
UPGRADING DYNAMICS NAV:

Add value to your business with minimal disruption



■ WHY UPGRADE?

Upgrading your ERP system can provide your company with powerful new functions to help your business grow. By taking advantage of improved functionality, new features, and enhanced capabilities, you can cut costs and keep your ERP system up to date.

Most companies are concerned that upgrading their ERP systems will be expensive and time consuming and not provide the required business benefits. However, with the right professional services group, like the Dynamics Services Group (DSG), a division of IndustryBuilt Software, upgrading to a later version of Microsoft Dynamics NAV can be easier than ever. That means you can add value to your company with minimal disruption to your business.

Your upgrade partner can help you upgrade to a later version of Microsoft Dynamics NAV, so you can give your people the information and tools they need to help your business grow. By taking advantage of enhanced functionality and new features, you can boost productivity, reduce costs, and improve customer service.

■ UPGRADES ARE CHALLENGING

Upgrades for a business can be quite challenging because that business is already live on the software and operating day to day. So trying to do an upgrade project on an ERP system or a financial system while that system is still running and working for the business is like trying to hit a moving target. That's why an upgrade should be treated the same as a full implementation.

It's important that you and your upgrade partner put the appropriate amount of thought and planning into a Dynamics NAV upgrade in order to make it successful. Part of that planning involves determining exactly what business benefits your company will achieve by doing the upgrade. Because just having new software or software for its own sake will not necessarily provide your company with the right benefits—an appropriate collection of key features that will give it value.

It's critical that your partner think carefully about where you are today and where would you like to be in the future. That's a discussion that has to happen without software in mind. You and your partner have to determine what challenges you're having today and where to you want to be next year or in five years in order to figure out an appropriate plan.

“We’re very happy to do that exercise with clients,” says Jeff Austin, DSG Vice President. “The benefit we can provide is to tie everything together. We give them the information specifically on what’s in the package and try to address the other concerns and challenges they’re experiencing. There are often other things an upgrade exercise provides in addition to the upgrade itself. An upgrade will just take your software and move it from one version to another but in that process we want to add extra value wherever we can.”

For example, maybe there was staff attrition in the company in the past, so an upgrade is an opportunity to retrain or focus on areas of the system that a company might want to use now that it hadn’t used previously. In addition, a company can use an upgrade to address staff knowledge—even someone who’s comfortable working in Dynamics NAV could benefit from tips and tricks and some additional guidance. The Dynamics Services Group can help retrain staff and give them more knowledge of the system under the scope of an upgrade.

An upgrade is also an opportunity for a company to evaluate its business processes—to take half a step back and look at the overall business and see if the software matches the business requirements. Is it configured to give the business what it wants out of it at the end of the day? Does it facilitate today’s business practices and policies?

And the business may have changed in the five years since Dynamics NAV was first implemented and in that timeframe the internal business processes, the business policies and practices, even the overall company focus might have shifted or changed. Whatever was implemented in NAV five years earlier might not be what’s required by the business today.

“Sometimes an upgrade contains a bit of tweaking, changing, adjusting, programming in order to make the new version suited to today’s or tomorrow’s business practice and intent,” Austin says.

WHY UPGRADE?

You might decide to upgrade to a later version of Dynamics NAV because your company has bumped into the limits with the capabilities of the current software. If you’re on a really old version, the software usually can’t do what the business needs it to do. For instance, maybe you have to replace servers but the newer versions of the operating systems on a server are not necessarily easily compatible with really old versions of Dynamics NAV.

“The first thing we do is have a meeting with the customer and review if it’s worthwhile and if it makes sense to look at an upgrade,” Austin says. “Then we’d make a decision about which of the two upgrades to do. One is the standard upgrade—moving all your data from the old version and the majority of all of the objects and the software customizations. It’s basically that tomorrow’s system looks like today’s system with all the current data—it’s just been upgraded to the most current version.”

The DSG group can also do a reimplementation, which means it starts off with a brand new copy of the most current version of Dynamics NAV and very deliberately moves over only what data and only what programming your company requires today. That allows DSG to cleanse the system.

