



# BEHIND THE BUILD

Is D365 working for you or against you?

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# MEET MATT

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**Tech Pre-Sales | Senior Consultant**

Microsoft tech stack evangelist

Solution-first advocate

Making technology work for you

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# MEET MIKE

**Mike Sigler, [mike.sigler@nexergroup.com](mailto:mike.sigler@nexergroup.com)**  
**Senior Director, Customer Success**

Pragmatic approach to  
ERP implementation & optimization

D365 know-how = functional + technical

Focus on a better experience

**MIKE SIGLER**  
Customer Success

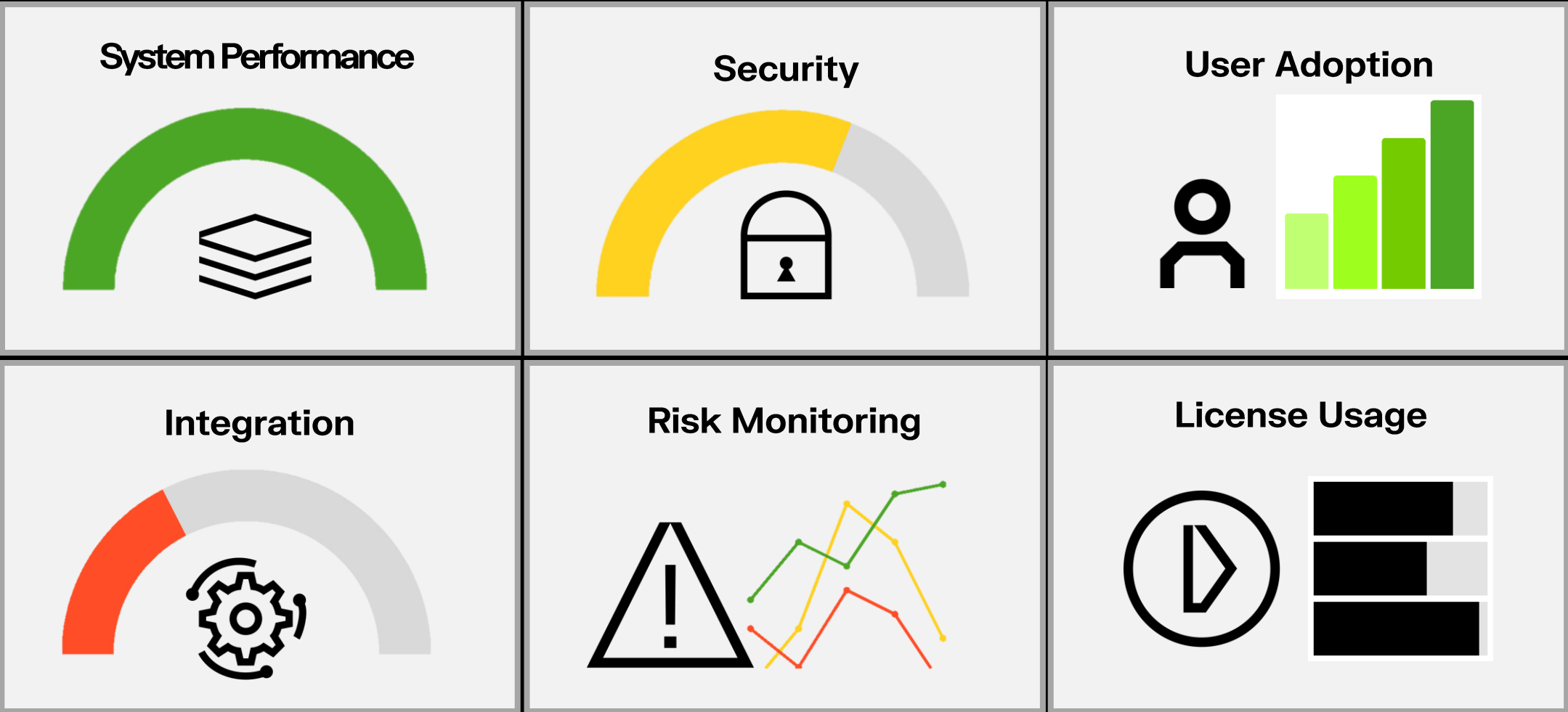


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# D365 HEALTH - HOW'S IT GOING?



