
WELCOME
TO The Fabulous
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2026
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Sam Baldwin

Cutover without Chaos
Planning a Successful D365 F&SCM Go-Live

About Me

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New Arc SOLUTIONS

About Sam:

- Leading implementations at New Arc Solutions with 10+ years of hands-on expertise in D365 Finance & Supply Chain Management
- Designs WMS and MRP solutions that reduce complexity and drive operational performance
- Specializing in mid-market manufacturing, supply chain, and distribution
- Founding team member at New Arc Solutions, built on real supply chain operator experience

About New Arc Solutions:

- Most of the team came from Blue Horseshoe Solutions - Architects of the WMS/TMS modules sold to Microsoft, the foundation of what is now Advanced Warehouse Management in F&SCM
- Focus on real client value. We get called in on the hard cases; rescue projects are a significant part of what we do

2026 DYNAMICS CON

Agenda

What We are Covering Today

Section	Slides	Time
Setting the Stage	5-6	XXX
The Toolbox	7-9	XXX
What Actually Needs to Happen	10-14	XXX
Building the Playbook	15-20	
Practice Like you Play	21-25	
Manufacturing and Supply Chain Gotchas	26-29	
Go-Live and Hypercare	30-33	
Key Takeaways and Q&A	34-36	

Setting the Stage

Why Cutover Deserves Its Own Strategy

Why Cutover Deserves it Own Strategy

- Cutover planning starts at kickoff, not the week before go-live
- Bad data in = bad data out
- Cutover is a project within the project — it needs its own plan, ownership, and rehearsals
- Don’t just lift and shift — cutover is your opportunity to improve data and gain new functionality

The Toolbox

How Data Actually Gets Into D365

Data Entities and Excel Templates

- Data entities are pre-built mappings on top of D365 tables - the interface for getting data in and out
- Workflow: export blank template → populate in Excel → import back into D365
- Each entity maps to a specific functional area (customers, vendors, products, BOMs, routes, orders, etc.)
- The quality of your migration lives or dies in these templates - this is where “bad data in, bad data out” becomes real

Data Management Framework

- DMF is the workspace in D365 for configuring and executing import/export projects
- Key concepts: import projects, staging tables, validation, error handling
- Two-step process: data lands in staging first, then pushes to target — staging is your safety net
- All data loads run in batch processing
- Error logs tell you exactly what failed and why — fix and re-import just the failures

What Actually Needs to Happen

Cutover Scope — Static vs. Dynamic Data

The Static vs. Dynamic Data Framework

Static Data (Masters)

- Records that define your business — they exist or they don't
- Customers, vendors, items, BOMs, routes, warehouses, sites
- Can be loaded early and validated over time
- Get this work off the critical path

Dynamic Data (Open Transactions)

- Records with point-in-time state that changes until freeze
- Open SOs, POs, production orders, in-transit inventory
- Can only be loaded after legacy system freeze
- Inherently on the critical path

Static Data Deep Dive

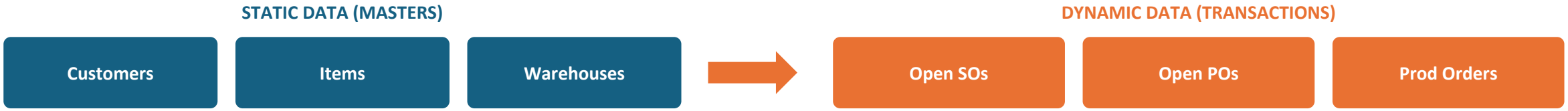
- Examples: customers, vendors, released products, BOMs, routes, sites, warehouses, coverage groups, trade agreements
- Load weeks before go-live - get static data off the critical path
- Load iteratively: initial load → validate with client → delta reconciliation → reload
- Build net-new data that didn’t exist in legacy - this is your opportunity to improve
- Validation is collaborative and can happen at the client’s pace

Dynamic Data Deep Dive

- Examples: open SOs, POs, production orders, in-transit transfers, open AP/AR invoices
- Can only be migrated after legacy system freeze — this is the cutover weekend critical path
- Freeze window duration determines time to extract, transform, load, and validate
- Validation must be fast and pre-scripted — reconciliation reports built before cutover weekend
- Key reconciliation: open SO count/value, open PO count/value, inventory balances
- Consider the volume: sometimes hand-keying is faster than building an import file

The Dependency Chain

- Dynamic data depends on static data being correct — you can't load an open SO if the customer, item, or warehouse doesn't exist
- Static data quality issues cascade into dynamic data failures on cutover weekend
- Static data validation must be complete before cutover weekend begins — it's a prerequisite, not a parallel activity



