Begin the journey with deeper understanding

Begin the journey with deeper understanding

EXPLORE

Adopting Microsoft Dynamics 365 requires a thorough understanding of existing business processes, what is and isn't working and how workers perform daily tasks. It is likely that existing business processes were created based upon limitations of existing technical solutions and may not represent the most efficient way to do something. Transforming to a dynamic, outcome focused organization requires elimination of process inefficiencies, manual entry and duplication of effort, while automating and aggregating data to empower the workforce to facilitate faster and more confident decisions.

Navigating all the possibilities with Dynamics 365, together with the Office 365 ecosystem, requires careful planning and thoughtful considerations to optimize the investment with a solution designed for today's modern organizations.

Dynamics 365 industry solutions

Organizations have unique ways of managing their business. Not all industries will follow the same set of finance, manufacturing and sales processes, or rules and regulations. Microsoft has developed industry solutions tailored for Public Sector and Government, Education, Health, Safety and Security, Manufacturing, Financial Services, Communication and Media, as well as Retail and Consumer goods. These industry solutions are great accelerators but don't necessarily have everything an organization might need.

Dynamics 365 allows organizations to leverage its extensible framework to decrease gaps between an organization's processes and the associated Dynamics 365 solution. Microsoft's vast independent software vendor (ISV) partnerships enable organizations to leverage pre-built industry solutions that tie in directly to Dynamics 365.

Organizations would benefit from the guidance of a partner like Dell Technologies, who understands Dynamics 365 industry best practices and the wide array of available choices. Navigating whether to use the native platform, customize or adopt pre-built add-ons to meet unique business needs can be challenging.

Dynamics 365 industry solutions

EXPLORE

PUBLIC SECTOR

GOVERNMENT

EDUCATION

HEALTH

SECURITY

MANUFACTURING

FINANCIAL SERVICES

COMMUNICATION

MEDIA

RETAIL

Develop a clear vision of the future state

When attempting to architect a future state solution, all areas within the organization (i.e., sales, marketing, operations, accounting, finance, operations, IT, HR, etc.) need to be considered and analyzed. There should be a clear vision and direction of what the organization wants to achieve and a strategy for ensuring successful adoption of the new solution. To achieve an encompassing vision, be sure to include stakeholders, who can make the hard decisions on which way to go, even if it is the road less traveled.

Future state solutions need to consider people, process, technology and data as these four elements are key factors in successfully transforming an organization. If any of these elements are not considered, the organization runs the risk of not achieving desired results.

Organizations should identify the right people who have the right skills, experience and knowledge to help architect processes and technology changes. Effective leadership and communication from executives and decision makers are imperative to ensure adoption of upcoming changes. Business processes should be well defined and understood by all workers within the organization along with the associated roles and responsibilities of who does what, when and how. The goal of defining a future state solution is first to get the right people in the right place

doing the right thing (process) and then provide the tools and technology to make the people and processes more effective.

The last essential component in building the future state solution is data. Organizations have lots of data accumulated over time via many different processes and technologies, so they need to develop a plan of how that data will be used and whether the data is accurate. Having the right people, processes and technology in place without accurate and usable data, will continue the cycle of "garbage in, garbage out" and negatively impact key performance indicators (KPIs) which power data driven decisions.

Develop a Clear Vision of the Future State

EXPLORE

Discover internal business processes

All organizations utilize business processes to drive consistency and enable accurate reporting. Business applications are used to automate processes, track results and reveal insights. As organizations look to modernize their ERP and CRM strategies, they should start by determining what has worked well in the past, what challenges still exist and what new processes (if any) are currently not being accounted for in the existing strategy.

Organizations should review all areas within the organization and identify high performing workers to help provide the most up to date business processes and methods to track results. Workers identified as thought leaders will provide the most value in these exercises as they will also be tasked to think about ways to improve upon existing inefficiencies and help brainstorm the art of the possible. Senior leadership should contribute to this review by providing the required KPIs to ensure all necessary results are captured. Findings revealed during this review process

should be documented and used as critical inputs into the overall business requirements for the Dynamics 365 solution.

Understanding what makes a business successful and the unique requirements that differentiate them from competitors are key drivers in achieving the right solution.

