

# Supporting your business after migration/implementation

What if the music fades?  
Think about future support



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Based on our experience, we believe that a service organization should do more than offer support when issues occur. **It's our believe that support offers much more than break/fix.**

Support should be a vital part of your ERP implementation. Once you can look at your ERP project as a **continuous optimization strategy**, this approach will enable you to remain competitive, agile and innovative.

**With the right mindset and focus on optimization, a support and service organization can be a true partner to enlarge the scope of your project and to think about future growth.**

In this document **we want to inspire you** and **help you get started** with the organization of your internal team. We do this by discussing **different service components** we typically offer to our customers. Once you know which areas you need focus on, you can decide upon a **sourcing strategy**. Depending on the choices you'll make, there will be an impact on your budget or on your recruiting strategy.

More on this on page 17.



# Service components

At Cegeka, we typically offer several Service Components in our customer agreements. Besides the rather classic components such as incident, event and alert management, we also put emphasis on **continuous optimization** by offering change, test and release management.

In the next couple of pages, we'll outline these components to inspire you and get you thinking about the different domains your ERP will need attention. Obviously not all components are relevant for all projects or all environments. This list is merely a **starting point to get your mindset in the right direction** and to get you **thinking about how you need to organize yourself for future support**.

## Incident & request management

L2 & L3 support

## Event & alert management

Monitoring & health checks

## Problem management

Corrective & preventive maintenance

## Change management

Adaptive & innovative maintenance  
Continuous improvements, advisory service

## Test & release management

Deployments, D365 update services, test & environment management

## Knowledge management

Selfservice portal, knowledge sharing, knowledge base



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# Incident & request management (1)

The purpose of the incident & request management service is to support the customer in their business continuity of the application.

**Incidents** are **unscheduled functional or technical failures** or quality reductions in your applications. The aim of incident management is to **restore normal system operations**, possibly by providing a workaround within the agreed resolution time and depending on the priority.

**Examples of incidents** might be one of your users is blocked in one or more applications, the application is entirely or partially inaccessible, one or more applications show a sudden significant performance drop ...

**Requests** are all requests submitted to the service desk that do not belong to other categories such as incidents, problems, standard change requests (SCRs) or Request for Changes (RFCs).

**Examples of requests** are functional or technical queries on the use of the systems, queries on the environment in which the application is used.



# Incident & request management (2)

## Some things to take into consideration

- To be able to respond to incoming incidents and requests in a controlled way, it's important to **organize your service organization in a structured way** and define an **escalation strategy**.
  - Which layers (lines of support) do you define in your strategy?
  - Who will take responsibility over those layers? Your internal team or an external partner?
- As part of your escalation strategy, it's also important to **define priority levels** for incidents or requests. These can be based on the **impact and the urgency** of the requests.
- To give transparency and set the right expectations, it's important to define **Service Level Agreements**. These are the time windows within which the user may expect an answer or a solution to his incident or request. See the table as an example
- Finally, also **service windows** can be agreed upon with your service provider. These reflect the time window within which your service partner is operational. For example: during business hours, standby 12x7, standby 24x5

Service Level Agreements	
Incident priority	Response time
1 – Critical	100% < 2 working hours
2 – High	90% < 8 working hours
3 – Medium	90% < 16 working hours
4 – Low	90% < 32 working hours



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# Event & alert management

The purpose of the event & alert management service is to proactively notice and prevent incidents or problems from occurring.

Events and alerts may lead to the automatic creation of an incident, problem or a change.

We identify **MONITORING & HEALTH CHECKS**:

- Monitoring offers a direct line from the tool to the service partner in which a problem is communicated. The partner in turn will act and so, **unburden the customer**. Examples could be monitoring uptime of an environment or execution of an integration or an interface. Depending on the scope of your service contract, your service partner will either inform you of the problem or will take appropriate action to solve it.  
**For example** peripheral applications might be monitored by the service partner without him having permission to act.
- Health checks in turn are **not automated**; rather together with the customer the service provider will determine which applications should be checked and with which frequency, ranging from daily to annually. The service provider will make an analysis and propose certain improvements.  
**For example** a database might grow month after month, so we foresee issues within a certain timeframe. The service provider can anticipate issues that are expected by defining an action plan.





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# Problem management

The purpose of the problem management service is to **resolve the root cause of incidents.**

We identify 2 variants:

- **Corrective maintenance** occurs after a failure has taken place. It can be the consequence of an incident, a monitoring alert, health check or even a service request. Something happened and we'll now try to identify the root cause of the failure. In consultation with the customer, the service provider will find a structural solution for a returning problem.
- **Preventive maintenance** describes upkeep designed to prevent failure and unplanned downtime from occurring. Based on the knowledge and experience a service provider can offer or based on defined health checks, there is further investigation to the cause of a potential problem.

**For example** as part of the health checks the monthly growth of a database might be monitored. As part of corrective maintenance, we'll act when a database runs full resulting in the app to shut down. Preventive maintenance on the other hand will suggest an increase in infrastructure before the app goes down.



