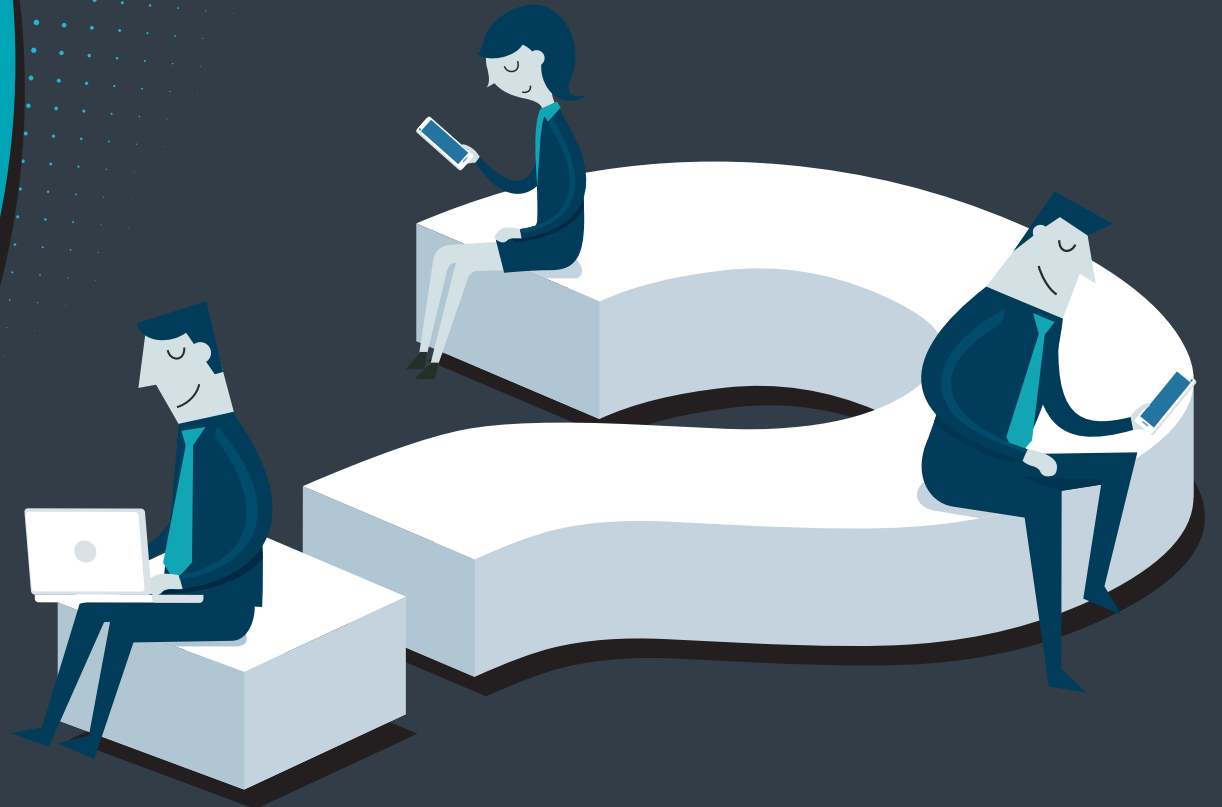# 30 QUESTIONS

YOU NEED TO ASK!

tecman

Finding the Perfect Partner

FOR DYNAMICS 365 BUSINESS CENTRAL

Introduction

You've decided that Microsoft Dynamics 365 Business Central is the business solution for you. Or maybe you're fed up with your existing partner and want to start looking to transfer your Dynamics 365 support elsewhere. But now you have another dilemma – who should implement, or look after, the software for you?! ERP is an important piece of kit, it is the heartbeat of your business. However, leave it in the wrong hands and it could mean thousands of pounds down the drain due to a failed implementation or something which just doesn't support your business.

Currently on Microsoft's website there are over 100+ Dynamics 365 partners listed in the UK, so where do you start? It can be a minefield, shifting through literally hundreds of partners and trying to find the right fit for your business is time-consuming.

If you are looking to transfer your solution and support you won't want to be making the same mistakes as last time. You have probably experienced one, a few or even all of the below problems:

- Inexperienced in your industry and/or the software
- Implementation not meeting your business goals
- Substandard support
- Poor resources and lack of training
- Rising costs

Over the years we have heard all scenarios and seen for ourselves that not all Dynamics 365 Business Central implementations (or partners!) are equal. Often money talks and businesses go with the cheapest option. Yet, many organisations are still left paying tens of thousands of pounds for a Dynamics 365 Business Central implementation which doesn't solve any of the problems they originally wanted resolving.

The partner may not understand your industry, be inexperienced with the software or not able to provide the support you need, so we have put together a comprehensive list of questions that you should ask possible partners before you sign on the dotted line. These questions will help you to wheedle out any partners who are not a great fit for your business and who aren't going to give you the solution you expect.

