


Dynamics **and more**



IN TODAY'S CLOUD-FIRST WORLD

**IT IS TIME TO IMPROVE  
YOUR METHODOLOGIES AND  
THE MINDSET OF YOUR TEAM**



# **IT'S TIME TO MODERISE YOUR PROJECT METHODOLOGY AND YOUR TEAM'S MINDSET & ATTITUDE**

## **HERE'S SOME HELP TO GET STARTED**

The world of ERP solutions is undergoing enormous changes. Technology is innovating at a breathtaking pace. Customers have learned their lessons and are therefore more critical than ever before. In recent years, projects have changed diametrically from technical exercises to large-scale change exercises. On top of that, connecting and retaining your employees has never been so challenging for you as an implementation partner.

Most Microsoft Dynamics 365 partners have greatly modernized their solutions in recent years and made them suitable for use in the cloud. Remarkably, the methodologies, habits, mindset and culture of these partners' teams have remained virtually unchanged over the same period. Perhaps also at your organization?

The question is whether you will fully exploit your potential in this new world if your team, attitude and methodologies are still based on the traditional model.

In this whitepaper I give you 10 valuable tips to upgrade and further improve your team, your behavior and your roles in implementations. Including suggestions on how you and your team can better prepare your customers for what's to come. With the aim of achieving more Project Success together with your current and future customers.

# 1/ THE ERP PROJECT IS NOT AN END BUT A MEANS TO AN END

Many D365 partners see getting the lead (marketing), winning the deal (sales) and delivering the project (operations) as their ultimate goals. And I understand that. But for your customer, signing the agreement and implementing or migrating to the new software is just a means. Their project goals often have little to do with the software itself. Because in an ideal situation, they are focused on their

markets, customers, business partners and employees. And are linked to their medium- and long-term strategic goals.

Wise partners understand and acknowledge that their task today is to provide maximum support to the customer in achieving their strategic goals. And teach their teams to act accordingly every day.

# 2/ MANAGE THE RIGHT EXPECTATIONS

Expectation management is a highly underestimated activity in ERP projects! Your customers are often inexperienced. And they usually don't have a clear idea of what the right level of expectation should be. Then you often see two extremes. On the one hand, there are exaggerated expectations. As in,

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*The newly purchased software is going to solve all our problems. And fast! Without us having to contribute much ourselves.*

On the other hand, the expectations that are sometimes far too low. Such as:

”

*We opt for a lift & shift scenario, in which we put all existing business processes, reports and mental insights into a modern new system.*

While this last approach may feel comfortable for you as an implementation partner at first, this scenario also quickly results in disappointment and anger. Up to and including churn!

Smart partners ensure substantive contact with the customer's management from the start of the sales process and steer towards the correct, realistic expectations. This is usually your first step on the road to project success.

### 3/ HELP THEM FORMULATE STRONG GOALS

Traditionally, many ERP projects lacked clear, measurable and business-relevant goals. Staying within the set budgets of time, money and quality was and still is a popular goal today. And as understandable as the importance of this trio of goals is, they are not the goals that your operational staff are passionate about. Or even want to fight for! In addition, the disadvantage is that these goals lose their

effect as soon as the new system is operationally deployed.

Modern partners inspire their customers to formulate strong project goals. Who are business driven. Which can be understood by everyone involved. And therefore also address the teams in the workplace. And that will remain relevant for a long time even after the GoLive.

### 4/ ALWAYS FOCUS ON THE DESIRED CHANGE

Too often in the past, the existing business processes from the old system were indiscriminately transferred 1-to-1 in the new system. After all, it was easy, fast and cheap. And everyone could stay in their comfort zone. I fully understand that. It's a perfect fit for organizations active in industries where little or nothing has changed for years. Unfortunately, there are hardly any industries left where this still applies.... This means that your customer must be actively supported in his

or her change. And in the realisation of the previously formulated strong goals.

So, partners who have successfully completed their own transformation are no longer focusing on their great solutions. But always take the strategic goals and the necessary changes as a starting point. From there, they look at how their solutions and services can support the defined project goals.

## 5/ BE HONEST AND SINCERE

On average, ERP customers replace their systems every 8 to 10 years. But for implementation partners, this is their daily work. It is therefore logical that there is a yawning gap between the two organizations when it comes to knowledge, skills and experience.

Wise partners train their teams to be aware of the limited skills and knowledge on the customer side. They adjust their communication accordingly – especially when it comes to contact with the C-level! They teach their teams not to be satisfied with the first answer to their intake ques-

tions. But then by asking additional questions to ensure that the true needs and motivations become clear to both parties. They dare to ask cheeky questions. And to name **the elephant in the room**.

The IT industry is well known for its whole and half lies. Or sometimes just for the omission or late sharing of important information. Modern partners understand that the time of **yocing** is over. They train their teams on honesty and clarity in all their actions. Interesting observation: they notice that this attitude is increasingly rewarded with new deals.

## 6/ PREPARE YOUR CLIENTS BETTER

Carrying out projects at poorly prepared or immature organizations is bound to lead to hassle. And that hassle often results in having to deliver unpaid hours, sending credit invoices, receiving claims and sometimes even lawsuits. These are all things that cost you money and that damages your image. Do you have any idea what the total value of all these costs is on an annual basis in your company?

**Year after year..... :(**

Smart partners reverse this learning curve. They inform and inspire their customers and prospects **before** the implementation starts. They make clear what the customer's tasks and responsibilities are and what they can expect from their partner. They explain what the success and failure factors are. And what the roles are that the client's management itself has to fulfil.

