AN ENGINEERED WATER SOLUTIONS COMPANY

REDEFINED ITS PATH FOR A NEW DIGITAL FUTURE

With Sonata's assessment that helped to prepare a compelling business case to upgrade to Microsoft Dynamics 365

Microsoft Dynamics

Sonata delivers innovative solutions and services – consulting, implementation and support, helping enterprises accelerate their digital transformation initiatives with Microsoft Dynamics 365.

From Sonata Software - The Platformation Company

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IT IS NOT ABOUT THE UPGRADE!

It is about accelerating digital transformation with the next-gen platform while leveraging existing investments

Our client is an industry leader and manufacturer with the largest breadth of engineered water solutions based in US.

CONTEXT

Our client has been using Microsoft Dynamics AX 2009 over the years and is at a critical juncture of making a decision to upgrade to Dynamics 365. While the imminent risk of the current platform not being supported beyond 2 years is looming, our client faced a dilemma between upgrading their current Microsoft platform and on-boarding another leading ERP platform.

SONATA'S UPGRADE APPROACH

- ❖ Accelerated direct upgrade from older version to Dynamics 365
- ❖ Specialized Sonata + Microsoft LCS upgrade tools and methodologies
- ❖ Supports migration from AX 2009, 2012 R1, R2, R3 to Dynamics 365
- ❖ Standardized delivery and commercial models for upgrade
- ❖ Hybrid upgrade methodology that combines technical upgrade, New feature uptake and code optimization of existing customizations

SOLUTION FOR THE CLIENT'S NEEDS

Before initiating the upgrade activity, Sonata helped the client with a 3-wk assessment and analysis to study the current state and, provided a definitive and simplified upgrade path to Microsoft Dynamics 365. Sonata's team prepared a detailed report with technical and functional approaches and, associated business benefits in upgrading to Dynamics 365.

MS Dynamics AX usage profile

5 ENTITIES

1500+ USERS

10+ ISV PRODUCTS

Tens of integrations, 50+ batch jobs, 4K+ custom objects and 80K+ current code health

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DYNAMICS 365

DIGITAL WITH

- ❖ Intelligent Customer Engagement
- ❖ Empowered Employees
- ❖ Transformed Products & Operations
- ❖ Data driven intelligence driving engagement & operations
- ❖ Cloud & mobile enabled for anytime anywhere access

SONATA'S ACCELERATED UPGRADE METHODOLOGY

ASSESS	ANALYZE	UPGRADE	DEPLOY
Technical and functional gaps assessment – upgrade readiness check	Technical, architectural and functional analysis on customizations & new features	Upgrade conflict/issue resolution, code conversion, solution merge & data migration	Training, User Acceptance, Infrastructure provisioning, cutover and go-live transition
★ ★ ★	★ ★ ★	★ ★ ★	★ ★ ★
Upgrade strategy, technical & functional approach, high-level plan and business case	Conflict resolution approach, solution architectures and detailed plan for upgrade	QA, functional and performance testing of the converted code base including new features	Dynamics 365 in production, cloud-enabled and remote monitoring & support

AUTOMATED TOOL & METHODOLOGIES

SHORTER TIME TO MARKET

30-60% COST AND EFFORT SAVINGS

REPEATABILITY WITH LOW RISK

SONATA HELPED THE CLIENT TO PREPARE A BUSNINESS CASE FOR AN UPGRADE TO MICROSOFT DYNAMICS 365

Sonata's assessment report highlighted a number of key areas helping the client to prepare a comprehensive business case for adoption of Microsoft Dynamics 365:

1. Auto-upgradeable codebase (50% of the objects) with Sonata's code migration tool

2. Baselined template – partially upgraded / configured Dynamics 365 system (with Auto-upgraded code + Standard features)

3. Replaceable custom solutions built on AX and solutions provided by 3rd party vendors with capabilities available in Microsoft Dynamics 365

4. To-be-refactored objects

5. Business process improvements that were planned to be implemented with customizations which can be fulfilled by out-of-the-box features

6. New features that can be leveraged for digitizing business operations and moving towards cloud based hosting model and any-time & any-where access with responsive mobile apps

7. Strategies & architectures for technology, reports, data-migration etc.

To meet the current & future technology needs of the client, Sonata recommended a 'Hybrid' approach as the best-fit model, a blend of technical & new feature upgrade from Dynamics AX to Dynamics 365.