“We’re very specific about what data is required and we move that forward as well as what development may have been done in the past that’s required or appropriate for today’s business,” Austin says. “So companies that may have gone through a restructuring or a change in their businesses may decide to do a reimplementation of the most current version of the software and leave behind a lot of what was done in the past because it no longer applies to today’s business.”

Because there are advantages and disadvantages to each upgrade path, DSG guides a client through the process of determining which path is in its best interest. Then once a determination is made as to the approach—upgrade or reimplementation—DSG puts a plan in place with a scope, a budget and a timeline and manages it just like any other project.

“We look at the scope of the project—upgrade or implementation—then we put together a budget that includes all of the extra benefits we’ve determined are needed,” Austin says. “So it could include some extra training hours or some extra development of a new tool that they didn’t require before that we want to include in this project. Or it could exclude certain things that are no longer required. We try to help minimize costs for our clients and try to identify those things that are or are not included in the scope. We carefully try to refine the scope to keep the budget as appropriate as possible.”

During the upgrade it’s critical that the client have the time available to do testing. So DSG includes time in its project plan to help and coach a client through its user acceptance testing or pilot testing. That’s because the real proof is that the customer can continue to do its processes the same way in the new system as it did in the old software. Therefore DSG books time in its plan for user acceptance testing, assistance and facilitation because that’s the key part of the upgrade for a successful project.

After the testing is finished, DSG is ready to take the system live, something that typically happens over a weekend.

“We capture data up to the close of business of our cut-off date, which is often a Friday evening. Then we work over the weekend and do our testing in the company’s off hours, Austin says. “The client does a little bit of testing as well of that final upgrade product so the client is ready to go Monday morning.”

SELECTING AN UPGRADE PARTNER

If you’re looking to upgrade to a newer version of Microsoft Dynamics there are a number of questions you should ask a potential partner including:

Questions to ask your potential partner:

1. How many upgrades have you done?
2. What's your experience with upgrades?
3. What's the size of your company? Smaller partners may not have the capacity to do an upgrade.
4. Have you taken different approaches to upgrades in the past? What sorts of upgrades were they, i.e., from version 5 to version 6 or from version 2 to version six?
5. What were the scopes of the upgrade? Were they two-week jobs? Two-month jobs? Or two-year jobs?
6. Do you have business analysts who are familiar with upgrades?
7. Do you have developers who have done upgrades in the past?
8. Do you have a standard process or model that you use for a project plan for an upgrade?
9. Do you have experience doing this type of work?

Keep in mind that to have an upgrade provide value to the customer, a partner has to go beyond just implementing the system. Experience is really important because all the resources have to know the software and processes inside and out to provide extra value.

 **WHY PARTNER WITH THE DSG GROUP**

Over the last 10 years, Dynamics Services Group has provided services for hundreds of companies working with Microsoft Dynamics NAV. And DSG has most likely already helped a customer who has faced similar challenges, and can bring those solutions to your company.

With over 250 implementations in the past 10 years, there are few companies that have more experience or resource depth. No matter the need, DSG is there to help. DSG's clients are typically mid-sized businesses with employees performing multiple duties. They have all the business complexity of a larger business, but without the benefit of the resource availability that a larger business would offer. They have to do more with less. DSG understands this and offer services to help its clients operate their businesses more effectively. Delivering results for this type of company is DSG's expertise.

The Dynamics Services Group has a full project team ready to help its clients with their NAV upgrades implementation. Full integration of Microsoft's Sure Step Methodology, resources including project managers, business analysts, and developers who are all product certified and heavily experienced makes DSG the right choice as your business partner.

“We’ve done lots and lots of upgrades from all versions back as far as Version 2 through the current platform,” Austin says. “So we have that experience and we can talk to that experience and our customers identify what those advantages would be and if it makes business sense to do a project like this in the first place. Our focus is on whether an upgrade is going to help that business. Does it make sense for them? Does it provide that company with value—regardless of whether there’s a project in it for us.”



Information on Dynamics Services Group can be found at <http://industrybuilt.com/ProductsServices>



Information on Microsoft Dynamics can be found at www.microsoft.com/dynamics