


Your people collaborate for success

Microsoft Dynamics Sure Step Case Study



 Microsoft Dynamics



"We wanted implementation methodology that was on the cutting edge. The out-of-the-box methodology provided by Microsoft Dynamics Sure Step has allowed us to create intellectual property with only slight modifications. Our clients reap the benefits here as this feeds a repeatable process with lower documentation costs."

Eric McGuardian, CEO, MIG

Scenario

Microsoft Gold Certified Partner, MIG, has specialized in the implementation of financial and business management systems for more than a decade. Helping customers streamline their processes and maximize productivity, MIG takes pride in providing transparency to clients throughout each project.

As MIG grew, they found themselves juggling multiple customer projects and implementations. While regular project meetings helped achieve the goal of transparency, the number of meetings was becoming cumbersome and took time – something most companies cannot spare. Estimating accurate project costs also took several meetings to properly assemble the data. More meetings turned into even more time spent before a project could begin.

As a result of MIG's growth, the number of active projects increased. Working hard to meet all of their clients' needs, MIG recognized the need

for stronger engagement management. MIG needed an organized process and methodology that could provide structure for each project and reduce meeting time. These needs had to be met while ensuring a high level of client communication could be maintained.

Additional growth related issues needed to be resolved if MIG were to retain their reputation as a successful Microsoft Dynamics partner. Analyzing their own processes, they discovered these issues surfacing for attention:

- Difficulty in estimating projects 100% accurately
- Increased sales lead to increased implementation work. To stay competitive, successfully managing multiple projects simultaneously was non-negotiable. Ideally this would happen with more shared resources, bringing costs down.
- Current meeting schedules enabled *periodic* customer visibility; MIG was concerned about missing warning signs with limited checkpoints.

Solution

MIG became involved early on in the development of Microsoft Dynamics Sure Step methodology, participating in early adopter events and providing feedback to shape the Sure Step framework. Sure Step became the catalyst MIG needed to refine their consulting practice. The nature of Sure Step's design contributed towards a more productive consulting practice.

[Sure Step maps the process flow, sets clear expectations](#)

Continuous visibility of project progress is important to clients. One of a client's main concerns is how long a project will last and the degree of impact on their day to day tasks.

When MIG presents Sure Step methodology in the project kick-off meetings, confidence in the upcoming implementation project goes up. The customer sees the logical flow of the implementation phases. Processes for data gathering, user acceptance testing and training are supported by tried and true templates. Outlining the project progress with Sure Step, the implementation team can predict the project length.

In turn, the customer can plan for system upgrades or implementations in a way that lessens potential business impact to end users or customers. The MIG customer feels assured they are working with a professional team who has walked this path before.

[Centralized Documentation available to all in Microsoft SharePoint](#)

MIG prefers documentation for client implementations to be kept in a central location. This provides clients with full visibility – useful for project organization, team member changes and audits. Some of MIG's specialized staff is needed in very specific points of the implementation. When an MIG resource steps into an engagement, quickly finding relevant information to do their job can reduce the hours spent on the project.

With Microsoft Dynamics Sure Step, consistent documentation is found across engagements in a centralized project repository on a SharePoint site. All resources have full visibility of each client assignment, accessing consistent documentation. Email traffic is minimized, high levels of communication ensue in an organized environment.

MIG discovered growth related issues:

- Inaccuracies in project estimation
- Managing shared resources across projects
- Limited visibility into project progress

Deploying Microsoft Dynamics Sure Step provided welcome solutions:

- Visibility of Sure Step processes result in greater customer confidence
- Centralized Documentation through Microsoft SharePoint
- Change Management Tools found in Sure Step's Project Management Library
- Greater project visibility leads to predictable processes and outcomes

MIG experienced benefits as they began using Sure Step on Dynamics implementations:

- Structured, goal oriented consultants
- Increased customer satisfaction
- Successful implementations
- Streamlined Sales Process
- Switch to Fixed Bid Processing

Go to Microsoft Dynamics Sure Step to learn more about

- Sure Step Online (all Sure Step content accessed via online portal)
- Introductory videos

Sure Step provides tools useful in Change Management scenarios

Introducing new processes is nearly inevitable in a business solution implementation. Sensitive topics of change come to the surface. The goal is to bring on smooth knowledge transfer amongst team members, helping them to comfortably adopt the new solution. Using the Sure Step Project Management Library, the MIG staff accesses resources relating to Change Management. These tools equip the consultants for proactive client discussions that prepare them for a transition to new processes. Sure Step's Change Management tools allow MIG to ease implementation anxiety as clients move to a new solution.

Predictable Processes, Predictable Outcomes

Sure Step enables more efficient processes throughout an implementation. This increased level of efficiency allows MIG to meet client budgets in an expected time frame. And when a client gets what they expected with measures incorporated to alleviate surprises, they are a satisfied customer. This is where the Sure Step tag line rings true: "On time, on budget, on spec!"