With Sonata's assessment and baselined template (& auto-upgraded code), our client is well positioned to leverage the existing investments while defining a new digital future enabled by Microsoft Dynamics 365.

BUSINESS CASE

CLIENT'S

IT BENEFITS

❖ Reduced costs with Sonata's code migration tool

❖ Reduced ISV costs - vendor portal, CPQ etc.

❖ Reduced h/w & support costs with any-time & any-where access and responsive apps

❖ Projected savings with features such as Workspaces, Hosting, Data Architecture, MDM etc

PROCESS BENEFITS

❖ Increased inventory visibility through warehouse management mobile apps

❖ Reduced inventory with enhanced Available-To-Promise calculations (ATP)

❖ Eliminated forecasting issues with embedded machine learning

PROJECTED FINANCIAL BENEFITS

$3M+
INCREASE IN EBITDA (ANNUAL)

$10M
SAVINGS WITH REDUCED INVENTORY (ANNUAL)

$1M+
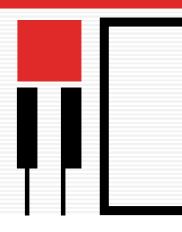AVOIDANCE OF EXTRA COSTS (ONE-TIME)

WHY SONATA?

Sonata provides a full range of services including consulting, engineering services and managed services on Dynamics. With deep value-added engineering experience on multiple releases and a proven track record of enterprise implementations, we can help you with digital transformation on Dynamics 365 by extending your business processes to mobile, migrating to cloud and get actionable insights using analytics. Our offerings include:

Accelerated Dynamics Upgrade: Sonata's Dynamics 365 Code Migration Tool enables direct upgrade of any older version of AX (2009, 2012 R1, R2, R3) to the new Dynamics 365 in a short time by saving 30-60% of cost and effort. It also enhances developer productivity in scenarios when a complete migration is not possible.

Consulting: By leveraging our deep understanding of Microsoft Dynamics® product architecture and roadmap, you can assess and plan your global implementation journey, design for scale and performance, know your investments and justify them.

Engineering Services: With our global development factory model, tools, reusable assets, process driven methodology and high performance engineering skills you get a trusted engineering partner to drive complex and large scale customization and implementations to success.

Dynamics Care – Support: We ensure a stable and optimized system by delivering end-to-end support services using our mature service delivery model, service improvement best practices, standardized processes, metrics driven execution and governance and flexible engagement options with global coverage.

Sonata is a global technology company, that enables successful platform based digital transformation initiatives for enterprises, to create businesses that are connected, open, intelligent and scalable. Sonata's Platformation™ methodology brings together industry expertise, platform technology excellence, design thinking-led innovation and strategic engagement models to deliver sustained long term value to customers. A trusted partner of world leaders in the Retail, Manufacturing, Distribution, Travel, services and Software industries, Sonata's solution portfolio includes its own digital platforms such as Brick & Click Retail Platform©, Modern Distribution Platform©, Rezopia Digital Travel Platform©, Kartopia E-commerce Platform©, Halosys enterprise development automation Platform©, and CTRM Commodity trading and risk management Platform©, KODO - AI powered customer experience (CX) Platform, Sonata's Platformation realization services have been specifically designed so that implementation of services on Microsoft Dynamics 365, Microsoft Azure, AWS, Cloud Engineering, Managed Services as well as on new digital technologies like IoT, Artificial Intelligence, Machine Learning, Robotic Process Automation, Chatbots, Block Chain and Cyber Security, deliver to the Platformation promise. Sonata's people and systems are nurtured to bring together the depth of thought leadership, customer commitment and execution excellence to make a difference to business with technology.

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