



100% independent ERP and Enterprise Software Advisors
and market leaders in Australia and New Zealand

Implementation Partner Guide

Choosing Your Implementation
Partner for Microsoft D365



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enabling your digital future

About this guide

You have decided which enterprise software solution is the right one for your business, but did you know that your choice of Implementation Partner is just as important, if not more important?

There are many implementation partners in the market and this guide provides insight and assistance in finding the one that gives you the greatest chance of success, offering value for money and a track record in Australian and New Zealand.

Partner Solutions

Choosing the right solution is more than just picking the software

In many instances, companies needing new enterprise systems think first and foremost about the product itself and the vendor that develops, maintains, and supports that software solution. In some cases, those vendors do offer implementation services for their solutions, but more commonly, they rely on third party businesses called 'Implementation Partners' for that task.

Implementation Partners provide important capabilities and skillsets, including:

- Industry specialisation beyond the vendor's offering.
- Servicing regions with local resources to undertake the software development and configuration for your specific needs.
- Providing implementation teams that deliver to your requirements beyond potentially more generic capabilities provided by the software provider.
- Providing additional product features above and beyond what the solution provides 'out of box, potentially filling gaps in the solution's functionality.
- Providing you with ongoing support for your solution with resources potentially located within your geographical region.
- Providing you with deeper 'practical' application of the software.

The challenge of selecting an Implementation Partner

In many cases, vendors may have dozens, even hundreds, of certified third-party implementation partners, each with their own mix of these capabilities. Determining which partner has the required mix of the above capabilities that are relevant to your business can be time consuming to ascertain given some of these characteristics and capabilities only become clear once you have formally engaged with them. By then, it is often costly or too late to change course should their capability not meet with your needs. Some of the well-known software providers occasionally have long partner lists, with some detail on their websites, but the information provided can be incomplete and they rarely recommend or even point you in the right direction, instead leaving the market research and due diligence up to you. It is important to note that vendors also find it difficult to recommend just one sole partner from their long list of partners.

Selecting the right implementation partner and navigating the associated risks can be a challenging task. Understanding what an implementation partner's role is and how it differs from the vendor's is an important part of the process.

What you need to consider

What to look for when selecting an implementation partner?

To identify the most suitable implementation partners on the market for your unique needs, it's important to go through an interactive and detailed process with many touchpoints throughout. Consider the following:

Key Considerations

Experience and expertise

Look for a partner who has a proven track record of successful solution implementations, particularly in your industry and/or with similar organisations. The selected implementation partner should have a team of experts who are knowledgeable about the solution and can offer guidance and support throughout the implementation process.

Communication and collaboration

Effective communication and collaboration is critical to the success of any implementation project. Select an implementation partner who is responsive, accessible, and willing to work closely with your team to understand your needs and goals. The selected implementation partner should also be able to provide regular progress updates and address any concerns or issues that arise during the project.

Project management skills

A good implementation partner must have strong project management skills, including the ability to develop a clear project plan with timelines, milestones, and deliverables, as well as considering client-side activities. This also means that the selected implementation partner has the required experienced consultants with capacity to deliver. An experienced resource pool will be able to manage scope changes and risks effectively and keep the project on track to ensure it meets its objectives.

Training and support

The success of a solution implementation depends on your team's ability to use it effectively. Picking an implementation partner who can provide comprehensive training and support to ensure your team is fully prepared to use the solution is highly recommended. Take into consideration the ability of the implementation partner to provide ongoing technical support and assistance as needed.

Flexibility and scalability

As your organisation's needs change, so may your solution requirements. It is important that the implementation partner is flexible and able to adapt to these changes, whether that means accommodating changes to the project plan or scaling their services to meet your evolving needs.

Reputation and references

Before selecting an implementation partner, it is important to learn about their reputation in the industry. Appraise user reviews, testimonials, and case studies from previous clients and ask for references that can be contacted directly. Speak to contacts in your industry about their specific experience with an implementation partner. This helps gauge their level of expertise, quality of work, and ability to deliver results.

Assessment Criteria

In addition to the key considerations, you should consider establishing an “assessment criteria” that represents the minimum qualifications or parameters that your business requires before considering a suitable implementation partner. Typically some of these criteria encompass the following:

Number of years in business and with the vendor

Implementation Partners with lengthier tenure in Australia and New Zealand will typically have better-rounded experience with the vendor's offerings.

Partner tier

Higher tier usually indicates the capability to implement for larger, more complex organisations, which is not always suitable, or necessary, for smaller or less complex implementations.

