



CuroGens Helps Meriton Achieve a Successful D365 Implementation and Business Expansion

Executive Summary:

In this case study, we will explore how CuroGens helped Meriton, a holding company that focuses on commercial HVAC companies, rescue their inefficient D365FO implementation. Having gone live with only two business units in one legal entity, CuroGens has worked with Meriton to expand their business into key markets across the United States through the implementation of several business units with a plan to activate more.

Introduction:

Meriton was experiencing challenges with the implementation of their D365FO system. Another partner began the project, exceeded its budget, and was behind schedule. CuroGens was brought in to resolve issues with the implementation of the D365 system. The previous partner had only implemented two out of three business units of one legal entity, resulting in the accounting team having to simultaneously record General Ledger (GL) in two different systems, which lead to an enormous workload and challenges in maintaining accurate records. In addition, CuroGens discovered the previous partner implemented customizations through bad code that was causing issues in the already live environment. After a quick analysis of the situation, CuroGens proposed a plan to bring the final business unit live within three months and make F&O the system of record.

Goals and Objectives:

When CuroGens was brought in, the primary goal was to implement the remaining business unit for the first legal entity and address issues caused by poor implementation and coding practices. After successfully going live with the first legal entity, Meriton's goal was to onboard all of their acquired companies onto D365FO and pave the way for business expansion into key markets across the United States. CuroGens played a key role in defining the data extraction, migration, and cleansing processes, which helped to onboard new acquisitions more quickly and efficiently.

Approach:

CuroGens listened to Meriton's request to come with a plan to make F&O a system of record, analyze the current state of implementation, and utilize native functionality as much as possible. The team identified 52 code strands, investigated them and proposed fix solutions to Meriton. CuroGens partnered with Meriton to GoLive with the first company and launch multiple new legal entities as they were acquired. CuroGens completed the successful implementation.

Solution:

CuroGens successfully and quickly resolved issues with the initial inefficient partner implementation. Recognizing, fixing, and deleting bad customized code from previous partner, CuroGens continues to work alongside Meriton to launch new legal entities and migrate acquired entities from legacy ERP systems to D365 in addition to identifying operations and ISV solutions to streamline their business processes.

Results:

CuroGens successfully and quickly rescued Meriton from their live but inefficient D365 implementation. Within 3-4 months, CuroGens helped Meriton recognize D365FO as the system of record for Meriton. As a global company, CuroGens resources were able to complete work in Europe before Meriton started their workday and pass it along to the customer in Texas for review and testing, speeding up the process. In addition to fixing bad code from the original partner, CuroGens paved the way to make the system more robust for bringing additional legal entities onto the system. Defining data extraction and migration and cleansing processes for new acquisitions, CuroGens has assisted with three companies going live.

Conclusion:

Through the successful implementation of D365FO and partnership with CuroGens, Meriton was able to expand its business into key markets across the United States and improve its data management processes.

Additional Information:

John Beatty, Director of Operations, and Melinda Lawrence, Chief Financial Officer, participated in the case study. Meriton's philosophy of "buy and build" aligns with CuroGens own expansion strategy and approach to co-create lasting growth by defining big vision and paying attention to small details.