NAV
UPGRADE
PROPOSAL
E X A M P L E*

We trust our analysis will help you get insights of your customer solution and thus win the deal

Inga Sartauskaitė
Northeastern Europe Managing Director
Inga.Sartauskaite@1ClickFactory.com

Mission: Upgrade customer to a new version

You have requested to receive **1ClickFactory Fixed Price Upgrade Proposal** so we assume you have a customer who have raised the hand to upgrade the software. Congratulations: you are on the right track.

However, moving a Customer to a new version is very much similar to moving someone to Mars: you must be an expert of **existing** environment, be fully prepared for the **new one**, and you have to be certain on **how will you get** there as well as on **how much** will it cost you.

Upgrade is a one way ticket, so you must have a plan. A good one.

Facts only

There are 140 000 NAV installations worldwide.

Almost 70% of customers are running on old versions.

1ClickFactory data shows, the Tipping Point for an average ERP customer is 5 years: running on the same version for more than 5 years customers start to evaluate not only the costs of upgrade, but also the cost of replacing the Partner and ERP system in general.

1ClickFactory upgrade process

Let 1ClickFactory share its in-house knowledge on YOUR solution technical upgrade: not only can we help you better understand customer solution you delivered, but also make it easy for you to propose this upgrade to your customer.

Solution analysis

· Comparison with the Standard version

· Changes by Functional areas

Comparing OLD/NEW versions

· Identifying the overlapping and conflict areas

· Recommended paths for actions

Scope evaluation

· Upgrade Strategy

· Identifying the Scope & responsibilities

· Estimating Investments

Step 1: Solution analysis

Your customer solution would be upgraded from Microsoft Dynamics NAV 2013 R2 W1 to Microsoft Dynamics NAV 2017 W1. To provide you with the insights, during this step we identified all modifications in functional areas and conflicts that need to be resolved.

The two tables below represent:

· Your solution's comparison with the standard version of NAV

· Changes by functional areas

Solution's modification level in comparison with the standard version NAV 2017 W1

Object Type/Upgrade action	Use Custom	Merge	Re-implement	RTC: Standard Objects to Transform	RTCL Custom & Add-on Objects to Transform
Table	35	68	10	0	0
Form	0	0	0	0	0
Report	53	2	28	0	0
Dataport	0	0	0	0	0
Codeunit	21	24	15	0	0
XMLport	3	0	6	0	0
MenuSuite	1	0	2	0	0
Page	40	121	13	0	0
Total	153	215	74	0	0

Changes by Functional Area:

	Object in Functional Area	Changed Objects	Object for RTC Transformation
Administration & Set-up	206	4	0
Dimension management	43	2	0
Fixed assets	179	1	0
Financial Management	414	23	0
Human Resources	80	1	0
Inventory	322	30	0
Inventory and Warehouse	43	14	0
Main functionality	200	7	0
Manufacturing and Purchases	28	1	0
Manufacturing	265	27	0
Purchases	206	33	0
Purchases and Sales & Marketing	18	3	0
Sales & Marketing	463	75	0
Services	310	2	0
Warehouse	239	1	0

What does this mean for you as a Partner?

· We believe such analysis helps your consultants understand what functional areas of solution are modified most (especially, in the cases when a consultant is not familiar with the solution);

· You save a lot of your presales time as no longer you will have to dedicate your own consultants to perform this task;

· 1ClickFactory's, as a third party evaluation, will reduce your project risks.

Why do we share the result of analysis for FREE? We do this because the only way for us to win is to help YOU win.

Step 2: Comparing old/new versions

Knowing the delta between two versions from functionality perspective is a critical selling point. To help you get prepared, 1ClickFactory has built a detail guide on What is New Migrating from NAV 2013 R2 to NAV 2017 (please find a file attached).

We also analyzed the objects and add-ons of YOUR solution that need to be upgraded or transformed. Please take a look at two tables below which represent:

· List of objects with status and upgrade action (use custom, merge or re-implement) next to them;

· List of add-ons with upgrade action (replace, remove or upgrade "as is") next to them.

