



proserv

# From AX to Dynamics 365: *Future-Proofing* ERP at Proserv

How a global leader in controls technology  
worked with Telefónica Tech to modernise their  
ERP strategy through Dynamics 365

## ABOUT THE CUSTOMER

**Proserv is the controls technology company providing energy technology solutions for customers across the energy sector.** Specialising in subsea and topside controls, monitoring, metering, sampling, IWOCs, digital Intelligence and optimisation, Proserv are unrivalled, agnostic and agile. Proserv leads the industry in overall performance and value, leading across attributes but most noted for technical support, equipment quality and aftermarket services.

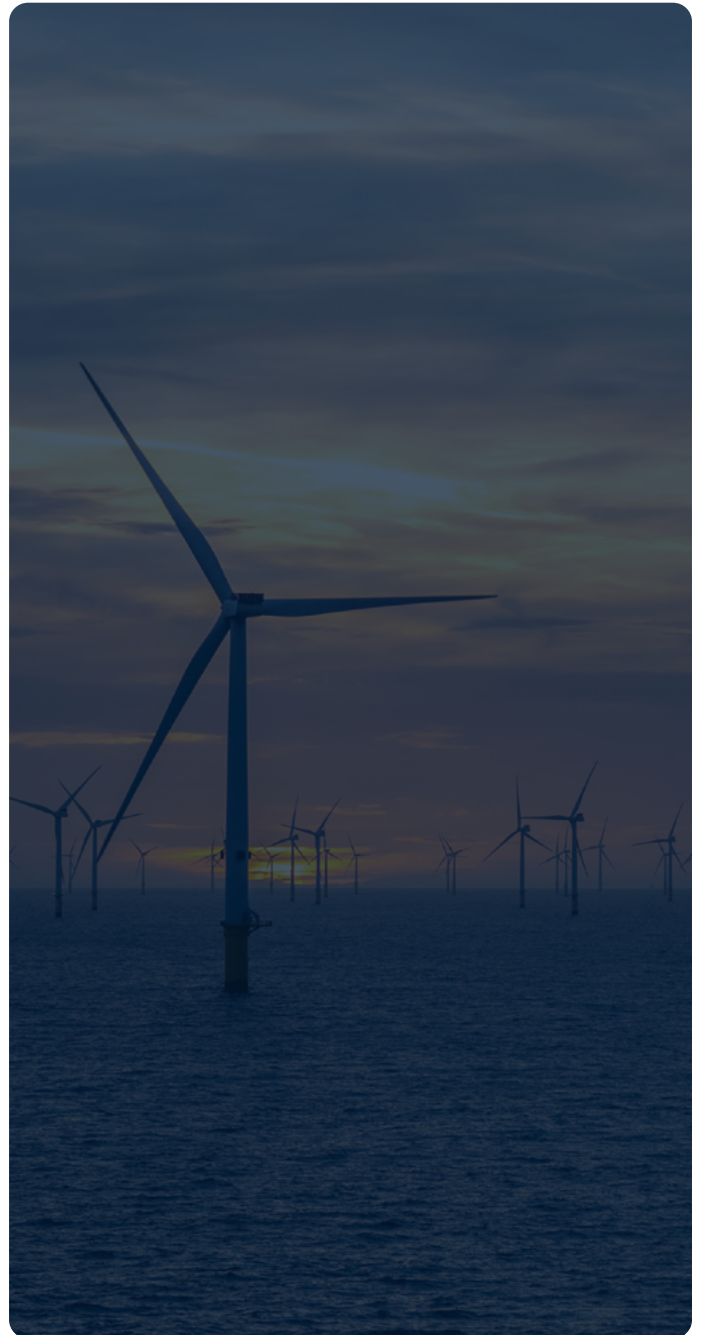
## THE CHALLENGE

Proserv had been using Dynamics AX across the global business for a number of years. However, AX was heading towards end of support and therefore Proserv needed the modernise its ERP system.