## 7/ CREATE A GOOD ATMOSPHERE

ERP projects are challenging. And so they demand a lot from both teams. Both physically and emotionally. Complexity and deadlines cause stress. And the interests of the customer and your organisation are not always aligned. So it's not really surprising that things get intense at times. But in order to achieve project success, it is crucial that the communication channels are open at those tense moments. That the teams treat each other with respect. And that both parties keep a sharp eye on the carefully formulated project goals.

Of course, this is far from easy! But if there is cooperation in a good atmosphere right from the start, the chance of success is obviously greater.

Partners who understand this well take measures to work in a structured way to create that good atmosphere for all people involved. And even make this part of their standard implementation methodology!

## 8/ WRITE & SPEAK IN 'CUSTOMER LANGUAGE'

The recurring complaint from the market is that ERP providers are difficult to understand. This makes sense, because most D365 partners make full use of the Microsoft jargon. Interspersed with 3-letter abbreviations and other (often English) technical terms, which are difficult to understand for the average entrepreneur or board member. This often starts on your website. And it repeats itself in amplified form in conversations with sales and operations. Do you recognize this? This is very annoying, because the result is that these partners are often the first

to be crossed off the longlist. This is understandable from the customer's point of view, because:

*"if we don't understand them in the preliminary phase, how will we do that later during the implementation?"*

Wise partners train their teams to think, speak and act in 'customer language'. And that's a language that, by the way, can vary from country to country, culture or even from a vertical market to vertical.

## 9/ DON'T STOP AFTER THE GOLIVE

The traditional approach from D365 partners was to quickly turn the focus back to the next customer after the GoLive and some aftercare. Just as most customers went back to business as usual after the implementation. But in the modern cloud world, that's no longer effective! Updates for D365 are no longer available every 2 years, but every 6 months. Because of the nature of cloud technology, postponing updates and upgrades is a lot more complex. And in our rapidly changing business world, this is often undesirable.

In a Cloud-First world, implementing ERP systems has become more of a process rather than a project. A continuous process. Of course, this has a direct impact on matters such as budgeting, training and management involvement on the customer side. For you as a D365 partner, this means that you have to ask yourself whether your current project approach and internal organization are still appropriate and effective.

## 10/ MEASURE & REWARD PROJECT SUCCESS

So not based on revenue. One of the top-3 frustrations of ERP customers worldwide is the fact that their implementation partners never stop invoicing! Whether the problems have been solved or not. And regardless of whether the set goals have been achieved. So it's actually very strange that many partners still measure and reward their people on the basis of realized turnover. In today's world of subscription, for a partner organization is

all about project success and customer satisfaction. And preventing churn. If these things are in order, customers remain loyal to the partner and continue to pay their monthly contributions.

Modern partners measure and reward their teams and individual employees (in part) based on project success, customer happiness and minimizing churn.

# THE PROJECT EXCELLENCE WORKSHOP

In Dynamics and More, I train and support Microsoft Dynamics 365 partners in updating and modernizing their methodologies, attitudes, skills and mindsets. A proven first step in your transformation process is to organize the so-called Project Excellence workshop. These 10 tips are part of this intensive 2-day workshop alongside many more practical suggestions and creative, but easy-to-realize quick wins.

We will achieve the best results if you follow this workshop with your entire team. Or at least with a delegation from all departments within your organization. After all, both success and failure in projects are always achieved together.

Because of the interaction required and the emotions that can arise, it is wise to organize this workshop on location. And not remotely. Online sessions in this domain are demonstrably less effective.

**→ READ THE AGENDA**

## THE INTAKE CALL

During our intake call, we will discuss whether this agenda fits your current challenges and which themes may be missing. Based on this, I can adjust the agenda and content if desired.



## WHAT DO YOUR FELLOW D365 PARTNERS SAY?

“ *These Project Excellence workshops as delivered by Guus is, without a doubt, the single most effective way to engage the whole team. Guus' content is relevant, insightful, provocative and, most importantly, based on real world experience! Everyone has come away feeling positively charged and eager to implement both personal and business-wide change.*

PAUL KERR | BUSINESS UNIT MANAGER 4PS UK

“ *Our world is changing faster than ever before. So we must prepare ourselves for the future. We've asked Guus to deliver a provocative workshop to our wider management team. I can say that a workshop has been well delivered when people refer to "As Guus was saying..." when they are making their case. And "I'm going to approach this the Guus way". It's super valuable to have a reference, a symbol, really to put on the new and changed ideas.*

EINAR THORARINSSON CEO OF ADVANIA (ICELAND)

“ *The most important lesson for me from this great 2-day workshop was that I stand in my own way with my ingrained thought patterns. And thereby slow down the development of the company. After the workshop with Guus, we immediately implemented the first findings and ideas. And we are already using them in our projects. Positive customer feedback shows that we are on the right track here.*

MARC TEUBER | CEO OF AGOLUTION (GERMANY)

## THREE OPTIONS FOR YOUR FIRST STEP

If you and your teams want to focus (more) on Project Success in 2025, I can offer a number of valuable options to support you in that process:

- Delivering an inspiring presentation for your internal 2025 kick-off event
- Delivering an on-site Project Excellence workshop for the whole team
- Providing a series of 12 stimulating blogs and webinars in order to challenge, stimulate and inspire the team in creative ways in each month of 2025. After all, structural change takes time, right?
- Combinations of these 3 options are of course negotiable

## WANT TO GET STARTED TOGETHER?

Are you interested in becoming a **more customer-oriented organization** by 2025 that continuously works together with your existing and new customers to realize Project Success?

And do you want to become **more attractive** for potential new customers to do business with successfully?

Let's quickly set up a call to discuss how I can support you in this.

Email me today on [gk@dynamicsandmore.com](mailto:gk@dynamicsandmore.com)  
or call me on +31 622 496 073.

I guarantee you will not regret it!

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