Discover internal business processes

EXPLORE

Analyze personas

When deploying business applications, consider both workers and their technology habits to ensure alignment with the organization's overall technology strategy (BYOD, mobility, etc.). Each worker focuses on productivity differently, so a crucial step to deploy a successful Dynamics 365 solution is to find out as much as possible about the workforce, how they are working today and group them into personas.

For all Dynamics 365 projects, "day in the life" persona reviews should be conducted to understand the successes and challenges that all levels of the organization deal with on a regular basis, and the results of these reviews should be factored into the solution architecture. Executives drive results through tracking KPIs, but workers make or break whether an organization accomplishes these results. By understanding the vision, direction and what goes on in the trenches daily through workforce personas, organizations will be prepared to build a solution that meets the needs of both workers and management.

One common consideration when analyzing "day in the life" scenarios would be to understand which personas could benefit from mobile capabilities. Personas to consider include remote sales teams, service technicians, warehouse workers on the shop floor and executives in remote locations. It is also important to define which specific business processes could benefit from a mobile strategy. Some examples include sales pipelines, expense reporting, time entry, inventory updates and service support tickets.

A support strategy for these mobile workers is critical for ensuring remote productivity remains high. Workers should have easy access to the data they need without the confusion and distraction of things they don't. Support staff must be efficient at isolating issues related to mobility vs. the application itself. These mobility considerations are just one example of why "day in the life" modeling is beneficial.

Analyze personas

EXPLORE

Perform a fit gap analysis

Performing a persona analysis and business requirements assessment prepare the organization to identify the key business requirements and future state "must have" and "nice to have" functionality. Conducting a fit/gap analysis will identify which of the business requirements can be met by "out of the box" Dynamics 365 functionality (known as a "fit") and which requirements are not met (known as a "gap").

EXPLORE

The future state architectural design should include the considerations needed to close all gaps identified, which could be to:

- Institute business process changes to adapt to the capabilities of the Dynamics 365 solution out-of-box

- Revisit the requirement to ensure it is important enough to necessitate customization (for example time and cost impacts)

- Implement an ISV solution that integrates with Dynamics 365 to handle the specific requirement (many can be found in Microsoft AppSource)

- Develop a custom solution to meet the unique requirements identified

Once all the fits and gaps are explored and solutions determined, it is always useful to include visuals (e.g. future state diagram or blueprint) that depicts the vision as pictures are more often better than words. In Dell Technologies' experience, these visuals generate many conversations and can be used by stakeholders to build excitement and create buzz about what is to come.

Deployment options – cloud or on-premises
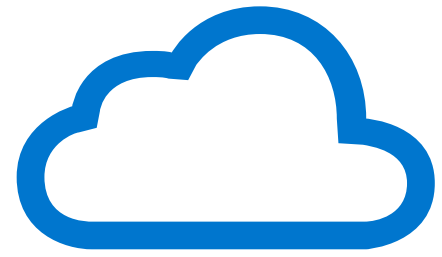
Cloud deployments of Dynamics 365 are fully managed by Microsoft with new features and functionality rolled out regularly vs. on-premises solutions which allow for more control over timing of updates.

Cloud deployments tend to be shorter given there is no need to set up any internal infrastructure. Resources can quickly be scaled up or down as business demands change, offering more flexibility compared to hosting on-premises. Cloud deployments offer high availability, disaster recovery and sandbox environments including the option of setting up data failover in the cloud.

With an on-premises deployment, organizations can leverage existing data center investments. Business data and processes are disconnected from the cloud and are stored and run locally in the organization's or partner's data center. Some connectivity is required for system management and updates, enabled through Microsoft Dynamics Lifecycle Services (LCS), a cloud-based application lifecycle management service.

Organizations who choose to deploy Dynamics 365 on-premises will need to take on the following responsibilities:

- ✓ Stand up the infrastructure
- ✓ Configure high-availability and disaster recovery solutions
- ✓ Stand up sandbox environments
- ✓ Manage the infrastructure, including scheduling operating system updates

The additional costs to deploy and manage these capabilities on-premises could lead to higher deployment costs and a greater Total Cost of Ownership (TCO).

