COMMUNITY SUMMIT FO/AX

2023

The Largest Independent Gathering
of the Microsoft User Ecosystem

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Dynamics 365 Finance & Operations Implementation Learnings

Decrease Complexities,
Deliver Results.

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Speakers

Michelle Peters

Ovintiv

Manager, D365 Optimization

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Sweet Success

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- Who am I?
  - Michelle Peters – Denver, Colorado (Ovintiv)
- Why am I here?
  - Led a 9-month D365 F&O Implementation that went live January 2022
- What do I want to share?
  - Some of our **Sweet Successes** from our implementation

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Agenda

- Ovintiv D365 Journey
- Sweet Successes: Implementation Learnings
- Go Live – What's next?

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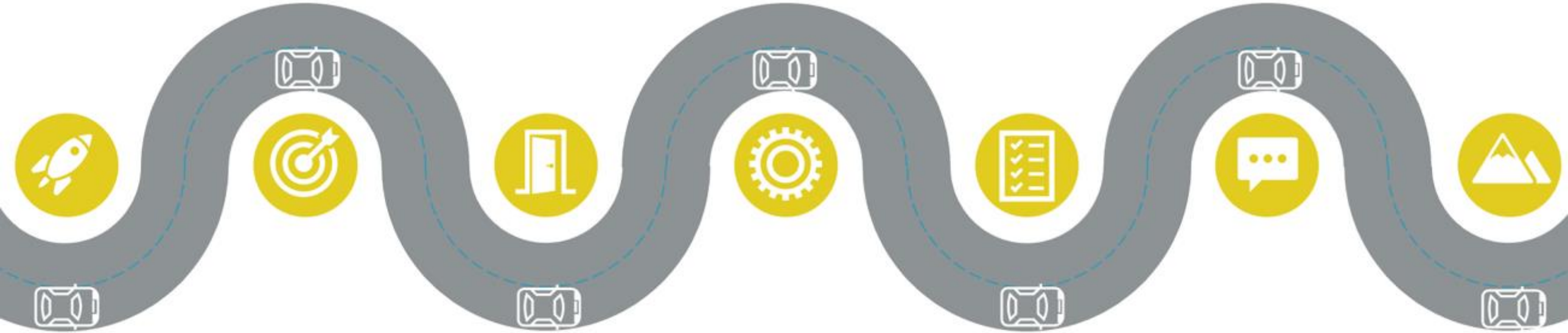
Project Go Live: January 4, 2022

- Modules: F&O + Supply Chain
- 4 ISVs
- Integrations with 10+ Systems
- Data Warehouse

Maturity: 2023

- Release cadence and automation
- Optimizing our Microsoft Platform Investment



Project Kick-Off: April 5, 2021

- MVP Approach

Stabilization and Post Go Live: 2022

- Security
- Support
- MVP Enhancements

Fail Fast (Rolo with it)

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- Change course if it's not working
  - People
  - Modules
  - Reports
  - Other….
- Don't overthink – trust your intuition on making a change

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Change Management (Fish out of water)

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- Change Management might be as important as the technology you are implementing
- Get your teams comfortable with being uncomfortable
- Find your people

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Go Virtual (Be a smartie!)

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- Smart use of your time and resources
  - Cost
    - Reduced travel costs
  - Time
    - Efficiencies in moving from meeting to meeting
    - Less socialization, and more work
  - More effective
    - Work is at your fingertips
    - Easy to share documents, demos, or other data
    - Can include more people in a discussion

- Not a long-term solution, but effective for an implementation

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ISV vs Customization/Integration (Twix)

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- Weigh the pros and cons
  - Time to implement?
  - How will it impact the budget?
  - What does it do to scope?

- Long Term Support should be considered

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Celebrate the Wins (Wine!!)

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- Implementations are going to push everyone's limits
- Reinforce the progress you want to see (big and small)
- Engage people's hearts and minds

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Go Live...What next?

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- Microsoft Releases
  - Your first release is going to come faster than you realize!
- Licensing
  - Your security isn't going to be perfect at go-live
  - Look at your contract to determine how long you have to figure it out
- Testing Automation
  - Start thinking about this after you refine your processes

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Key take-aways

1. Fail Fast
2. Manage the change
3. Go Virtual
4. Think through ISVs vs Customizations/Integrations
5. Celebrate big and small wins
6. Be ready for post go live

Be yourself – honest and authentic

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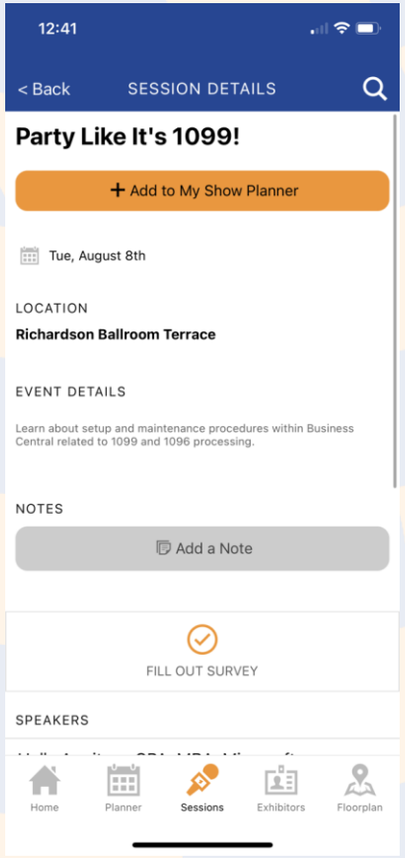
Please fill out the speaker survey

- Located in your mobile app via the session details on the agenda



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Thank you for Attending!

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