Example: Company "X"

D365 Finance Health Check

Example: D365 Health Check Timeline

Pre-Discovery

Identify key dependencies, major pain points, and supporting processes, key SMEs.

Produce Detailed Discovery and Engagement Plan with timeline.

Final Report – Results and Prioritized Roadmap

Compile findings and recommendations. Present Report with Roadmap with critical issues prioritized for resolution.

06/16 - 06/22

06/23 — 08/31
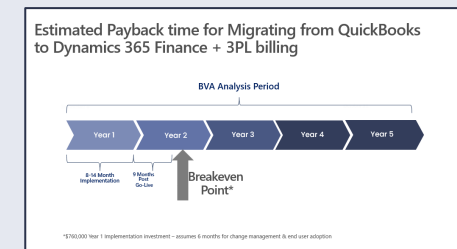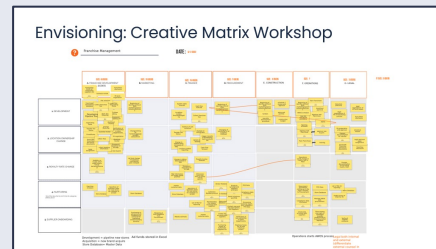
09/01 –9/07

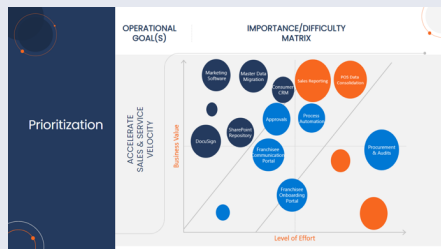**Technical and Functional Assessment**

Perform Technical Assessment on system (Code, Customizations, ISVs) Perform P2P Health Check /Audit - Procurement and AP.

Keep Stakeholders informed by weekly status updates, interim reports and targets for next reporting period.

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Example: D365 Health Check Process

1	2	3	4
APPLY AND TEAM ALIGNMENT	**Assessment**	**Recommendations write-up**	**SCOPING/HAND-OFF**
5 DAYS	**10-15 DAYS**	**10-15 DAYS**	**5-10 DAYS**

DELIVERABLES

Avantiico

Example: Ranking Findings

Risk

Could include fraud, financial risk, frustration from users leading to adoption issues, etc.

Value

Follow-up Wave recommendations take into account topics where we recommend strategic investment to unlock key value

Pain

Feedback from Team Members on Time spent, measured when possible and ranked when not

Complexity

Ranked complexity of potential solutions, ranging from simple (config/training) to complex (modification/ISV solutions)

Pain Level
How much time and energy does each issue take?

Risk
How much risk does this issue bring to the company?

Complexity
How complex would a potential resolution to this problem be?

Perceived Value
Based on our understanding of your business, how valuable would the resolution of this issue be?

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Example: Executive Summary – Key Findings

Functional

- Discussed and ranked 124 pain points related to AP, GL, Reporting and Procurement
- Pain points are primarily due to System Design, Process, and Reporting deficiencies
- Estimated annual time waste of almost 42,000 hours

Technical

- Overall, very positive review
- Handful of adjustments to process recommended incl OneVersion frequency

Reporting

- Lack of current reporting is restrictive and inhibits management of day-to-day business
- Lagging behind other businesses of similar size, key opportunity to drive this initiative forward

Security

- Recommend overhaul of AP/Procurement security roles
- Recommend application of standard D365FO segregations of duties rules

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Example: Executive Summary – Cost and Value

Break Pain Points into "Waves" to address issues by theme

Wave 1: Training and Configuration	Wave 2: Purchase Agreements and Reporting	Wave 3: GL and Portals	Wave 4: PR/PO Approval Optimization
• Cost: 3-4 weeks, $30K –50K	• Cost: 7-10 weeks, 70K – 110K	• Cost: 5-8 weeks, 70K – 90K	• Cost: 4-6 weeks, 50K – 70K
• **Value: 1800 Hrs/Yr Saved**	• **Value: 12000 Hrs/Yr Saved**	• **Value: 9800 Hrs/Yr Saved**	• **Value: 1200 Hrs/Yr Saved**
• Risks: data errors, accounting inaccuracies, payment duplication	• Risks: pricing control, Budget to Actual disconnects, lack of visibility to liabilities	• Risk: approvals bypassed, broken vendor communication, freight visibility	• Risk: wasted time, redundant approvals

*Waves 5 and 6 are TBD as they involve implementation of 3rd party solutions that are already in flight and changed since the start of this health check

** Estimating 2 consultants working 20 Hours/Week for the duration of the sprints plus Sprint Planning and PM time

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