



# Strategic Solutions

VISION **NW** EXECUTION

## The Scenario:

Operations is in chaos.  
Accounting can't close.  
Things are so bad, your  
company is ready to ditch  
their partner and engage  
a new firm.

## Universal Challenges:

**Learning curve.** The previous partner has all the knowledge. Any new firm is going to have to spin up on your business, its processes, and key team members – and fast!

**Money.** By this time, the budget for the project is already blown. Every dollar spent is being scraped from some other priority.

**Operations.** Everyone is trying anything they can to move orders along, often creating new problems along the way. You may be dealing with a huge backlog of orders you cannot process, hard against deadlines, or even a dearth of orders because your order taking is down.

**Morale.** The regular staff are burnt out. Overworked and heavily stressed, trying to fight the operational fires day-in day-out. The best workers may even leave. Do you recognize this situation? Keep reading. Hopefully we can help you find a path to success.

# 7 keys to implementation project recovery:

**1. } Get Rescue Experience**  
Some people thrive in chaotic environments and some burn out. Make sure your Partner AND project resources have experience doing recovery. These people have proven they thrive in this environment. The last thing you want is for the new help to burn out after the first few weeks and leave. This is going to be a long, rough haul. You need people who are going to stick around to see it through.

**2. } Watch Your Cashflow**  
Ensure the business has cashflow. If cashflow is blocked, a business can die fast. Identify the processes that are breaking cashflow and target them first. Can't take orders? Fixing that is your top priority. Can't take payments? That's next. Ensure the person leading the rescue has their eye on your current cashflow situation and is prioritizing work to improve it.

**3. } Build Morale**  
Give your team hope that stability is on the horizon. Identify some wins the new team has created and get ready to talk about them at an all-staff meeting. Give people clear next steps on the path to recovery.



# 4.

## Get a Handle

Gather a body of documentation to track issues against. If the original implementors created a process list, validate it. If not, you're going to need everyone's help creating it. Have a specialist lead your team through creating user stories. Ensure each area manager is aware of their responsibility to get and maintain a complete list of processes. Get it to your Partner ASAP to kick-start that learning curve.

# 5.

## Map Issues to Processes

Do more than just log issues: map them to process flows. Your recovery team will be evaluating the root cause of your issues and many will be in an upstream process. Tag those upstream processes for each issue they are causing. This will help identify which processes need a complete redesign and which can be repaired or improved.

# 6.

## Mind Your Data

Assess the quality of data in each area and determine the root cause of bad data. In an ERP system, bad data causes wide-scale problems and fixing knock-on effects can be very difficult. You may even have to consider a re-launch, basically performing a new data migration to a clean system. This is sometimes easier than trying to fix an enormous volume of bad transactions, but only after the sources of your bad data have been fully identified and corrected.

# 7.

## Reevaluate Modifications

List all modifications and map them by business process. Identify which mods are invasive versus superficial. For example, changing how MRP or the pricing engine works is invasive. Adding a user defined field to a document is superficial. Look hard at the invasive mods. Assess whether they can be replaced with out of the box features, superficial mods, proven solutions, or changes to business practices. Reduce complexity and level of effort not only during recovery, but going forward into support and future upgrades.



Strategic Solutions NW is a Microsoft Gold Partner specializing in implementation, upgrade, project recovery, and support services for Microsoft Dynamics 365 solutions. Our greatest strength is our ability to solve problems for our clients. The problems we have solved range from creating and running the accounting function for a \$500 million manufacturer to fixing the IT effectiveness of both small and large companies.

Our greatest asset is our people. We believe experience is what allows consultants to provide practical, implementable advice. We are such consultants; our collective experience enables us to give answers rather than recommend lengthy assessments. Service is our primary driver. We understand deeply that we exist because of our clients.

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