



3 Inspiring Dynamics 365/AX Case Studies: Proving There Is Hope for Your Dynamics Project



Having Trouble With a Current Microsoft Dynamics AX or Dynamics 365 Project? enVista Can Help.

Enterprise Resource Planning (ERP) environments are not simple, and Microsoft Dynamics AX and Dynamics 365 Finance and Supply Chain Management are no exceptions. Implementations, upgrades, and support projects can be a challenge and do not always go as planned. If your project is off track and you are unsure how to get it back on track, you are not alone.

In this short eBook, we have compiled **three unique companies** that have had projects fall off track and engaged enVista to help right the ship. Each company, in some fashion, was not getting what it needed from its current Dynamics Partner and approached enVista for a second opinion.

In order to protect our **client's privacy**, we will keep each case study anonymous. Each case study explores the challenges, solutions enVista recommended and deployed, and the results of the projects.



LEADING MOTOR-HOME BRAND

Company Overview

Company A is a leading motor-home brand in North America and greatly impacts the industry by producing nearly one out of every four motor-homes sold each year. Company A was formed as a result of a strategic merger of two other leading motor-home brands. This consolidation solidified Company A as the #1 retailer selling motor-homes and market leader.

Challenge

Company A approached enVista when it was having performance issues with its Microsoft Dynamics AX 2009 environment and could not get the support it needed from its former Microsoft Dynamics Partner. It was experiencing support issues and slow response times and needed quicker resolutions. In addition, Company A was looking for a Dynamics Partner that was well versed in Dynamics 365, specifically with experience in designing an upgrade from Dynamics AX to Dynamics 365.

Furthermore, Company A's Customer Service Representatives were using manual processes to triage customer calls. In addition, the work order creation process for Field Technicians was long, inefficient, and prone to human error. Field Technicians had manual processes for receiving work orders and scheduling, and schedules were not optimized based on proximity of customer work orders. Lastly, parts and inventory were not always available when Field Technicians arrived, resulting in long customer response times, inefficient scheduling, and overall poor customer service.

Solution

Initially, enVista jumped in and provided much needed Dynamics AX 2009 support and performed a System Health Check.

A System Health Check is a comprehensive analysis of your business systems to identify problems that can slow system performance and provide recommendations for improvements. A System Health Check should follow a multi-pronged approach including:

- 1. Analysis of Goals:** What are your organization's goals and objectives?
- 2. Identification of Challenges:** What are the resources/processes that may impact users from taking full advantage of the system?
- 3. System Audit:** What are potential problems with configurations, workflows, custom coding and interface logic?
- 4. Recommendations:** How to get the most out of the system to meet current goals and objectives?

Secondly, enVista implemented Dynamics 365 Customer Service to allow direct integration to Company A's telephony system, which automatically populates customer information when receiving calls. Now Customer Service Representatives can quickly see the caller's motor-home make/model/year and other relevant information, such as warranty claims and repair history. Additionally, a knowledge base of typical repairs is available for a look-up in order to triage easy resolutions. Customer Service Representatives can now close the order without having to go into the Field Service application. Customer Service Representatives can generate a work order within seconds and automatically have it sent to the Field Service Team for next steps.

Next, enVista implemented Dynamics 365 Field Service to reduce the manual effort required to track the flow of work orders, scheduling, processing, and closing out. This ensures that all required inventory parts are available for the Field Technicians when they arrive to fix a motor-home and can perform the service and close the work order once complete.

Lastly, a Dynamics 365 Upgrade Assessment was conducted to determine the roadmap for moving from Dynamics AX 2009 to Dynamics 365 to help prepare for migration. The assessment included timeline, scope, and effort required, as well as an ISV inventory and all customizations and whether they are needed in Dynamics 365.



Results

As a result of enVista stepping in and reviving the project, enVista was able to optimize Company A's Dynamics AX 2009 environment, while also increasing speed of the system. Furthermore, all manual processes for customer and field service were automated or improved with technology. Additionally, enVista optimized performance to ensure the system was ready to upgrade to Dynamics 365. Currently, enVista is implementing Microsoft Dynamics CRM applications, including Customer Service and Field Service, and a complete upgrade is scheduled to follow the current CRM project.

