

Case Study: Rapid Implementation of Financial Operations with Microsoft Dynamics for a Leading UK Engineering Consulting SME

Project Background

An established UK engineering consultancy had an urgent need to replace their existing Finance solution due the current cloud-based SAAS product becoming obsolete and vendor support ending.

The client engaged ERP Advisors to implement a Microsoft Dynamics D365 Finance and Operations solution within a compressed 5-month duration, from initial discovery to going live. Adhering to the timeline was essential so that the business could seamlessly continue to run its finance operations after the existing SAAS solution was withdrawn.

Business Challenges to overcome

In addition to the short duration available to complete the full project lifecycle, the client needed to ensure continuity and consistency in its finance and management reporting. As the existing in-house MIS was old and not well understood, this also needed addressing by the project along with extracting and migrating data from the legacy SAAS platform to Dynamics.

In common with most SMEs, the client had a small finance team who were needed to continue business as usual operations in parallel with the new system implementation.

The challenges and their solutions were therefore:

Challenge

Solutions

Delivery timeline

- Provide an accelerated delivery approach incorporating ERP Advisors bring best practice processes and adhering to standard D365 capabilities.

Replace MIS

- Enabling and utilising Microsoft data lake as a repository for historical data migrated from the legacy SAAS system where it could be combined with data fed directly from the new D365 solution.

BAU workload

- Creating a price calculation engine to support complex sales price calculations based on different customer and contract requirements such as base wage rate with contract multiplier, hourly rate, per hour billing, role-based pricing, etc.
- Developing capabilities to upload or interface project forecast data from existing, external project forecasting tools to Dynamics Project Operations budgeting function to ensure reporting consistency.

Challenge

Solutions

Quick decision making

- Empowerment of the client's project team members to make decisions on processes and configuration settings without senior management approval as far as possible to minimise delays.
- Documenting decisions for retrospective ratification at the next Governance meeting to enable rapid progress.

Rapid acceptance

- Comprehensive test execution within a compressed duration resulted in minimal disruption at go-live.



Project Mission: Building a Future-Proof, Compliant ERP Solution

Starting in September, the mission was to complete discovery, solution design, build, test and rapidly deploy a Microsoft Dynamics D365 Finance and Operations solution by January month-end.

ERP Advisors' Approach: Rapidly Deploying a Dynamics Finance Solution

Our team collaborated with the client to agree a rapid yet structured implementation and deployment approach to deliver the required scope and achieve the business-critical deadline.

The agreed approach included:

- Running an intense Discovery process to define scope and requirements.
- Preparing a detailed Implementation Plan with associated resource demands aligned to the availability of the client's business team.
- Utilising Azure DevOps to capture project information and progress.
- Completing a condensed Solution Design stage including providing Dynamics familiarisation sessions for the client team to enable rapid design agreement.
- Iterative system configuration and process playback to confirm the solution was being built to the agreed design and developing the client team's system understanding.
- Agreeing a simple download/upload approach to migrate critical data only for D365, with historical data being transferred to data lake for reporting.
- Executing an accelerated UAT covering all elements of the solution scope with consultant support for rapid defect resolution.
- Keeping the consultants assigned throughout hypercare including first month-end to enable further knowledge transfer to the client.

Scope and Solution Components

The following business processes were in scope for the implementation, utilising the D365 Finance capabilities listed.

Business Process	D365 Finance capabilities
Core Finance	Chart of Accounts, Financial dimensions (Cost Centres), VAT (inc. make tax digital), Month-end journals, Currency, Trial Balance
Accounts Payables	Vendor Management, Invoicing, Vendor Payments
Accounts Receivables	Customer Management, Customer Billing, Customer Collections
Bank	Bank setup, Reconciliation
Fixed Assets	Fixed Asset Register, Capitalisation, Depreciation, NBV
Expense Management	Expense Management GL Only (without projects sub-ledger)

The main Microsoft components used in constructing the solution include:

- Dynamics Finance and Operations
- Microsoft Data Lake
- Power BI

Outcome: A Robust ERP Finance Platform

The new solution provided our client with a modern, standardized platform, achieving their goal of replacing their outdated SAAS solution on time.

The solution went live without interruption to business operations whilst introducing process efficiencies and improved reporting capabilities.

Ready to Learn More?

Contact us to see how ERP Advisors transformed this client's operations with a scalable, compliant ERP Finance platform. Discover how our expertise in Dynamics can help your