



Armanino + Microsoft

Support is Ending for Microsoft Dynamics AX: Now What?

Let's Plan Your Upgrade From Dynamics AX

Support Is Ending For Microsoft Dynamics AX: Now What?

Today's Presenters



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Support is Ending for Dynamics AX: Now what?

- 1. Research:** Learn about new capabilities and Microsoft's roadmap
- 2. Prepare:** Focus on internal readiness, organizational change management and alignment
- 3. Plan:** Understand your options and establish your preferred approach

Microsoft Support Lifecycle

- **Dynamics AX 2012 R3**

- Mainstream Support ended Oct. '21
- Extended Support ends Jan. '23
 - *Security hotfix updates only.

- **Dynamics AX 2012 RTM & R2**

- Extended Support ended Oct. '21

- **Dynamics AX 2009**

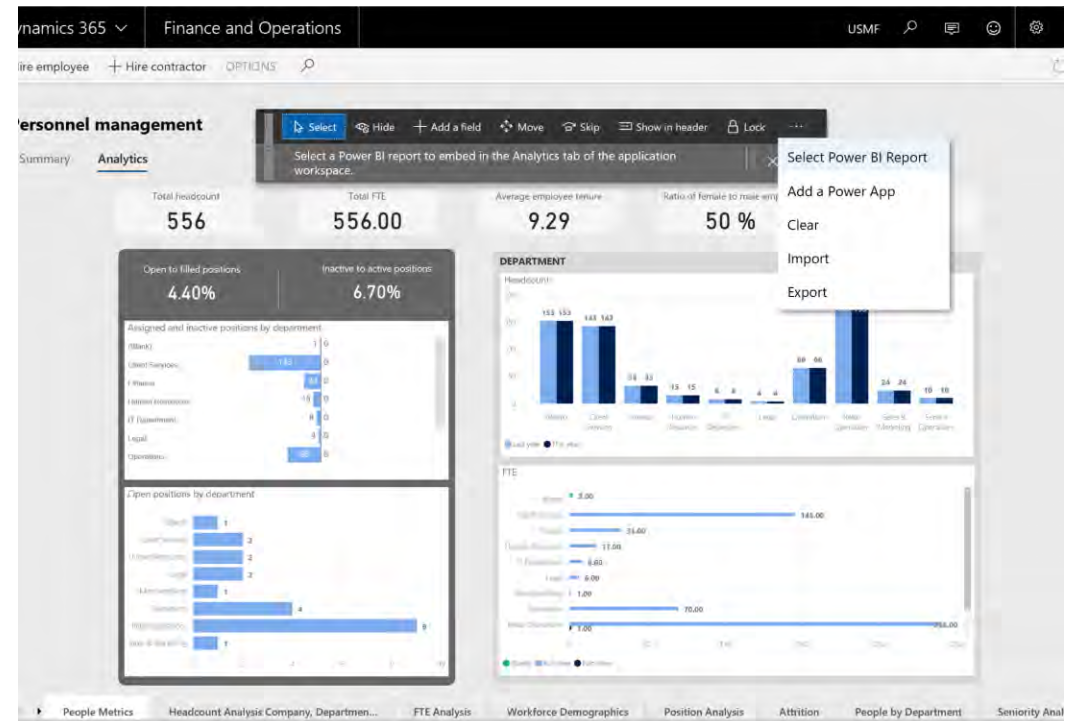
- Extended Support ended Oct. '21





Why move Dynamics 365 to the Cloud?

- Improve security, privacy, and reliability
- Increase collaboration and productivity
- Empower your organization to do more
- Enable scalability and flexibility
- Free up IT Resources
- Bring all your data together
- Benefit from investment, innovation and continuous improvement
- Adapt to your business needs





Dynamics 365 Cloud vs On-Prem Comparison

Costs, Features, Efficiencies, Innovation	Full-Service Cloud	Local Business Data
Faster time to deployment/implementation i.e. ordering new servers, equipment	Included	Not included
Systems of Intelligence – Native integration i.e., Cortana Intelligence Suite	Included	Not included
Seamless Power BI integration for reporting/visualization	Included	Not included
Additional usage rights software i.e., embedded Power BI	Included	Not included
High-availability infrastructure i.e., hardware, software, networking, energy, housing	Included	Not included
Disaster recovery i.e., hardware, software, networking	Included	Not included
Sandbox environment (Production environment + Tier 2 sandbox. LCS deployment of additional)	Included	Not included
Servicing production environment (FTE) i.e., provisioning, updates, pro-active monitoring	Included	Not included
Native Telemetry (deep application insights)	Included	Not included
Responsibility for performance improvements & infrastructure	Microsoft	Customer
Financially Backed SLA i.e., 99.9%	Included	Not included
License price (enterprise user) i.e., Simple USL vs. D365 S/W + Windows Server & CAL + Client RDP + SQL Server	Per user Subscription	H/W & S/W upfront
Compliance / Certifications i.e., SAS 70 SOC 1/2	Included	Not included



