

# CASE STUDY

## Engage Group

Ensure an efficient and cost-effective Dynamics AX solution migration to Dynamics 365 Finance and Supply Chain Management using insightful solution analysis.



**Engage Group** is a consulting company whose business concept is to be a driving force for their customers' efficiency, innovation, and acceleration through a strong customer presence with a deep system and business insight. By taking a holistic view of use, processes, and systems, Engage Group ensures that all parts of their customers' businesses interact optimally. They believe in long-term partnerships with their customers, which they develop by building a mutual trust, respect, and openness. This enables Engage Group to deliver a strong support for their customers' business systems in both IT and operations. All their services are based on making a use of the business system's full potential to drive growth, business value, and profitability.

*"I like the customer interaction and working with people. Some of my time is spent on sales, recruiting and running the company and some is spent on being a partner as a consultant, therefore, I combine those roles as part of my daily work life."* – shares Hans Gillesen, CEO at Engage Group West AB.

Besides consulting services and licensing, Engage Group also offers several service products, and Companial's BestPath Assessment is one of the offerings they use to go to the market with. According to H. Gillesén, they have *"a Rapid Cloud Transition, which is the way for Dynamics on-premises customers to undertake the journey to the cloud. We have a couple of steps for that, and one of them is the BestPath Assessment together with Companial."*

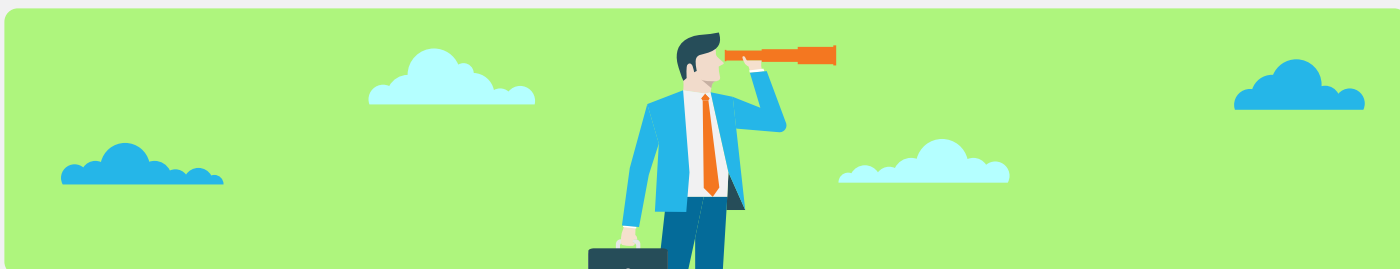
The Engage Group customers are typically coming from on-premise platforms - either AX2009 or AX2012.

For Gillesén, business is *"between people"* and, as he stated, he likes to be *"close to our customers and we are proud to not have any conflicts with any customers since the company was founded."* Engage Group's philosophy is when it comes to doing business is *"we do not promise more than we can deliver and it is important that we work with strong Partners like Companial so our customers are satisfied with the services and products we provide,"* says Gillesén.

## CHALLENGES FACED BEFORE USING THE BESTPATH ASSESSMENT

Although migration to the cloud has a huge impact on business operations and provides customers with many crucial benefits, such as increased scalability and security, and the elimination of infrastructure to maintain, some customers are still using on-premises solutions due to concerns about what the new solution brings. According to Gillesén, the biggest challenges and concerns their customers had about moving towards the digital future were *"how do we transition to the cloud solution?"* and *"is it safe to go to the cloud?"*. That was where Engage Group needed to help their customers to get started on their cloud journeys.

However, as Engage Group customers got closer to the migrations, Gillesén emphasizes that the main challenges became *"technical aspects and finding the right plan to move forward."* Moreover, there's *"always an issue when having interim integrations and how you can start the journey by slicing the elephant into smaller pieces while still being cost-efficient,"* says Gillesén.



