Where to take Dynamics GP after your first 18 months

This eBook is offered by Technology Management Concepts,
the #1 Microsoft Dynamics ERP Partner in Southern California

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"Companies change their ERP Partner mainly because of lack of support, the need to move to the cloud, larger projects their current partner can't support, lack of specific industry expertise by their current partner, etc. It is usually around 1-2 years a Dynamics customer will stick with their current partner if things aren't "going well" before they plan on making a change. Mainly because it's all too new and too expensive to make a move before that."

Jennifer Harris, TMC President

Inc. 5000 AMERICA'S FASTEST GROWING PRIVATE COMPANIES   Bob Scott's 2016 TOP 100 VARS   accounting TODAY THE 2016 VAR 100   Microsoft Gold Partner

Checklist!

18 months
Post-Implementation Checklist

✅

Where your Dynamics ERP system should be after the first 18 months of an implementation?

If you can't check off all the boxes in this list....

You probably should be looking for a new partner that can help support you and accomplish those goals.

Is Phase 1 really complete?

It's been 18 months, so you should be up and running on your ERP software and checked off some critical boxes in your implementation plan.

Phase 1 is typically intended to build a solid foundation, so that any future Phase 2 (or 3, 4 ......) will be stable, and can leverage the work done in Phase 1.

Once Phase is 1 is (truly) complete, it is time for Phase 2.

Let's Review What Should Be Completed By This Point
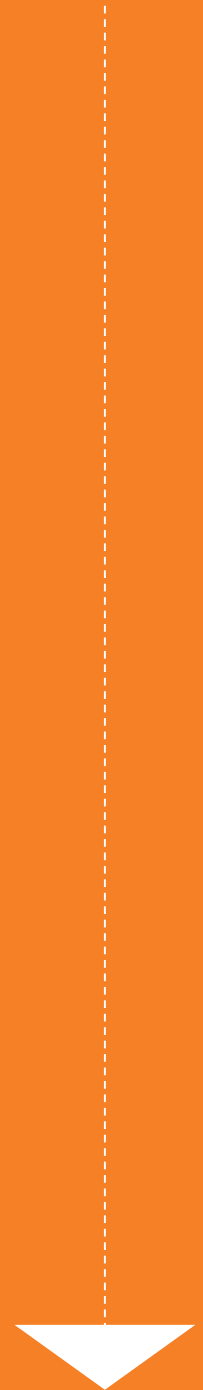
Phase 1 | Steps That Should Be Completed

- Start with the list of Goals, Objectives and Critical Success Factors from the initial implementation & project plan. Has this list been successfully implemented and deployed? Some of these may have been discarded during the first phase, due to time, expense or complexity.

- Did a "Wish List" of items get created during the initial implementation? Now is the time to address any remaining items here.

- Review your Process Documentation. Is it up to date, or does it need to be revised to accurately reflect any changes since the initial implementation? You do have Process Documentation, right? If not, now is the time to start.

- Has the Team truly absorbed their training? An easy way to check is ask their confidence level in training someone new. You should also ask if they feel the time is right for additional training.

- Have you kept up with "What's New" for your system? Microsoft release new features thru a regular update cycle, have you learned about the new enhancements?

OK, Phase 1 is complete!!!

Once Phase is 1 is (truly) complete, it is time for Phase 2.

This is where you can combine your knowledge of **"What's New"** and the results from reviewing Phase 1, and determine **"What's Next?"**

Is there a Phase 2 or 3 to your implementation?

Modern ERP systems have extensive capabilities, and few initial implementations will attempt to tackle all of them in Phase 1

For many (if not most) companies, the initial implementation of the new ERP system focused on the areas with the greatest need, and other parts of the system were perhaps left off the initial project plan.

With the passage of time, the new ERP system should now be stable, and it is time to look at really maximizing the value the new ERP system can offer.

Let's look at some potential options for Phase 2, 3, or 4 for your ERP Implementation

Upgrade to most current version of Your ERP System

Have you kept up with installing new versions and updates for your ERP system? New features are released regularly now, and you could benefit with upgrade to the latest version. By not staying current, you can risk unintended consequences.

