Finding the Right ERP to *FIT* Your Business
Welcome to the Microsoft Dynamics ERP Discovery Guide, a guide designed to help you assess your current business needs and develop a strategic road map, as you define the most important criteria for an ERP solution. By following the steps and considering the questions in this guide, you can begin framing the discussion with your ERP vendor or systems integrator.

- Consider employees' level of comfort and support required
- Identify relationships among existing systems
- Understand how people interact with systems and processes
- Characterize your organization's job functions
- Understand how people use information
Realize the Promise of ERP with a Solution That Fits

To seize growth opportunities and build your competitive advantage in tough economic times, you need to ensure efficient and adaptable business processes and empower employees to reach higher levels of productivity—all while reducing costs. By connecting business processes and people and enabling access to current, consolidated information across departments and locations, ERP software can be a powerful asset in meeting these challenges.

This is the clear promise of ERP technology. But, not every system available on the market can meet the needs of every business. Whether you’re evaluating the purchase of an ERP system for the first time or considering replacing your current system, you need to identify an ERP solution that will fit your business. Specifically, one that includes the following attributes:

- **Is easy to use.** A familiar interface and intuitive tools minimize the risk of downtime, reduce training costs, encourage adoption by the broadest possible set of users, and ensure high productivity.

- **Meets the needs of all your people.** A single system that offers comprehensive functionality cuts across all departments and lines of business—financial analysis and support for operations as well—and provides that functionality in a way that’s tailored to the individual.

- **Integrates seamlessly with existing systems.** A solution that works well with your existing IT systems minimizes deployment costs and custom programming and enables efficient sharing of data among business applications.

- **Adapts to the unique needs of your business.** A system that can be efficiently tailored to your industry and specific processes means that you will not have to modify your way of working to match the software. Long-term success depends on a flexible solution that can be updated as your business grows and changes.
ASSESS Your Business Needs and Create a Strategic Road Map

The success of virtually any major software initiative depends on aligning the systems and applications with the needs of the business. This is absolutely essential in the case of an ERP system, because it touches every department and includes mission-critical financial, operational, and customer data. Even before you talk to vendors or prepare an RFI, you should develop an understanding of the issues that are unique to your industry and your organization.
The following sections provide some thought-provoking questions that will get you thinking about your business and that can help you evaluate candidate systems to frame a discussion with ERP vendors and systems integrators. As you move forward with your ERP evaluation process, make sure you’re fully prepared to start that conversation. Walk through the following steps and encourage your people to answer the questions below before contacting a local partner.

**STEP 1: Consider employees’ level of comfort and support required**

Even the most full-featured system won’t be used effectively if important features are hard to find and potentially missed when new users are brought up-to-speed. The best business applications make it simple for all employees—sales and support staff as well as financial analysts—to learn how to use it and incorporate it into their daily routine. As you think about ease of use, consider the following:

- How often do job roles transition within your organization, and how important is it to your business to have intuitive and easy-to-learn systems?
- How much time does your staff spend supplying reports and other data to frontline employees?
- Could frontline employees serve themselves if they had secure, timely access to the data specific to their role or job function?
- What types and levels of support are required for your current systems?
  - Are employees generally happy with the functionality, integration, and support of your current systems?
  - Where are your systems meeting the needs of the groups you support, and where are groups asking for additional functionality or updates?
  - What are your current priorities in these areas?
STEP 2: Identify relationships among existing systems

When business systems—such as accounting, purchasing, and inventory—work together flawlessly, you increase efficiency and reduce support costs, which is why you should look for proven success in this area when you consider a new system. The availability of connectors and adaptors for a given solution can streamline deployment, limit costly development, and make it easy to get the new ERP system up and running quickly. When thinking about interoperability, consider:

- To what extent are you affected by systems that are not already fully integrated or systems that don’t easily support Web access to information?
- What is your approach to either integrating or terminating these systems?
- How do your current systems support the sharing of sales and operations data and accounting data and processes? Does your human resources management system share data with other aspects of your business infrastructure, such as payroll and the general ledger?
STEP 3: Understand how your people use information

Systems that connect your people to your data in the way that is most flexible for them provide employees with better insight into the business. The most successful ERP solutions help employees at all levels of the organization track business metrics, visualize data and sales opportunities, and access key performance indicators in real time. These solutions can democratize business intelligence so that it is more usable for people, teams, and organizations.

