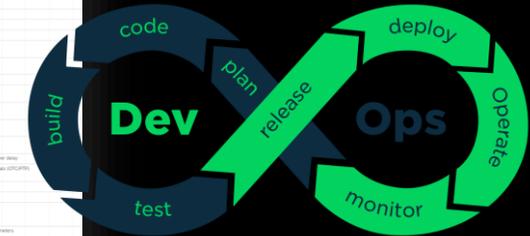
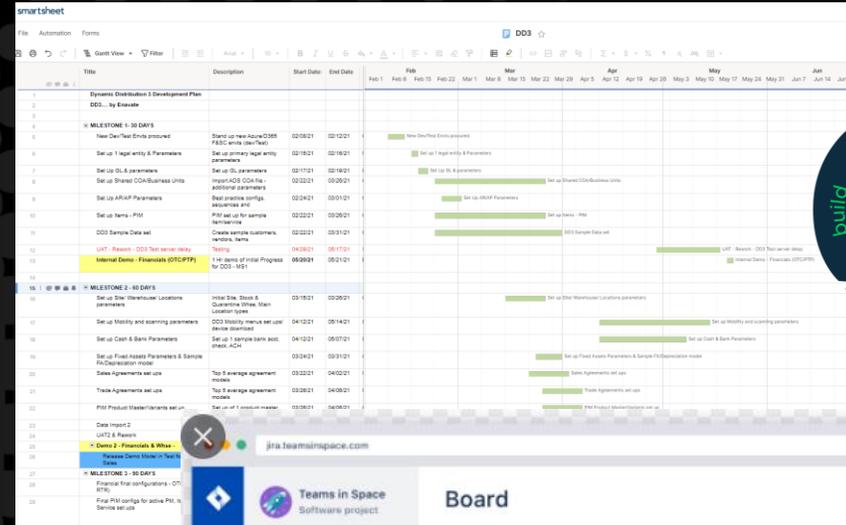


# Planning Tools

## Keys to Success

### Key Operational Tools Used by Enavate

- Jira – Task management-Agile
- Smart sheet or MS Project
- Dev Ops by MS for technical tasks
- SharePoint – Document management





**MISTAKE #2:**  
**Let's take a big bang approach.**

# Implementing D365 F & SC

## Applying the Plan

### THE BATON RACE

#### Use Staggered Workstreams

Big Bang approaches seem compelling, but businesses fail to recognize the complexity and cost of missing timelines.

### YOU AREN'T THAT UNIQUE

#### Use Standard Processes

Use the business transformation opportunity of an ERP implementation to adopt standard processes in your business.