Deployment options – cloud or on-premises

EXPLORE

Data migration strategy

Data is critical to the success of a future state solution. It is best to build a formal data migration approach and strategy to determine the data types and quantity to be migrated. We recommend a team review and clean the data in the current system or within the data migration middleware tool to ensure the most accurate, consistent and cleansed data is loaded into the new system. A formal data migration approach and strategy should answer the following questions:

On-premises   **Dynamics 365 Cloud**

Data migration strategy   EXPLORE

1. Which master data (accounts, vendors, customers, inventory items, etc.) will be migrated to the new system? Are changes needed to the basic structure of this master data (i.e. a change or the account structure or customer/vendor/item IDs). If changes are needed, a strategy for mapping the old structure to the new structure must be considered as well as the approach for staffing to define the mapping.

2. How much historical transactional and financial data will be migrated to the new system?

3. What open item transactional data (purchase orders, vendor invoices, sales orders, customer invoices, etc.) will need to be migrated in detail?

4. Who will be responsible for ensuring the accuracy, validity and cleanliness of the data being migrated from current or legacy systems to the new system?

5. Who will be responsible for extracting the data from the current system?

6. Who will be responsible for migrating the data to the new system?

7. What tools will be used to migrate the data (Excel, middleware, etc.)?

8. Will multiple data migrations be performed to load data up to a specific date and then a final migration of data right before go-live, or will one "big bang" data migration be performed?

Going through this process may also help to reveal data that doesn't need to be migrated but needs to otherwise be available to the Dynamics 365 solution for lookup, reference or integration.

Data integrations

Dynamics 365 solutions offer extensive functionality, but there may be other applications and/or ISV solutions needed to handle unique business functions.

EXPLORE

Data integrations

Some examples include capabilities for:

- Tax solutions
- Customer management solutions
- General ledger from other ERP systems
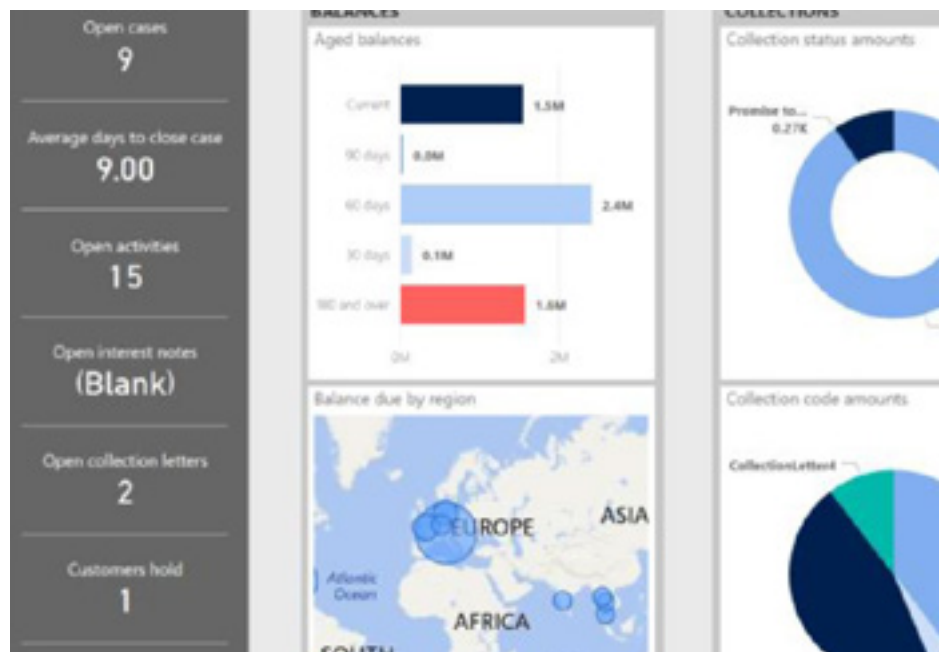- External payroll
- Auditing
- Industry specific solutions
- Organization specific applications

In the event these integrations are required, there will be a need to share data between these systems and Dynamics 365, which can be handled by middleware connectors, custom web services or Dynamics data management import/export framework services. The key is to ensure there is a single master data source (i.e. system of record) and limited duplication of data entry.