☐ Do you have adequate metrics to know how your organization is performing?
  • Do you have quick insight into how specific departments, projects, or initiatives are performing?
  • How easily or how quickly are you able to mine data and present reports from across all your systems?

☐ How are the tools and processes you currently have in place helping you anticipate fluctuating demand and accurately forecast business?

☐ Do you have the ability to dynamically synchronize your core systems with input from local frontline managers or business analysts to help ensure data accuracy and prevent rekeying data?

☐ How do you access or gather the information necessary to accurately forecast and meet demands today?

☐ Are there specific areas where information is difficult to gather or missing?
STEP 4: Characterize your organization’s job functions

To facilitate broad adoption, a successful ERP initiative should strive to provide individualized experiences to people working in specific roles. Systems that enable people across the organization to access the functionality they require—exactly where they need it and when they need it—increase the productivity of the entire organization.

- How much time does your staff spend supplying reports and other data to frontline employees?
- Could these employees potentially serve themselves if they had secure, timely, role-based access to properly formatted data?
- Where are you seeing challenges in accurately and efficiently pulling information from different systems, cross-platform systems, or different departments?
- How are you managing the challenges and taking advantage of the opportunities posed by a dispersed organization?
- Do any of your employees work from the road, from home, or in remote or branch offices?
- How do you ensure that these mobile and remote workers have timely access to the business information and functionality they need to work effectively?
STEP 5: Define specific processes and requirements of your business and industry

An ERP solution that aligns with the requirements of your industry is essential in helping you connect and streamline business processes to boost efficiency. And, as your business grows and changes in response to new industry trends and regulations, a system that can grow and adapt to handle your evolving business requirements can save money and help ensure greater continuity.

Each industry has unique requirements. The section that follows contains some key questions that organizations in the manufacturing, distribution, retail, professional services, or public sector industries can use to define their specialized requirements when evaluating the market for ERP systems.
MANUFACTURING

Success in the manufacturing industry requires producing the right products, in the right quantities, at the right time—with good quality and at a price the customer is willing to pay. The flexibility to respond to compliance standards and the ever-changing needs of customers requires real-time visibility into operations. You need an ERP system that gives you the ability to make quick decisions based on current and accurate data so that you can meet these demands and build your competitive advantage.

☑ Has your inventory valuation increased over the last few years? By how much? Have your inventory write-offs increased?

☑ Are your current manufacturing and accounting systems integrated to your satisfaction?

☑ Do you have the ability to see the impact of change orders to your production schedule so that you can take preventative action?

☑ How do you currently track lead time for materials? Do you have forward visibility to enable you to consolidate vendor orders to gain larger discounts?
**Distribution**

New distribution channels continue to appear, while existing channels are expanding with new approaches, such as global sourcing, cross-sell capabilities, third-party logistics, and RFID. Distributors are also faced with greater competition and higher customer service expectations. To cope with these changes, distribution companies need to implement more advanced management solutions.

- Are you able to measure operating margins by customer? If not, what is preventing you from doing so?

- Do you feel you can accurately recognize all shipment costs, including labor?

- How much inventory do you maintain as a cushion against higher-than-expected orders, and how do you gain visibility into quotes and orders?

- How do you manage your sales and operations planning process, and how is marketing integrated in this process?
Retailers must reduce inventory investment while improving in-stock positions; increase customer service while reducing labor costs; and decrease operation costs while expanding to multiple channels. In addition, businesses in this industry need to consolidate acquisitions, fight off encroaching competition, and do it all in a challenging economic environment—complexities that underscore the need for a fully integrated and flexible business management solution.

- Do employees currently have secure, role-based access to data from your point-of-sale, inventory, merchandising, or customer relationship management systems?

- Do your systems give you a single view of store performance, inventory, pricing, promotions, and customers across all channels?

- How quickly and precisely can you identify and apply product margin information to adjust your planning and purchasing activities?

