CLIENT CASE STUDY

DYNAMICS 365

Alma Mater Society – Queen's University

## THE SOLUTIONING PROCESS

Business Outcome Analysis

- First, Paragon Micro's team of experts spent time understanding the client's business needs through multiple structured discovery sessions.

Proof of Value + Demos

- We then delivered multiple product demos which were customized to the client's specific needs.
- These demos were delivered to all of the line of business decision-makers, including IT, Operations, and Finance.

The Business Case

- Our proposal included a detailed implementation plan outline, as well as projected timelines.
- We evaluated the client's current as well as projected revenues and costs both with and without the new solution, and provided a business case.
- The ROI calculation was based on client supplied historical data, and included a 5-year projection outlining 2 options: status quo, and proposed solution.
- We projected an 8-month payback period.
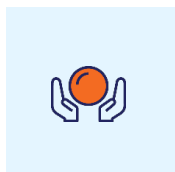
Summary

Client chose to replace their existing Sage 300 financial and accounting management system with a more flexible solution which included full integration with their existing M365 environment, as well as AP (Accounts Payable) automation and future PoS system modernization.

The Business Needs

- Enablement of accurate, real-time reporting capabilities to help make more informed and timely decisions.
- Streamlining of operational interdependencies between the financial management system and campus stores, as well as online ecommerce platform (Shopify).
- Move off physical server to cloud infrastructure.

The Solution

Microsoft Dynamics 365 Business Central with LS Retail licensing and PoS system enablement, plus 3rd party Microsoft ISV integration with Continia (AP automation and Expense Management).

PROJECT DELIVERY

Project Objectives for Phase 1

- Replaced Sage 300 with D365 Business Central and integrated Continia's document capture and expense management system.

- Configured, tested, and implemented D365 Business Central on the cloud for 1 legal entity.

- Integrated Continia Document Capture and Expense Management modules into the new financial management system.

- Deployed out-of-the box reporting and performed data migration from Sage 300.

- Achieved go-live deadline 6 months after initial project kickoff.
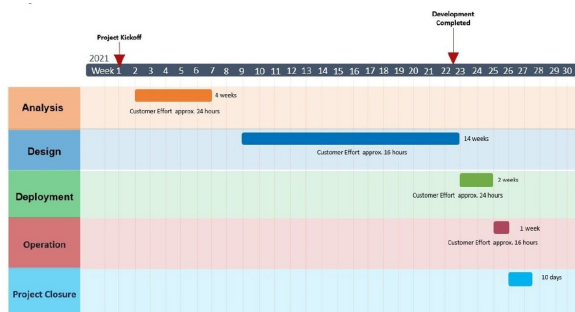

Project Management Approach

- Using Microsoft's Dynamics SureStep 365 hybrid approach (Agile & Waterfall), our PMO delivered the project in the following phases:
  - Review, Analysis, and Discovery
  - Configuration and Design
  - Development (coding, extension creation)
  - Knowledge Transfer, Training, and User Acceptance Testing (UAT)
  - Deployment & Go-Live
  - Post Go-Live Support

The Outcomes

- Project delivered on time, and below budget.

- 1 Change Order accepted in week 15 to give client back 20 hours from Deployment phase.

- Phase 2: PoS system integration with Business Central financial management system currently under review to determine implementation timetable.
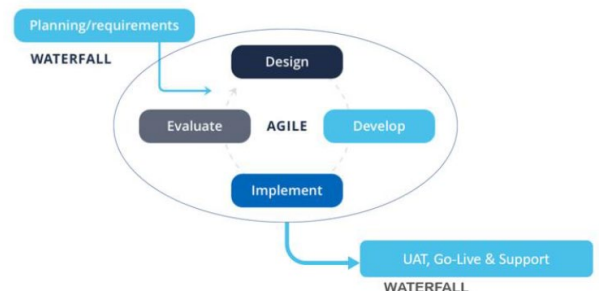
WRAP UP: THE RESULTS

Business Outcomes

(After Phase 2 implementation)

- Improved reporting capabilities for AMS Finance.
- Seamless scalability of system to match business model seasonality.
- Baseline established for entire PoS system overhaul (LS Retail).
- Ease of new user onboarding as staff changes annually.

Key Takeaways

Lessons Learned:

- Communication and trust is key: everyone, including sales, project managers, and technical resources must be intimately aware of all client business processes from the very beginning.
- Executive sponsorship and constant communication at leadership level critical.
- Strong Project Management team with functional experience in ERP implementation necessary.
- Train the trainer approach works.

Next Steps:

- Full PoS system overhaul for all campus stores and online portal with LS Retail.
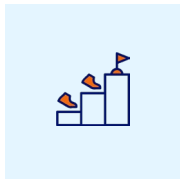
Client Feedback

Lyn MacFarlane
Financial Controller

"The implementation of any new system is a process that can be daunting at best and a nightmare at worst. And the team that you partner with can make all the difference. The team at Paragon made it a priority to ensure that issues were addressed as we identified them, provided ongoing support, troubleshooting and continually touched base to ensure that problems were resolved to our satisfaction."

Matthew Guy
IT Manager

"Through the execution of innovative technology, Paragon helped enable us to achieve our goal of having a more integrated and secure ERP system. As an organization already vastly integrated into the Microsoft 365 environment, Paragon aided us in moving one more element into our ecosystem that previously had to be used and monitored separately. Along with the new feature set of what Business Central brings to the table, there is no doubt in my mind that Paragon has supplied value by unlocking potential new avenues to streamline operations, and in turn saving us time and effort for the foreseeable future."

Lyn Parry
General Manager

"As an Executive Owner of our project, I had timely and ready access to my counterparts at Paragon and [their team] through regular weekly cadence and as needed. Any issues raised were immediately investigated and corrected, or a plan of action was provided for discussion amongst our respective teams within days. Paragon and their team were equally invested in our project and its successful outcome."

![Paragon Micro — Experience That Keeps It Easy.]

CONTACT DETAILS:

Mike Pivniceru
Director, Solutions and Services

1-647-361-2806

mpivniveru@paragonmiro.ca