

ERP Solutions Promise *Opportunities & Challenges*



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ERP Evolution

- Updated ERP and financial systems form the backbone of an organization's digital nervous system.
- All processes within an organization need to be reflected in some shape or form within the ERP/financial system to enable capture of all activities and their impact on the organization's performance.
- ERP systems and capabilities have evolved:
 - Core Operations to Finance additions
 - CRM, WMS, SCM and e-Commerce extensions
 - Analytics and BI evolution
 - HRIS and Social XRP enablement
- Outdated and poorly integrated/enabled systems pose a significant obstacle towards the digital transformation journey!



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Digital Transformation Journey

- Digital transformation is an effort by management to leverage the latest information technology capabilities.
 - This is done by improving and integrating business processes within the organization and with outside parties such as suppliers and customers.
- This journey is an evolutionary process, and its pace is dictated by management and driven by several factors such as capabilities, resources, competitive forces and client demands.
- Every organization embarks on this journey, from the “Old World” onto the “New World”, but to what extent and at what pace?



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Digital Transformation Defined

- Digital transformation is the ability for an organization to leverage the latest information technologies in order to achieve capabilities such as:
 - Establishing highly integrated, frictionless operational processes
 - Enabling collaboration within the organization
 - Enabling customer interaction with our systems
 - Integrating within the supply chain network
 - Improving management decision making capabilities
 - Viewing data as an organizational asset
 - Establishing proper cyber and privacy safeguards
 - Maintaining a spirit of experimentation & innovation



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Transformation Accelerators

- Recent Events – Realization that we need the ability to work from anywhere at anytime with ease and security.
- Industry Realities – Competitive pressures and customer expectations for product and service pricing and delivery capabilities.
- Emerging Technologies – Cloud and mobile computing, process automation, artificial intelligence, Web 3.0.
- Internal Capabilities – Outdated IT systems, applications, tools and related resources.
- Managerial Priorities – Executive leadership’s view on priorities and allocation of resources for growth and profitability.



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ERP Digital Transformation Enablement

- Process integration/efficiency (direct or API)
- Break down the silos, provide visibility
- Real-time information updates and alerts
- Dashboards for Management by Exception
- BI/AI for Decision Support
- Access any where/time/device
- Less paper, more workflow
- Increased self service capabilities
- Software as a service, ease of IT management
- Address information security and privacy concerns



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ERP Opportunities

- Operational Agility – Ability to adjust to changing conditions in a rapid response manner.
- Lowered Transaction Costs – Tightly integrated systems offer increased process efficiencies.
- Improved Decision Making – Data becomes more of a digital asset; easier to slice and dice/dashboards.
- Increased Customer Loyalty – Customers across generations find ways suitable for them to conduct commerce.
- Increased Scalability – Company can easily add or remove users and new products/services/markets.
- Improved Cyber Resiliency – Reducing risks through leveraging cloud provider security expertise.



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Market Leaders



ERP Solution Approaches

All-in-one

- Using one primary software solution to handle various facets of the company.

Best of Breed

- Using several software applications and providers to satisfy the needs.

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ERP Platform Considerations

- Best of Breed approach provides an opportunity to mix and match cloud-based applications
- Applications leverage differing underlying technologies and as a result, could pose challenges in areas such as:
 - Ease of integration
 - Technology familiarization
 - Resource consideration
 - Total cost of ownership
- A unified platform approach could be leveraged as a source of competitive advantage.

