

Case Study

ERP Transformation: Unifying Global Operations with Microsoft Dynamics 365 Finance



Customer Overview

Customer

A leading global legal services provider

Profile

Operating across 17 global entities, the client offers end-to-end legal services and technology-enabled solutions to enterprise clients.

Industry

Professional Services

Services

Microsoft Dynamics 365 Implementation

Business Need

The enterprise faced a time-sensitive ERP transformation challenge driven by the impending renewal of costly Oracle licenses. Its complex environment spanned multiple ERP systems, including Oracle and AX 2012, leading to disconnected data, limited transparency, and rising operational costs.

Key objectives included:

- Modernize and unify legacy ERP systems to simplify operations and improve control.
- Enable data-driven decision-making across all business units.
- Eliminate revenue leakage through accurate time tracking and financial visibility.
- Establish a scalable foundation for continuous innovation and operational growth.

The company required a partner capable of executing a full-scale ERP transformation within five months, without disrupting business operations.

Approach and Solution

Fast-Track ERP Transformation

Synoptek collaborated closely with Microsoft through a FastTrack D365 Solution Blueprint Workshop, securing \$220,000 in ECIF funding and achieving executive alignment before implementation.

Under intense time constraints, Synoptek replaced multiple legacy systems—including Oracle Finance, Intapp, AX2012, and other tools—with Microsoft Dynamics 365 Finance & SCM. The new platform unified operations across 17 global offices and went live in just 4 months and 22 days, well ahead of the Oracle renewal deadline.

This accelerated rollout leveraged Synoptek's proprietary accelerators and blended delivery model, ensuring efficiency, predictability, and success:

- Integration Framework for seamless data migration and system connectivity
- Data Migration Recipe to streamline legacy data consolidation
- Reusable Components for rapid configuration and deployment

As a result, the enterprise reduced its licensing and administrative overhead by ~50% while achieving operational stability and scalability.

Process Transformation: From Setup to Strategy

The cornerstone of the transformation was the Project Management and Accounting module, reengineered to drive speed, accuracy, and auditability:

- Templated Work Breakdown Structures (WBS): Standardized project setup across business lines.
- Logic-Driven Project Categories: Automated, accurate financial postings.
- Role-Based Costing & Automated Revenue Recognition: Linked delivery to margins, ensuring profitability.

This reimagined structure eliminated manual errors and improved financial controls across the organization.

Automation & Integration: Reducing Friction, Increasing Visibility

To support end-to-end operations, Synoptek integrated critical third-party systems with D365:

- Payroll: Blue Marble & Paylocity
- HR Lifecycle: Oracle-based onboarding/offboarding connected to D365
- Banking: Real-time financial transaction integration
- Travel & Expense: Chrome River integrated for intercompany processing
- Workflow Approvals: Enabled via Outlook & Power Automate
- Financial Consolidation: FCCS linked for automated close and reporting

These integrations eliminated manual dependencies, improved data accuracy, and provided unified visibility across functions.

Closing the Revenue Gap

Pre-implementation audits revealed unbilled contractor hours, resulting in hidden revenue leakage. By enforcing time tracking within D365 and automating cost-to-bill structures, Synoptek eliminated these gaps, creating a clear line of sight into project profitability.

Insight at Scale with Azure & Power BI

Following implementation, Synoptek centralized all ERP data within Azure Data Lake, integrating it with Power BI to deliver real-time dashboards and analytics. Leadership now benefits from consolidated, accurate, and actionable insights—enabling faster, data-driven decisions.

Business Benefits

Through Synoptek's rapid ERP modernization, the enterprise achieved measurable results across performance, cost, and scalability:

- 50% reduction in licensing, administration, and implementation costs
- ERP go-live in 4 months, 22 days, beating the original timeline
- Consolidation of 10+ legacy systems into a single D365 environment
- Full automation across project, finance, and HR functions
- Revenue leakage eliminated through structured time capture and billing controls
- Predictive analytics enabled via Azure & Power BI integration

Phase 2, initiated in 2025, builds on this foundation with new integrations and modernization efforts:

- Paylocity clock-in/clock-out automation
- PR workflow enhancements and dual-ledger compliance (US GAAP + India Statutory)
- Salesforce replacement evaluation
- Ongoing optimization workshops for performance tuning and analytics refinement

The organization is now exploring AI-driven capabilities and Copilot integration within Dynamics 365, expanding automation and insight generation through Microsoft's ecosystem.



Synoptek delivered where others could not – helping us transition off Oracle under an impossible timeline. The new ERP environment is fast, transparent, and future-ready.

– **Executive Sponsor, Global Legal Services Provider**

About Synoptek

Synoptek delivers accelerated business results through advisory-led, transformative full-life-cycle systems integration and managed services. We partner with organizations worldwide to help them navigate the ever-changing business and technology landscape, build solid foundations for their business, and achieve their business goals.