

CASE STUDY



Martin Messick is the IT Manager at James M Pleasants Co. Inc., a manufacturer's representative. In 2017 they made the decision to migrate from AX2012 R2 to Microsoft Dynamics 365. With 185 active users and over \$120 million in business per year, this was a big undertaking!

Their small, agile IT department completed the migration within 15 months and continue to be successful maintaining their cloud implementation for Microsoft Dynamics 365 Customer Engagement, Field Service, Finance & Operations, and Power BI.

Messick shared his company's migration journey with Dynamic Communities.



Uniting People Through Community.

www.dynamiccommunities.com

One Company's Journey Out of Excel and Into a Single Enterprise Solution

BACKGROUND

James M. Pleasants Company (JMP) has 15 offices in six states covering the Southeast United States. The company has grown over the years as an employee-owned sales organization providing integrated hydronic and steam solutions. JMP currently represents more than 30 manufacturers in its territory.

Messick started working at JMP in the fall of 2016. With over a dozen Sales Offices spread out over multiple states, each acted as their own entity. "There was no consistency in the way Sales submitted their orders to Operations at HQ. There was an Excel template, but every salesperson implemented it in their own way," said Messick.

By 2017, JMP had been running AX 2012 for about five years and felt r2 was getting out-of-date. They knew they did not want to upgrade to r3. Messick met with their VP of Operations, who gave him the okay to begin researching Microsoft Dynamics 365. Messick describes their driver for migration as the company ran on gut, not data. They wanted to improve their processes and systems.

APPROACH

Initially planning for just an upgrade, JMP soon realized they should strive for a full Digital Transformation. From an infrastructure perspective, JMP did not have a true data center but rather a closet with a dual A/C system in the warehouse, and a whole building generator: One full standing rack of servers of various ages.

Messick's Migration Tips

Governance is a critical component for success.

Get strong business leadership for BI initiatives.

Form an MDM team.

Use your own Azure DevOps templates.

CASE STUDY

One Company's Journey Out of Excel and Into a Single Enterprise Solution



“Our strategy was to move to a secure cloud solution and to reduce our on-prem systems. We didn’t want to be managing servers, paying every 6 months to make little changes to keep things running... We could get rid of the data closet,” said Messick.

The entire company got involved in the eight-month partner evaluation that began in late summer 2017. JMP created a decision matrix with 10 different criteria. “As we embarked on the journey the problem statement evolved. Initially it was just ‘upgrade AX’ but over the long evaluation process, and many dozen presentations from strategic thinkers at the various vendors, we realized the problem statement was about how to reduce the variation in process,” said Messick.

A steering committee, comprised of executives, sales, and operations made the decision together. “This was not driven by IT. IT supported the business in this transformation,” said Messick.

JMP spent nearly 5 months to select a Partner to Sherpa them on this journey and ultimately decided on Arbela Technologies, a global digital transformation consulting firm and top-rated Microsoft Dynamics Gold partner for ERP, CRM, BI & Analytics.

“Many consultants pick the easy way to get stuff done, not the best. Arbela had a whole enterprise perspective to the transition, beyond common configuration, which was important to us,” said Messick.

Arbela accomplished this by looking at what JMP had in place already (O365, M365) as well as AX2012 and making the strong case that if they moved to a D365 solution which included CE, they would be in a position to truly transform their business. “They were able to convince the business that the journey we had started on in 2016 was not only viable but valuable, and could be described as a complete Digital Transformation,” said Messick.

The biggest need for JMP’s Sales Team was the ability to

create comprehensive, complex quotes that could be acted upon by the Operations Team as effectively as possible. “Core FO does not provide a strong mechanism for building Quotes – we knew this from our experience with AX and Arbela agreed,” said Messick.

JMP used Experlogix software to build an internal Configure Price Quote (CPQ) team, shifting their entire sales organization into D365CE. “Every salesperson used to use an Excel template to submit orders to the operations team. This has all been moved into a single Enterprise Solution,” said Martin. “From an overall Enterprise Signal perspective, there is no doubt that information is much more readily available than previously when all work was done via email.”

RESULTS

By the time the project started in March 2018, Microsoft had put the r2 upgrade utility in place. Arbela performed an upgrade of their AX2012 system which allowed JMP to keep their historical data, giving them a leg up rather than having to start from scratch.

They performed the data migration test to Dynamics 365 four times to practice, migrating all the data each time – not just the delta. This allowed them to see how in-flight data would go, meaning “projects” that had already started and could be in any state other than Final Posting, such as an open sale order.