Building the Playbook

Cutover Plan Construction

Makings of a Cutover Plan

- The cutover plan is your single source of truth — every task, owner, validator, and time estimate in one living document
- What goes in it: task name, owner, validator, estimated duration, actual duration, dependencies, status
- Granularity matters — “load data” is not a task. “Load open POs via DMF, validate count and value against legacy” is a task
- The cutover plan is a living document — it gets refined through every mock cutover

Sequencing and Dependencies

- Dependencies and sequencing are built directly into the cutover plan
- Identify your critical path: which tasks must complete before others begin
- Each task distinguishes owner (who executes) from validator (who confirms)
- Flag parallel workstreams where they exist
- Build buffer into every estimate — if a task took 2 hours in rehearsal, plan for 2.5

Roles and Responsibilities

Execution Team

- Cutover lead
- Data migration lead
- Functional leads by module
- Technical/DBA support

Validation Team

- Client-side validators
- Integration lead
- Module SMEs
- Business sponsors

Key Rules

- Partner loads data
- Client validates data
- Every task: 2 names
- Define before mock #1

“The partner cannot validate client data. Only the client can say ‘yes, that’s right.”

Go / No-Go Criteria

GO Criteria

- All critical data loads complete and validated
- Reconciliation variances within agreed thresholds
- Core business processes pass smoke testing
- Integrations confirmed functional
- Rollback plan tested and ready

No-GO Triggers

- Data reconciliation variances exceed threshold
- Critical integrations non-functional
- Time estimate exceeds remaining freeze window
- Predefined checkpoints throughout weekend
- Rollback path defined: what does going back to legacy look like?

Communication Plan

- Define a status cadence for cutover weekend - regular check-ins at fixed intervals
- Single channel for status updates - don’t split across email, Teams, texts, and calls
- Escalation path: who gets called at what severity level
- Stakeholder updates: on track, at risk, or blocked
- Pre-build status update templates - don’t draft communications while troubleshooting

Practice Like You Play

Mock Cutovers

Why Rehearsals Matter

- A cutover plan that hasn't been rehearsed is just a theory
- Mock cutovers validate: is the sequencing right, are time estimates realistic, does the team know their roles
- Rehearsals expose gaps you can't find on paper — missing fields, unexpected errors, steps you forgot
- Minimum of two mock cutovers before go-live — the first one will be messy, and that's the point

Mock Cutover #1: Baseline

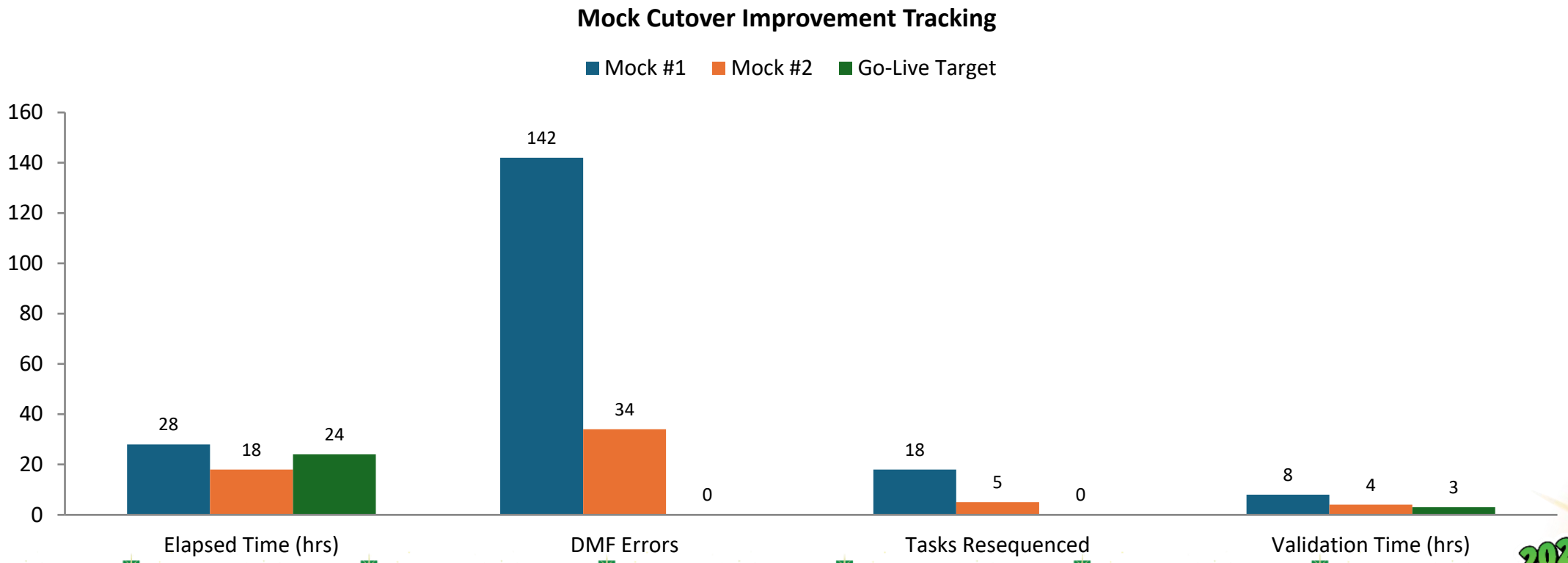
- **Goal:** establish a baseline - not perfection
- Execute every task end to end - record actual durations against estimates
- Document every issue: DMF errors, data gaps, missing dependencies, wrong sequencing
- Capture total elapsed time - this is your starting benchmark
- After rehearsal: conduct a retrospective - what broke, what took too long, what was missing
- Update the cutover plan: add tasks, re-sequence, revise time estimates

