Dynamics 365 for Finance and Operations: Monthly Update Cadence

Preparation and Implications

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The Business Case
The old cycle of upgrading ERP

- Purchased ERP System
- New features continue to roll out month by month
- While your business could benefit, implementing them would be like a mini-upgrade each time
- A few years have passed, a new version is out, time to upgrade?
Management resistance

- Costs
- Disruptions
The compromise

The need to modernize is recognize

Management still resisting upgrade “cost/disruption”

Customizations & third party solutions become the go-to
Compromise again… and again…

The need to modernize is recognize

Management still resisting upgrade “cost/disruption”

Customizations & third party solutions become the go-to
Pressure building

More new features released, considering upgrade again

Now more expensive to move (more features, more third party)

Strategy becomes Reactive vs. Proactive
The ERP System TCO Nightmare

If you think an ERP system is expensive already, consider this:

• Every few years, you’re spending at least 1/3 of the original cost just to upgrade!
• Then add in the business disruptions, internal resource allocation and opportunity costs
The Microsoft Response
The Microsoft Dream

Dynamics 365 · Always updated · Always ready
“Evergreen” ERP

Minor fixes and functionality tweaks every month

Major functionality additions every 6 months
Business users and IT resistance

Testing

Disruptions
The Methodology
How is it possible?

Automated Tools and Testing:

- Code Upgrade Tool
- Data Upgrade Tool
- Regression Testing
- Performance Testing
Automated Code Upgrade Tool

Extensions – No more “Overlaying”

In place since 8.0 (2018) – Code has been hard sealed

Minimal exceptions
Automated Data Upgrade Tool

Automatically Migrates Data to New Version

Minimal Exceptions
Release cadence

- Release notes published in advance
- Pre-releases available
- Update to new version every 30 days
- Delay up to 90 days
- New features are turned off
- Backward Compatible
What’s next if you are moving to D365?

Follow best practices (Your Partner should ensure that)

Use the tools LCS tells you to use

• BPMs, Task Recordings, Extensions
What’s next for existing D365 customers?

- BPM & Task Recording Refinement
- Build Test Scripts
- Implement Regression Testing Suite
Questions?
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