### GETTING YOUR TEAM READY

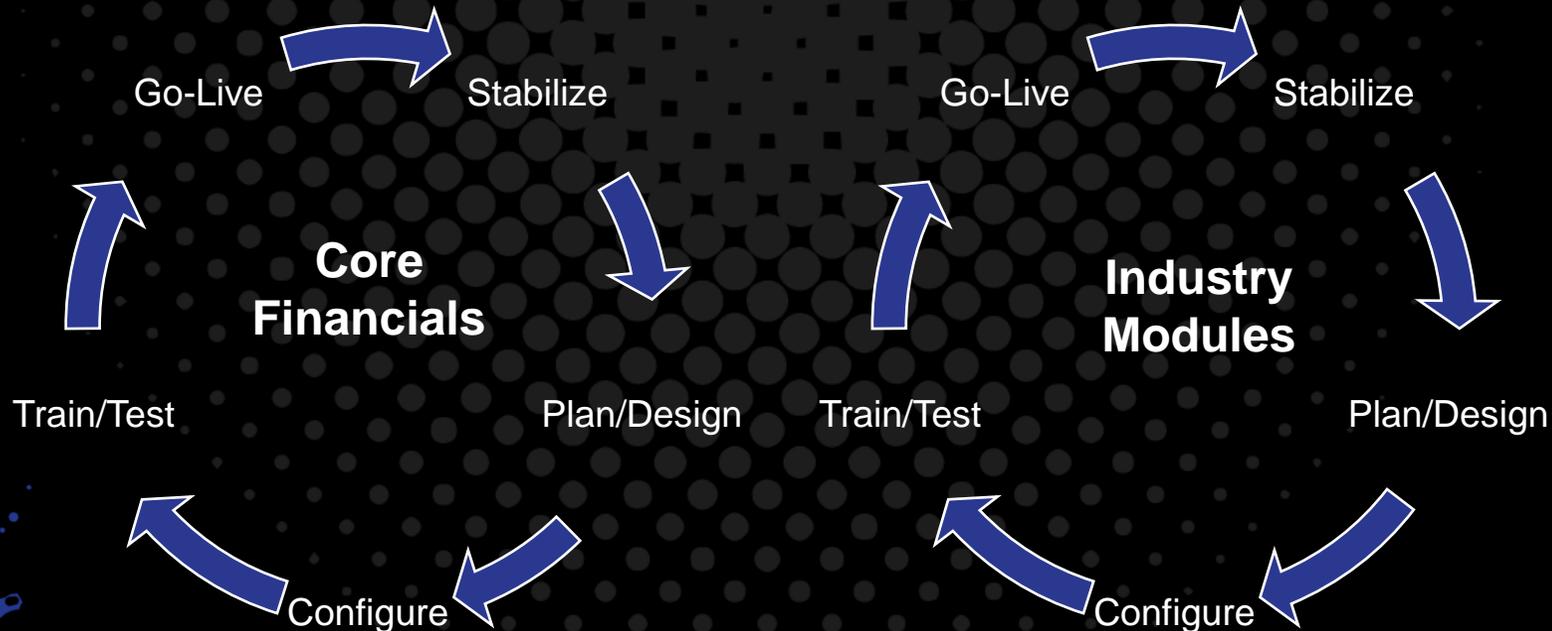
#### Invest in Training and Testing

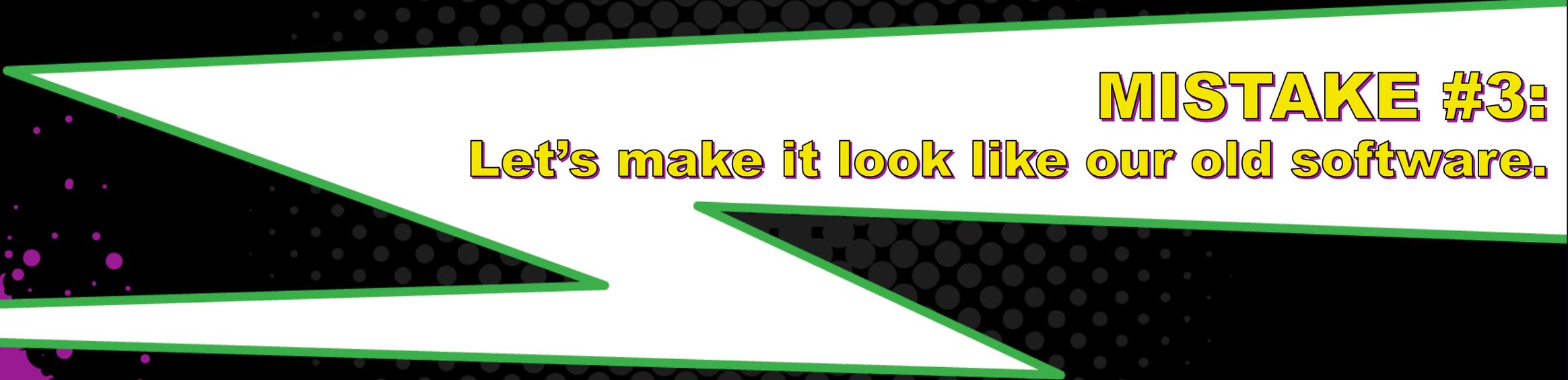
An ERP implementation isn't the time to be frugal in these areas.

# Staggered Workstreams

When implementing D365 F & SC, embrace an iterative, sprint-based approach.

