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## RESEARCH NOTE

### THE BENEFITS OF SURE STEP FOR MICROSOFT DYNAMICS CUSTOMERS

#### THE BOTTOM LINE

**Companies investing in Microsoft Dynamics ERP and CRM should engage with Microsoft partners who use the Microsoft Dynamics Sure Step implementation methodology. Sure Step enables customers to reduce deployment cost and risk and accelerate payback.**

In an effort to help all Microsoft partners be more successful in delivering on-time, on-budget Microsoft Dynamics solutions to customers, this spring Microsoft began providing Sure Step to all its Microsoft Dynamics partners. Sure Step includes:

- Standardized content and workflow diagrams to structure and streamline the solution delivery process, from initial business diagnosis to implementation and hand-off to internal IT support teams.
- Tools and detailed documentation for project activities, resource allocation, and system configuration.
- Best practices guidance based on the experience of Microsoft partners for tailoring Dynamics applications to customers' unique requirements.

Customers working with partners that follow a structured methodology such as Sure Step can achieve more rapid payback and be well-positioned to evolve as their business needs change.

There are a number of components and characteristics of the Sure Step methodology that reduce the risk and increase the success of Microsoft Dynamics deployments.

#### Better use of resources

The Sure Step methodology ensures partners can more effectively communicate, collaborate, and allocate resources as needed to reduce the risk and cost and increase the predictability of deployments for customers. A set of common tools and practices, as well as an ecosystem of internal staff and Microsoft partners that follow the same practices and methodologies, means partners can more easily access subject matter experts if a specific need or question arises in the implementation process, or quickly identify other partners that may be able to contribute to making a project a success. Key benefits for customers include:

- More rapid resolution of questions or challenges that arise during planning and implementation
- Greater focus on customers' specific business needs and how Dynamics solutions can help them than on technology, communication, or process

**TOPICS**

Enterprise Applications  
Customer Relationship  
Management

- Less internal personnel time spent on meetings, planning, communication, project management, and ongoing support.

Integrated support from partners and Microsoft resources continue beyond the initial project implementation, so as any challenges arise, companies on the Microsoft Dynamics Business Ready Enhancement Plan can access the CustomerSource Web site for information and guidance as well as the latest downloads.

**More clearly defined roles, processes, and resource allocation**

Sure Step's detailed requirement-gathering checklists, workflow diagrams, and role definitions help partners accelerate the discovery and project planning process. This enables customers to quickly visualize and understand key roles and tasks in the planning and deployment process and identify individuals that may be on the critical path to success. In-depth guidance on responsibilities, timelines, and requirements can help customers and partners set expectations and maintain executive engagement and visibility throughout the project.

The Success with Microsoft Dynamics Web site (at <http://www.microsoft.com/dynamics/success>) can help customers gauge their level of readiness on key factors to the success of an implementation, such as clarity of executive commitment, budgeting accuracy, and scope. This, along with requirements gathering processes in Sure Step, can ensure an appropriate level of customization, so customers only invest in what they need.

Also, rapid implementation projects in Sure Step can help a partner to control risk and cost, and change management guidance can help focus on what key business processes will be changed or improved and who needs to be involved at what step. Key benefits for customers include:

- Greater control and visibility for resource planning purposes
- Less risk of scope change and change orders
- Improved processes leading to increased productivity

For many companies, the most important benefits of working with a partner using a structured methodology such as Sure Step are fewer risks of business disruption or unexpected additional costs.

**More guidance to maximize initial and ongoing ROI**

Microsoft Dynamics partners can use Sure Step's standard industry best practice templates to guide customers through the implementation project, document business value, and communicate the overall value of the project to management and investors. During the implementation and during subsequent upgrades, partners following Sure Step ensure they only make the changes or customizations that are actually needed to meet the customer's business needs.

Key benefits for customers include:

- Operational improvements driving greater business performance
- Reduced training costs
- Increased productivity through improved user adoption

## CONCLUSION

Nucleus has found that, when deployed properly, Microsoft Dynamics ERP and CRM solutions can deliver significant returns to customers — however, that is often dependent on selecting a partner that can deliver the project on time and on budget with minimal changes from the initial project scope and planning.

Choosing a partner that has a structured methodology such as Sure Step can help ensure that the partner has the tools in place to support the tactical, operational phases of the project such as project requirements, resource planning and allocation, and change management — so they can instead focus their resources on the higher-level success factors of an ERP or CRM project such as executive involvement, user adoption, reduced risk, and ultimately, maximized return on investment.

Organizations exploring a Microsoft Dynamics ERP or CRM investment today should be looking not just at the reference accounts or relationship with the Dynamics partner but also whether they use a structured methodology such as Sure Step, which will reduce the risk, accelerate payback, and increase the predictability of their Microsoft Dynamics implementation.

*Nucleus Research is a global provider of investigative technology research and advisory services. Building on its unique ROI case study approach, for nearly a decade Nucleus Research has delivered insight and analysis on the true value of technology and strategies for maximizing current investments and exploiting new technology opportunities. For more information or a list of services, visit [NucleusResearch.com](http://NucleusResearch.com), call +1-617-720-2000, or e-mail [info@NucleusResearch.com](mailto:info@NucleusResearch.com).*