We have split the questions into 5 different categories;

1 **Knowledge**

2 **Reputation & Experience**

3 **Supporting Expertise**

4 **Training & Support**

5 **Implementation**

Knowledge

1 Do they focus solely on Microsoft Dynamics 365 Business Central or do they implement other ERP solutions?

2 Are they forward-thinking and up to date with all the new functionality, features and product launches from Microsoft?

3 Does the partner have a proven methodology to ensure businesses reach their goals?

4 What training does the partner provide to ensure its employees are kept up to date with all the new versions of Dynamics 365 & the rest of the Microsoft stack?

5 How will you continue to be kept up to date after the initial implementation goes live?

It's important to find a partner whose main focus is Microsoft Dynamics 365 (not just a Microsoft partner in general). They will be experts in that solution, rather than being a 'Jack of all trades & a master of none' and will know the solution inside out plus all of the features and functionality included. We have heard of Microsoft Dynamics 365 Business Central 'partners' recreating standard features with bespoke code as they don't know what is already included and charge the customer for the development work. Don't let this be you!

Also, a single point of contact during implementation, such as a Project Manager and a dedicated Account Manager once completed will make sure that you aren't passed from pillar to post and are always kept up to date.

Hand in hand with this is the partner's knowledge and training. By attending Microsoft approved training sessions and gaining certifications the experts working for the partner will know everything there is to know about the software. You can be sure that your implementation is in the best of hands! So, make sure you ask about the experience and training of the specific consultants working on your implementation.

During your partner search it is vital that you understand how the partner has helped customers reach their goals. This is to ensure that you recognise how they work and what they will do to ensure you achieve your goals with the software. If they don't really have a plan then steer clear – you won't get a usable system!

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Reputation & Experience

6 Does the partner have the relevant Microsoft qualifications, i.e. what solutions partner designations do they have?

7 Does the partner have any case studies or testimonials for other similar customers that you can review?

8 What other similar implementations has the partner delivered for businesses like yours?

9 Does the partner understand the terminology and business processes involved in your industry?

10 How many implementations have they done in your industry?

11 How many years has the partner focused on implementing Microsoft Dynamics 365 Business Central?

Ensuring the partner you choose has a great reputation is vital but if you are completely new to ERP the industry can be overwhelming and confusing. Asking the partner what Microsoft certifications and solution partner designations they have will confirm that they are Microsoft approved and have the relevant product knowledge.

It's important you choose a partner who understands your business, the industry you work in and what you do. If they don't, you are leaving yourself wide open to a long implementation with constant back and forth to the partner and in the long-run a possible solution that does not tick your boxes. If they are experienced in your industry they will have done other implementations similar to yours, have seen your business problems before and be able to solve them easily and smoothly! It's also important to find out how long they have been working with the software; the longer they have been working with it the more experienced they will be.

Case studies and testimonials will show the type of work the partner has previously implemented and these are great to show what they have done in your industry or in a similar business scenario to yours. However, remember these are written by the partner and they will only want to shout about successful implementations.

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Supporting Expertise

Microsoft Dynamics 365 Business Central is a fast moving, constantly updated product. Twice yearly it has major updates with new features and functionality. Often these updates run smoothly and there's no problems, however when there is a problem it's usually business stopping. Partners with a cloud management process will already have a method they follow, know what to check and what to do, you won't have to do anything they will manage the update for you.

Hand-in-hand with cloud management is security, it's another key point which is often overlooked and not thought out. A good partner will want to make sure that your data is secure and you are using the best security techniques, such as OAuth authentication and improved Azure security services.

Another important consideration is what training the partner offers, if any. Some partners have a dedicated training team to support to you before, during, after implementation – with training manuals and online leaning platforms to use once you're back at your day job. Other partners may just send you a playlist of videos and say 'here you go!' and leave you find your own way around the software.

12 How does the partner ensure that there's no interruptions to your day to day operations during the twice yearly Microsoft updates?

13 Are their Dynamics 365 trainers dedicated solely to education?

14 How does the partner ensure continuity so that their team get to know you and are able to respond to your changing business needs?

15 How does the partner ensure that your data and systems are secure?

16 Who from the partner, will I be working with and how much experience do they have?

Training & Support

Picture this, it's 5:05pm and you need to dispatch an order out to your customer but (oh no!) there's an error on your system and none of the shipping documents or labels are printing – what do you do? Your Dynamics 365 support partner will be able to rectify this issue in a jiffy but they close at 5pm on the dot. As mentioned previously, not all partners are equal and this includes support, some partners have longer hours than the standard 9 to 5. If you are a company which operates outside of normal hours it is important that you are supported during that time otherwise you could be left high and dry.