Microsoft Platform Highlights



Microsoft Business Application Solution Ecosystem

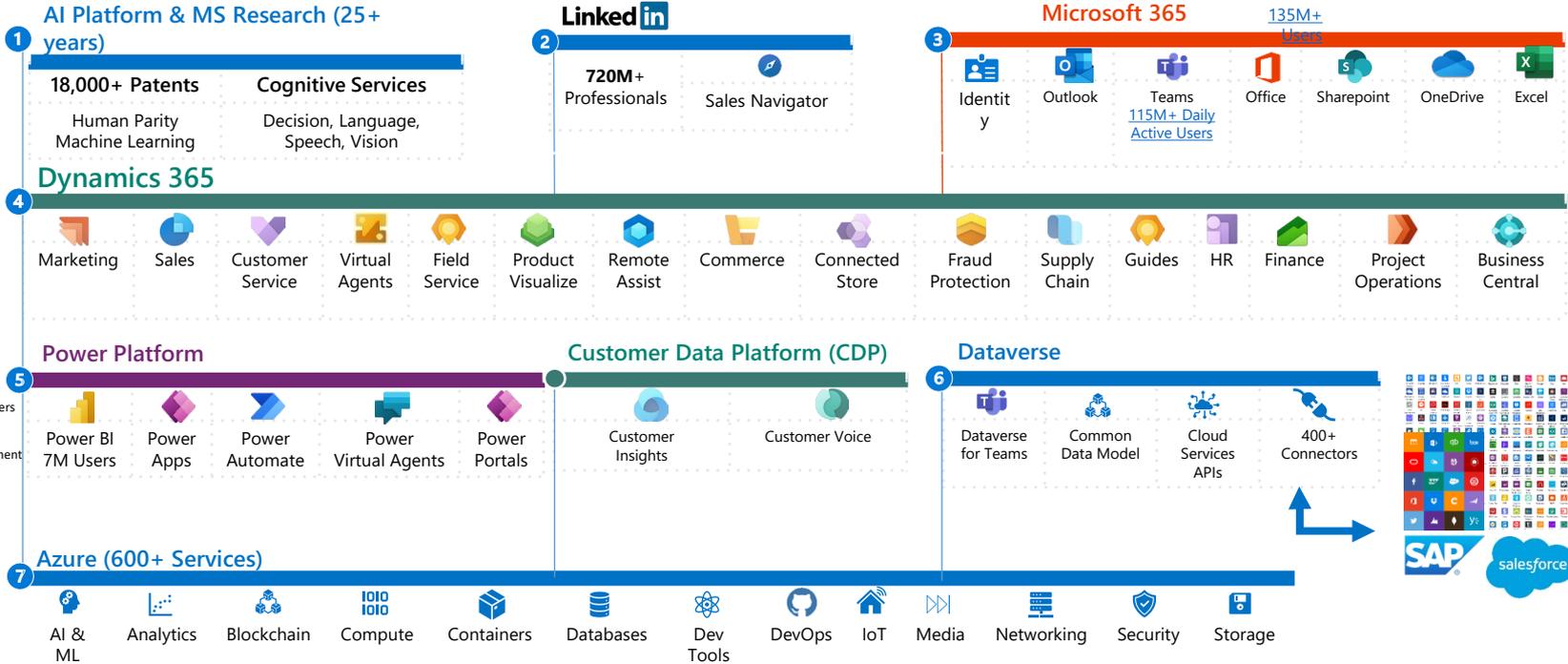
Microsoft's Business Applications are built on **Azure**, using a **Common Data Model** that unifies data in **Dataverse**. **Power Platform** is the low code extensibility solution for Microsoft's **Office 365**, **Teams**, **Dynamics 365** business applications (CRM & ERP) and integrates with **400+ services**.



64K+ Partners

Analyst Recognition:

- 1) Analytics & BI
- 2) API Management (Full Lifecycle)
- 3) Cloud DBMS
- 4) Cloud Infrastructure
- 5) Content Services Platforms
- 6) CRM Customer Engagement
- 7) CRM Customer Service Solutions
- 8) CRM Lead Management
- 9) CRM Sales Force Automation
- 10) Data Integration Tools
- 11) Data Science & ML
- 12) ERP (Cloud)
- 13) Iot (Industrial)
- 14) Low-Code App Platforms
- 15) Meeting Solutions
- 16) Robotic Process Automation (RPA)
- 17) Security: Access Management
- 18) Security: Cloud Access Security Brokers
- 19) Security: Endpoint Protection
- 20) Security: Ent. Information Archiving
- 21) Security: Unified Endpoint Management



nickfratello V.2020.02

Microsoft Dynamics Highlights

Microsoft Dynamics 365 SMB Ecosystem Map – October 2022



Dynamics 365 Business Central

Enterprise resource management for small and medium companies

- Finance Management
- Accounting
- Accounts Payable
- Accounts Receivable
- Budgeting
- Analytics
- Inventory Management
- Supply Chain Management
- Demand Forecast
- MRP/MPS Planning
- Warehouse management
- Assembly management
- Fixed Assets
- Production Management
- Project Management
- Resource Management
- Service management
- Seamless Onboarding
- Shopify native integration
- Treasury
- Approvals
- Workflow
- Embedded PowerBI
- Embedded Power Automate
- Task management
- Data Exchange Framework
- Human Resource Management
- Basic CRM
- XBRL
- Intercompany
- VAT & Tax Management
- Banks and Payment Reconciliations
- AppSource solutions
- Outlook add-in
- Excel add-in
- OneDrive add-in
- Microsoft Teams add-in
- Built-in Telemetry
- Mobile Client
- 100+ countries



Dynamics 365 Sales Professional

Sales management for professionals

- Lead and Opportunity Management
- Visual insights
- Marketing Lists and Quick Campaigns
- Products, Price lists, and Product bundles
- Simplified opportunity-to-invoice process
- CPQ and Data Enrichment Solution Discovery
- Real-time Customer 360 view
- Live Org Charts
- Business process flow
- Documents templates
- Document management
- Microsoft 365 Integration
- Microsoft Teams add-in
- SharePoint support
- Mobile Client
- AppSource solutions
- Application Customization
- Viva Sales add-in
- Portal add-in