With the use of AX, Proserv found a rising number of IT support tickets were being raised by business users, rendering it an expensive application to maintain. Typically, these issues were being caused by customisations or poor data, due to the AX solution having become inconsistently customised across Proserv's entities for tasks such as timesheets and invoicing. Furthermore, AX's performance was slow, leading to a user experience that fell short of what is expected today.

Therefore, Proserv firstly sought a cloud-based solution that could modernise operations and enable the use of AI, supporting the business' plans for growth with a future-proofed IT strategy. Having heavily invested in the Microsoft ecosystem, Proserv chose to migrate to AX's successor: Dynamics 365 Finance & Supply Chain Management.

Secondly, Proserv required a knowledgeable partner to mobilise the new solution quickly. Previous experience led them to Telefónica Tech.



*We recognised the efficiencies that could be gained by moving from AX to the latest and most advanced Microsoft ERP products, which we hoped—and expected—would deliver real value. We appreciated Telefónica Tech's honest recommendations around Dynamics 365, especially when to engage with an ISV to maximise impact. It truly felt like Telefónica Tech was an extension of the Proserv team, and our collaboration was seamless and effective*

**Paul Harriman**

Operational, Finance & Systems Director, Proserv



## THE SOLUTION

# A trusted partnership for rapid mobilisation

Proserv engaged Telefónica Tech to deliver their new Dynamics 365 ERP solution. Having worked together in the past, the Telefónica Tech team understood the Proserv business which aided the project to **move quickly**—an important requirement for the customer in order to remain cost-effective, benefit from momentum, and avoid overlapping systems.

The fact Proserv chose to remain with Microsoft meant their modernisation from AX to 365 benefitted from an **existing foundation**, rather than starting from scratch. The project delivered by Telefónica Tech caused **minimal disruption** and enabled a familiar solution that users were able to rapidly adopt.

# Tailored implementation with scalable value

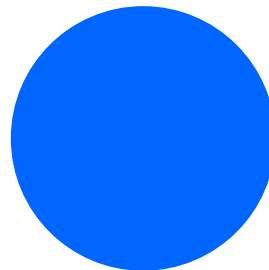
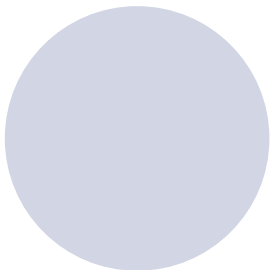
Telefónica Tech conducted onsite workshops to map out Proserv's requirements, timelines, and where we could add value. By reviewing current processes, we mapped requirements to Dynamics 365's capabilities and identified gaps that could be filled by Microsoft's extensive network of ISVs. For example, Proserv needed a specialist system for Rental Management, which Sycor was able to deliver.

Proserv sought to **standardise as far as possible** in order to improve data quality, efficiency, and outputs. Telefónica Tech implemented the fundamentals first, focusing on ease of use and on providing Proserv with a fit-for-purpose solution. As well as training, we established an internal **Centre of Excellence (CoE)** to enable a smooth migration and to equip the customer with the knowledge and skills required for maintenance and ongoing improvements.



*Having considered various Microsoft partners, we chose Telefónica Tech to deliver our Dynamics 365 ERP transformation. The team were knowledgeable, quick-moving, and were always there to help throughout the process. With Dynamics 365, we now have a fantastic base to be able to leverage the latest and greatest Microsoft features, giving our colleagues the ability to easily access the information they need anywhere, anytime.*

**Simon Kane**  
Solutions Architect, Proserv



# Global rollout and business impact

To facilitate user adoption, the Dynamics 365 solution was **rolled out iteratively** over 28 weeks, starting with the UK, and then the US, followed by India—and is now in use across the global organisation including Europe, the Middle East, and Asia.

