

How to Evaluate Your Application Management & Optimization Needs

**Dynamics 365
Post-implementation Guide**



www.mcaconnect.com
solutions@mcaconnect.com

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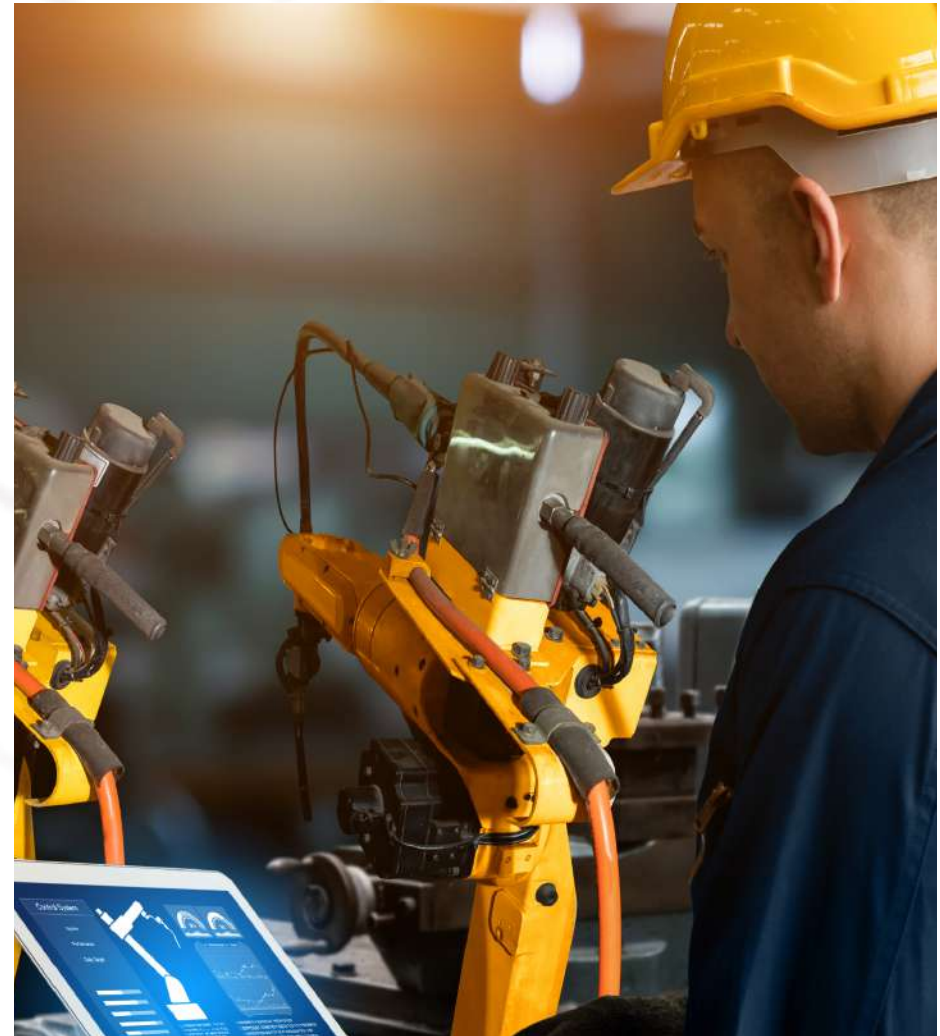
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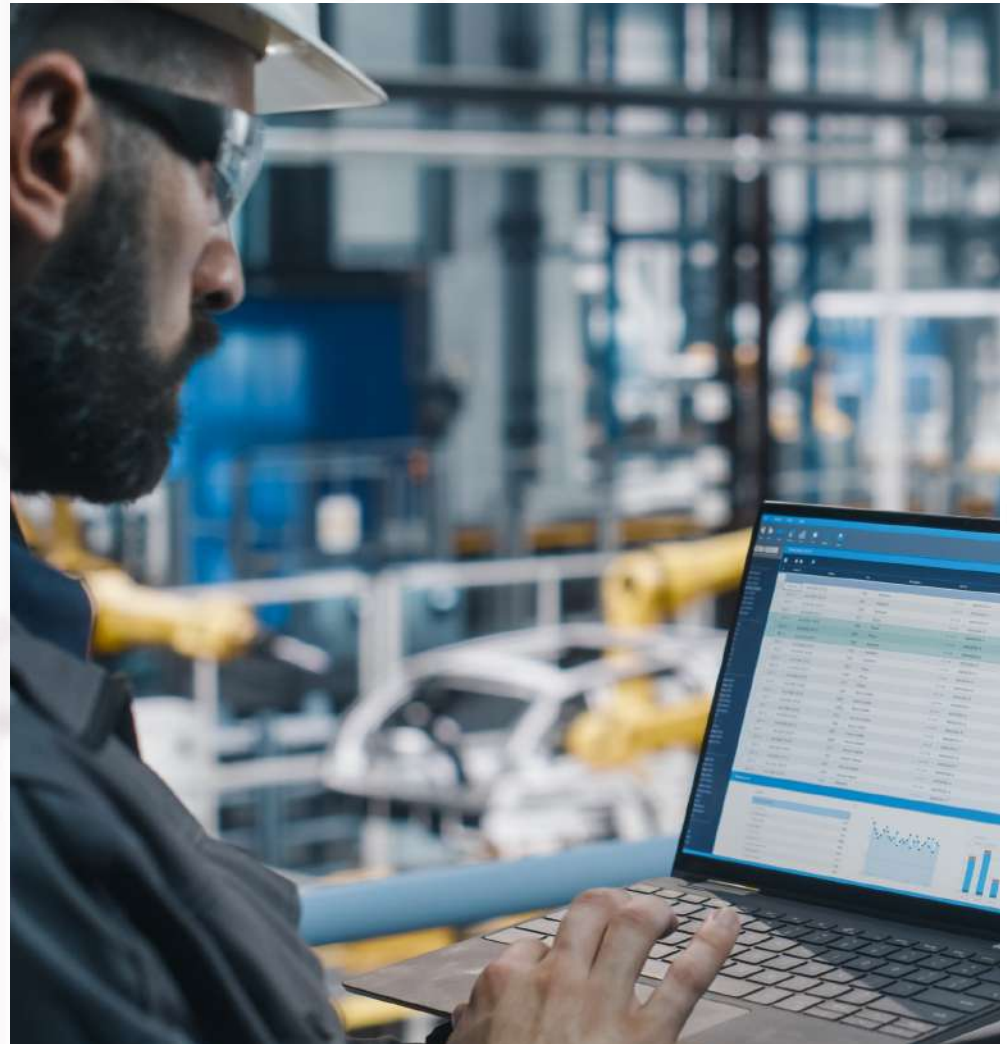
Whether you finished your Microsoft Dynamics implementation last week or 5 years ago, keeping your software running smoothly is essential to keeping your business running smoothly.