# WHAT WE'LL COVER

- Identify common red flags and avoid costly missteps
- Confirm adoption of Microsoft's latest tools and features
- Evaluate ISV vs. custom functionality decisions
- Optimize licensing and security roles to reduce risk
- Align project governance with your team's working style
- Drive meaningful change management and user engagement



Misalignment between business processes and system design is the leading cause of ERP project failures and user frustration

# RED FLAGS

## Strategy & Plan

- No clear business objectives
- Unrealistic timeframe & budget
- Scope creep
- No defined success metrics

## Project Management

- Poor stakeholder engagement
- Weak governance structure
- High turnover in project team
- Lack of communication

## Technical

- Customization overload
- Integration issues
- Data migration problems
- Environment mismanagement

## Users

- Resistance to change
- Insufficient training
- No change management plan
- Lower user adoption

## Testing & QA

- Skipped or rushed testing phases
- Defects ignored or unresolved
- No regression testing

## Go Live & Beyond

- Panic at the go-live
- Support gaps
- Performance issues
- Spike in user complaints

# FUNCTIONAL

Know your business rules

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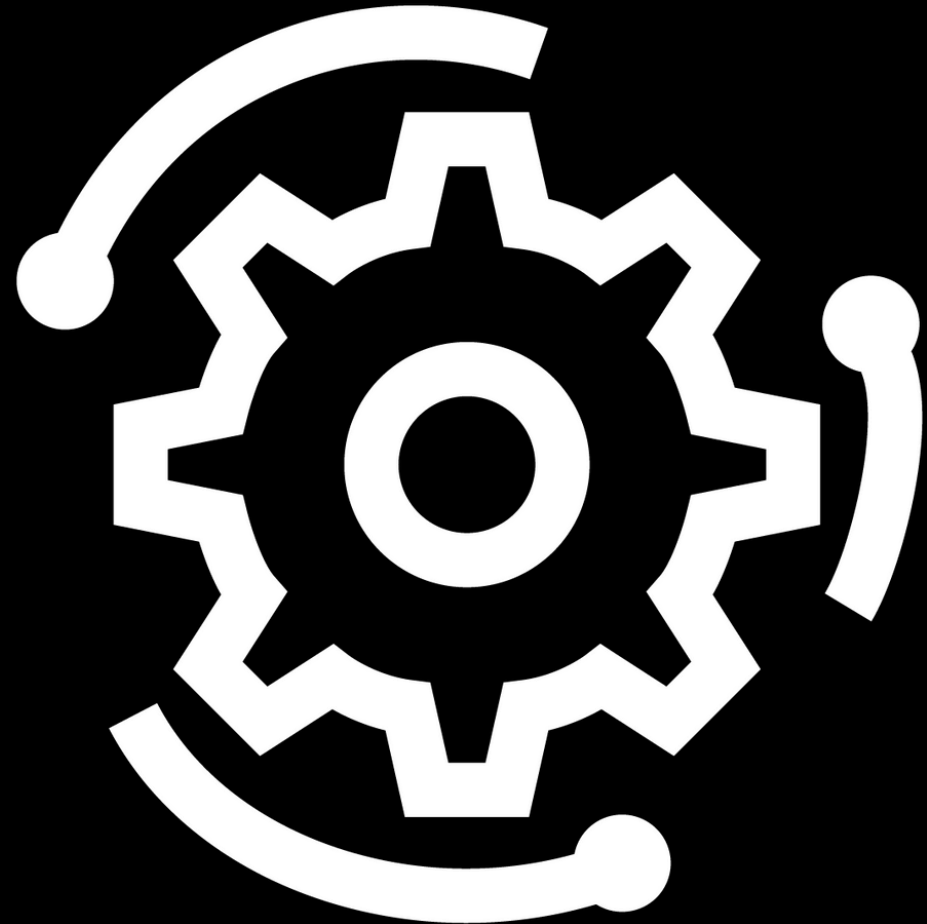
Get process owners to the table