Benefits

Putting Microsoft Dynamics Sure Step into use as MIG's implementation methodology garnered benefits for Dynamics customers, as well as the MIG implementation consultants and project managers.

Structured, Goal-Oriented Consultants

Sure Step provides MIG staff a reusable framework with a template-based implementation methodology. MIG has published the Sure Step methodology internally on their Microsoft SharePoint, enabling consultants to aggregate their knowledge from past implementations. And as consultants share their experiences, they have built up a Dynamics implementation knowledge base with Sure Step at the core.

MIG consultants live by the Sure Step process. Using Sure Step as the training ground for new consultants, every MIG consultant is prepared to engage consistently in Dynamics implementations. In fact, the entire consulting staff has passed the Microsoft Sure Step certification exam. MIG is 100% Sure Step certified. Since adopting Sure Step, MIG has seen increased collaboration amongst their consultants. Instead of individual consultants relying on their own strengths, the competencies of the entire team are drawn together for a complete solution implementation delivered as a team.

"Sure Step takes over the Superman approach where one consultant is in charge of an entire implementation; Sure Step has enabled MIG to work as a TEAM."

- Daron Migirdeyan, CTO, MIG

Satisfied Customers when Expectations Exceeded

As the MIG team works more coherently, so do each of the implementation project teams. A common reason for failed implementations is lack of ownership inside the client firm. This typically happens when the end users of the client aren't feeling informed of the implementation process and the new changes; or all parties are feeling overworked and overwhelmed.

By sharing each phase of Sure Step, from Diagnostic to Operation, MIG provides clients with full visibility into the current status of their projects. This open communication has kept the project team on the same page and moving fluidly through each phase of implementation. As a result, MIG customers report high levels of satisfaction with the implementation project, the consultants, and their new solution.

Successful Implementations

As the MIG staff has learned to maintain consistent documentation in the Sure Step projects, the consultants can move from project to project with ease. Additionally, the project managers are able to successfully manage multiple projects simultaneously. Even with increased volume in work, efficiencies have been seen with resulting decreases in costs. These savings are passed onto clients by offering more streamlined implementations that are completed on time.

With an implementation methodology that keeps communications clear and next steps visible, MIG is able to attain the "Go Home by 5!" mission for clients as well as consultants.

Streamlined Sales Process

Integral to finding the right solution for the client is identifying the client's primary needs along with the gaps needed to be filled. Microsoft Dynamics Sure Step contains a "Solution Envisioning" section with a series of Decision Accelerator Offerings that map directly to the Develop & Discovery* phase of the sales process. MIG has found the *Preliminary Requirements and Process Review Questionnaire for Dynamics GP* to be the document of choice for initiating this dialog in the client's discovery process. This, along with other presales guidance and templates found in this section of Sure Step, have streamlined the sales process for MIG.

*Develop & Discovery phase of the Microsoft Selling Process, based on Solution Selling® as licensed by Sales Performance International, LLC

Switch to fixed bid pricing

MIG has seen many changes in the marketplace over the years. As many vendors come to the table with a price structure in place, a prospect may ask for a price prior to understanding the solution fit. This seems to be especially true when partners get involved later in the selection process. MIG felt the need to move to fixed bid pricing and felt they could do so safely based on historical projects. 20 – 25% of MIGs implementation costs were in documenting customer needs. MIG realized the consistent use of Sure Step was allowing them to reuse basic project documentation. This meant that MIG could standardize on deliverables and offer packaged solutions with a fixed price. Sure Step made the transition to fixed bid pricing a smooth one.

Conclusion

Using Sure Step as the basis for all Dynamics implementations has given MIG the team approach they were looking for while ensuring visibility to numerous clients at once. Using a comprehensive methodology designed specifically for ERP (Enterprise Resource Planning) solutions also helped their team focus on using specific tools needed in each phase of the implementation.

Next Steps

- [Review implementation success factors and using Microsoft Dynamics Sure Step](#)
- [Read about other ways Microsoft Dynamics ERP solutions can reduce complexity](#)
- [Connect with Microsoft Dynamics](#)

For more information about Microsoft Dynamics, go to:
www.microsoft.com/dynamics

MIG is a successful Microsoft Dynamics Gold-Certified Partner founded in New York City in 1998. With locations across the United States, they have been implementing and consulting on industry-leading business solutions including Dynamics GP, Dynamics SL, Dynamics CRM and SharePoint since 2005. Specializing in widely used financial and business management solutions for Mid-Market to Enterprise Clients, MIG & Co. has the experience and the local presence to provide solutions specifically catered to clients' needs.

Goals

- Accuracy in implementation estimates
- Effective sharing of resources across implementation projects
- Project Transparency
- High levels of customer communication

Industry

- ERP; CRM

Country or Region

USA

Connect with MIG

<http://www.mig.com>

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