PREPARATION

Plan for Success

Jeffrey Russell



Recommendation #1: ERP Best Practices “Reminder”

The “IT Project” Syndrome



THE DISEASE:

“It’s just an IT project” 😊



THE CURE:

Executive leadership

Subject matter experts
(i.e. not a “side project”)

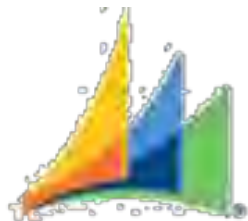
Steering committee

Avoiding the “IT Project” syndrome





Recommendation #2: Mindset Matters



Microsoft
Dynamics AX 2012 R4

- Avoid the concept of “It’s Just an Upgrade”
- Where can I get R4?
- Is University education Grade 13-16?

The migration to Dynamics 365 is *not* AX2012R4 in the cloud.

This a new ERP with change management benefits from AX.



Recommendation #3: Chose Better over Parity

“Is my business identical today as it was when we implemented AX?”

- Different geographies
- Different regulations
- New businesses/markets
- Changes in client/customer needs
- Mergers & acquisitions
- Changes over time

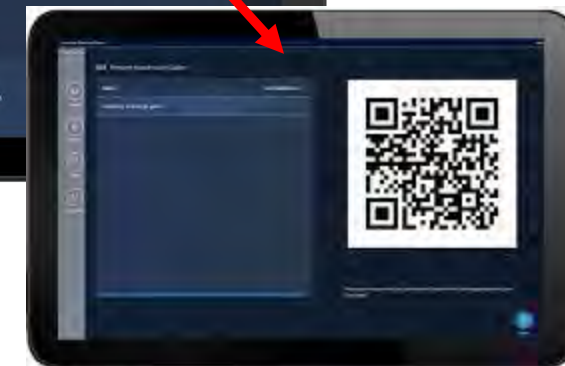
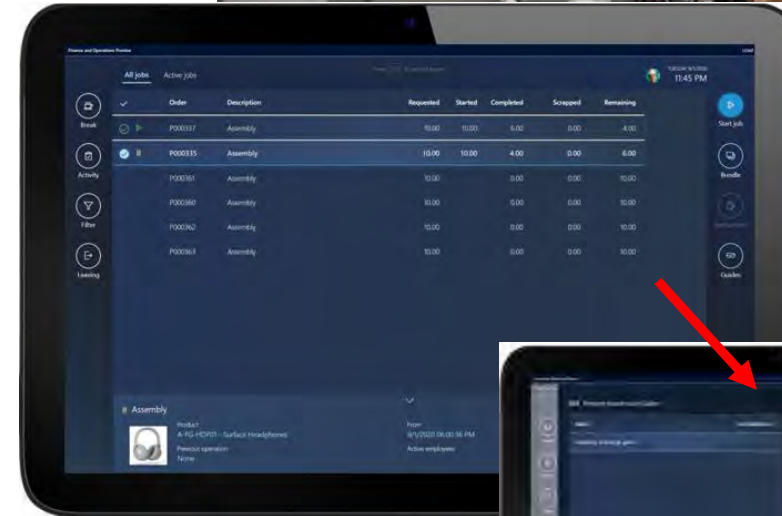
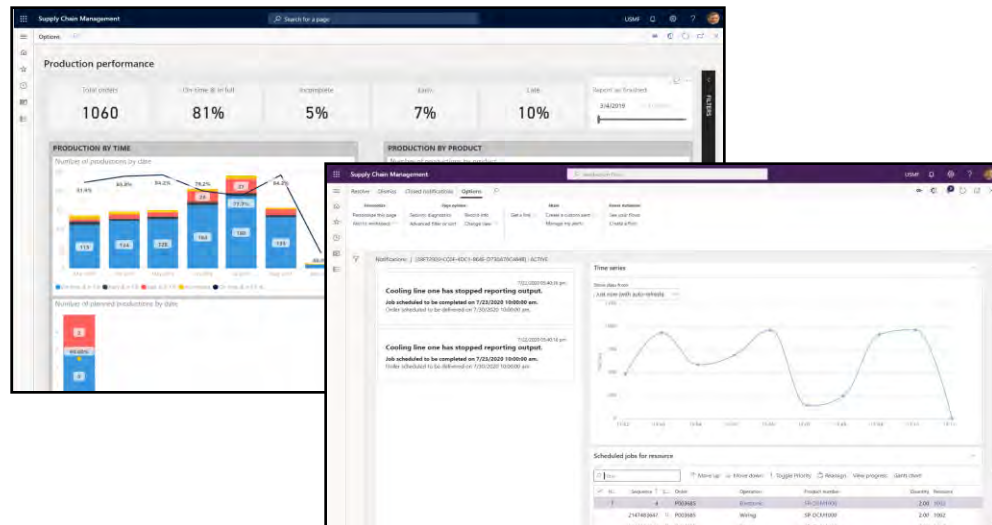
Seize the Opportunity