Similarly, when approaching the first month-end after implementation you may be a little apprehensive. It's normal, it's an important procedure, so when using brand new processes within your new business software you may need someone on hand to support you throughout the tasks. A good partner who supports you during the initial teething process will want you to have a smooth transition period and be confident with the solution.

17 When contacting the partner about a query or have a guidance question, how long on average will you wait for a response?

18 Are you limited to the number of support queries you log per month?

19 What hours is the support helpdesk open?

20 Is the support team solely dedicated to the helpdesk?

21 Does the partner offer support for your first month-end?

22 How will the partner continually support you with education after implementation?

23 What training will you receive before, during and after implementation and how will it be delivered?

Implementation

24 What exactly do you get for your money and what are the ongoing costs?

25 What is the partner's availability to start the project?

26 If you customise the solution, who will own any software development code?

**27** What is the partner's typical implementation process like?

28 What will you, the client, be expected to do during the implementation?

29 What is the partner's process to easily transition to another partner?

30 What is the length (and notice period) of the software/support contract?

It's important to know exactly what you will be getting and how it will be implemented. Knowing what you will be paying upfront and after in subscription and licencing will make certain you don't have any nasty surprises.

Also, understanding the implementation process is key too. A timeline will ensure you know what is being done when and also when you need to supply data or supporting information. Remember, the implementation is a partnership, if the partner has to wait around for you to supply what they need for the build the implementation may be delayed, potentially incurring extra costs. It's vital you also know what you own and are responsible for and what the partner will take ownership of, this isn't just processes and tasks but also your data and your solutions custom code (important to have if you choose to transfer support etc.).

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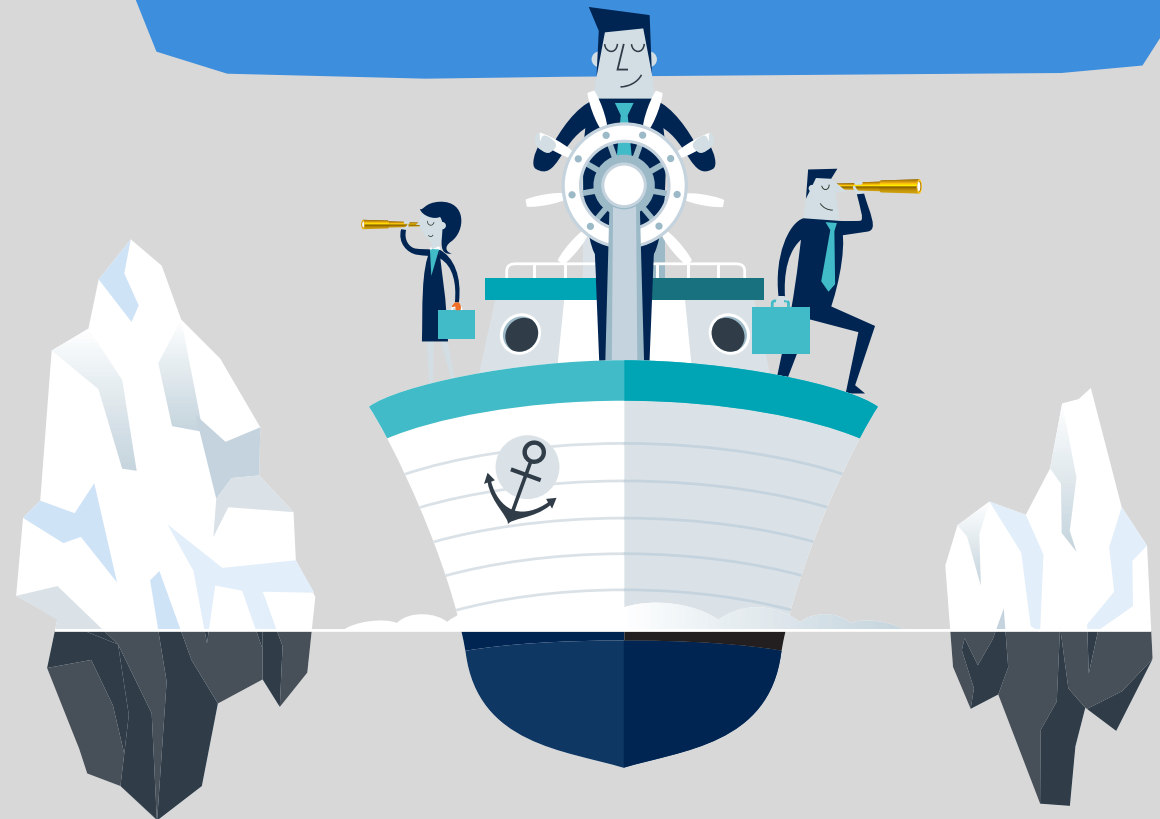
Why Dynamics 365 Business Central from Tecman

Leading with business objectives, not technology

Our aim is to make the lives of Manufacturers and Distributors easier through the implementation of Microsoft Dynamics 365 business software.