Summary

- Insufficient and slow support from former Dynamics Partner
- Resolved Dynamics AX 2009 performance issues
- Improved customer service experience by reducing manual work
- Improved management of field service, including scheduling, processing, and more

PROMINENT REGENERATIVE MEDICINE COMPANY

Company Overview

Company B was founded in 1985 and is a leading regenerative medicine company. Company B focuses on empowering healing and specializes in advanced wound care and surgical and sports medicine. Company B develops, manufactures, and sells its products providing options to clinicians.

Challenge

Company B approached enVista for assistance on its Microsoft Dynamics 365 upgrade project. Company B was a long-time user of Dynamics AX 2009 and had a heavily customized environment. Company B worked with several Dynamics Partners and did not have a consistent consulting staff on its Dynamics 365 upgrade. Additionally, it suffered from a revolving door of new staff on the project that always needed to get up to speed. Company B wanted a dedicated staff to help with its upgrade and reached out to enVista.

Solution

Initially, enVista was brought in to lead data migration efforts for Company B's Dynamics AX 2009 to Dynamics 365 upgrade. Due to positive feedback from the initial engagement, Company B wanted to explore bringing enVista on as its dedicated Dynamics Partner for the remaining project.

enVista's approach focused on education of Dynamics 365 capabilities and minimizing system enhancements. Before enVista stepped in, the client was not exposed to new system functionality and it could not make decisions based on industry/system best practices. Company B's previous Dynamics Partner had over 30 planned customizations that enVista replaced with base Dynamics 365 functionality.

Results

As a result, Company B saw a huge reduction in customizations and started efficiently using Dynamics 365's out-of-the-box functionality. Additionally, Company B developed strong relationships and communication with enVista and now there is an open-door policy. Lastly, the company was able to take advantage of new warehouse and pricing efficiencies utilizing a combination of Advanced Warehousing features in Dynamics 365 and enVista's enHanced Pricing Management solution.

Summary

- Provided a dedicated project team
- Replaced 30 customizations with D365 base functionality
- Created new warehouse efficiencies with D365 Advanced Warehousing
- Created new pricing efficiencies with enVista's enHanced Pricing Management solution

TOP AMERICAN FOOD-SERVICE DISTRIBUTOR

Company Overview

Company C is a leading American food-service distributor founded in 1989. Company C partners with approximately 300,000 restaurants and food-service operators and has 70 stores across the United States. Additionally, Company C owns and operates wholesale restaurant supply stores, providing a unique way to shop and save on wholesale food and restaurant supply equipment.

Challenge

When Company C approached enVista, it was suffering from very slow system performance after a problematic Dynamics 365 implementation, inhibiting productivity and customer experience. Additionally, it had integrations to its parent company's financial system and had a variety of system enhancements that did not follow best practices. Based on the challenges it was experiencing, Company C did not feel like it was getting the expertise it needed from its current Dynamics Partner. When enVista was brought in, enVista provided a consulting team to evaluate all aspects of the company's system, including, technical architecture, system enhancements, and functional configurations.

Solution

At the beginning of the project, enVista provided a functional and technical assessment of the company's Dynamics 365 system. enVista prepared a detailed Findings and Recommendations Report and shared it with Company C's IT leadership team. Upon completion of the assessment, enVista resolved small system issues that resulted in a drastic improvement in system performance. The most notable improvement was its end-of-day batch jobs from the company's retail locations, which were reduced from one to two hours per job down to 15 minutes. Company C is currently working with enVista to resolve high priority items that resulted from the assessment.

Additionally, a large portion of the project focused on Dynamics 365 and business process best practices and education. For example, enVista reviewed Company C's current integrations and provided a detailed roadmap on how to improve the integrations for long-term success and growth. Some planned system enhancements were eliminated, and enVista recommended replacing them with third-party solutions.

