



2026  
**DYNAMICS**  
**CON**  
*Vegas*





# D365 Roadmap



Green lights and Red flags



# About Me

- D365 Business Analyst at TD Williamson
  - BA role for 2.5 years
- RSM Consultant 2 years
- Key contributor in 7 implementations
- Accountant
  - Industries: Energy, Advertising and Marketing, Technology, Cybersecurity
  - Functional user
  - Managed SOX, internal, and external IT and financial system audits



# ERP Roadmap

- Clear Business Objective
- Strong Executive Sponsorship
- Business Process Owner
- Change Management
- Resourcing and Scope
- Data Readiness
- Testing
- Go-Live and Hypercare
- Post Go-Live Optimization



# ERP Implementations: The Real Reason They Succeed—or Fail

- ERP implementations rarely fail because of technology.
  - They fail due to gaps in leadership alignment, ownership, readiness, and discipline.
- This roadmap highlights proven success drivers (Green Lights) and predictable failure signals (Red Flags) across the ERP lifecycle
- **Green Lights** represent behaviors and conditions consistently seen in successful ERP implementations



# ERP Implementations: The Real Reason They Succeed—or Fail

- **Red Flags** are early warning indicators that increase cost, delay value, and reduce adoption
- Most ERP risks are visible early and preventable with timely leadership action
- The purpose of this roadmap is to enable proactive decisions, not reactive problem-solving



# Green Lights

- **Clear Business Objective**

- Business goals clearly defined and documented
- KPIs established before implementation
- ERP decisions tied directly to business value
- Success criteria agreed by leadership

- **Strong Executive Sponsorship**

- Active executive sponsor with decision authority
- Regular steering committee participation
- Quick resolution of cross-functional conflicts
- Sponsor communicates importance of ERP change



# Green Lights

- **Business Process Owner**

- Named owners for all core processes
- Owners accountable for design and outcomes
- Process decisions made by the business
- Clear sign-off ownership

- **Change Management**

- Clear communication of why changes are happening
- Role-based training plans
- Super-user network established
- Adoption measured and monitored



# Green Lights

- **Resourcing and Scope**

- Dedicated project team with backfills
- Realistic timelines with buffers
- Active scope management
- Clear trade-offs when changes are requested

- **Data Readiness**

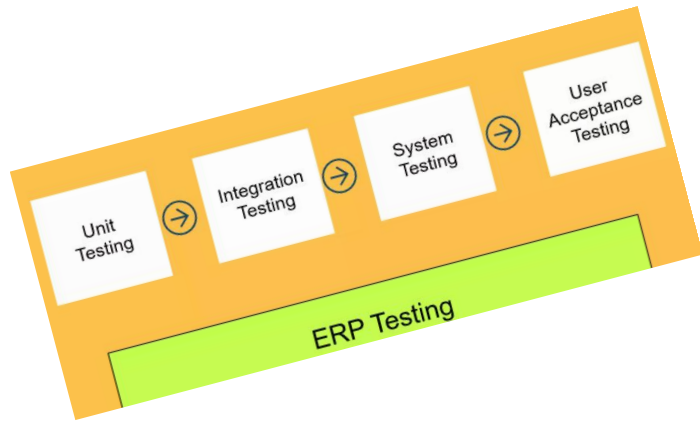
- Data owners identified early
- Data standards defined
- Multiple test migrations completed
- Business validates data accuracy



# Green Lights

## • Testing

- Business-led end-to-end testing
- Real-life scenarios tested
- Defects prioritized by business impact
- Clear test entry and exit criteria



# Green Lights

- **Go-Live and Hypercare**

- Cutover rehearsed
- Hypercare support model defined
- Rapid issue triage process
- Business and IT staffed post-go-live

TRIAGE



HYPERCARE



# Green Lights



- **Post Go-Live Optimization**

- Optimization roadmap established
- Metrics tracked against baseline
- Continuous improvement ownership defined
- ERP treated as an evolving product



# Red Flags

- **Clear Business Objective**

- Objectives vague or undocumented
- Success measured only by go-live date
- No defined KPIs or baseline metrics
- ERP positioned as a technology refresh

- **Strong Executive Sponsorship**

- Sponsor disengaged or unavailable
- Decisions repeatedly deferred
- Conflicts unresolved across functions
- Project driven by system integrator



