

CASE STUDY

Microsoft Dynamics 365 Business Central and CRM

OVERVIEW

CorefocusX was engaged to work with a European Manufacturing Group active in the aluminium industry. The client is a leading supplier of high-quality alumina based products and services with a worldwide customer base.

The group has over 50 years of experience of working in the aluminium industry with offices in Guernsey, Switzerland and a manufacturing facility in Germany. It is also part of a larger manufacturing group with the founding company originally established in 1915.

The Challenge

The challenge of the project was to assist in the upgrade of the entire organisation from the Great Plains (GP) Microsoft platform to the upgraded Dynamics 365 Business Central platform from Microsoft. The key elements included Office 365 Migration, CRM Integration, SharePoint & Exchange Implementation and a complete cloud infrastructure transition alongside the decommissioning of the legacy Citrix system. The journey included a number of key stages to the project which all required careful and timely implementation to ensure no disruption to the day to day operation of the business.

KEY CHALLENGES

- Pan European Company
- Large Scale Manufacturer, Worldwide Sales
- Enhanced levels of security
- Cloud based Migration
- Office 365 Implementation
- Azure Infrastructure
- Azure Integration Services
- SharePoint & Exchange Implementation
- Dynamics 365 Business Central & CRM



THE PROJECT

CorefocusX upgraded the on-premise CRM platform used to assist the management team to manage all of the complex relationships between the multiple sites across Europe.

With improved security and enabled the seamless migration between Dynamics 365 and Microsoft 365 this has led to more cost-effective processes than the previous GP solutions employed by the group and has provided greater accessibility for colleagues across the business. CorefocusX implemented a robust Customer Relationship Management (CRM) system for the client, now all cloud based instead of previously being on premise. This has helped to modernise and improve the client's customer interaction management across the worldwide sales force of the Group. This new CRM system now streamlines processes, enhances customer insights, and improves service delivery, leading to more efficient workflows and improved customer satisfaction levels.

The project was multi layered and completed in a period of six months, covering four jurisdictions across Europe.



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THE SOLUTION

The primary aim was to upgrade the previous system which was less secure than required by the client and not in keeping with the growing needs across all jurisdictions. With a change in priorities the company was looking to put in place a more secure, accessible, cloud-based solution which enabled them to customise and scale to their growing needs. In a significant move towards modernisation, we transitioned the client from on-premise servers to a scalable and secure cloud infrastructure.

This change has provided greater flexibility, enhanced security, and ensured that their systems are always up-to-date and resilient and ready for the next set of challenges. CorefocusX also greatly improved the security of the newly installed system with extensive pen testing and verification tasks to ensure all users of the improved system were securely connected to the newly created cloud-based environment. Finally, as a key part of the project IT transformation we decommissioned the incumbent Citrix system, simplifying the client's technology stack and reducing maintenance overhead. This strategic decision now allows the client to focus on more critical initiatives, driving their business forward.

The upgraded and improved cloud-based solutions of Dynamics 365 and Business Central have now securely placed all important records and relationship management in one place. This has made it easier to manage and control and easier to process customer invoicing, vendor management and management reporting.

This is now more accurate and responsive than ever before making more responsive reporting and decision making. In addition, CorefocusX has successfully migrated the client to Office 365, providing them with cutting-edge productivity tools and cloud-based solutions. This transition has enabled seamless access to emails, documents, and applications from any location, boosting their team's connectivity and productivity.

Another key requirement of the project was to introduce SharePoint as the client's new platform for team collaboration and document management. SharePoint has now empowered their teams to create, share, and manage content more effectively, fostering improved teamwork and communication across the organisation.

IMPLEMENTATION & TIMELINE

The project began in early May 2024, following a Discovery Phase undertaken in Jan 2024. This comprehensive exercise was crucial in preparing both the client and our internal team to address the challenges of transitioning this multi-jurisdictional manufacturer, operating in four separate countries, to an entirely cloud-based solution.

Security was a key consideration for the client. As such, extensive penetration testing and vulnerability assessments were conducted to ensure data security throughout the transition and beyond. New SharePoint and Exchange systems were introduced into the client's environment, and Office 365 was made available across the entire organisation, significantly enhancing communication among colleagues in all locations.

The project was successfully delivered in September 2024. Post go-live tasks were completed once all older on-premise systems had been successfully migrated to the cloud, allowing us to decommission the legacy systems.



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