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You Implemented D365. So Why Aren't You Seeing the Value?

A strategy-first perspective on recovering value from Dynamics 365 investments

Modernizing the platform is not the same as transforming the business. Real value begins by connecting business triggers, transformation goals and end-to-end processes.

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Across the Dynamics 365 market, I am increasingly seeing organizations facing the same frustrating situation. They implemented D365, the system is live, and the project may even have met its traditional measures of success. Yet leadership is left asking a difficult question: Where is the value we expected from this investment?

The instinct is often to look at the technology. Do we need more functionality, better reporting, more automation, AI, or another implementation phase? Sometimes those are the right questions, but I believe there is a more fundamental one to ask: What did we actually want the business to do differently once D365 was implemented?

One of the biggest risks in an ERP transformation is starting with the technology rather than with the future of the business. Organizations understandably spend significant time documenting requirements based on their current environment. What does the legacy system do today? Which reports are required? What interfaces exist? What functionality needs to be carried forward? Those questions are necessary, but they can also create a trap. If most requirements describe how the organization operates today, the implementation can quickly become an exercise in recreating the existing business on a modern platform. The technology changes, but many of the same processes, workarounds, organizational silos and decision structures remain.

That is modernization. It is not necessarily transformation.

The objective should not be to replicate today's processes in a new system. It should be to design for the business the organization is becoming. That requires organizations to spend time defining “what comes next” before determining how technology will support it.

Before asking what D365 should do, leadership needs to step back from the system requirements and understand the triggers for change. Is the organization entering new markets? Are margins under pressure? Are customer expectations changing? Are acquisitions creating complexity? Is the business introducing new products or services? Are employees spending too much time on manual activities? These are the reasons transformation is needed in the first place, and they should provide the foundation for the investment.

From there, those triggers need to translate into clear transformation goals that describe what should be different. “Implement D365 Finance,” for example, is a project objective. “Improve financial visibility while reducing the effort required to close the books” is a business outcome. Similarly, “implement Supply Chain Management” describes a technology initiative, while “improve inventory visibility so we can increase service levels without unnecessarily increasing working capital” articulates the value the business expects to achieve.

This is why I use a simple sequence in transformation strategy work: Understand Today → Define Tomorrow → Align Investment. Understand how the business operates today, including its strategy, operating model, processes, roles, pain points and constraints. Define where the organization needs to go next and the capabilities and processes required to get there. Then align technology investment, priorities, governance and the transformation roadmap to that future state.

An important part of this is looking at the business through end-to-end processes rather than ERP modules or functional departments. Organizations do not deliver value through modules; they deliver value through processes that cross functions, systems and organizational boundaries. Order to Cash, for example, can span sales, inventory, fulfillment, finance and reporting. A problem experienced in one department may have originated much earlier in that process.

This shifts the conversation from “How should we configure this module?” to “How does this process need to operate in the future, and what needs to change to get us there?” It gives the organization permission to challenge legacy practices rather than automatically reproducing them. Which activities no longer add value?

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Where are manual handoffs creating delays? Where is information being entered multiple times? Which processes should be standardized? Which genuinely differentiate the business? And, perhaps most importantly, which processes have the greatest impact on the transformation goals?

By connecting business triggers → transformation goals → end-to-end processes, leaders can focus their transformation effort where it has the greatest potential to create value. D365 then becomes an enabler of the transformation rather than the definition of it.

For organizations where D365 is already live but the expected value has not materialized, it is not too late to take this approach. The answer does not necessarily begin with another large technology project. Instead, step back and revisit the strategic questions that may not have received enough attention the first time. What has changed in the business? What outcomes matter now? Which end-to-end processes have the greatest influence on those outcomes? How do those processes need to operate differently? Only then should the organization determine where changes to D365, data, process, governance, roles or other technology investments are required.

Go-live is an important milestone, but it is not the ultimate measure of transformation. The real measure is whether the organization operates more effectively, makes better decisions, serves its customers better, supports growth more easily, or achieves whatever business outcomes justified the investment in the first place.

The goal of a D365 investment should not be to recreate the business you already have on a newer platform. It should be to build the foundation for the business you are becoming.

ABOUT REDCAT CONSULTING GROUP

RedCat Consulting Group helps organizations align business strategy, operating models and end-to-end processes with technology investment. Our work is designed to help leaders move beyond implementation and create measurable, sustainable business value.

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