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# Change management

The change management service is a **less classis service component** in which we identify 2 areas: advisory services and adaptive & innovative maintenance

The environment we work in (hence also the scope of an ERP project) is under constant change. An organization itself, the industry it operates in, technology... all aspects are constantly evolving, so we believe it's **important to adapt and continuously optimize your ERP**.

Within our **advisory services**, our customers can ask for advice when discussing their roadmap. They'll tell us on which domains they see challenges and which apps they believe are interesting. **Based on our expertise and knowledge of the customer that we gained during the implementation of the ERP**, we stay closely involved and **continue to guide our customer towards ongoing optimization**.

Within **adaptive maintenance** we'll support our customers with making adjustments to the project, based on requests that come from the customer itself. As the needs of an organization might change, come change requests for the scope or functionality of an ERP. Also governmental changes might lead to change request, eg setup of VAT declaration.

Our **innovative maintenance** also suggests changes but these are initiated by Cegeka as a service partner. Our consultants have ample experience, are in close contact with Microsoft, ISV's and other partners. So, as part of our **innovation meetings**, we can make suggestions that may lead to concrete optimizations.



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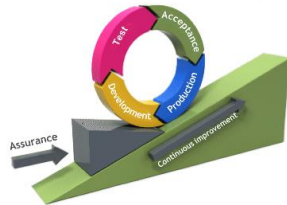
Documentation, knowledge sharing

# Test & release management

A phased approach to software testing and deployment, is DTAP (Development, Testing, Acceptance & Production).

Test management is best practice. As a service partner we can play either a **supportive or executive role**. Testing of new apps and functionality always is responsibility of the customer, yet we **advise our customers, offer tools and can support them by providing testing scenarios**. However, the execution of the acceptance testing always lies with the end users.

Release management is a MUST, it's important to **go live with adjustments to your ERP in a controlled way**. Updates and adjustments can range from configuration in security to updates of new features and functionality. As part of our release management services, we can **unburden our customers**. We advise why releases are important and how often they should be done.



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# Knowledge management

The goal of knowledge management is not so much to unburden our customer, it's rather oriented at helping them become self-sufficient.

The objective of knowledge management is to **capture, analyze, update and share information and documentation** within the customer's own company and/or between the customer and Cegeka. Key is that the information is at all times **accurate, reliable and trustworthy**.

**For example** When a certain solution or work around to a problem is logged and documented via the incident, the customer will be able to resolve this the next time it occurs, without needing the support of the service partner.

The ultimate goal is to **improve and strengthen L0 & L1 support** which will result in **lower costs** as the customer doesn't need to ask for support from the service partner.

Knowledge management should result in an **improvement of the service efficiency** in short term and improve overall services on the long term.





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So, what's next?



# Sourcing strategies (1)

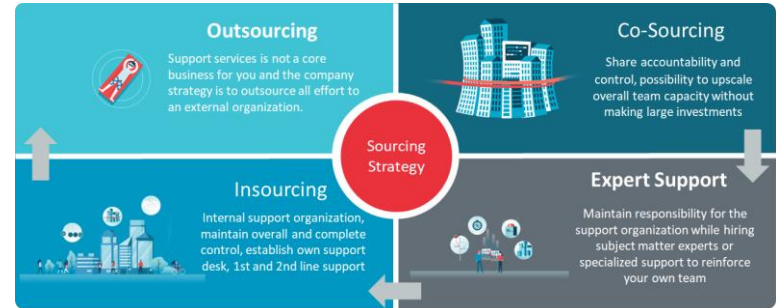
Once you have a clear view on the different areas you need support for, it's time to decide how you'll get yourself organized. It will be no surprise that there is no one-size-fits-all.

As mentioned before, we believe all service components are equally **important for the success of your ERP after go live**. There are however different flavors in how you organize yourself based on your business strategy and budgets.

**The main question is: HOW WILL YOU PREPARE YOURSELF FOR THE FUTURE?**

- ☞ Which components will be at the responsibility of your internal team?
- ☞ Which components will be outsourced to an external service partner?
- ☞ To what extend will you or the partner be responsible for that component?
- ☞ How does this strategy effect your budget?
- ☞ Which people will you need internally – where will you find those people?
- ☞ ...

**In our experience, we can state this isn't a one-time decision; it's in an ongoing strategy that evolves over time.**  
On the next page, we describe two different flavors with the challenges and impact they can have on your business.



# Sourcing strategies (2)

## Scenario 1

Right after go-live you want your service partner to take as much responsibility as possible. It will be challenging times for your users after go-live, so you want to **unburden your own people**. Within this strategy, you won't need to think about building an internal team or involving the right people at the right time. However, you'll need to bear in mind the **costs to your service partner for the upcoming years**. As time goes by, the pressure on the service organization will lower and you might start to take over some responsibilities internally.

## Scenario 2

As part of the strategy, the decision has been made to set up an **internal service organization** that can take responsibility over all components. To build the knowledge and experience that will be needed after go live, it's important to **start hiring people at the beginning of the ERP project**. They'll need to be closely involved with the implementation in order to gain the insights that are needed to deliver support after go live. The service organization needs to be built during the project, so you need to start thinking about this early in the project. A challenge might be to find the right people; obviously in terms of budget there will be no external cost.



# Thanks for reading!



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**TWO TO TANGO**