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A successful upgrade to
Dynamics 365 ***With the right
migration strategy***

Is your organization *cloud-ready?*



It's no coincidence that more and more companies are switching from Dynamics AX or any other ERP solution to Dynamics 365. Business applications in the cloud offer flexibility, support faster innovation and help you to respond better to market demands. Cloud software is constantly improving and when using Dynamics 365 and Azure technology, you are assured of the highest level of security. But where to start?

An upgrade to Dynamics 365 comes with a few important questions:

- What does an upgrade process entail?
- What will the impact on your organization, processes and employees be?
- Do you have insight into the differences between your current Dynamics AX application and the potential capabilities of Dynamics 365?
- How should you manage your data when migrating to the cloud?

HSO offers companies an ERP Modernization Assessment to get answers to these important questions in a short time and without an extra investment.

This factsheet shows you what the assessment entails, our project approach and the outcome you can expect. We look forward to supporting your cloud journey!

In approximately 3 weeks,
***you will clearly see the
benefits the cloud has to
offer***, the impact on your
business processes and what
is needed for a ***successful
upgrade***.

How to get started on your **(Cloud) ERP Modernization journey**

Envisioning Workshop

(1-2 days)



Inspire

Imagine a future state ERP solution for your business

Use design thinking

a proven problem-solving process – to organize great ideas through creative and critical thinking exercises. With this workshop, we will address:

- Key Drivers and their impact to your ERP Modernization roadmap
- Major process enhancements
- Change Management considerations

week 1

Solution Assessment

(3-5 days)



Design

Discover what's possible by aligning technology to business goals

Analyze what's feasible

whether it is about an expansion of your current business application landscape or a greenfield approach, it's about how technology will affect your objectives. Our technical analysis will cover:

- High-Level Target Architecture
- Integration Scenarios
- Dynamics 365 standard versus Partner solutions

week 2

Visual solution demonstration

(1 day)



Empower

Empower others in your organization to see the value

Share demo or video assets across your organization to increase alignment and enthusiasm for the value of your ERP transformation.

Based on 1 defined process, your will get a feeling about working with Dynamics 365 and how it integrates with your Modern Workplace.

week 3

In approximately 3 weeks, you will clearly see the benefits the cloud has to offer, the impact on your business processes and what is needed for a successful upgrade.

The first step of a *successful cloud journey*

The ERP Modernization Assessment is the first step of a journey to the cloud and provides insight into the benefits of the upgrade, the upgrade process and the expected Return on Investment (ROI).



The Assessment provides insight into:

- The difference between Dynamics AX on-premise v. Dynamics 365 Finance in the cloud.
- How Dynamics 365 supports the realization of your business objectives.
- How the migration will be organized. We start by using standard functionality as much as possible. This reduces cost and effort at the same time.
- A proposal for either a more detailed analysis of your modernization or for the implementation itself.

How does the Assessment work?

After a review, we organize a two-day workshop (step 1), in which the ERP manager and/or the IT manager, key users from the business and other relevant stakeholders are present.

We perform the Functional (step 2) and Technical review (step 3) and then produce the Deliverables (step 4), based on the output from the workshops.

During the workshops:

- We take a closer look at the business processes: which processes are currently supported by Dynamics AX?
- We conduct a technical review of your current AX configuration: which customizations are in use and can Dynamics 365 standard functionality replace them?
- We compile a summary of the most important functionalities for your organization in Dynamics 365.
- We map customizations, ISV applications, localisations and interfaces, review what extent the organization depends on these, and how can they be migrated to Dynamics 365.

Based upon the functional and technical review, we draw up an ERP Modernization Assessment report that contains an overview of all aspects that need to be considered. You will receive a final presentation in which we present our findings and recommendations.

What do we require of you?

- Prior to the workshop, we schedule a review with the ERP owner and/or IT Manager.
- HSO requires access to all systems and applications.
- During the workshop sessions (approximately 2 days), we need availability of the CXO, the ERP owner/IT Manager, business department leads and other relevant stakeholders.
- The ERP owner/IT Manager must be present for the final presentation.

The result

After the Assessment you receive:

- A report with a proposal for the correct migration approach, including recommendations on any existing customizations.
- A report of the functional assessment, technical assessment and go-forward recommendations for the decision makers in the organization.

The **ERP Modernization Assessment** is a cost-effective approach that provides you with the right information to decide if, when and how to make the transition from Dynamics AX to **Dynamics 365 Finance**.



ERP Modernization

Assessment stages



Project Initiation

- Initial stakeholder meeting on scope
- Share assessment goals
- System access

Functional review

- Assessment of new capabilities and enhancements against existing functional Dynamics AX configuration
- High-level business process review

Technical review

- Customizations, ISV and interface assessment and mapping with Dynamics 365 Finance standard functionality
- Analysis of data migration requirements
- Requirements definition of the technical D365 architecture and other platform requirements

Deliverables

- Project scope definition in HSO Business Function Model
- Mapping of Dynamics AX solution (incl. ISVs) v. D365 Finance standard functionality
- Findings of functional & technical assessments and recommendations
- Project migration approach including timelines and budget estimates



The **ERP Modernization Assessment** gives insight into the impact of Dynamics 365 on your **processes, data, custom work** and **your people**.



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Would you like to know more about the HSO ERP Modernization Assessment?

Our experts are ready to help you.
Feel free to contact us.

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HSO has been active as a Microsoft Solution Integrator since 1989 and has grown into a successful ICT company with more than 800 employees and offices in Europe, North America and Asia. HSO supports local and international companies in retail, wholesale, industry and (technical) services to make a difference with digital technology. The foundation for this is Microsoft Dynamics 365 (CRM & ERP), Microsoft 365 and Data & AI. HSO takes care of the implementation, optimisation and 24/7 management of these cloud solutions, worldwide. HSO belongs to the Microsoft Dynamics Inner Circle and is proud to have been awarded the title 'Microsoft's most customer-oriented partner'. You can find more information on HSO at www.hso.com/nl