

THE ULTIMATE CHECKLIST TO PREPARE FOR A SUCCESSFUL MOVE TO MICROSOFT DYNAMICS 365

Looking to upgrade your legacy Microsoft on-premises ERP system?



Microsoft Dynamics GP, NAV, SL, and AX have been the solution of choice for hundreds of thousands of organizations across the globe. And today, a majority of these organizations that have not already made the move to the cloud are seriously considering “What’s next?”. Many tasks can be performed to increase your organizational readiness for the implementation of your new ERP solution. These 5 areas must be addressed as you plan to move from your on-premises Dynamics ERP solution to Microsoft Dynamics 365 in the cloud.

01

Take Stock

Identify where you are now and decide what needs replacing and when. To help you with this exercise, here are six very important to-do’s, or top areas to take stock of before you select your new **Microsoft Dynamics 365 (D365) ERP**.



APPLICATION INVENTORY



MOD INVENTORY



INTEGRATION INVENTORY



OUTPUT INVENTORY



FILES



REPORTS

02

Make Your Business Case

Preparing a business case to justify the investment of an ERP solution like, is no different than building a business case for any other investment. Be sure to check these boxes as you create your case:

- Start your Total Cost of Ownership TCO spreadsheet looking up to 7 years out.
- Include both external costs and internal costs.
- Consider materiality and probability and document all assumptions.
- Include qualitative as well as quantitative commentary.
- Consider your ROI, it will keep business value on the agenda.



03

Change Management Planning

To get the ball rolling, you need to assess the readiness of the people most directly affected by the project. Be sure to:

- Make an honest assessment of your ability to handle change and identify the risks.
- Put people at the center of your change management efforts. How people are managed through the process will be a significant success factor.
- Communication is key.
- Appoint change management team roles.



04

BI & Analytics

It is very important to plan for and consider the role business intelligence (BI) should play. To start, gather an inventory of all the data sources that will be used for your BI or analytics. Here are the **top 4 readiness activities** for successful analytics:



CONSIDER DATA SOURCE TYPES



DATA GOVERNANCE



IDENTIFY DIMENSIONS AND MEASURES



DESIGN THE MODEL

05

Prepare for a D365 Licensing Quote

To work out your licenses, we recommend starting off by cracking open a spreadsheet!

- Download and study the Dynamics licensing guides from the Microsoft website. It’s painful but has to be done!
- Know the various ways you can purchase software and what the strengths and limitations are for each option.
- Work out your named user counts.
- Ask your partner to help with licensing and pricing.



Wondering where to go from here?

The Sikich team is happy to answer any questions and provide any additional guidance as you prepare your business for Dynamics 365 and the Microsoft cloud. From selecting the right Dynamics 365 solution for your company to organizing your selection team, working out your licensing requirements, business process documentation, security, and more, our team of professionals is ready to assist.