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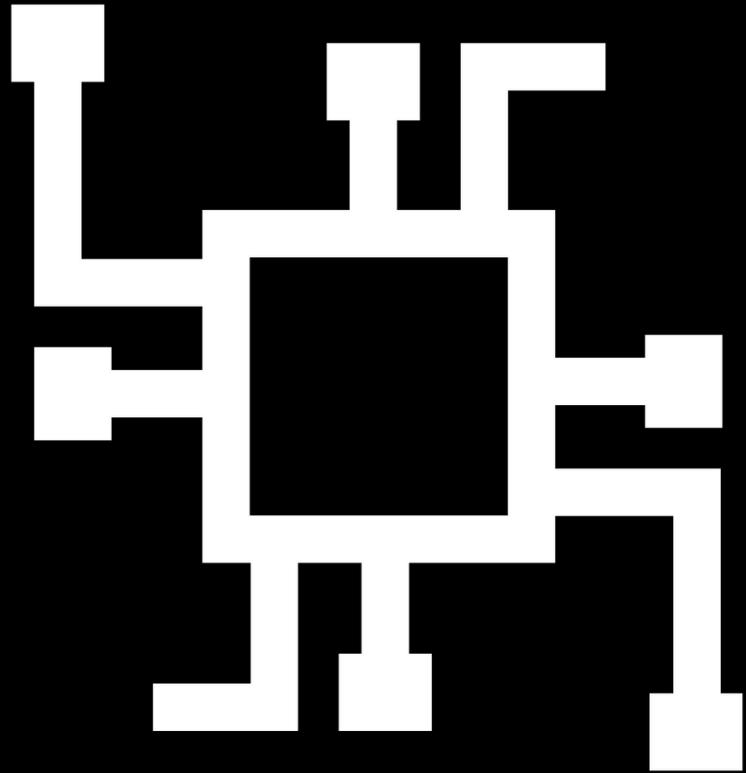
Maximize standard capabilities

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Question workarounds



# TECHNICAL



Leveraging Modern Tools

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Architecture Review for Scaling  
and System/User Performance

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Customizations + Execution

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ISVs

# LEVERAGE MODERN TOOLS

**Identify** legacy components such as siloed databases and standalone systems

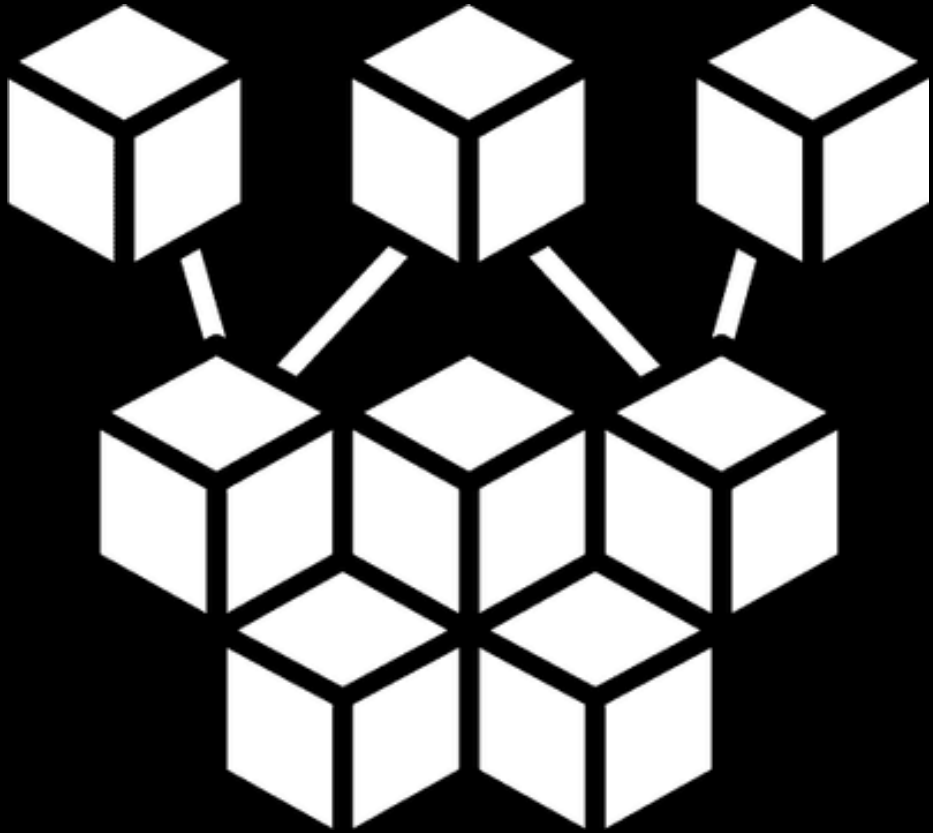
**Globalization Studio** for Electronic Reporting or Tax Calculation Service

**Data Management Framework** = old, but gold for data import/export

**Power Platform** to leverage low code/no code solutions and Dataverse

**Unified Developer Experience** for cost-effective development and debugging

**Power Platform Admin** to enhance management and environment insights



System architecture is  
always changing.