Our unique combination of manufacturing and distribution industry know-how, Microsoft Dynamics 365 implementation expertise and technical skills means we have delivered over 8000 successful projects for our customers.

With Dynamics 365 Business Central at the core, we can add Dynamics Sales, Marketing & Customer Service (CRM) as well as our own industry-specific, Microsoft-approved apps to deliver a single integrated solution for growing manufacturers and distributors.

You can extend the solutions even further with the Power Platform, a collection of powerful low-code tools for building apps, workflows, AI bots, and data analytics. You are in control and often don't need a developer to take advantage of incredible functionality. Enabling you to enhance and even transform your business and give you the edge over your competitors.

We are a Microsoft Gold Certified Partner, based in the Midlands and deliver Dynamics 365 solutions in the cloud.

No jargon. Just business improvement. Contact us today:

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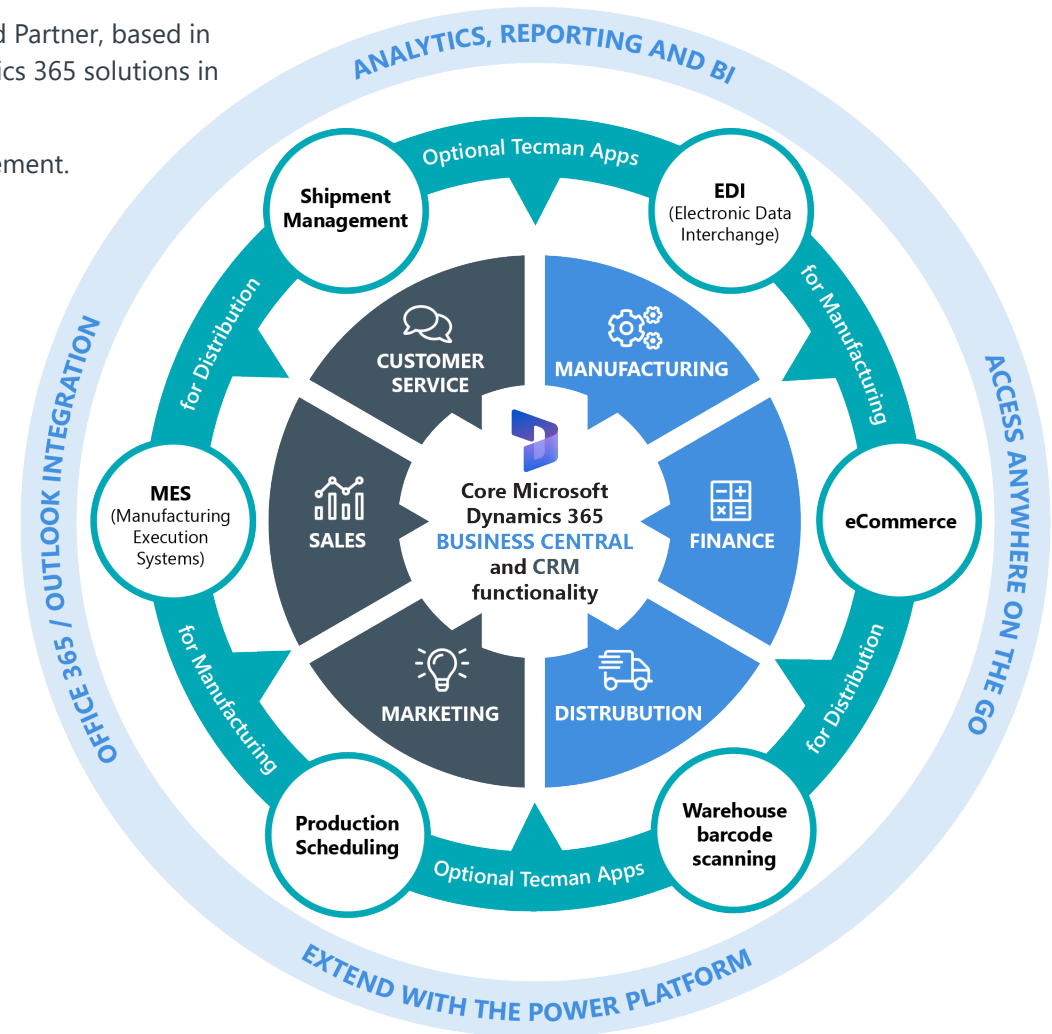
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Gold Small & Midmarket Cloud Solutions
Gold Data Analytics
Silver Collaboration & Content
Silver Cloud Business Applications