Business intelligence and reporting

Business intelligence (BI) reporting is at the heart of data-driven decisions, enabling organizations to make informed decisions by quickly analyzing KPIs, application data and presenting actionable information in graphical dashboards. Dynamics 365 comes with many out of the box BI reports and has Microsoft's Power BI tool embedded. This enables organizations to quickly create custom reports, dashboards and data visualizations for unique business operations to help executives, managers and workers make informed decisions.

EXPLORE

Business intelligence and reporting

Security roles and privileges within Dynamics 365

The key objective in application security is for workers to be able to use the functionality needed to do their jobs, while ensuring access and segregation of duties adhere to corporate policies. Dynamics 365 has multiple levels of security to ensure access is only granted based on the defined personas. It is highly integrated with Office 365 and uses Azure Active Directory (AAD) to allow for single sign-on (SSO) capabilities. Access to the Dynamics 365 application must be specifically granted to AAD users. Security privileges are assigned within the application to define what a worker can or cannot do. Dynamics 365 provides predefined role-based security to allow limited access to what workers need based on their assigned roles.

EXPLORE

Security roles and privileges within Dynamics 365

MULTIPLE LEVELS OF SECURITY

INTEGRATED WITH OFFICE 365

AZURE ACTIVE DIRECTORY

PREDEFINED ROLE-BASED SECURITY

SINGLE SIGN-ON

Extending the Office 365 productivity suite to workers using Dynamics 365

While there has always been integration between Dynamics and the rest of the Microsoft productivity suite, the shared tenant model with Dynamics 365 and Office 365 simplifies this integration. Traditional integrations required connectors, whereas now integrations can be turned on in just a few steps during setup and configuration. Some of the benefits of these integrations include.

EXPLORE

Exchange
Provides workers the ability to track emails, apply templates from Dynamics 365, attach KB articles, create tasks and access Dynamics 365 records, all from the Outlook UI.

SharePoint Online
Dynamics 365 allows for attachments in the 'Notes' area, but this approach has some drawbacks (e.g. DB size, maximum file size supported, lack of structure). However, integration with SharePoint Online allows a cheaper storage alternative while providing more robust document management features like versioning and approval workflows.

Excel
Allows workers to export/import Dynamics 365 data, create Excel templates from existing data, and refresh Dynamics CRM data directly from Excel using Pivot Tables and Dynamics worksheets.

Power BI
Provides the option to easily embed Power BI visualizations into personal Dynamics 365 Dashboards. It can also use Dynamics 365 as a source to generate reports and share them with non-Dynamics 365 users.

Teams
Allows Dynamics 365 to be added as an app within the Teams collaboration workspace to connect data in context of what the team needs.