- Plan to release key functionality in 1-4-week segments



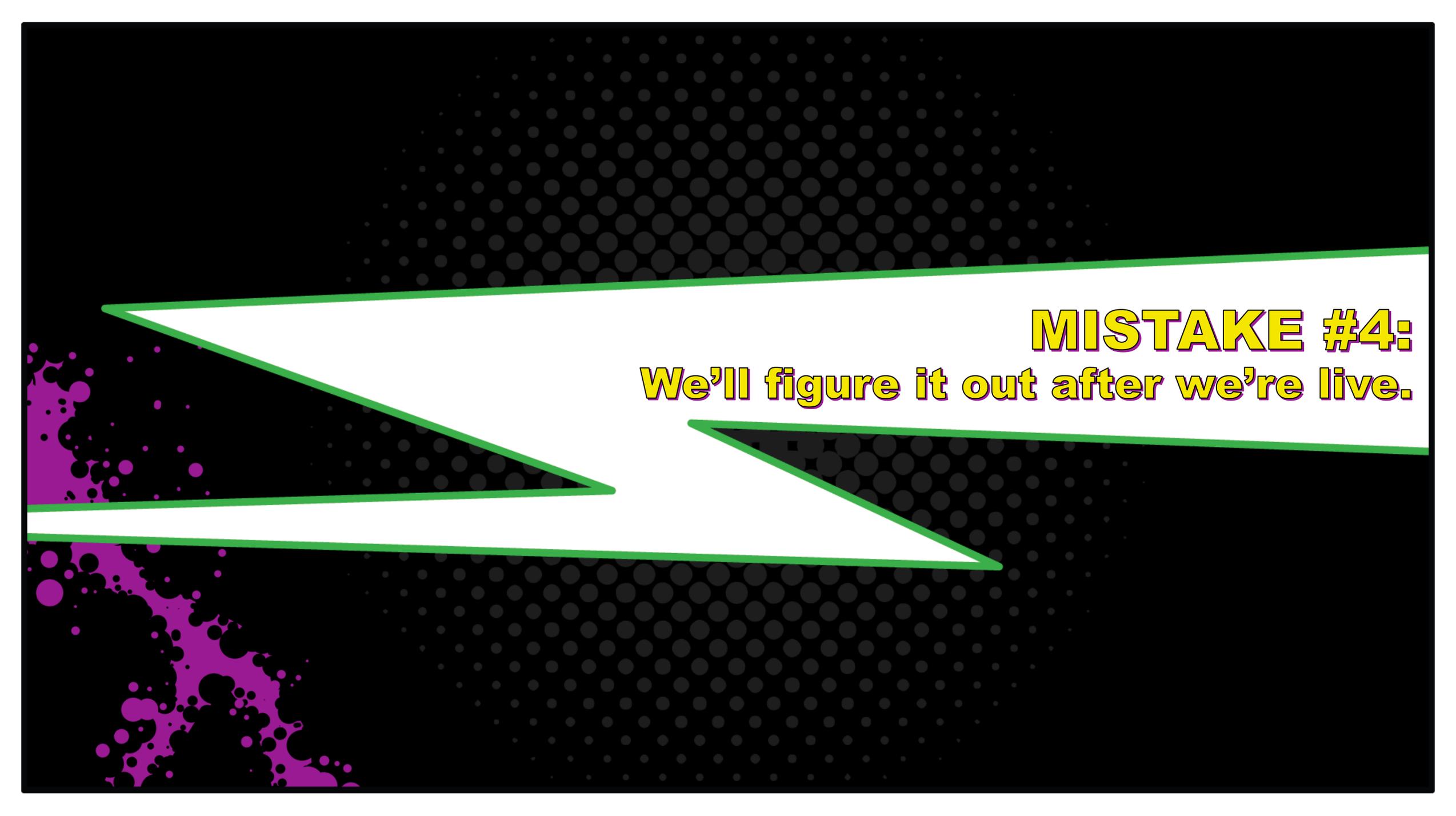


**MISTAKE #3:**  
**Let's make it look like our old software.**

# Aligning Your Business to D365 F & SC

**Many businesses enter ERP implementations with the intent of not customizing but leave with a highly customized system.**

- Consult with your partner's project team about their experience adapting similar processes into F & SC.
- Analyze the impact to the business to adjust your process to F & SC'S way and challenge yourself to adapt.
- If adapting isn't an option, consult with your partner's technical architect on the invasiveness of the customization and potential impact with future upgrades.
- Make the right decision for your business on how to move forward.



**MISTAKE #4:**  
**We'll figure it out after we're live.**

# Learning and Creating New Habits

## Training

- Thoroughly train your team before you have them test. Training should never be a minimally invested event.
- Build internal role-based training so that it's easily translatable for each team member.
- Evaluate knowledge retention and adjust/iterate on training accordingly.

## Testing

- During Planning and Design, keep in mind end-user Use Cases.
- Develop Test Cases based on Design Use Cases.
- Execute Test Cases to evaluate functionality not only on ability to meet design requirements, but also speed. If business expectations are not met, iterate through re-evaluating design or training, if end-user speed is an issue.



