

# Microsoft Dynamics 365 Customer Engagement System Health Check



## *Time for a System Health Check-up?*

A detailed system health check can be beneficial across your entire operations, but determining when and if it is appropriate for your organization to undergo a thorough system health check can be complicated. In some instances, a company may not have the proper resources or expertise to conduct a system analysis. However, even if this is not the case, we often find decision-makers and managers within an organization are susceptible to overlooking critical issues and process gaps because of their proximity to the business operations.

System health checks should be included as a matter of “routine maintenance” for organizations. Much like an annual physical, it is better to see potential issues ahead of time through a system health check in order to proactively resolve them before they negatively impact business operations. While routine evaluation is the recommended best practice, there are symptoms that may be

present in your system that warrant an immediate evaluation. These include noticeable lag in system performance, change in utilization and adoption, or even perceived impact of available capabilities after an upgrade.

### **Here are some questions to help determine if it is time for your organization to conduct a system assessment:**

- Have there been changes in business requirements due to organizational growth, employee turnover, or emerging market trends?
- Are there identifiable performance issues?
- Is there a perceived loss of productivity because of inconsistent operations or tedious and labor-intensive workarounds?

One specific area we recommend conducting a system health check is for your company’s Microsoft Dynamics 365 (D365) suite of software applications.

enVista's System Health Check for Microsoft Dynamics 365 covers customer engagement applications which include:

- Sales
- Field Service
- Customer Service
- Project Service Automation
- Marketing

## Our Approach

enVista's prescription for a comprehensive Microsoft Dynamics 365 (D365) system health check is comprised of a multi-pronged approach that includes the following:

**Analysis of Goals:** What are your organization's goals and objectives with using D365?

- 1. Identification of Challenges:** What are the resources/processes that may impact users from taking full advantage of D365?
- 2. System Audit:** What are potential problems with configurations, workflows, custom coding and interface logic?
- 3. Recommendations:** How to get the most out of the system to meet current goals and objectives?

### 1. Analysis of Goals

It is important that enVista gets a baseline understanding of your organizational goals and how the processes and system design aligns to support and deliver towards these goals. Organizations vary greatly in how they want to use the system, and this initial analysis of organizational goals provides a foundational element for our analysis. enVista starts with a Business & Technology Assessment. The key activities of this assessment include:

- Conduct interviews and document the goals and objectives of key stakeholders from across the organization at various levels of

responsibility as they relate to D365

- Review existing processes and technology documentation as they relate to D365 and the organization's use of the system
- Document all systems, e.g., D365, Office 365 (SharePoint), Google Docs, etc., that are used as part of the sales process

### 2. Identification of Challenges

Often, enVista sees similar challenges from one organization to another. Some of these common challenges include:

- Capturing as much relevant information about your customers as possible
- Using an over-engineered system that has become ineffective because sales staff resist the use of the system due to it being viewed as burdensome and lacking in value
- Determining which data is the right data – are we following appropriate duplication procedures?

Following the analysis and documentation of goals and objectives through stakeholder and user interviews, enVista will utilize this information to identify potential gaps and opportunities to streamline and optimize system functionality driving utilization and growth towards fulfillment of goals and objectives.

### 3. System Audit

A system audit is designed to identify and resolve setup and data problems that could cause improper or inconsistent operations within the D365 system. D365 is a very robust system, and Microsoft has empowered users to easily make changes to enhance their systems. Organizations continue to refine their processes to take advantage of new features after the initial go-live, but without a proper health check, problems can exist and exacerbate without the organization knowing, resulting in a degradation of D365. At a minimum, enVista will validate the following to identify potential issues and assess risks:

- Configurations
- Workflow Configurations
  - Async and sync workflows
  - Realtime vs. background processes
  - Workflow resource allocation and output monitoring
- System Jobs
- Auditing Functionality
- Scripting
- Plugins
- Solutions
- Data Backup Snapshots

It is necessary to conduct a periodic review of each of these areas because when they are left unchecked, they could impact performance, usage and your bottom line.

#### 4. Recommendations

There is no one-size-fits-all D365 implementation. In the past, we have observed that most organizations utilize the same 80 percent of D365 functionality. It is the other 20 percent that is important for any organization to get right for the best use of the system.

Based on the initial phases of the health check, enVista crafts a clear and concise direction for the rollout of recommended changes. enVista will provide recommendations on system changes that can be made to improve system performance. However, it is important to know that these recommendations may extend beyond just configuration settings and custom solutions. enVista provides recommendations that deliver the right solution to support and drive the goals and objectives of the customer.

The right solution may include changes to business processes, leveraging new features that have not been considered, optimization of existing systematized processes (e.g., workflows or plugins), or the use of other technology to enhance the features of the existing D365 implementation. It is

important for our clients to get the most value from the total solution and not focus on just D365 as a piece of software.

## Our Prescription for a Healthy System

D365 is an important investment that is central to the growth of your organization. As with any business, as new initiatives emerge, technology needs evolve that require your organization to make changes. It is important that your organization look at not only technology changes but also process changes to take advantage of the technology. Our goal is to ensure you are taking advantage of the features and technology around you that make you as efficient as possible, create an environment your users want to use, and help you grow your organization. In order to achieve this, you should perform health checks periodically on any business system that your organization uses.

## About enVista

enVista is a leading global software solutions and consulting services firm enabling enterprise commerce™ for the world's leading manufacturers, distributors and omni-channel retailers. enVista uniquely delivers both physical and digital commerce solutions – optimizing supply chain efficiencies to drive cost savings, and unifying commerce to drive customer engagement and revenue.

**Consulting and solutions delivery is in our DNA.  
Let's have a conversation.™**

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