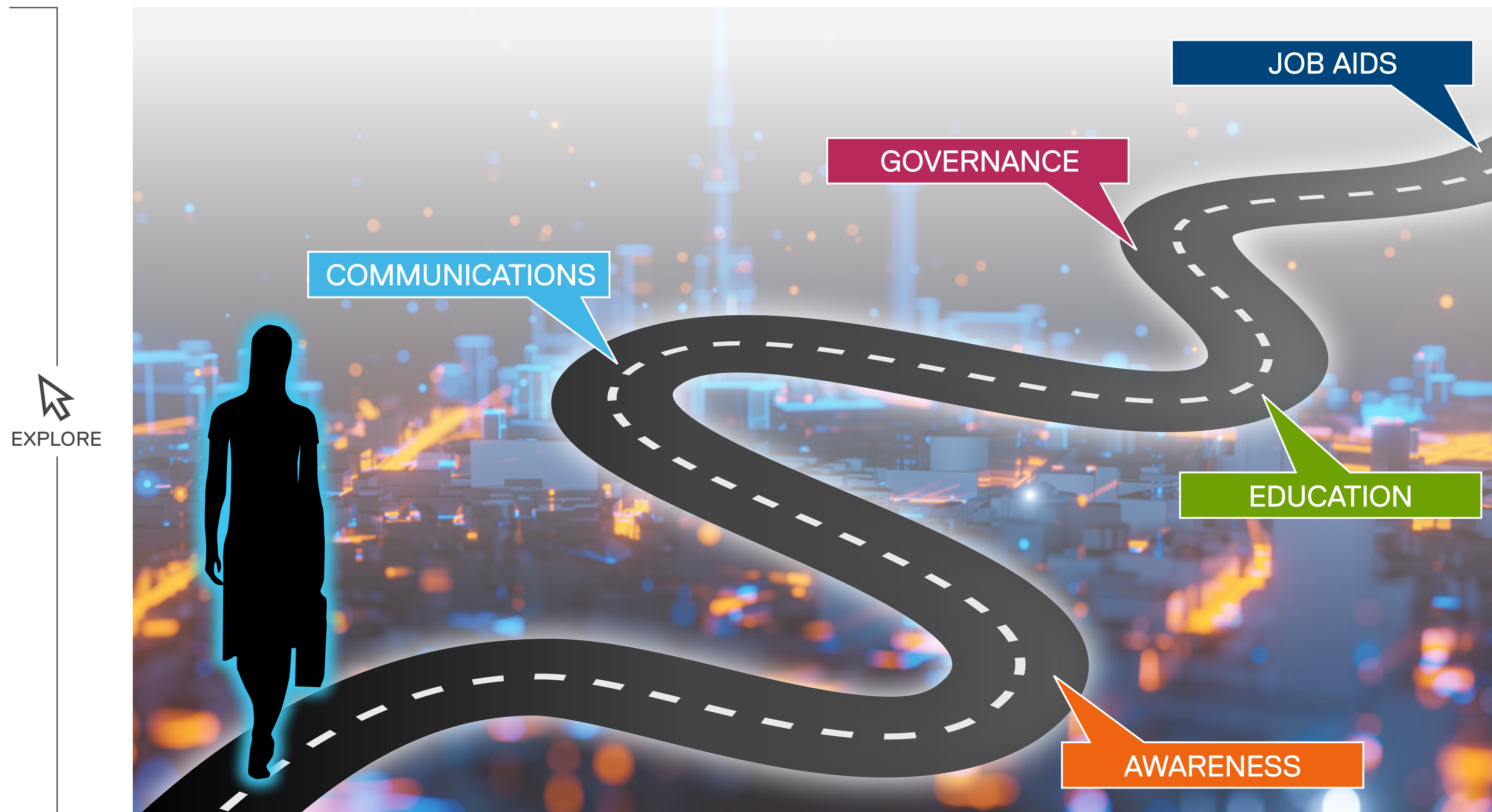Extending the Office 365 productivity suite to workers using Dynamics 365

Drive adoption and change from the workers' point of view

Lack of worker adoption is the single biggest reason why Dynamics 365 ERP and CRM solutions fail. The importance of an adoption and change management program cannot be emphasized enough to ensure the organization reaps the benefits of the solution. The key to successfully transitioning from the old way of working to the new way is by developing a persona-centric approach to adoption and change management (ACM) to help workers navigate through the change journey.

Changes to workforce technology is ultimately a personal experience for workers. From their point of view, workers want to understand what's in it for them, why they should care and how easy is it to change. A comprehensive, persona-driven approach to driving adoption allows awareness, communications, education, governance and job aids to be more targeted, tailored and effective. Developing an in-depth understanding of how workforce personas do things today enables the vision of how they could do things in the future. With this awareness, organizations can design a targeted ACM program to move workers through the cycle of change and gain their buy-in to embrace new services with enthusiasm. Overall this persona-driven model for adoption and change management will better position organizations to maximize their technology investments and reap the rewards and benefits of a more productive workforce.

Learn more about the components of a successful Adoption and Change Management Program by reading our perspective Take a Personalized Approach to the Human Side of Technology Change.

EXPLORE

JOB AIDS

GOVERNANCE

COMMUNICATIONS

EDUCATION

AWARENESS

Partner with the Dynamics 365 experts

Dell Technologies Services understands the Dynamics 365 solution industry best practices and the wide array of available choices for its extensible framework. Our Dynamics 365 Practice has deep industry expertise designing and delivering modern ERP and CRM solutions. We can help organizations navigate whether to use the native platform, customize or adopt pre-built add-ons to meet unique business needs.

Contact your Dell Technologies Sales Representative to learn how we can help you develop a Dynamics 365 solution tailored to empower your workforce to make better, more informed decisions.

DELLTechnologies

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