

The 101 guide to implementing Microsoft Dynamics 365

How to get the most out of your
Microsoft Dynamics 365 solution



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introduction

The world of business is changing.

The development of cloud technology has led to a new digital era, where modern businesses demand measurable results and continual improvement.

In this age of the cloud, both businesses' and customers' expectations have changed considerably, bringing a new set of challenges when it comes to ERP and CRM implementation.

Microsoft Dynamics 365 is designed specifically for the cloud era, bringing a range of benefits with it. Compared to more traditional ERP and CRM systems, Microsoft Dynamics 365 provides greater connectivity between departments, improved analytics and insights, a shortened sales cycle and better customer service.

The right implementation method is the key to unlocking the potential of this software, and in this guide we will cover everything you need to know about choosing the right approach for your business.

old vs new implementation methods

While there are a multitude of different implementation methodologies, generally speaking these variants can be gathered into two overarching categories:

old-world **big bang** implementations and a more modern **agile** approach.

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big bang approach

Large ERP platforms were renowned for the considerable time and effort required in set up, which caused large-scale disruption to operations.

Big bang implementation methods utilise a ‘waterfall’ approach, where each process takes place in a systematic manner.

This method is rooted in on-premise ERP systems, which require the installation of both hardware and software.

While this invasive method of implementation took plenty of time and money to deliver, the advantage of such an approach was a consistent company-wide system, which would potentially last for many years.

In the digital era, however, both software and the needs of businesses and customers move much faster.

As a result, the majority of businesses simply can't afford to spend the time and upfront cost on such wide-scale ERP and CRM implementations.

Aside from the change in culture, such an all-encompassing application method conflicts with the adaptable Microsoft Dynamics 365 model.

Agile methodologies provide increased flexibility and speed by delivering the ERP or CRM solution in stages.

An agile approach focuses on quick returns, whereby functions are rolled out across your business in short cycles.

Agile is essentially the antithesis to the big bang method - where rigid, linear processes are replaced with far more flexible sprints.

The main benefit of an agile approach is that it offers you quicker returns by providing a fully operational piece of functionality before implementing another aspect of the solution elsewhere.

This means that an agile method could start in one department (such as sales or marketing), or focus on improving a specific aspect of your business (such as the customer journey), before moving on to the next priority and repeating the cycle.

While this general concept lies at the heart of most agile methods, not all approaches are cut from the same cloth.

There are a number of variants - including Scrum, eXtreme Programming (XP), and Feature Driven Development (FDD) - which each offer differing approaches to delivering results.

agile approach

key takeaways

While agile approaches are more suitable for implementing Microsoft Dynamics 365 in the cloud era, many legacy providers still utilise methods that are ingrained in the big bang approach.

Although agile is definitely the way to go, it's important to understand that the above approaches are all broad methods utilised to implement various types of software.

Very few agile methodologies are specifically designed for Microsoft Dynamics 365. That's where RAPID comes in. Our purpose-built methodology is created in the cloud age, specifically for efficient, adaptable and results-driven Microsoft Dynamics 365 implementation.

the RAPID methodology



The RAPID Methodology is our agile approach created specifically for Microsoft Dynamics 365. This iterative methodology focuses on delivering value through implementation, ongoing support and continuous outcome-based improvement.

The RAPID methodology is built around five core tenets:

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RAPID is results-driven

Traditional ERP and CRM implementations are expensive, time-consuming and challenging. In the cloud era, you no longer need to accept this.

RAPID identifies the areas of your business with the potential for most improvement at least cost, delivering visible, quantifiable change. Inciper focus on the complete solution and have the breadth of skills required to ensure solution adoption and business objectives are met.

RAPID is adaptable

Despite Microsoft Dynamics 365 removing the need for time-consuming activities, many partners are still applying old world thinking to their client engagement approach.

Instead of following a rigid siloed implementation model, our approach is flexible, priority led, and adaptable. RAPID is not simply a method for software implementation, but engages your business to support organisational change, delivering continuous improvement.

RAPID focuses on your **priorities**

Implementing Microsoft Dynamics 365 should not be a monolithic process, where an entire ERP or CRM solution is created from the ground up.

Instead, results should come from starting where the biggest impact can be made in the shortest space of time. Our iterative approach focuses on the biggest opportunities for improvement within your business to help you achieve the highest value outcome.

RAPID is incremental

With the speed at which businesses and technology develop, slow ERP and CRM implementations are so time-consuming that they run the risk of being obsolete on delivery.

Our strategy recognises this issue by introducing new functionality in increments through regular releases to production. RAPID delivers instant benefits and demonstrates success before moving onto the next stage based on your new requirements.

RAPID is dynamic

Old-world waterfall approaches from legacy providers simply aren't built to respond to the changing needs of modern businesses.

Our approach uses a fluid, responsive method built for a dynamic age. We understand that business needs are ever-changing, with our company created to reflect this need. We don't just provide Dynamics implementations, we are Dynamic.

RAPID is how we deliver value

the RAPID process



Guided by the five core tenets, RAPID is an iterative approach to delivering value through implementation, ongoing support and continuous outcome-based improvement.

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Because your business is continually evolving, our method is not linear, but delivers results through a recurring cycle. Our method is built around the evolving needs of your business. Like the wheel of a sports car, the RAPID methodology is built for ongoing movement and speed, driven by your business priorities.





stage 1: identify

Understanding your company's vision and the needs of the business is central to our process. In the initial stage, we identify your business processes from the inside out to understand how we can add value.

This is our opportunity to drill into your business capabilities - from where you excel, to the areas that need work - to understand what is causing any problems in your processes.