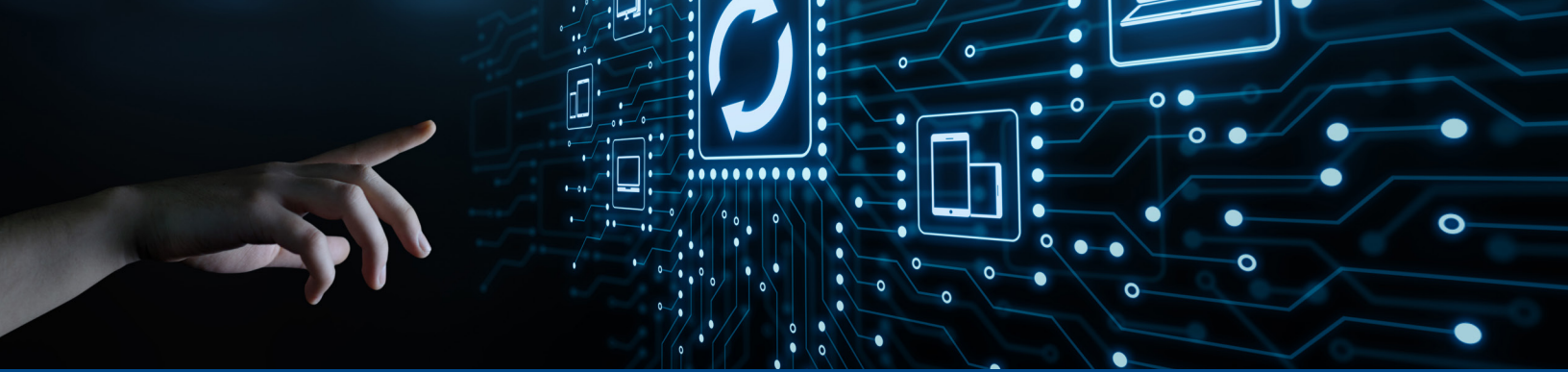
Results

As a result of the project, Company C is experiencing improvement in system performance and has a long term strategy for success. Moreover, the project is ongoing and continues to resolve more issues and improve the user experience and knowledge of Dynamics 365. In addition, Company C is more familiar with Dynamics 365 and business process best practices, such as Accounts Payable, Accounts Receivable, General Ledger, and Procurement.

Summary

- Provided Findings and Recommendations Report to IT leadership
- Resolved high priority issues resulting from report
- Improved overall system performance
- Educated client on D365 and business process best practices





Stop struggling with your Microsoft Dynamics project. We are here to help.

Stop struggling with your Microsoft Dynamics project. enVista has helped many companies just like yours identify project roadblocks, create a plan, and take a corrective course of action. Additionally, if you just want another opinion on a current project, we are happy to provide recommendations and educate you on best practices. To talk to us about a Dynamics project, **[schedule a consultation](#)** with our in-house Microsoft Dynamics experts.

About enVista

enVista is a leading global software solutions and consulting services firm enabling mid-market and Fortune 100/5000 manufacturers, distributors, retailers, and healthcare providers to drive customer engagement and revenue. enVista is a Microsoft Gold Certified Partner, specializing in the Microsoft Dynamics 365 suite of products, including Finance, Supply Chain Management, Sales, Marketing, Field Service, and Customer Service, the Microsoft Power Platform, including Power BI, PowerApps, and Power Automate, along with many other Microsoft Azure services to support Business Intelligence, Custom Application Development and Integration Services.

enVista's clients benefit from a single partner with expertise in a wide range of Microsoft capabilities and that can address all their ERP and IT requirements. enVista has been awarded multiple accolades including recognition as an Inc. 500|5000 List Fastest Growing Companies eight years in a row from 2011 – 2018. enVista has also been recognized by SupplyChainBrain 100, CRN Tech Elite Solution Provider and Indianapolis Top Places to Work.

Let's have a conversation.™

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