Objects to upgrade and transform

Object Type/Upgrade action	Use Custom	Merge	Re-implement	RTC: Standard Objects to Transform	RTCL Custom & Add-on Objects to Transform
Table	35	68	10	0	0
Form	0	0	0	0	0
Report	53	2	28	0	0
Dataport	0	0	0	0	0
Codeunit	21	24	15	0	0
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Upgrading add-ons

Supplier name	Upgrade Action	Data migration	Solution component name	Object tags	Partner provides Add-on Standard Current Version	Partner provides Add-on Standard New Version	Partner provides Data migration tools
1st Add-on	Replace	Migrate	Localization 2013r2	SL	Yes	Yes	Yes
	Upgrade As-is	Keep As-is		KAS	No	No	No
	Upgrade As-is	Keep As-is		AS	No	No	No
	Upgrade As-is	Keep As-is		TRANS	No	No	No
2nd Add-on	Replace	Migrate	KKAL	KKAL	Yes	Yes	Yes
	Upgrade As-is	Keep As-is		TU	No	No	No
	Upgrade As-is	Keep As-is		PR	No	No	No
	Upgrade As-is	Keep As-is		GA	No	No	No
	Upgrade As-is	Keep As-is		MB	No	No	No
	Remove	Delete		EURO	No	No	No
	Upgrade As-is	Keep As-is		AD	No	No	No
	Upgrade As-is	Keep As-is		RK	No	No	No
	Remove	Delete		TEMP	No	No	No

What does this mean for you as a Partner?

This is the stage when actual scope of the Upgrade Project is designed:

· You can clearly see/evaluate which changes are in scope and what upgrade actions are foreseen for each object.

· You can modify the scope document before starting the project in order to optimize the offering;

· 1ClickFactory designed reports taxonomy tool (please find the list of all reports found together with the proposal) will help you identify usage of the reports. Removing the unused reports from the list will affect the scope (and price) for RDLC transformation dramatically

You are more than welcome to use the tools 1ClickFactory designed to decrease or optimize the upgrade scope.

Step 3: Upgrade scope evaluation

In the table below you can see the calculations of Your customer solution upgrade from NAV 2013 R2 W1 to Microsoft Dynamics NAV 2017 W1.

Price estimated includes:

· **Project Management.** You will have a Project Manager assigned to your project who will make sure you receive constant updates on the project status and quality of the project;

· **Automated Tools.** To minimize the cost and the risk of the project, we will use automated 1ClickFactory designed upgrade tools;

· **Support.** You will have 3 months of FREE support after we deliver the project.

Assumptions taken:

· We expect you to provide us the new add-on version for target version;

· For any object where the version tag includes only information about add-ons or standard NAV tags, and the object is not set to modified, it is assumed that the object does not contain any changes and is not included in the upgrade scope;

· It was assumed that you will provide add-on objects for the old version to identify modifications done in the add-on objects;

· There are changes to objects that were not documented. These changes are included in upgrade project scope;

· Upgrade of usage of external components is out of scope;

· A security update (roles, permissions, user logins) is out of the data migration service scope;

· Performance tuning is not in scope unless specifically requested;

· It was assumed that reports containing RDLC layout will be moved "as-is" keeping same RDLC layout.

Upgrade estimate

#	Description	Price, EUR
1	Solution Upgrade	
	Solution kick-off workshop, clean-up discussion Factory check-in and process control (DB preparation, upgrade toll set-up, project management) Object Upgrade Deliverables: new object structure (FOB), upgrade implementation guidelines	**6.270,00**
2	Data Migration of Test Database	
	Data test and clean-up for SQL migration Data migration process test Deliverables: Tools to perform data transformation, 2 companies, 220 GB	**2.695,00**
	Upgrade project total	**8.965,00**
3	Additional services	
	Live Data Migration (2 companies, database size: 220 GB)	**3.025,00**

A clarification workshop may be arranged for a fixed €165 price to refine the scope & discuss key points;

Project timing. 1CF commits to deliver Your customer project by June 27th.

What does this mean for you as a Partner?

· Fixed price upgrade offering minimizes your risk;

· 1ClickFactory automated tools assures not only good quality, but also a decrease in cost;

· Outsourcing 1ClickFactory for an upgrade, you can save your valuable specialists time as 1ClickFactory will take care of the time-consuming repetitive tasks.

No matter how things will unfold, you can be sure you will get the upgrade delivery on the price and date promised.

Mission: upgrade customer to a new version

A one way ticket only, remember?