The move to Dynamics 365 Finance & Supply Chain Management has equipped Proserv with an **easy to use, fast, and responsive solution** enabling **more efficient working** in a central environment. The new ERP system is available 24/7 and has eliminated the need for onsite servers.

Additionally, Dynamics 365 integrates seamlessly with Microsoft Power BI, facilitating insights to be available at the click of a button. Proserv is using Power BI extensively for Financial and Operational KPIs, Project Performance Reporting, Material Supply/Demand Visuals, Quotation Status Reporting, and Utilisation of People and Equipment reports.

Given the Software-as-a-Service (SaaS) and cloud model of Dynamics 365, Proserv will benefit from ongoing system improvements and can leverage **embedded AI** (Copilot) for further efficiency gains.



## THE RESULTS

As a result of the Dynamics 365 Finance & Supply Chain solution, Proserv has:



**Improved financial reporting:** Several spreadsheets have been replaced with centralised



**Reduced customisations:** Replaced custom apps with Dynamics 365 modules, such as an outdated timesheet app replaced by Dynamics 365 HR



**Saved time with automated processes:** Teams are working more efficiently by automating tasks such as supplier remittances, and having eliminated paper processes



**Improved user experience:** Dynamics 365 is fast, responsive, and easy for the business to use



**Future-proofed their ERP:** Proserv partners with Telefónica Tech Managed Services for ongoing support, maintenance, and consultation



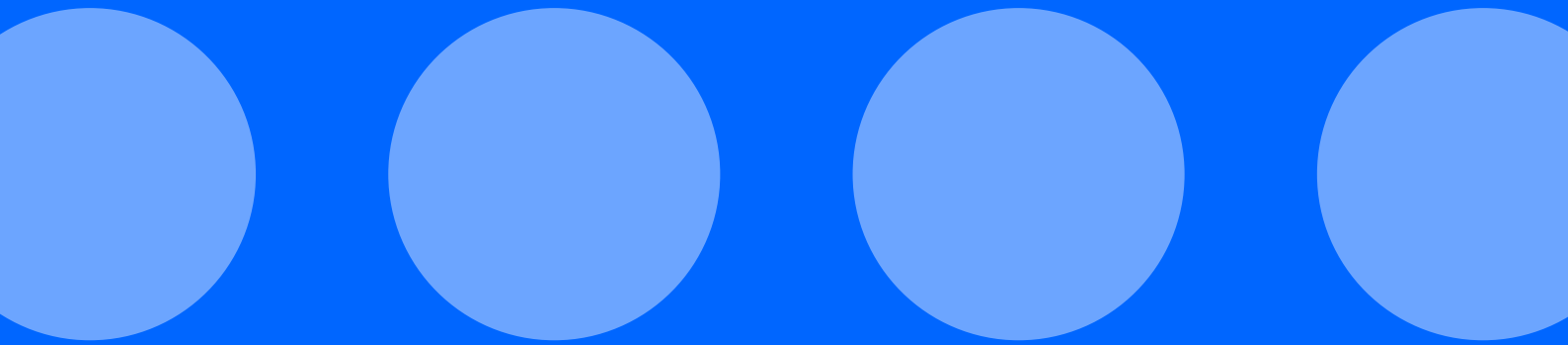
*Moving to Dynamics 365 allowed us to rationalise processes that had evolved on previous systems. This significantly reduced time spent on support and day-to-day housekeeping, allowing the team to focus on more productive tasks to the benefit of the business.*

*Dynamics 365 also allowed us to link into to modern tools like Power BI and Fabric in a much easier and consistent way.*

*During the ramp up to go-live, Telefónica Tech were excellent, able to quickly provide help and advice as well as systematically work through the more complex issues we came across.*

**David Lawson**

System Development Manager, Proserv



Leading the Way in  
*Digital Transformation*  
for our Customers

Telefónica Tech unlocks the power of integrated technology, bringing together a unique combination of the best people, with the best tech and the best platforms, supported by a dynamic partner ecosystem to make a real difference to every business, every day.