Dynamics 365 Customer Service Professional

Customer service management

- Case Management
- Self-service portals
- Customer Satisfaction Insights
- Personalize Service
- Intuitive Agent Experience
- Knowledge-driven Case Management
- Actionable Insights
- 360-degree View of Customer Journeys
- Operational Cost Management
- Service Scheduling
- Contacts Management
- Leads Management
- Resources Management
- Workflow
- Deep AI Intelligence
- Mobile Client
- AppSource solutions
- Application Customization
- Embedded PowerBI
- SharePoint support
- Microsoft 365 Integration



Native integration between SMB solutions
Embedded Power BI
Power Platform Connectors

Microsoft Dataverse native or integrated solutions
Automated backups
Permission sets and Data policies

Microsoft Azure native solutions
Integrated with Microsoft Azure services
Integrated with Microsoft 365 solutions

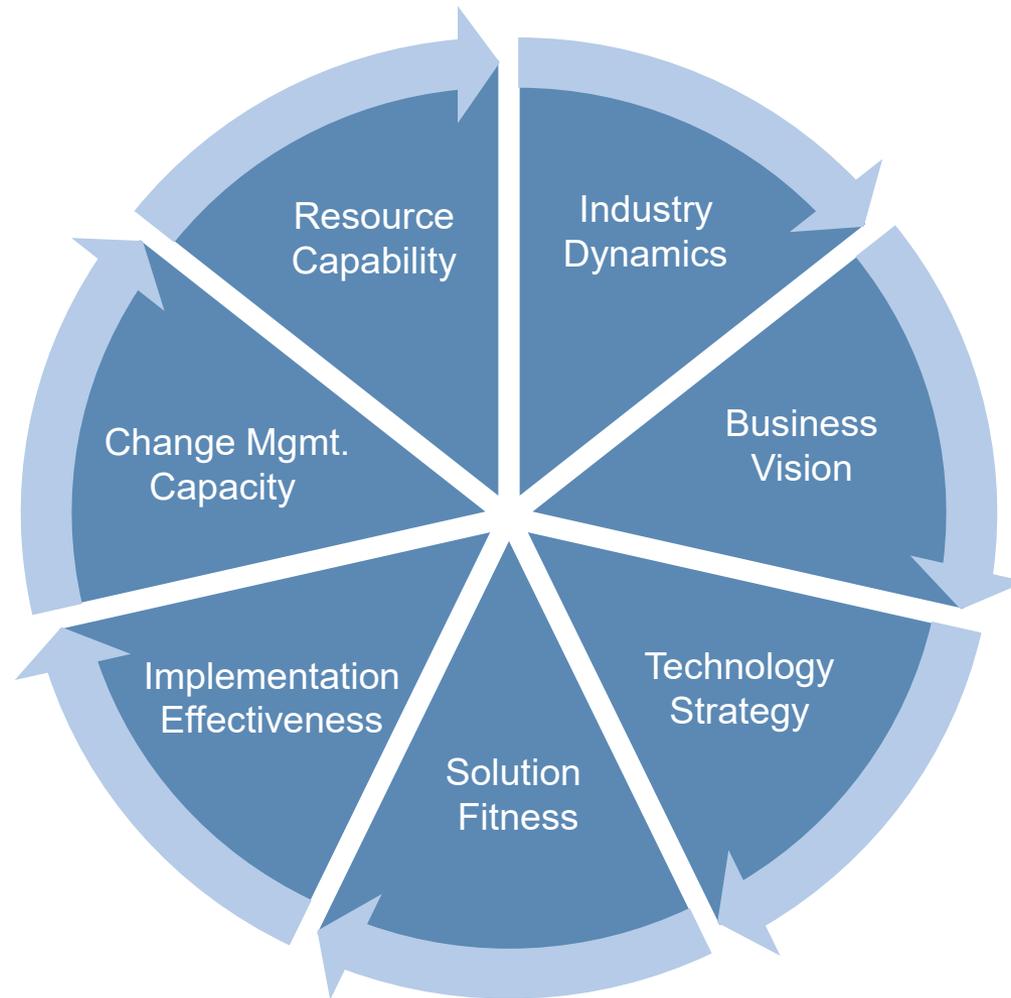
ERP Transformation Challenges

- Solution Approach
 - Business Vision
 - Platform Approach
 - Application Portfolio
- Implementation Effectiveness
 - Executive Engagement
 - Project Management
 - Change Management
 - Training & Support Resources
- Transformation Journey
 - Continuous Improvement Mechanisms
 - Innovation as a Service Concept



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Financial & ERP System Success Factors



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Concluding Comments

- Pathway towards leveraging updated Financial/ERP systems to achieve digital transformation varies from one organization to another.
 - One size does not fit all!
 - Simpler is better; platform matters
 - Strategic clarity is needed
- **What is your “New World” Digital Roadmap?**
 - KM offers a half-day “Complimentary” consultation to get you started:
 - On-site/virtual tour/overview of operations
 - Roundtable executive discussion and identification of key IT related issues
 - Recommended approaches and best practices



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Thank You for Attending!



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