Number of implementations

Aside from more implementations meaning more experience, it is worth determining whether an implementation partner's claimed implementation count is for full life cycle implementations, or upgrades or just providing support.

Number of consultants

More consultants typically result in better experience with different types of implementations, and related functionality, but when considering the consultant count of a given partner, one should also determine the proportion of those located in your region vs from their global operations, which can be located offshore.

Custom IP

Some implementation partners have a significant software development capability, either in a specific best-of-breed capability, or where customisation is required to enhance the software. Investigate what, if anything, they offer in addition to what the vendor offers. This IP could come in various forms, such as product extensions, documentation, artifacts, accelerators, etc.

Local implementation and support

Direct physical access to consultants during the implementation and ongoing support phases can be more effective than remote virtual assistance. A modern approach is a hybrid delivery model with a mix of on-site and face to face vs remote.

Industry specialisations

Most partners will have experience across a large set of industries however some will have their own set of industry specialisations. It is often the case that implementation partners focus on a subset of industries, sometimes just one. The more specialised the better as they won't be learning on your project.



How can SMC help?

As 100% independent advisors and consultants in enterprise software, we utilise a proven software and implementation partner selection methodology that has been fine-tuned over the past 17 years.

SMCs Digital Transformation Model

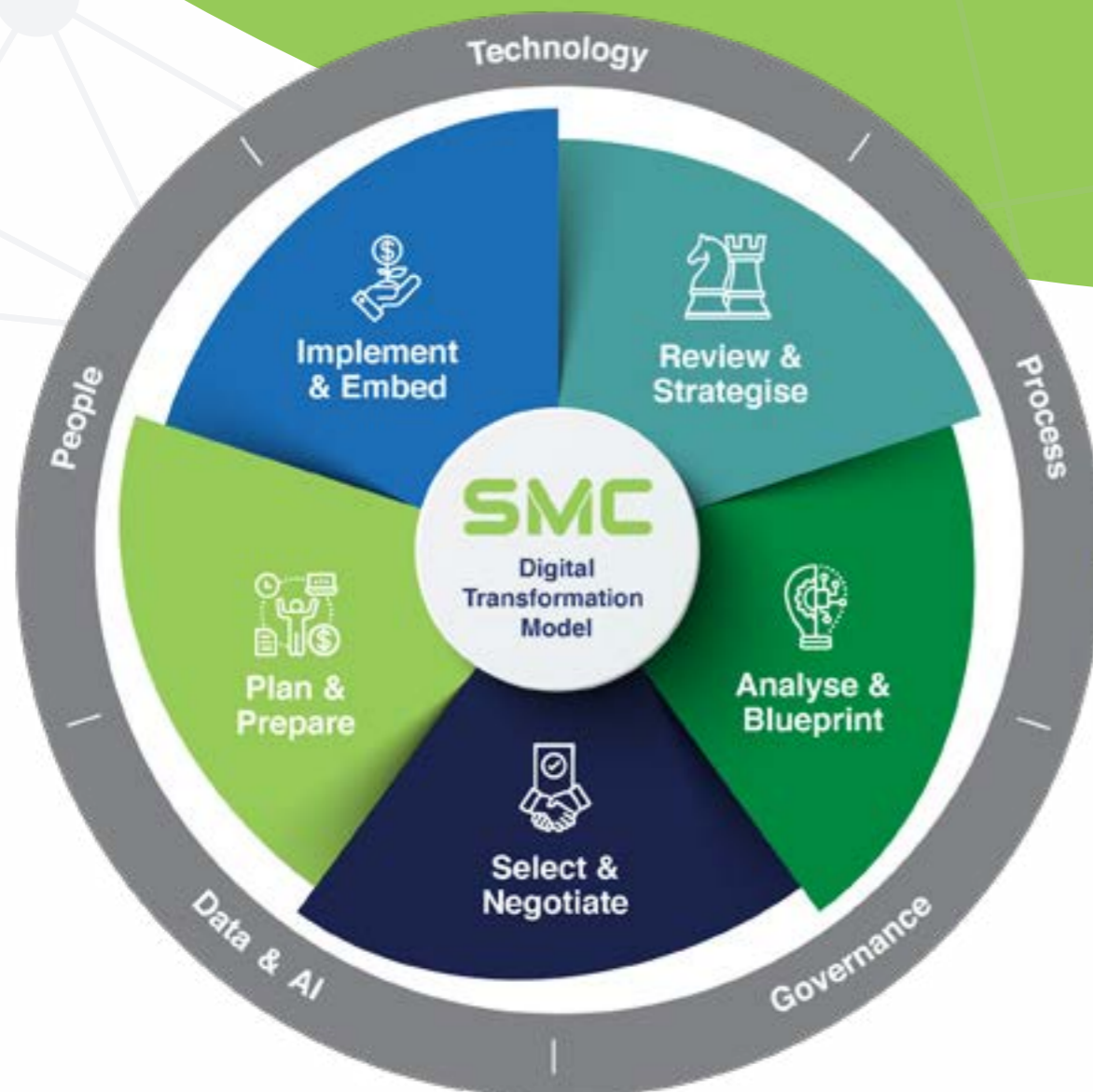
Our Digital Transformation Model comprises phases and workstreams