With hundreds of implementations under our belt, we've seen:

- Organizations who become less regimented about applying updates.
- System maintenance done by IT, but with few new business processes added or optimized.
- Companies who have little partner support.
- Users who are frustrated with the system, or with their management, because they aren't getting the timely software support they need.

We put together this guide to help you re-imagine how you'd like your systems, people and processes to be supported post "go live". If you have any questions, please reach out to us at: www.MCAConnect.com/contact

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9 Areas for Post-implementation Support and Optimization

1 Environment Updates

Microsoft Dynamics 365 is just one part of your technology infrastructure. Outside of maintaining the system itself, your technology team needs to understand all the layers - from the database to operating systems to web browsers - and understand the impact that changes may have on the system.

2 Continuous Updates

Microsoft Dynamics 365 provides regular and easy updates to enhance the functionality and security of the system. In an on-premise deployment of Dynamics, these updates must be manually applied.

Because Microsoft Dynamics 365 is delivered as a software-as-a-service (SaaS) tool, starting in April 2019, updates will be automatically applied, but someone on your project team must test these updates against current business processes and functionality. You will need to ensure there's no business interruptions, and that employees are prepared for any changes in the user experience.

3 User Support

Who will users call when they have questions or issues? Most organizations setup a tiered system, with a select group of internal staff handling common questions. When the key internal Dynamics 365 support staff don't readily know the answer, the question is escalated to tier-two support, which can be managed internally or externally.

Some organizations prefer to manage and support Dynamics 365 with full-time employees. Other companies find that outsourcing application support, to a solution like MCA Advantage, is a better use of their resources.

