



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**

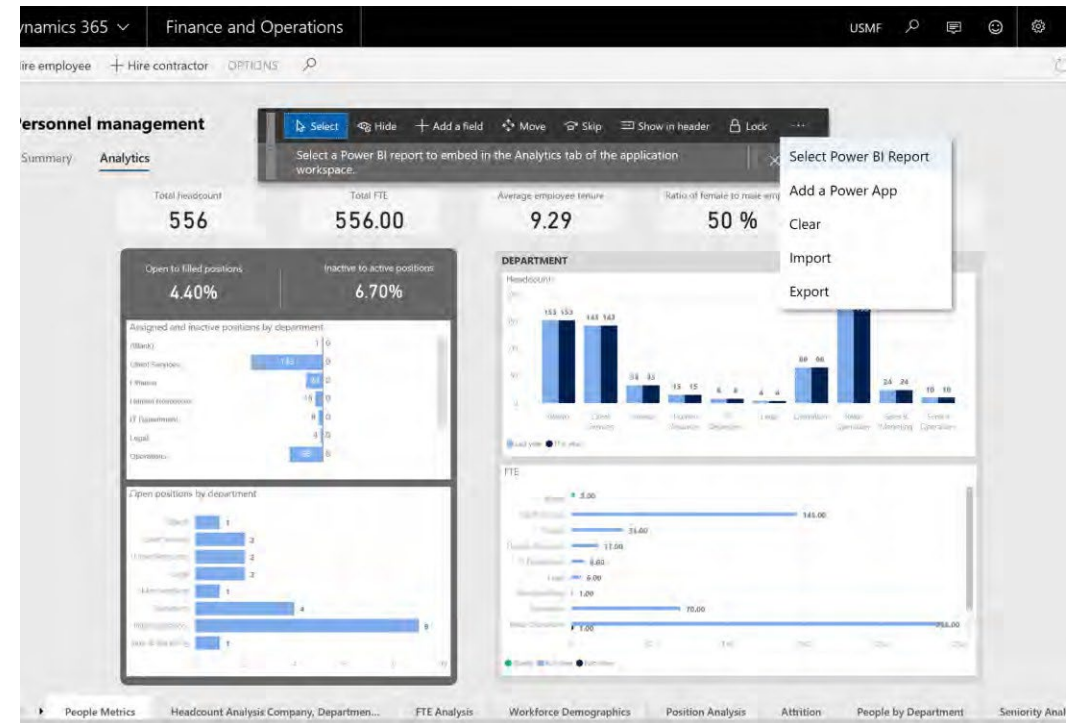
- Extended Support ended Oct. '21





## 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

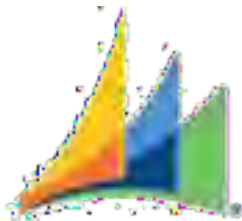
Avoiding the “IT Project” syndrome







## 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

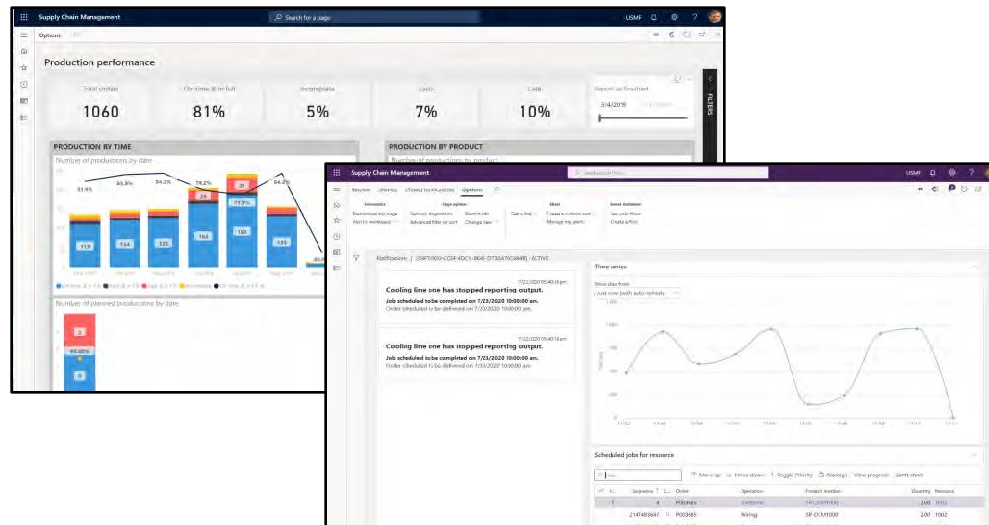
Seize the Opportunity



# 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

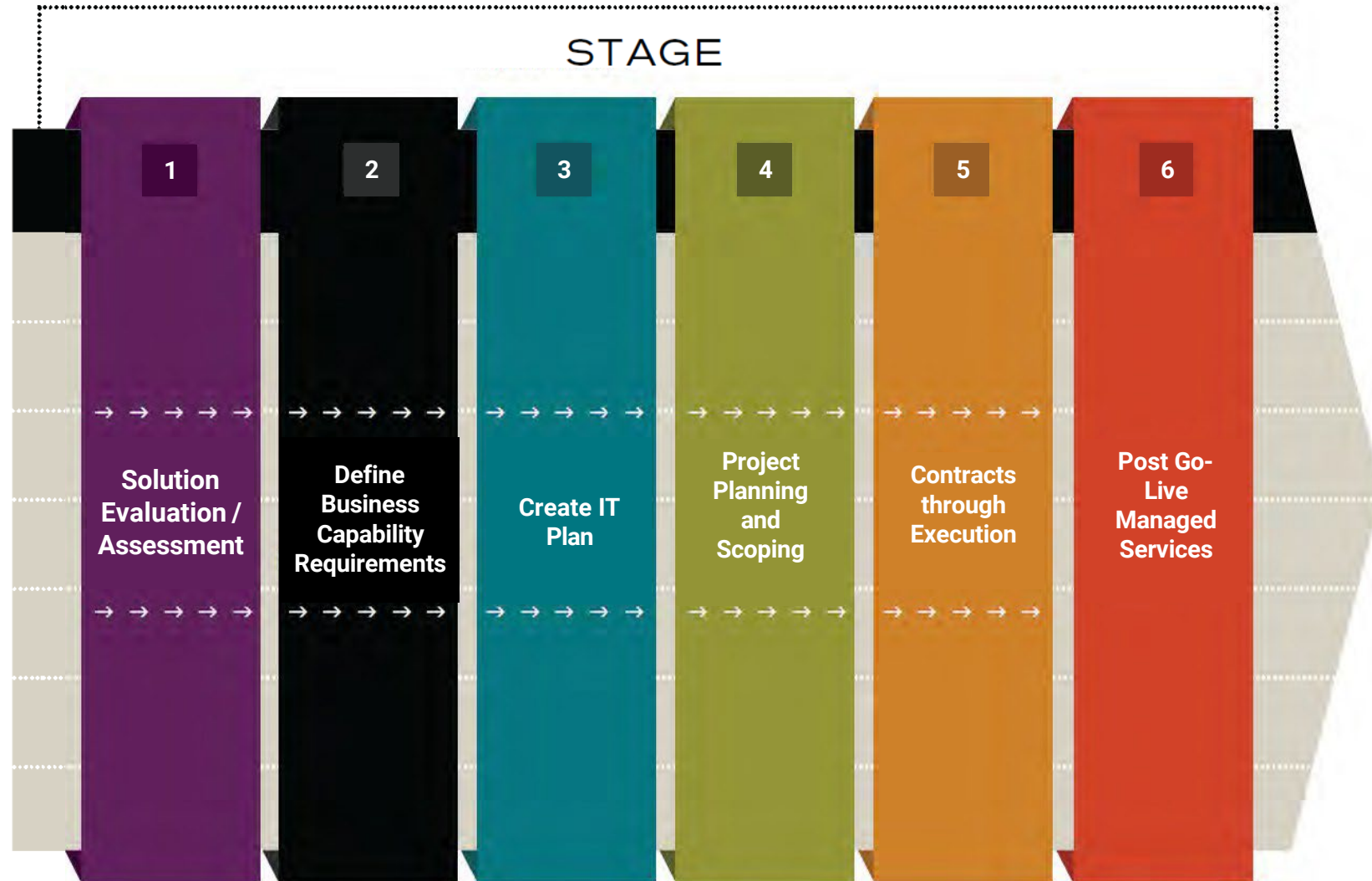
# Next Steps

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

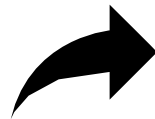
- Don't underestimate the level of participation of project team members in the upgrade process.
- Transformational re-implementations require engagement from both Business & IT throughout the process
- Evaluate timeline implications and other business initiatives
- Plan for Internal Resource Requirements, 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 tabs for 'New', 'Not enabled', and 'Scheduled'. Below these, a table lists various 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 'Comments' section.

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