Signs to watch for:

Users are slipping back into old habits – look for a workflow automation, or a new feature in the latest version, to process this activity.

Users are creating "work-arounds" – the ERP system is letting them down, somehow, time to find a proper solution.

Now is the time to review your ERP's supporting cast as well – the tools used for reporting and analytics, dashboards and KPI's. If have already made the switch to O365 and PowerBI, then you're covered. If you are still using other tools, then time to get current with these as well.

Move to the Cloud?

If you are running an On Premise ERP System, Is It Time to Consider A Move to The Cloud?

There are many benefits to migrating your ERP to the Cloud:

- ✓ Make upgrades easier
- ✓ Save money on your IT costs
- ✓ Make your system more flexible

For many companies, the move to the Cloud is a gradual transition. It might have started with Office 365, or a XRM system. At the time of the initial ERP implementation, it is common to install locally, leveraging existing servers and other infrastructure. As that equipment ages, however, moving the ERP to the Azure Cloud can both reduce overall costs, and simplify your ongoing IT overhead.

Process Automation:
Create Workflows to Streamline Your Business Operations

With an eye towards minimizing disruptions and maintaining existing levels of efficiency, some manual processes or approvals may have been left in place during the initial implementation. However, manual systems are prone to errors, delays and other issues.

Utilizing automated workflows and process approvals will tighten internal controls and improve efficiency.

Human Resources and Payroll

For many initial implementations, an existing reliance on an external payroll provider may have been left in place. In other cases, it might have been decided to minimize the potential disruption caused by replacing both ERP and HR/Payroll at the same time.

These capabilities, however, are in the ERP solution, and now may be the time to review the decision to use an outside provider.

Better reporting and analytics.

While this is a common area for driving new ERP deployments, the goals and objectives of better reporting can get left behind initially, due to the needs of keeping the operations moving forward.   Don't let this remain as a permanent state however, since the Business Decision Makers have a real need, and the ERP system can provide it.

With the ERP system now stable, it might be time to re-visit the Business Intelligence components of the system and make certain they are being utilized to their potential.

Some examples of more enhanced Analytics are:

- Power BI Pro

- Jet Professional or Jet Enterprise

- Solver BI 360

Now You Know:

✓Where Your ERP Implementation Should be After 18 Months

✓What Your Phase 2, 3 & 4 Implementation Options Are

If you haven't yet finished your Phase 1 Implementation or if your current ERP partner hasn't engaged with you on next steps for Implementation Phases:
It Might Be Time to Look for a New Partner

Engage Your Current Partner Why You Aren't There Yet. If You Aren't Satisfied With Their Answer, It's Probably Time to Find a New Support Partner for Your ERP System.

Some questions to ask a New ERP Partner:
- Can they support your growth?
- Do they have your specific industry knowledge?
- Do they have Cloud expertise/internal hosting options for you?
- Etc.

What you need to know about your change of partner

Easy Steps to Changing your partner:

- Sign the Change of Partner agreement with Microsoft
- Engage with your new partner to assess the current state of your system
- Change of partner can be completed, at any time, in just a few days.

Useful Links

- Change of Partner
- Dynamics GP - What's New
- Dynamics GP - Hardware Requirements

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TECHNOLOGY MANAGEMENT CONCEPTS

We concentrate exclusively on Dynamics ERP so you can concentrate on everything else.

TMC specializes in the implementation of financial and business management systems, helping our customers streamline their processes and maximize productivity. As a Microsoft Gold Partner, we are recognized for exceptional customer service, training and support. Combined with our proactive customer service, we've built our reputation as the premier Microsoft Dynamics Partner in Southern California, while also serving companies nationally and globally.

At TMC, we are a 100% Microsoft shop supporting Microsoft Dynamics ERP products.

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TMC has completed over 1,000 ERP implementations since it was founded in 1984.

Currently serving over 200 Microsoft Dynamics ERP clients, the TMC team has a combined 400 years of consulting expertise. TMC has been a Gold Certified Microsoft partner for more than 10 years and in 2016, we were nominated to the famed INC 5000 Fastest Growing Businesses. In addition, TMC has been a Microsoft President's Club member and has been included in Bob Scott's & Accounting Today's Top 100 VAR Awards for 8 years running.