## REASONS ENGAGE GROUP CHOSE COMPANIAL

Some of the main reasons that led Engage Group to choose the Companial team for their customers' AX2009 and AX2012 detailed technical solution analysis were the *"cost-efficiency, timing and gaining a better understanding of the challenges that may come up during the migration process,"* Gillesén explains. Since Engage Group was focusing more on the cloud transition while Companial was engaging in the specific parts of upgrading code, for Gillesén this collaboration was *"a good match and it is highly appreciated by the markets, therefore, we not only get greater confidence but also an input to the budgeting and planning for the migration projects."*

## THE SITUATION BEFORE CHOOSING BESTPATH ASSESSMENT

According to Gillesén, the Engage Group *"is not the normal system integrator who likes to sell as many hours of services and then deliver a fixed-price project on a specific date and then price it accordingly with a safe ethernet and everything."*

In the early phases of the Dynamics initiative, the customer and Engage Group thought it is a key that they get an understanding of the best way to move forward with estimating costs, and determine what challenges are likely to arise, what resources are needed to conduct the migration, what integrations are supported and possible to upgrade, and what needs to be developed from scratch.

Having all this in place, it is necessary to make sure that *"together with our customers we have the correct resource plan to work with an agile approach to delivering services and securing the upgrade."*

*"Choosing the BestPath Assessment as the initial step of moving to the cloud was a well-thought-out decision that we have made,"* Gillesén states.

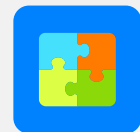
### Top Features of the BestPath Assessment for Engage Group:



The process to learn about the customers' challenges



Learning about the solution in a fair, cost-efficient way



Proactiveness and clear communication

*"While working together with Companial we were able to communicate clearly and effectively about the migration process with our customers, and we were always prepared before the BestPath Assessment workshops took place. The team undoubtedly has a good approach, combining technical skills with functional ones,"* shares Gillesén.

While migrating to the cloud, the key point for the customer often is “to reduce the number of customizations and bring only those that are business-critical and create value for the company. Therefore, determining the cost-estimate for that is truly important, and so far we’ve been confident about that,” says Gillesén. “Having a clear understanding of what integrations are possible to upgrade and what needs to be redeveloped gives confidence not only to our team, but to our customers as well.”

## HOW DID ENGAGE GROUP EVALUATE WORKING WITH COMPANIAL?

- **Price and delivery speed:** “Fair, competitive pricing means that you have a very broad understanding of the solution, accurate estimation, and a good delivery speed.”
- **Support:** “We haven’t had that many deliveries with any issues, but we had good support with the VPN setup, etc., to be able to get the model store. Your team’s structure and the way you communicate was very well appreciated as well.”
- **Communication:** “It was more about what we can expect in regards to estimation. In the beginning, it was slightly more communication from our side, as the first estimate is based on customizations and later we were having discussions with the Companial team about the challenges of different customizations apart from each other because they could be interlocked or connected, and those consequences are quite tricky to figure out exactly. Being able to communicate directly was one of the keys to successful project implementation.”

## WOULD ENGAGE GROUP RECOMMEND COMPANIAL’S BESTPATH ASSESSMENT TO OTHERS?

### Time saved using the BestPath Assessment

*Upgrade Assesments were completed twice as quickly based on the team’s focus and tools*

### The technical quality of the BestPath Assessment deliveries

80-90%

**“On behalf of Engage Group, I would like to recommend everyone who is not sure how to start the journey towards the cloud to choose the BestPath Assessment as the first initial step. Working with the Companial team was efficient, professional, and easy.”**

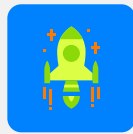
*Hans Gillesen*



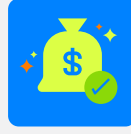
The Companial's BestPath Assessment service helps both Dynamics Partners and their customers to:



Save time by using constructed approach



Outline a well-defined path moving forward



Achieve a fixed-price proposal for the solution migration project



Reduce potential risks with upfront evaluation per current customizations

Are you still in search for the right path to move your customer's current Dynamics AX solution to Microsoft Dynamics 365 Finance and Supply Chain Management efficiently?

Choose our proven BestPath Assessment service – get in touch with your [local representative](#) or contact us via email [service@companial.com](mailto:service@companial.com)