There are five discrete phases:

1. Review and Strategise
2. Analyse and Blueprint
3. Select and Negotiate
4. Plan and Prepare
5. Implement and Embed

There are five workstreams that span the phases:

1. Technology
2. Process Improvement
3. People and Transformation
4. Data and AI
5. Governance



SMCs approach

Implementation partners are put through a rigorous process to ensure our clients understand the pros/cons/trade-offs of each of the short-listed implementation partners, so a selection can be made with confidence. Some of the key elements of our approach involve:

- Documenting unique requirements and focussing on potential differentiators
- Defining a set of 'knockout' criteria to qualify/disqualify implementation partners
- Weighting and evaluating criteria and requirements
- Conducting comprehensive market research
- Tailoring the selection process to what our clients see as important in the future relationship
- Managing the engagement with the implementation partners including:
 - Organising Non-Disclosure Agreements
 - Running Screening Sessions
 - Producing Modern Go-to-Market Documentation (RFP's, Requirements, Demo Scenarios, etc)
 - Assessing and Normalising Quotes
 - Moderating Demonstrations
 - Negotiating Vendor/Partner Commercials

From our Digital Transformation Model, the impact of implementation partner characteristics plays a significant role in implementation partner selection and subsequent interaction in Phases 3-5, based on the outputs of Phases 1 and 2.

Outcome and value

One of the key deliverables for SMC clients is a de-risked approach in selecting the correct partner. The outcome is an alignment of requirements with capabilities, resulting in clarity for the prospective implementation partners, but more importantly, the ability for our clients to hold partners accountable. This benchmarking allows organisations to make a choice with confidence and subsequently results in a positive commercial outcome.

A selection of Implementation Partners specific to Microsoft Dynamics 365

The diverse categorisations of Microsoft Partners were developed by Microsoft with the purpose of aiding customers in recognising a partner's proficiency in a specific domain. For instance, Partners provided with a Gold competency in Application Development and a Silver competency in other fields demonstrate a clear specialisation in App development.

Microsoft Gold Partners

Of the 64,000 Microsoft partners worldwide, only 1% of partners hold the distinguished status of being Microsoft Gold Partners, signifying the attainment of the highest level of certification. A Microsoft Gold competency stands as a testament to the pinnacle of expertise and demonstrated skills in a particular technology or product. These esteemed Microsoft Gold Partners are widely acknowledged for their trailblazing business solutions. Notably, our organisation has recently accomplished the coveted Microsoft Gold Cloud Platform competency.

Microsoft Silver Partners

Silver Partners demonstrate a specialised skill set in a particular product or service. They offer high-quality services and solutions. To achieve this competency, the company's technicians undergo a rigorous and auditable approval process in specific focus areas.

Microsoft Certified Partners

Unlike the Silver and Gold level competencies, businesses just need to join the Microsoft Partner Network to achieve basic partner status.

These partner categorisations apply to any given Dynamics 365 product. Some partner literature can have a heavy 'Enterprise Systems' emphasis, though only cater for a subset, especially the traditional CRM environment (now known as Dynamics 365 Customer Engagement). Always ask a potential implementation partner in advance which Dynamics 365 products they cater for, and have significant experience with.

Partner classification

SMC always recommends an in-depth analysis of what type of partner would bring the best value to your organisation when selecting a partner for the Dynamics 365 implementation.

A selection of Microsoft Dynamics 365 implementation partners in Australia and New Zealand is shown below:

RAPIDLY EVALUATE ENTERPRISE SOFTWARE AND IMPLEMENTATION PARTNERS

We help organisations become more streamlined, modern and competitive for the digital era through improved business processes and modern enterprise platforms.



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