# Red Flags

- **Business Process Owner**

- Objectives vague or undocumented
- Success measured only by go-live date
- No defined KPIs or baseline metrics
- ERP positioned as a technology refresh

- **Change Management**

- Little communication beyond project team
- Training treated as a checkbox
- No super-user coverage
- Resistance addressed too late



# Red Flags

- **Resourcing and Scope**

- Mostly part-time team members
- Unrealistic timelines
- Scope creep without trade-offs
- Key roles missing or overloaded



- **Data Readiness**

- No clear data ownership
- Poor data quality discovered late
- Single migration attempt
- Reports not trusted

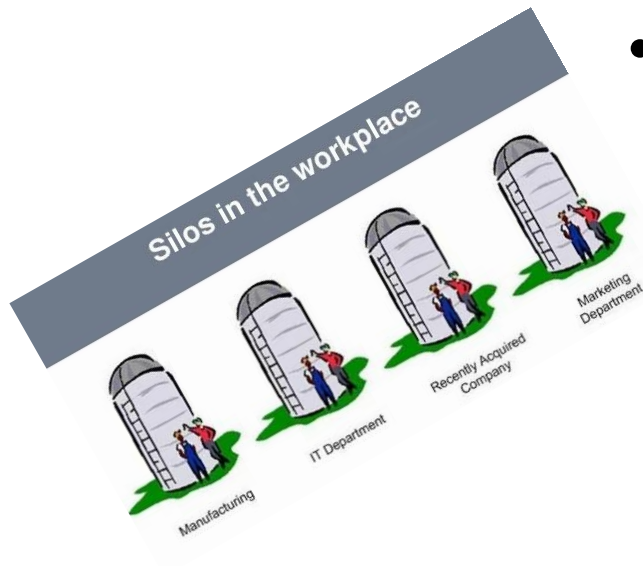
	20X1	20X2	20X3	20X4	20X5	20X6	20X7
<b>BALANCE SHEET</b>							
<b>Current Assets</b>							
Cash	1,773	2,000	3,325	4,816	6,501	8,449	8,449
Accounts Receivable	7,750	8,852	10,614	11,875	12,842	14,127	14,127
Inventory	4,800	5,702	6,705	7,375	8,113	8,924	8,924
Prepaid Expenses	456	1,849	1,292	1,569	1,726	1,994	1,994
<b>Total Current Assets</b>	<b>14,779</b>	<b>19,401</b>	<b>22,970</b>	<b>25,435</b>	<b>28,163</b>	<b>31,394</b>	<b>33,398</b>
<b>Fixed Assets</b>							
PP&E, Net of Accum. Depreciation	10,913	10,932	11,159	12,099	12,743	13,451	13,451
<b>TOTAL ASSETS</b>	<b>25,692</b>	<b>29,333</b>	<b>30,209</b>	<b>37,534</b>	<b>41,926</b>	<b>46,849</b>	<b>46,849</b>
<b>Current Liabilities</b>							
Accounts Payable	5,665	6,658	7,155	8,657	9,523	10,473	10,473
Line of Credit	792	1,375	32	500	500	500	500
Current Maturities of Long Term Debt	900	500	500	500	500	500	500
<b>Total Current Liabilities</b>	<b>6,957</b>	<b>8,533</b>	<b>7,687</b>	<b>9,157</b>	<b>10,023</b>	<b>11,473</b>	<b>11,473</b>
<b>Long Term Liabilities</b>							
Long Term Debt, Net of Current Maturities	5,000	4,500	4,000	3,500	3,000	2,500	2,000
<b>TOTAL LIABILITIES</b>	<b>11,957</b>	<b>13,033</b>	<b>11,687</b>	<b>12,157</b>	<b>12,523</b>	<b>13,973</b>	<b>13,973</b>
<b>TOTAL EQUITY</b>							
Common Stock	15	15	15	15	15	15	15
Additional Paid in Capital	9,220	5,000	14,091	17,196	20,642	24,511	28,829
Retained Earnings	13,725	11,287	19,066	22,181	25,657	29,558	33,324
<b>TOTAL EQUITY</b>	<b>25,692</b>	<b>29,333</b>	<b>30,762</b>	<b>34,051</b>	<b>37,814</b>	<b>42,049</b>	<b>46,799</b>
<b>TOTAL LIABILITIES &amp; EQUITY</b>	<b>51,384</b>	<b>58,666</b>	<b>61,971</b>	<b>71,585</b>	<b>79,745</b>	<b>88,898</b>	<b>93,647</b>