4 Issue & Request Tracking

Separate from user support, a project management team needs to track and prioritize feature requests and keep on top of more complex ongoing support issues.

5 Data Security

As employees and consultants come and go, get promoted and move roles, someone must do the work of onboarding and offboarding users from Dynamics 365, ensuring that security is setup properly.

6 Data Management

Information lifecycle management and enforcement of data governance policies are important to keeping your system clean, giving you the ability to deliver accurate, insightful, timely information.

7 Reporting

Every organization has its own reporting requirements and routines. Some reports can be automated. Information can be delivered to dashboards and portals. But you'll also need to determine who can create ad-hoc reports and deliver business analytics.

8 Deferred Initiatives

In order to "go live" with your system in a timely manner, some initiatives may be moved to later project phases. If you don't have a team focused on plan execution post go-live, these later phases can lag – sometimes indefinitely.

Process and Performance Improvements

As your system becomes more familiar and useful, users will find new opportunities for process and performance improvements. You'll want to capture and prioritize these requests.

Do you want reactive support or proactive advice?

Proactive Model

In a reactive support and maintenance model, the client initiates the help of the partner for support. Continual improvement tasks are considered "Upgrade Projects". These projects are scoped and delivered by a Microsoft Dynamics partner under a separate Statement of Work (outside of regular application support). The challenge is that solution continual improvements start-and-stop, and the organization has to find money, resources and approval to start the project.

Reactive Model

When clients have a Managed Services or MCA Advantage plan, the Dynamics Partner provides ongoing unlimited user support, which means that most issues are addressed sooner, while they're smaller. A hybrid support/consulting plan like MCA Advantage also includes management of the ongoing business improvement projects, seeing them through implementation.



The Role of Your Dynamics Partner

The relationship you have with your Microsoft Dynamics implementation partner can take on various forms.

Some partners focus primarily on the initial implementation and aren't staffed to support and maintain the system long-term, instead referring this work to other partners or to Microsoft.

1 Internal Primary Support with External Escalated Support

You hire staff as full-time employees to manage and support Dynamics 365. The challenge with this approach is that it can be difficult to find and retain knowledgeable staff with the right mix of skills. Unlike IT support, Dynamics 365 support requires some understanding of business processes and best practices.

Your external support team usually knows Dynamics 365 but may not work with your organization frequently enough to really understand your unique challenges. They fix the immediate problem, but without additional authorization, they're not always able to find long-term solutions. Your monthly bill may vary widely, and you have to budget separately for Continual Improvement types of tasks.

2 External Managed Services Support

In this scenario, your external consulting team handles all support requests for a set monthly or annual fee. This type of engagement enables you to address the smaller issues promptly, stopping them from snowballing into larger issues.

At MCA Connect, our Managed Services clients are assigned a Client Advantage Service Team (CAST) team of three primary support staff – a solution delivery manager, a functional lead and a technical lead – plus have access to niche expertise. Continual improvement projects are still managed separately.



3 External Application Optimization (MCA Advantage)

and optimization with reactive support. Upgrades are included as part of the regular recurring fee.

Hidden Costs of Reactive Support

In evaluating your ongoing Dynamics 365 support options, consider more than just the cost of hiring internal staff versus the cost of external consultants.

Be sure to also take into account:

- The risk of downtime
- The cost of hidden inefficiencies, including the toll on employee morale
- The level of industry, business and technical knowledge needed
- Availability of expert resources

Redefining Internal Roles

If you implemented Dynamics 365 recently, post-implementation is a great time to sit down and help your internal team members decide where they want to go next in their careers. Some may want to stay with the project. Others may go back to their old position or move elsewhere within the organization.

Gaining Momentum

Like all areas of business improvement, being successful with Dynamics 365 means creating routines, habits and procedures that will continue to build on your strong technology foundation.

Using MCA Advantage for Application Support And Optimization Can:

- Ensure you're following proper protocols, like testing changes in a sandbox environment before moving to production
- Reduce friction of internal office politics
- Provide you with predictable costs, even out cash flow
- Keep your systems running smoothly
- Allow you to quickly take advantage of new features
- Reduce risk of downtime



**Reach out to talk to one
of our experts today.**

**Solutions@MCAConnect.com
1-866-622-0669**