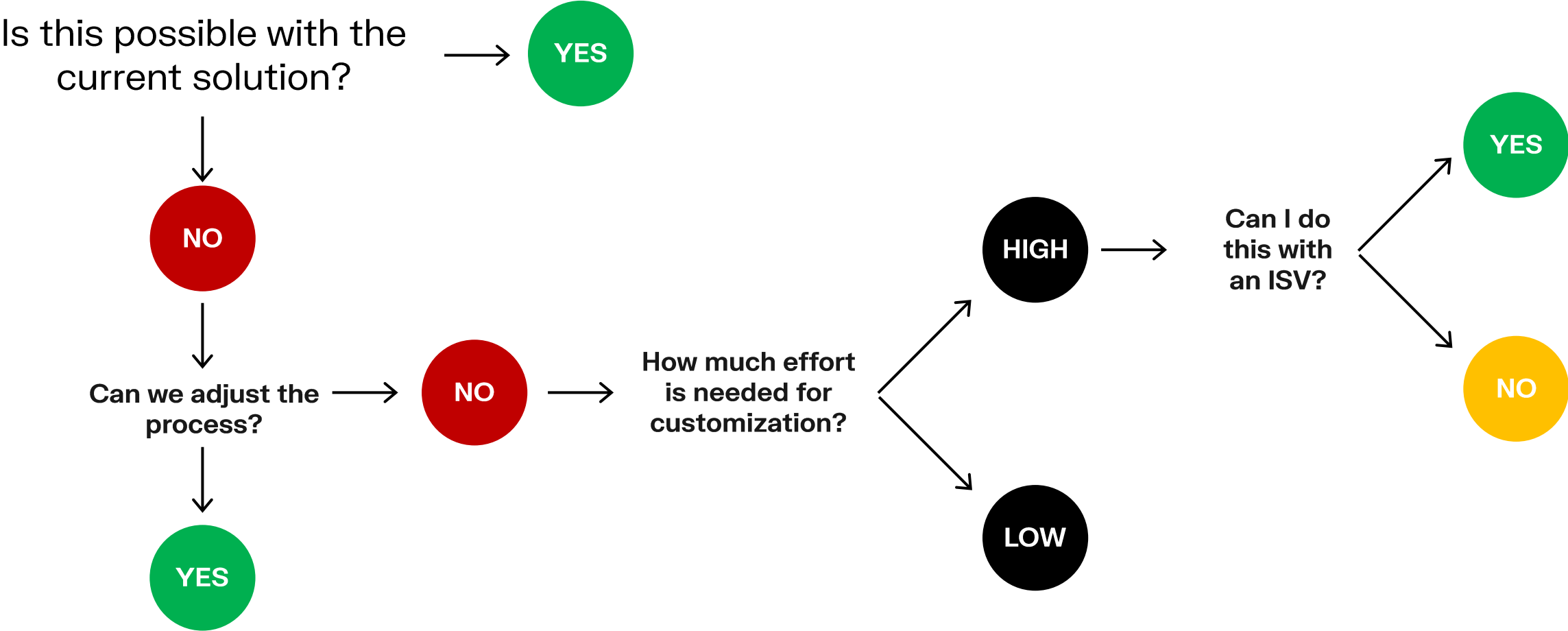
Don't get stuck by  
what you think know.

Your challenges are  
not unique.