Mock Cutover #2: Validation

- **Goal:** Prove the fixes work and the plan fits within the freeze window
- Every issue from mock #1 should have a resolution in the updated plan
- Compare mock #2 actuals to mock #1 — time estimates should be tighter
- Include client validation — are reconciliation reports ready, can validators sign off in time
- If mock #2 still doesn't fit the freeze window, you have a planning problem to solve before go-live

Measuring Improvement

- Track key metrics across rehearsals: elapsed time, DMF errors, tasks re-sequenced, validation time
- The trend line tells you whether you're ready — concrete numbers build confidence



Manufacturing & Supply Chain Gotchas

Where F&SCM Implementations Get Tricky

MRP Readiness

- MRP is only as good as the data behind it — bad parameters = planners drowning in noise
- Key data: coverage groups, item coverage settings, default order settings, safety stock, lead times
- Much of this may not exist in legacy — this is net-new data built as part of cutover
- Run a master planning job in validated environment before go-live
- If MRP output doesn't look right, the fix is data — not system configuration

Open Order Cutover Strategy

- Open SOs, POs, and production orders all require a cutover decision: migrate or close out in legacy
- Factors: volume, proximity to completion, complexity, freeze window duration
- WMS adds a critical layer — migrated orders need to be released to warehouse
- Define which orders to push to completion vs. hold for migration
- Decision must be made well in advance per order type — impacts cutover timeline and Day 1 ops

WMS Go-Live Readiness

- If WMS is in scope, it adds complexity that can’t be an afterthought
- Key setup: location profiles, location directives, work templates, wave templates, reservation hierarchies
- Inventory must be loaded at the right level — WMS requires license plate or location level
- Physical inventory count option: count fresh at cutover for clean opening balances
- **Soft go-live:** process a controlled set of transactions end to end before opening to full business
  - Receive a PO
  - Pick and Ship a SO
  - Execute a Transfer Order
  - Start and Complete a Production Order

Go-Live & Hypercare

The First 72 Hours

Go-Live Day

- Go-live day is not the end of cutover — it's the transition from execution to support mode
- **War room:** dedicated physical or virtual room where the core team is available in real time
- **Issue triage:** Critical (can't operate) | High (workaround exists) | Low (cosmetic)
- Critical issues get immediate attention — don't let noise distract from keeping the business running
- Predefined escalation paths: functional leads triage → cutover lead escalates → client leadership for business-impacting decisions

Hypercare Transition

- Hypercare bridges cutover and steady state — typically 2 to 4 weeks post-go-live
- Transition from war room to structured support: real-time triage to ticketing/issue tracking
- **First 2 weeks:** all hands support with full team availability and real-time response
- **After Week 2:** begin stepping down — shift to scheduled check-ins and normal support channels
- Key activities: monitoring batch jobs, MRP output review, resolving data issues, training reinforcement
- Define exit criteria: when does the implementation team hand off to internal support

Success Criteria

Day 1

- Core processes functional
- Orders entered
- Warehouse picks and ships
- Production orders created
- Financials post

Week 1

- No critical open issues
- Integrations on schedule
- Batch jobs completing
- Users transacting without constant support

Week 2+

- Issue volume trending down
- MRP output reviewed and trusted
- Hypercare exit criteria met
- Client operating independently

“Success is not zero issues; Success is the business operating and issues being managed.”

Key Takeaways and Q&A

Let’s Discuss

Key Takeaways

1. Cutover is a **project within the project** — treat it with its own plan, ownership, rehearsals, and timeline

2. Don’t just lift and shift — cutover is your **opportunity to improve** data and unlock new functionality

3. Static data comes first and comes early — **get it off the critical path**

4. Your cutover plan is only as good as your **rehearsals** — if you haven’t practiced it, you haven’t planned it

5. Remove subjectivity — let the **data from mock cutovers** drive your decisions

Let’s Discuss - Q&A

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