From this initial analysis, we can then prioritise your business requirements against Microsoft Dynamics 365, creating a delivery roadmap that provides the business with maximum benefits in the shortest period of time.

This roadmap allows us to review the capability and capacity of the business and complement the team with the skills required to drive the best value implementation possible.

key takeaways

Purpose: Understand your business processes

Feature: Identify the business problems

Benefit: Invest money where it makes the most difference



stage 2: focus

We can then focus in on each business priority, to ensure we know how to bring the requirement to reality – this could be through training, business change, system or process design. We work together with you as a single cohesive team to ensure that the idea is understood from every aspect.

Utilising standard Microsoft Dynamics functionality, the Microsoft PowerPlatform and integrating the Microsoft Solution cohesively into your current system landscape is our key driver. Gaining detailed insight into your business processes, your people and what differentiates you drives an output that delivers the desired business benefits.

Our focus throughout this stage is on meeting your business objectives in the most efficient way possible.

key takeaways

Purpose: Focus on how the implementation will take place

Feature: Put forward an implementation strategy

Benefit: Implement the solution where it will provide the greatest value



stage 3: create

With the end goal understood, we set about to deliver the vision, working in partnership with your team to put together the integrated solution that will fit within your business and give you the business benefits that you have identified.

Our goal is to meet your objectives, so business engagement continues to be at the heart of our approach, with our implementation experts providing continuous show and tell sessions, knowledge transfer and solution validation throughout the create process.

This not only validates the solution as fit for purpose, but also provides support for you and your team during the necessary change management activities.

key takeaways

Purpose: Delivering the integrated solution

Feature: Short sprint cycles and continuous support

Benefit: Minimising risk and disruption for your business



stage 4: transition

On completion of the solution creation, we work with your business to transition the concept into operation. This stage includes user acceptance testing, go-live rehearsals, and training of the user community followed by a transition to the new solution.

When the Transition stage is complete, your organisation will have all the necessary business processes and solution knowledge required to realise the intended business benefits.

Once your initial solution is operational, post-release we work closely with your team to offer immediate hypercare support before handing over to the business as usual support team.



key takeaways

Purpose: Support with going live

Feature: Final testing and training before going live

Benefit: Ensuring you and your team are fully happy and ready for the new implementation



stage 5: enhance

The incremental approach of our method means that short cycles are continually repeated to create ongoing, value-driven improvement.

This final stage allows us to enhance your solution through continuous improvement. As numerous departments intersect and your processes develop, enhancement is an essential evaluation stage within the cycle.

The evolution and structured support provided by Inciper's dedicated team ensures your users remain in control, with the necessary skills added to continually improve the service they provide.

key takeaways

Purpose: Enhancing your Microsoft Dynamics 365 solution

Feature: Repeat the cycle to upgrade solution

Benefit: Continuous improvement

what to look for in a Microsoft Dynamics 365 partner

When choosing a Microsoft Dynamics 365 partner, it's important to understand their approach to implementing this ERP and CRM solution. All providers will utilise an implementation method, and each will have a different approach to implementation. The approach a company uses will tell you a lot about what you can expect from a provider.

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While the majority of Microsoft Dynamics 365 suppliers no longer use a big bang approach, many methods are inextricably interwoven within this old-world philosophy - using rigid approaches even when focusing on staged implementation.

Many suppliers utilise this type of method, which is rarely focused on delivering a combination of functionality, speed and value.

Such an approach undermines the Microsoft Dynamics 365 ethos. To ensure both value and effective implementation, it's important to find a partner who utilises a truly flexible, agile method.

Inciper was born in the age of the cloud. We are a new breed of company built to provide an innovative solution to the evolving requirements of businesses within the digital era. Instead of using a linear system for implementation, we deliver Microsoft Dynamics 365 through our own continuous enhancement approach - RAPID.

Here are the benefits of working with Inciper

- Purpose built method designed for agile implementation
- Results-driven cycles to deliver tangible results quickly
- Speed and flexibility through short sprints
- Continuous development and ongoing improvement

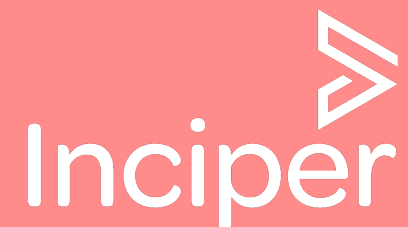


Inciper - A new breed of company for a new era of ERP implementation.

Next Steps:

Now you know how to get the most out of your Microsoft Dynamics 365 implementation, see how we can help solve your business challenges with a free 30 minute consultation with one of our experts.

**Book a free 30 minute
consultation online**



“Microsoft provided an enterprise quality solution that we were able to customise for our specialist market with the support of Inciper. Through Dynamics 365 we have introduced rigour and quality in every aspect of our customer journey. Our clients really value our responsiveness, proficiency and ready access to their individual case status.”



meet the author

Mark Roberts, founder and director of Inciper

With over 18 years' experience in the delivery of business solutions, Mark has a highly successful track record of implementing Microsoft Dynamics 365 to global businesses.

Mark's ability to drill down into the detail, as well as manage complex programmes at a senior level, ensures that business-critical decisions and business benefits are at the heart of his implementation strategy.

Supported by a wealth of experience in delivering business applications through both agile and waterfall methodologies, Mark understands the best approaches to delivering results and ensuring success.



Inciper is a Microsoft Dynamics 365 partner created in the digital age. Our innovative business model offers a new way of thinking about ERP and CRM implementation, through our rapid, results-driven methodology designed to deliver the right product for your business.

inciper.com

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