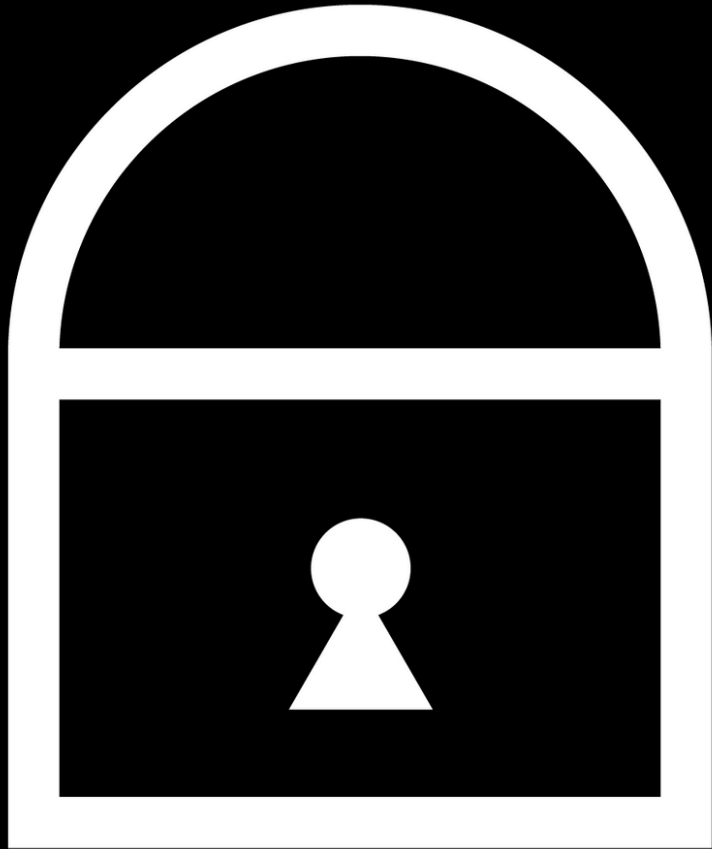
Microsoft & ISV are  
typically the most  
efficient solve.



# EVALUATING CUSTOMIZATIONS



# SECURITY



Regular reviews are critical

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Ensure roles match responsibilities

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Use caution when duplicating roles

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Telemetry is your friend

# GOVERNANCE & FIT

Align project structure and tools that fits your team's style

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Prioritize documentation that enables decision tracking and ownership

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Ensure DevOps, project trackers, or PMO tools support, not burden

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Avoid "black box" implementations



# USER ADOPTION

Remember – Change is hard

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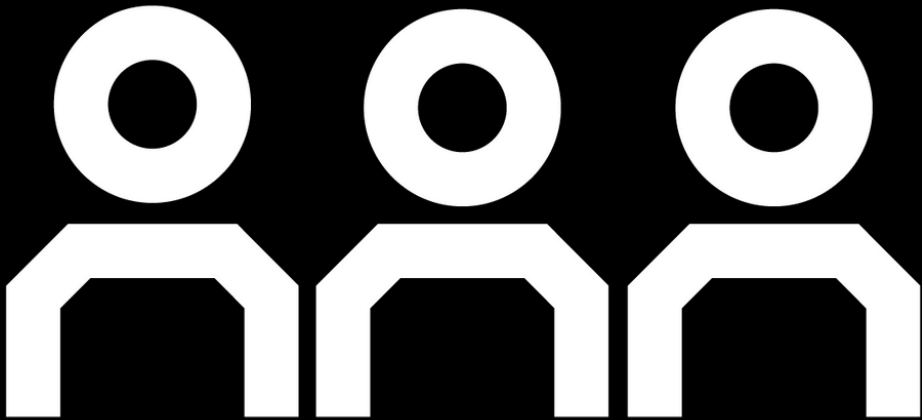
Identify champions and clearly communicate the “why”

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Start training early and involve super users throughout the process

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Recognize that disengagement is often the root cause of user resistance



# GREEN FLAGS

## Strategy & Plan

- Clear goals aligned with ERP capabilities
- Realistic scope, timeline, and budget
- Strong executive sponsorship
- Defined KPIs and success metrics

## Project Management

- Engaged stakeholders across departments
- Stable and skilled project team
- Effective governance and decision-making
- Transparent communication

## Technical

- Minimal customizations
- Successful integrations
- Clean and validated data migration
- Well-managed environments

## Users

- Positive user engagement
- Comprehensive training programs
- Active change management
- High user adoption

## Testing & QA

- Thorough UAT with real scenarios
- Defects tracked and resolved promptly
- Regression testing is routine
- Performance testing completed

## Go Live & Beyond

- Smooth cutover execution
- Hypercare support is responsive
- System performance is stable
- Continuous improvement mindset

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Nexer Group is a global tech leader driving innovation. In a world gone digital, we keep our customers one step ahead.

As a Microsoft Partner, Nexer brings together digital expertise and application know-how to provide you with a strategic approach to implementing and optimizing Microsoft business applications.

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