JMP didn’t have many core modifications which made the migration process easier. After initially creating D365FO and CE in separate data warehouses, JMP re-created their data model as a single data warehouse for more consistent reporting.

JMP cut off the old system on a Friday and went live with Dynamics 365 Customer Engagement, Field Service, Finance & Operations, and Power BI on Monday morning, July 1, 2019.

CASE STUDY

One Company's Journey Out of Excel and Into a Single Enterprise Solution



RESOURCES

In a nutshell? JMP talked to industry peers... a lot.

Messick and his colleagues utilized Dynamic Communities events and Local User Group meetings to have important discussions related to their migration.

At Summit in Nashville, the JMP team attended valuable breakout sessions with topics related to D365FO migration considerations. They also scheduled two days of in-person meetings with potential vendors at their hotel to discuss what the transformation should look like.

Research, networking conversations, and overall vendor evaluation took time and effort, but were vital steps. "Summit was critical to our implementation success. We had to meet with teams of people – Summit has the partner network and user network all in one place. It's hard to do that otherwise," said Messick.

KEY LEARNINGS

With every migration comes a learning curve. When considering what he would have done differently, Messick had four top recommendations.

1. Governance for the organization is the most critical component for success.

When Messick started at JMP, he began working on a governance framework, based on Agile Methodology, that would allow a small IT Team to support the highly distributed organization. "With executive approval we establish 'IT Support Contacts' at most of our Sales Offices so as to have eyes, ears and hands on the ground," said Messick.

An example of introducing Governance to JMP was the decision matrix. "You don't just 'start doing stuff'. You think about it, come up with a framework, decide on what the goals are, and a plan," said Messick. In the first year they focused on getting their Cloud Strategy fully implemented, streamlining everything possible, and assuring they had strong relationships with key vendors.

2. Wait to focus on Power BI and get strong business leadership.

Messick advises anyone considering a migration to get strong business leadership for BI initiatives. "Evaluate your Power BI strategy while designing your enterprise solution but wait to build it until the migration is done. Keep the continuous feedback loop – what is the implication for this decision in BI?" said Messick.

3. Form a Master Data Management (MDM) team prior to starting the project.

Messick wishes they had formed an MDM team ahead of time for business process reengineering. A mapping exercise in anticipation of the move beforehand would have helped prove why the disruption of past processes is worth it for operations and sales. Messick says ideally, they would have a dedicated resource, whose job is to control master data across the organization.

Data clean up is only a small part of the problem of how to not need to address every Master Data issue as one-off. "The challenge is shifting the organization to view Master Data in an Enterprise fashion so that everyone understands the interdependencies and importance of each person/team in the overall success of the organization," said Messick.

4. Take control of any Azure DevOps templates from the start

Azure DevOps allows JMP to track change requests and determine business priorities for all areas of their business – Dynamics, Power BI, and SharePoint. Their DevOps environment covers requests from start to finish to ensure accurate documentation.

CASE STUDY

One Company's Journey Out of Excel and Into a Single Enterprise Solution



Arbela created a custom agile process flow to implement the whole project, including D365FO codes. Because they went down Arbela's implementation path, JMP had customization limitations. This caused frustration as they couldn't manage their own change process without breaking Arbela's methodology.

"It is an amazing tool, but I wish we had learned Azure DevOps, negotiated our template and had Arbela use the templates we controlled from day one," said Messick.

A WHOLE NEW WORLD

"Having an Enterprise System is how we have achieved the Digital Transformation that we set out to achieve, once we realized that was what we were after," said Messick. With each office/region enjoying their autonomy, JMP continues to focus on Governance.

Another benefit of digital transformation is continuous updates. JMP's president recently asked Martin how much it cost them to do Platform Updates and was shocked at the response.

"It only costs us about 30 hours of business users' time to do the Regression Test Cycle. No cash. We are able to do that because we have embraced the full platform and because we can use DevOps effectively," said Martin.

JMP is working to implement it so the only internal time will be to review any exceptions – RSAT will conduct all of the standard business processes from end-to-end and indicate where something doesn't work.

Despite initial latency issues, having a cloud-based system has made it easier for JMP staff to work remotely - there is no VPN in the way or rebooting needed. This was especially beneficial in spring 2020 with the global impact of the novel Coronavirus (COVID-19).

"The full benefits of our Digital Transformation became very evident when we had to suddenly close offices across the southeast due to COVID-19. Except for the trouble of getting equipment, the general situation is that everyone can leverage the system to do their work just as well from home as for the office," said Messick.

Take the first step toward cloud success by migrating your on-premises solution with expert guidance from Microsoft through their Dynamics 365 Migration Program.

Sign up for a no-charge assessment