

Offshore Upgrade Partner with Local Presence Advantage

Leading Benelux Partner outsources upgrade to SAGlobal

"We chose SAGlobal because they are a global Microsoft Partner that has a local presence in Western Europe. This was one of the important factors because we were immediately at ease when we knew that we could talk to someone who knew the local (Dutch) implementation and development scenario."

Dominique DeVos,
Managing Director,
Edan

The Client

Edan is a well established Microsoft Partner in the Benelux region that offers IT services for small and midsize companies (SMBs) in the manufacturing, distribution, services and project industries. The company services locally as well as globally operating companies, both single-site and multi-site. Headquartered in Belgium, they have a subsidiary office in The Netherlands. Both sites currently employ about 75 professionals in total and they have a number of Microsoft Dynamics AX customers on older versions of Microsoft Dynamics AX

Business Situation

Edan's customer Zijlstra was eager to upgrade to the latest release of Microsoft Dynamics AX 4.0 from an older version of Microsoft Dynamics AX.

In order to manage this upgrade task as well as to continue to sell Microsoft Dynamics AX 4.0 to new customers, Edan needed:

- ✓ An offshore partner with a local project manager, who could offer a proven and low cost model of Microsoft Dynamics AX 4.0 upgrades to its customer
- ✓ To be totally secure that customer ownership would be retained
- ✓ Business continuity not to be disturbed at the customer site



Client Profile

A well established Microsoft Dynamics AX partner in the Benelux, headquartered in Belgium, with about 75 professionals in total.

BUSINESS SITUATION:

- ✓ The client needed to focus their limited resources on selling to new customers
- ✓ Wanted to maintain their existing customers satisfaction without losing customer ownership

RESULT:

The entire upgrade process took just weeks from beginning to end including end-user training on new features of Microsoft Dynamics AX 4.0. This was achieved without any loss in business continuity.

UPGRADE DETAILS:

- ✓ Upgrade from Microsoft Dynamics AX 3.0 to Microsoft Dynamics AX 4.0
- ✓ Integration AX: Outlook integration (CRM) and Computer Telephony Integration (CTICRM)
- ✓ Localizations: WEMEA DIS/DIP incl. Dutch localizations

Zijlstra is a specialised wholesaler and producer of occasional furniture. Considering the high degree of efficiency and planning that is required to operate in this niche of the furniture market, Zijlstra has been using Microsoft Dynamics AX since 2001 on all levels and disciplines of the organisation. As a company policy, Zijlstra uses only Microsoft Dynamics AX in combination with Microsoft Office for their internal processes.

One of the main factors that Edan was apprehensive about was the upgrade quality and if the project would be completed within the specified timeframe.

Solution

Edan looked for an Official Offshore Upgrade Partner that would provide them with high quality offshore resources, yet be able to maintain a local relationship. This was important to them as they needed to build a long-term relationship with a trusted Partner.

Result

SAGlobal's overall objective was to help the client save development and consultancy time that they could otherwise spend on (new) customer projects, by offering quality services at reduced costs by a combination of offshore upgrade resources and local project management.

Essential Upgrade Steps

An upgrade can be divided into four basic tasks - Pre-upgrade processes, the code upgrade, the data upgrade and the production upgrade.

Task: Pre-upgrade Process

A study of customizations and other integrated legacy systems is undertaken prior to taking a complete back-up of your current application and database and then installing our preupgrade tools for Microsoft Dynamics AX 4.0.

Task: Microsoft Dynamics AX Code Upgrade

Code upgrades are necessary if you've made any changes. This includes forms and reports. Layer technology in Microsoft Dynamics AX makes the code upgrade manageable. The process involves - identifying where the changes have been made, analyzing your business processes and deciding what code modifications need to be ported to the new version. Finally, comparing, porting and fully testing the modifications.



Task: Data Upgrade

Data must be upgraded and there will be activities to perform both prior to and post the Code Upgrade. The data must be upgraded because of changes made to the data dictionary since the last product version. Changes to the data dictionary mean that tables and/or fields have been added, renamed or deleted. In addition, upgrading to the new version might require validation and correction of existing data.



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Task: Production Environment Upgrade

After evaluating and extensively testing the upgraded code and data upgrade, we deploy the code changes into your SQA environment and run them through a comprehensive upgrade checklist, and get SQA signoff before deploying to your Production environment.

Key Benefits to Edan (Client):

- ✓ Able to outsource all upgrade requirements to a reliable partner so that the core technical team could focus on ongoing implementations and development of new business
- ✓ Immediate access to a team of experienced, dedicated developers for all customer upgrade
- ✓ Outsourcing to one of the select upgrade partners ensured that an upgrade methodology specific to Microsoft Dynamics AX 4.0 would be followed
- ✓ A non-compete, non-solicit agreement that was signed with SAGlobal ensures the clients business interests

Key Benefits to SAGlobal (Partner):

- ✓ Successful execution of a proven business process that benefit Partners
- ✓ In line with SAGlobals worldwide Partner Enablement Program initiative (PEP)
- ✓ Build a valuable relationship with a prominent Microsoft Partner in Benelux and maintain overall customer satisfaction


SAGlobal met client requirements as we have:

- ✓ One of the largest bases of Microsoft Dynamics AX Certified resources globally
- ✓ Microsoft Dynamics AX certified resources dedicated to upgrades in an offshore location – Bangalore, India
- ✓ Standard methodology for upgrading specific to Microsoft Dynamics AX 4.0 and full adherence to Microsoft best practices
- ✓ A business model built up around offering services to Microsoft Dynamics AX partners
- ✓ Routinely signed non-compete and non-solicit agreements with partners
- ✓ The ability to offer fixed cost upgrades quotations upon evaluation of the code base
- ✓ A combination of offshore and existing on site upgrade teams to execute an upgrade project
- ✓ Excellent communication skills and professional project management make SAGlobal an easy organisation to work with



 Let's talk

 info@SAGlobal.com

 Americas: +1 877-877-2266 ext. 703
EMEA: +44 (0) 22921 055902
APAC: +91 80 6733 8215

 www.saglobal.com