Step 4: Removing customer objections

Sure your customer has a desire to improve his operations and thus is looking for an upgrade. But deep down they don't want to change. Change is risky. It requires sacrifice, disruption and dedication. This is a one way ticket, and the decision to upgrade is not an easy one. This is why we are adding a fourth step to the process: "Removing customer objections":

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Removing customer objections
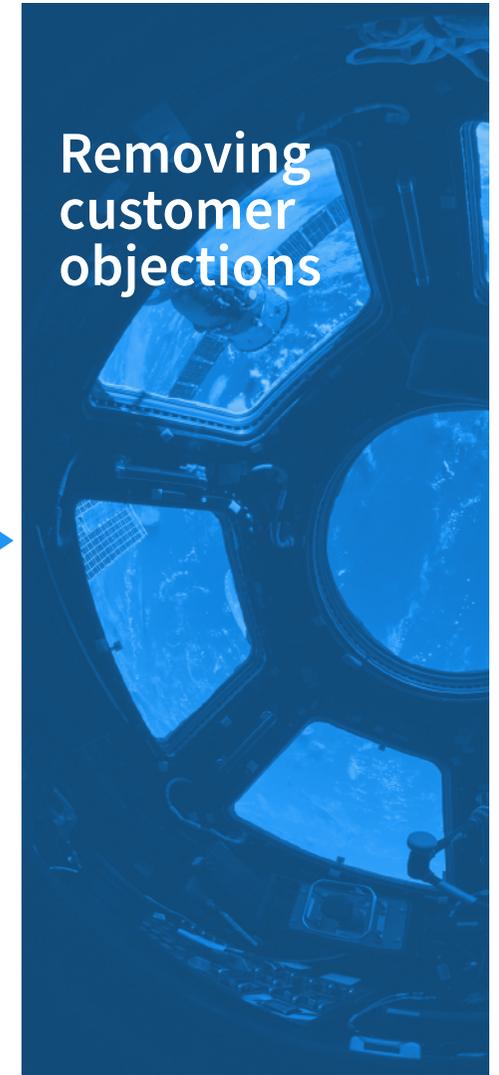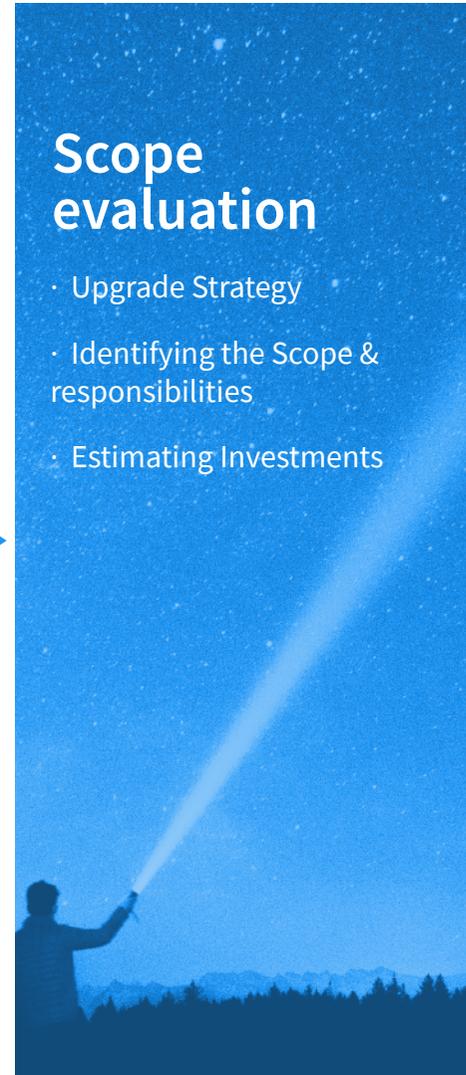
Why should your customer upgrade NOW?

· Highly valued people are eager to try new technologies and value working at modern companies. Encourage your customer not to delay the decision till it is too late.

· Microsoft constantly improves the software by adding functionality to increase productivity. Why wait to start getting benefits?!

· The closer customer solution gets to the standard, the more customizations are eliminated. Which means your customer solution maintenance complexity and costs are reduced.

· The longer customer waits, the harder and more expensive will be to Upgrade.

· Old version might not be supported by Microsoft. Is it really worth risking all the investments?

· Afraid of business downtime? 1ClickFactory is going to use the weekends.

Why outsource 1ClickFactory?

· We are doing more than 100 Upgrades/Year thus we have our lessons learned;

· We have tools to automate the process and thus can decrease the risk.

Your developers deserve to enjoy their work: let 1ClickFactory professionals do the boring part!