Opportunity in New Capabilities

Functional Improvements

- Manufacturing Execution optimized for various scenarios
- Mixed Reality & Guides with HoloLens integration
- Real time IoT Machine Connectivity & “Eventing”
- PowerBI embedded analytics





PROCESS

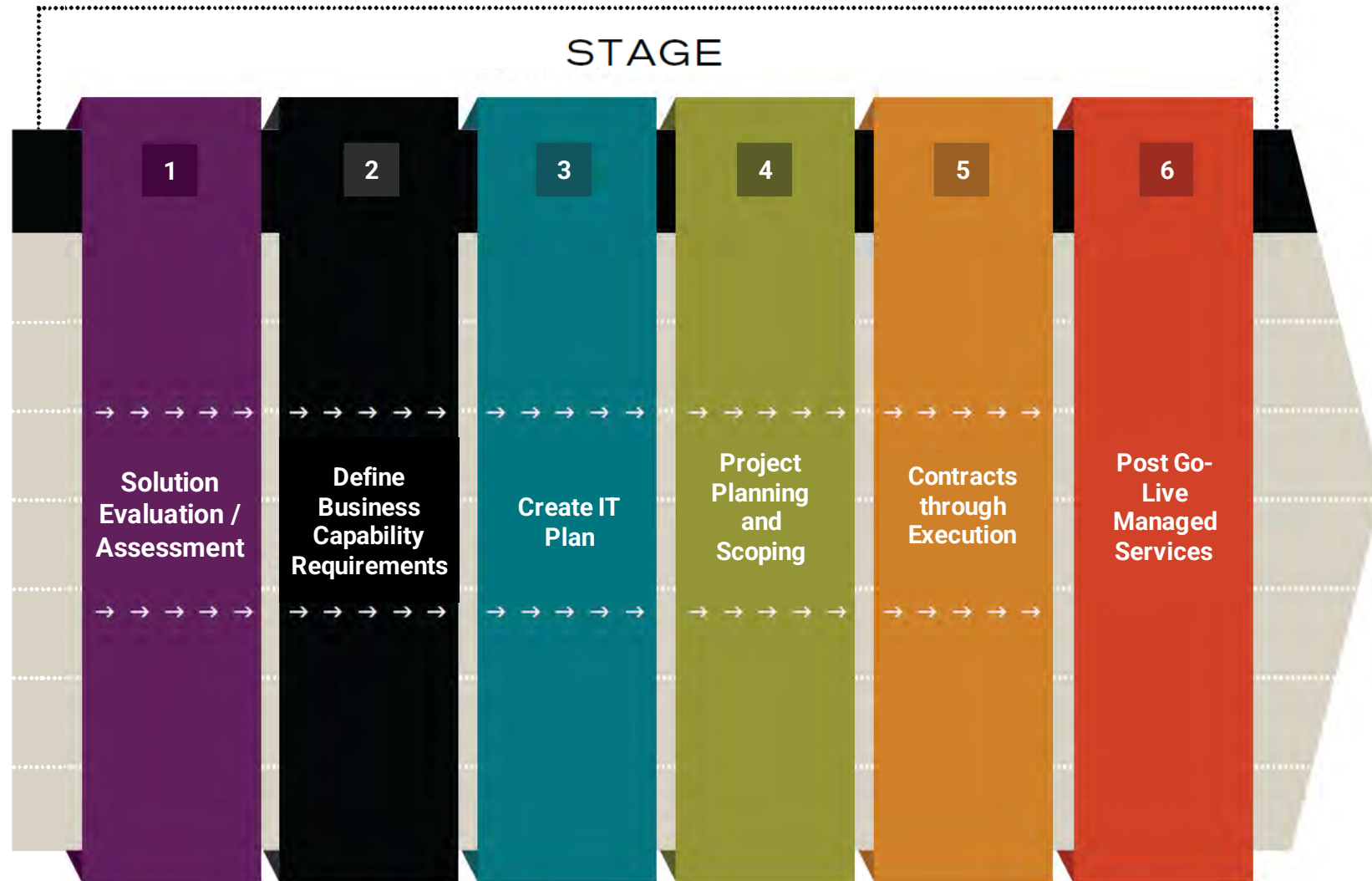
Next Steps

John Van Metre



Setting The Plan

Stages of a Successful Project





Evaluate:

Step 1

Plan Your Solution
Evaluation

& Engage in a Structured
Assessment Process

- Engage with a Dynamics partner
- Define a decision plan and process
 - Strategy & Transformation
 - Standard Migration Assessment
 - Catalyst Program
- Explore Microsoft end customer incentive funding programs and assistance (\$\$\$) for qualifying customers