**MISTAKE #5:**  
**This is your grandfather's ERP... NOT!**

# Monitoring and Controlling the ERP

## CHANGE MANAGEMENT

- Minimize change – it takes you off course
- Consider the ripple effect
- Is the change critical to be made, or is it a squirrel?
- Quantify the change's total cost and timeline impact before making the change a requirement

## BUSINESS INTELLIGENCE

- Don't rely on reports and spreadsheets to make decisions. Steer towards Analytics and Business Intelligence
- Determine your KPIs and Measures that your organization needs to monitor
- Build dashboards that aid in accelerating the decision support process

## WHEN "THINGS GO BUMP IN THE NIGHT"

- Don't ignore issues, hoping they'll fix themselves
- Actively Manage risks, including time delays, scope creep, third-party deliverables, and develop risk responses to execute when risks occur
- Anticipate the unexpected

# Closing the ERP Project



## Go-Live Readiness

End Users – Trained and Ready?

Muscle Memory Built?

Mock Go-Live Result?



## Go-Live Weekend

Detailed Plan of Who Will Do What

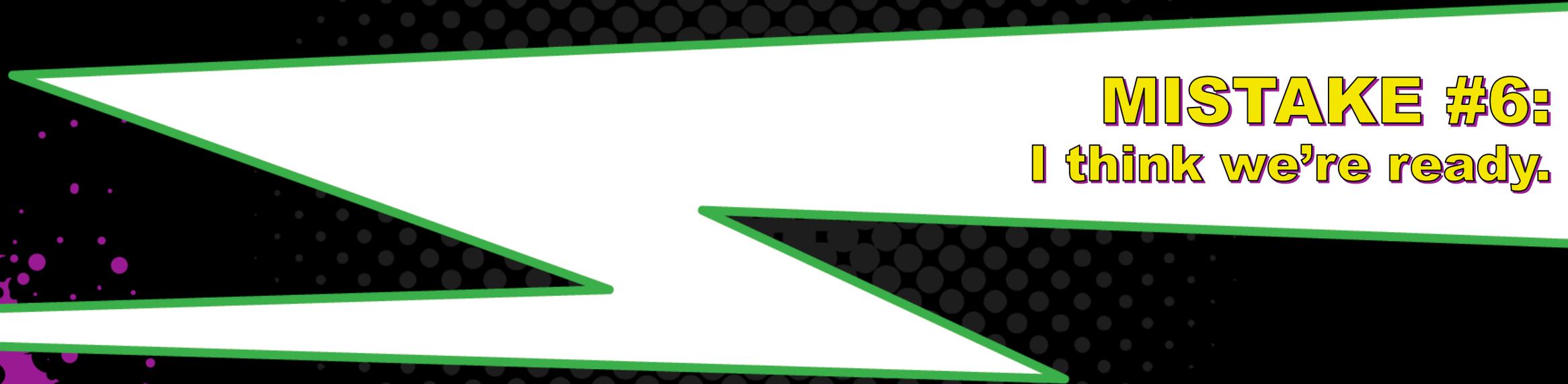
Integration Setup to Flow



## Post Go-Live Support

Do You Have a Support Plan?

Do You Have Process Area SMEs Identified?



**MISTAKE #6:**  
**I think we're ready.**

# Develop a Go-Live Readiness Checklist

- From the beginning, you should have a checklist, adding must-haves prior to go-live. Your partner should also contribute to that list.
- Prior to scheduling Go-Live Weekend, you should have met each of these checklist items. Planning the Go-Live Weekend and reaching it with open items creates a high-risk, failure prone scenario.
- Consider investing the time to execute a Mock Go-Live, with part of the team operating in the new system as if you were live, including integrations. You'll learn just how ready your business and your users are ready after this.



**MISTAKE #7:**  
**Celebrate after, not before.**

# Go-Live Weekend

## Let the Sprint Begin

- Planning Go-Live Weekend is super-important to get right with so little time.
- Consider the risks and be prepared to execute on mitigation plans. Murphy's Law is inevitable.
- Be sure everyone knows their responsibilities and check in to make sure each team member is getting started on time.
- Have regular check-ins. You can't afford surprises. Don't allow "roll-backs" to be an option.

## How Ready Are You?





**MISTAKE #8:**  
**Our users can support themselves.**

# Support After You Go-Live?

**There are multiple support plans that can meet your business' needs.**

- With subscription-based plans, you choose how much or how little you believe you need.
- Pre-paid buckets of hours gives you piece of mind that if you need them, they're available without a long-term or large investment.
- There are also Managed Services offerings to take the worry out of operating your new investment.

# Q&A

Can you tell me more?

What did you mean by ...?

How do you ...?

Why does this ...?