- How closely is your online presence integrated with your stores?
**PROFESSIONAL SERVICES**

Professional services firms face the difficulty of selling an intangible product that is both difficult to quantify and continuously evolving. To maximize profitability, these firms must accurately estimate projects and deliver services on time while meeting or exceeding customer requirements. To ensure long-term success, companies must adopt strategic and comprehensive financial, project, and resource management practices supported by IT systems that enable people to easily share data and work together to improve business results.

- Relying on your current systems, how easy is it for you and your managers to get a 360-degree view of a specific client, including their current projects, revenue activity, and profitability?

- Are you able to adapt appropriate collaboration methods for various partners, engagement teams, and staff under constantly changing conditions?

- What measures do you have in place to help ensure that you are billing for all time worked, including support in remote project management?

- Do your current systems give you and your project managers timely and accurate information on the status and profitability of projects?
PUBLIC SECTOR

The public sector faces unique challenges, including delivering on mandates for high levels of transparency and accountability and responsiveness to diverse, and often complex, citizen inquiries. Government agencies and other public sector entities typically rely on older technology, which can make achieving these goals even more difficult. To better adapt to new requirements, increase efficiency, and deliver improved constituent service, public sector organizations need IT systems that provide centralized accounting control and facilitate internal and external collaboration.

- Do your systems enable you to effectively collaborate across agencies and organizations, especially in instances with joint funding sources?

- How easy is it to derive metrics that help determine what programs or services are most important to provide or what could be cut?

- How do your systems and processes help you keep up with changing regulatory and compliance demands?

- Are you able to accurately forecast your funding position and future demand for services?
Take a Closer Look at an ERP Solution That Offers an 

EFFICIENT FIT

Microsoft Dynamics® ERP solutions are built to combine innovative capabilities with maximum flexibility to ensure an efficient fit with your people, processes, and IT infrastructure. Specifically, Microsoft Dynamics ERP solutions offer:

• **A familiar, intuitive interface.** Microsoft Dynamics ERP solutions are designed to look and feel like the Microsoft® productivity and business communication tools your people use each day so that they can become proficient in less time without the need for extensive training.

• **RoleTailored functionality.** By enabling you to tailor screens, reporting tools, and other features to specific job functions, Microsoft Dynamics business solutions empower employees to access and act on relevant information with greater speed and ease to move your business forward.

• **Integration with existing systems.** Microsoft Dynamics ERP solutions feature built-in tools to ease deployment and streamline integration with a wide range of applications; and, because Microsoft Dynamics solutions are built on Microsoft platform technology, you can take advantage of powerful integration tools, such as Microsoft BizTalk® Server, to quickly and cost-efficiently connect your ERP solution with data sources across your entire IT infrastructure.

• **Industry-specific solutions.** By taking advantage of the expertise of your Microsoft Dynamics partner and tapping the power of Certified for Microsoft Dynamics industry solutions—which tailor Microsoft Dynamics ERP functionality to meet the needs of various industries—you can ensure that your solution aligns with the way you do business.

Work with a Local Partner That Knows YOUR INDUSTRY

To ensure the successful deployment of your ERP solution and minimize risk, you need to be able to count on a trusted partner who is local to your area, has specialized knowledge of your industry, and understands your specific business challenges. When you choose a Microsoft Dynamics ERP solution, you gain access to an expansive network of partners—all thoroughly trained and certified to help you define the exact needs of your organization. Your Microsoft Dynamics partner can work with you to develop a solution that delivers an efficient fit for your business now and as your organization grows and changes.

Your Microsoft Dynamics partner has an arsenal of tools, including the Microsoft Dynamics Business Solution Roadmap, to help you develop an effective long-term plan for reaching your most important business objectives.

Next Steps

To find out more about Microsoft Dynamics solutions, or to connect with a Microsoft Dynamics partner, visit [www.synergybusiness.com](http://www.synergybusiness.com).
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The imagery for this campaign will consist largely of handmade (or handmade-looking) objects and will move in imperfect, organic ways, as though manipulated by hand. In this way, we will reveal the humanity within business.