# Red Flags

- **Testing**

- IT-only testing
- Limited end-to-end scenarios
- Critical defects deferred
- Testing compressed to meet dates



# Red Flags

- **Go-Live and Hypercare**
  - Cutover not rehearsed
  - Hypercare not staffed
  - Issues pile up post-go-live
  - Go-live driven by optics

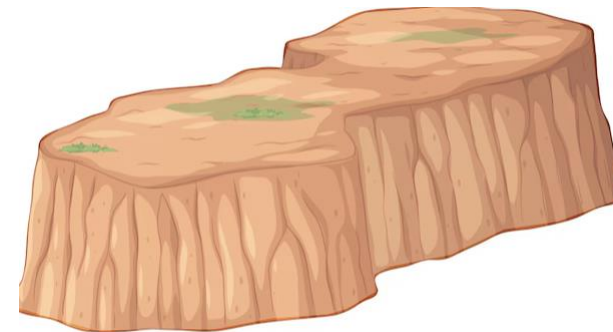


# Red Flags

- **Post Go-Live Optimization**
  - Project team disbands immediately
  - Users revert to spreadsheets
  - No optimization roadmap
  - ERP usage plateaus



MainAccount	CostCenter	ProductCode	BusinessLine	Journal number	Date	Voucher
215100	2500		10	GJEJ00046827	3/6/2026	ACHP000000454
100274	2500		10	GJEJ00046827	3/6/2026	ACHP000000454
215100	2500		10	GJEJ00046828	3/6/2026	ACHP000000455
100274	2500		10	GJEJ00046828	3/6/2026	ACHP000000455
215100	2500		10	GJEJ00046829	3/6/2026	ACHP000000456
100274	2500		10	GJEJ00046829	3/6/2026	ACHP000000456
215100	2500		10	GJEJ00046830	3/6/2026	ACHP000000457
100274	2500		10	GJEJ00046830	3/6/2026	ACHP000000457
215100	2500		10	GJEJ00046831	3/6/2026	ACHP000000458
100274	2500		10	GJEJ00046831	3/6/2026	ACHP000000458
215100	2500		10	GJEJ00046832	3/6/2026	ACHP000000459
100274	2500		10	GJEJ00046832	3/6/2026	ACHP000000459
215100	2500		10	GJEJ00046833	3/6/2026	ACHP000000460
100274	2500		10	GJEJ00046833	3/6/2026	ACHP000000460
215100	2500		10	GJEJ00046834	3/6/2026	ACHP000000461
100274	2500		10	GJEJ00046834	3/6/2026	ACHP000000461
215100	2500		10	GJEJ00046835	3/6/2026	ACHP000000462
100274	2500		10	GJEJ00046835	3/6/2026	ACHP000000462



# Final Takeaway

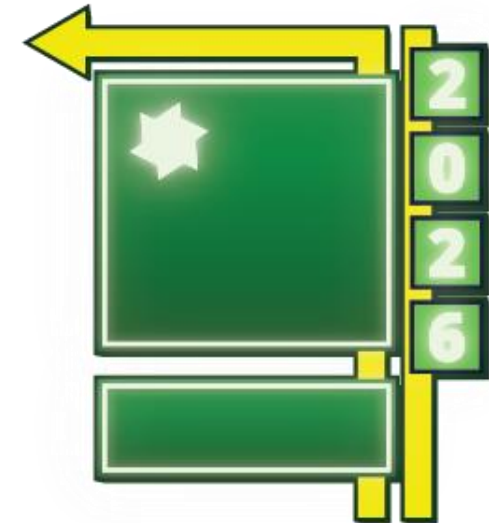
- ERP implementations don't fail suddenly
- They fail when **known risks go unaddressed**
- Every **red flag** ignored becomes cost \$ later
- Every **green light** enforced increases adoption and value



# Thank You

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**DynamicsCon Session  
Feedback**