Discovery / Assessment:

Step 2

Perform an Upgrade Assessment & Define Requirements

- Activities:
 - Review current processes, pain points and opportunities
 - Review new capabilities and approaches
 - Technical & Functional Reviews
 - Business Intelligence & Analytics
 - Process Automation & Workflow
 - Envisioning Demo
- Goals:
 - Review cloud architecture in D365 and how it will drive agility, efficiencies, and business process improvements
 - Identify manual workloads to move to F&SC due to added functionality
 - Identify customizations that can be eliminated
 - Review ISV solutions and strategy
 - Understand the vision of Dynamics 365 and how it can benefit your business
 - Understand Art of the Possible with new cloud functionality



Preparation:

Step 3

Plan Your IT Strategy



- Cloud vs On-Prem:
 - 90%+ of customers choose the cloud, but on-premise option is available
- Weigh upgrade approach options and benefits
 - Code & Data upgrade (in place)
 - Code upgrade & Data migration
 - Transformational Reimplementation & Data migration
- Re-evaluate technology stack
 - Opportunities to consolidate systems and eliminate silos
 - Data warehousing & analytics
 - Azure services, integration and middleware, etc



Project Planning & Scoping:

Step 4 – Part I

Upgrade or Transformational Reimplementation

- Migration from Dynamics AX to 365 F&O is much easier than trying to implement an unfamiliar product.
- Different project approaches depending on upgrade vs migration
 - Upgrade – more technical effort up front, but still requires heavy business engagement and testing on back end
 - Transformational Reimplementation / Migration – more business engagement and collaboration throughout, comparable to a new implementation
- Greater ROI opportunity with full transformation



Project Planning & Scoping

Step 4 – Part II

Define High-Level Implementation Approach



- ***Best practice is to take a phased approach to an implementation program***
- Typical phasing options can be by
 - Workload/modules, Finance then SCM.
 - Regional by country
 - Replacement/consolidation of legacy apps
- Ensure the “blueprint” or “template” is holistic in nature, and use for rollouts to follow



Project Planning & Scoping

Step 4 – Part III

Plan for Project Resources & Timing

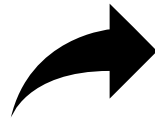
- Don't underestimate the level of participation of project team members in the upgrade process.
- Transformational re-implementations require engagement from both Business & IT throughout the process
- Evaluate timeline implications and other business initiatives
- Plan for Internal Resource Requirements, staff augmentation and backfilling



Contracting:

Step 5

Licensing & Subscription Considerations



- Different approaches possible - transitional promos available
- Microsoft EA/SCE programs:
 - Lock in 3-5 year pricing/discounts
- Microsoft CSP:
 - Flexible minimums, flexible ramp time



Post Go-Live

Step 6

Ongoing Operations

The screenshot shows the 'Feature management' interface in Dynamics 365. At the top, there are statistics: 18 New, 42 Not enabled, and 0 Scheduled. Below this is a table of features with columns for Feature name, Enable date, Feature added, and Module. The 'Customer aging performance enhancement' feature is highlighted. To the right of the table, there is a detailed view for the selected feature, including a description and a 'Schedule' button.

Feature name	Enable date	Feature added	Module
Customer aging performance e...	11/2/2019		Credit and collections
Future-dated worker transfer wi...	11/2/2019		Human resources
Inventory value report storage	11/2/2019		Cost management
License plate for reporting as fin...	11/2/2019		Production control
Project contract committed amo...	11/2/2019		Project management and accou...
RFQ reference link added to PO	11/2/2019		Procurement and sourcing
Purchase agreement responsibl...	11/2/2019		Procurement and sourcing
Enable purchase duty calculatio...	11/2/2019		Tax
Ability to confirm accepted purc...	11/2/2019		Procurement and sourcing
Select all product receipts to ma...	11/2/2019		Accounts payable
Parallel firming of planned orde...	11/2/2019		Master planning
Clienteling	11/2/2019		Retail and commerce
Fiscal integration local storage b...	11/2/2019		Retail and commerce
(India) Search customers in Reta...	11/2/2019		Retail and commerce
Enable multi batch processing f...	11/2/2019		Tax
Enable independent sales tax ca...	11/2/2019		Tax

- Most notable change from Dynamics AX to D365 F&O is the shift to the Evergreen Application strategy
- Microsoft releases 2 waves of major functional improvements, released in 8 monthly updates each year.
- Managed services becomes a strategic investment to maximize the ROI in the application
 - Take at least 2 updates a year
 - Opt-in to new features
 - Drive customer satisfaction
 - Culture of Continuous Improvement

Contact Us

Questions or Ready to Talk?

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