

De-risking a major Dynamics 365 ERP implementation with QA & testing



While Enterprise Resource Planning (ERP) solutions are essential to the operation of substantial organisations, their implementation and subsequent upgrades are beset with risk. When a nationwide farm equipment supplier replaced several legacy systems with Microsoft Dynamics 365, it looked to Assurity Consulting for testing and risk mitigation solutions.

Results ✨

Raised 450 issues for resolution in a single month

Validated to the company the benefits of consistency and diligence in testing

Provided hard data on the performance and latency of the ERP platform, so Microsoft and the implementation partner can make the necessary improvements.

ASSURITY



About

Organisation

Leading farm equipment supplier

Industry

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Solutions

Microsoft Dynamics 365 ERP
Quality Assurance & Testing

The client is a specialist New Zealand supplier of farm machinery, which has been in business for over half a century. This company resells farm machinery equipment through multiple locations around the country, with a sharp focus on the agricultural customers and communities it serves.

Challenge

Like many companies, this organisation found itself with a collection of disparate technology systems cobbled together over the years. As a result, the company sought a technology refresh that would bring many 'pull-through' benefits, replacing the systems which had last seen a refresh almost two decades back. These obsolete software packages even included greenscreen applications; the company sought replacement and updates not only of those systems but also improvements in work practices, and data entry points, with consistent and standardised processes at every outlet, which would contribute to improved operational performance.

A spokesperson stressed that the point of the exercise is an improvement in the company's capacity for delivering exceptional service to the farmers who depend on it for essential service and equipment. "Even the improved financial oversight which comes from improved systems means we're better positioned for looking after our customers," he said.

The company worked with several local specialist Microsoft partners for the Dynamics 365 implementation; one of these partners brought Assurity Consulting on board for testing and quality assurance.

Solution

The company spokesperson pointed out that addressing the risk elements of an ERP installation – and subsequent upgrades, with a regular 6-month cadence between versions – is crucial. “You want certainty around the implementation and testing. Assurity got involved with the original project, where we worked on achieving Minimal Viable Product ahead of the launch.”

As a company that knew what it wanted, a contract was in place, and Assurity was ready to get to work within two days of the initial engagement.

An accelerated approach meant Assurity was learning about the company and its use of Dynamics 365 as the client itself was learning about Dynamics 365 and system testing. As a result, testing regimes and decisions around inputting data sets and starting a system fresh produced opportunities to progress system design guided by test results. In simple terms, testing established the quality of the system’s performance at the time and guided development.

While noting that supporting a business case for testing is difficult as it is not measurable, the client made the point that any ERP system is consistently compromised to the detriment of its owner, owing to the vagaries of the real world. He said it isn’t possible to avoid workarounds, even in the most complete system; this makes testing an essential component of a risk-managed implementation and for every subsequent upgrade.

Despite Assurity Consulting offering automated testing solutions, the client opted for a more labour-intensive manual approach. This was necessary owing to organisational maturity in the client’s use of technology – moving to a modern ERP solution from obsolete, disparate systems was enough of a leap into the future. After all, the client observed that it is new to Dynamics 365 and has already faced a steep learning curve.

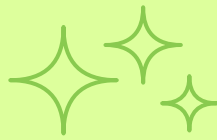
However, the client noted Assurity Consulting’s adept engagement and propensity for consistently demonstrating the value of testing itself while going beyond testing and advising on features that might or might not add value to its business.

“Assurity took the time to understand how our business works, where we are in terms of our ERP implementation and use, and how our investment can achieve the best results.”

The comprehensive approach taken meant Assurity consistently involved senior financial people within the company for the finance-related aspect of the Dynamics 365 implementation, those in control of supply chain management for this aspect of the ER), and business stream leads. This has delivered complete testing coverage as the new system has rolled out and matured.



Results



Defects are an inevitable component of any major software implementation, and testing is primarily geared toward discovering and remedying all such issues. In this regard, Assurity raised 450 issues for resolution in a single month. This was validation to the company that consistency and diligence in testing expose issues that would otherwise interfere with the smooth running of the business following 'go live'.

The client described Assurity as 'a well-oiled testing machine' ahead of the go-live. The subsequent engagement has shown the value of partnership and continuity because Assurity testing has helped address performance issues. It has also resulted in what the client described as 'the most seamless upgrade we have ever done'.

Performance issues in a new ERP system are, at the same time, inevitable and infuriating. Latency and other issues can torpedo the success of the initiative, even leading to staff members questioning the value of the new system. Because Assurity provided hard data, the client could engage meaningfully with the vendor (Microsoft) and implementation partner and work towards the necessary improvements. Without such evidence, pinpointing and resolving inevitable issues is far more difficult.

Whereas in the past, ERP upgrades were done or not done at the discretion of the system operator, the cloud computing era has ushered in a 6-month routine. The first of these dates has come and gone with a pleasant surprise for Assurity's client. Backed by a comprehensive testing regime, the time required for an upgrade has diminished substantially, with a smoother, tidier migration to the latest version. Again, Assurity analysed the upgrade and provided its view on the new features which might benefit the client and those which wouldn't add value. The client acknowledged that this insight demonstrates how Assurity's delivery goes beyond testing and covers the opportunities and risks of introducing any new services available in new Dynamics 365 versions.

“We've got to where we are with minimal disruption to the business. This is a measure of the value Assurity has provided, because it means in turn that we've continued looking after our customers without interruption.



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