

CASE STUDY

CAYMAN CHEMICAL Chemical Manufacturing

"Going forward, the additional functionality within Dynamics 365 and the cloud-based technology will add efficiencies to our business, reduce modifications, and eliminate the headache of managing on-site hardware."

[Bill Goeman, Director of Information Technology](#)



Cayman Chemical supplies scientists worldwide with high-quality assay kits, biochemicals, proteins, and antibodies to help advance human and animal health. In addition to its extensive catalog, Cayman offers a full suite of contract services including bioanalysis, assay development, medicinal chemistry, structure-based drug design, and custom synthesis.

Cayman was founded in 1980 by its current CEO, Dr. Kirk Maxey, with 30 grams of Prostaglandin A₂ and a vision of providing affordable, high-quality prostaglandins to the research community. Today, Cayman offers more than 16,000 products in its catalog and serves multiple global markets as part of its greater mission to help make research possible.

Cayman initially selected and implemented Microsoft Dynamics AX version 4 with Alithya, then Fullscope, in 2008 and upgraded to AX 2009 in the years that followed. "We've known for some time that we needed to upgrade AX2009 to Microsoft Dynamics 365 Finance and Operations because AX2009 was no longer being supported by Microsoft," says Bill Goeman, Director of Information Technology at Cayman Chemical.

Key Benefits

- > Upgrading from Microsoft Dynamics AX 2009 to Microsoft Dynamics 365 Finance and Operations
- > Identifying upgrade cost savings so that the project was not cost prohibitive
- > Replacing customizations with process changes where possible
- > Cloud-based technology will add efficiencies, reduce modifications, and eliminate the headache of managing on-site hardware
- > Upgraded software gives Cayman access to more ISV solutions
- > Ability to better manage contract services group with Microsoft Dynamics 365 Customer Engagement
- > Microsoft Dynamics solutions have grown as the company has grown and expanded its footprint

"Additionally, our AX2009 deployment was no longer optimized to our business processes and we wanted to correct that in implementing D365FO. At first, the project seemed prohibitively expensive, such that we'd need to get it done internally. However, Alithya helped us plan to do some of the upgrade work ourselves, leveraging Alithya where they could provide expertise we needed. This represented enough of a cost savings that we were able to move ahead on the project."

Reducing Capital Cost with the Cloud

With Microsoft Dynamics 365 for Finance and Operations, Cayman will move to cloud-based technology. "One of the main reasons to move to cloud technology is it reduces the capital cost to run your own infrastructure and removes a lot of the maintenance headaches of worrying about end-of-life versions for operating systems and databases and installing thick clients on desktop machines," says Goeman. "We were excited about the ability to leverage new updates to the product with a lot shorter turnaround time. The last update for AX 2009 came out about a decade ago. It's still under support from Microsoft, but there haven't been any new and exciting changes to AX 2009 for quite some time."

Cayman will now be able to utilize new features/functionality within Microsoft Dynamics 365 for Finance and Operations. "There have been a lot of updates to the platform through the 2012 lifecycle services and also now in Finance and Operations," says Goeman. "Also, to be in the cloud allows us to integrate with other software packages and vendors and ISVs a lot more easily."

To prepare for a move to the cloud, Cayman worked with Alithya to understand changes to the core product and application itself. "We've also been doing a lot of data cleanup work that was necessary before we could start on the data migration," says Goeman. "There is no official migration path from AX 2009 to Finance and Operations unless you want to go through a two-step upgrade process to 2012."

We decided that we didn't want to do the two-step migration through AX 2012, so the only tool that was available to us from Microsoft was something that we got early access to through the FastTrack program, which is called the data migration tool. It's a first party Microsoft tool that exports data out of AX 2009 and creates data packages that you can import into Finance and Operations. As part of using that data migration tool, we identified a lot of areas in our data that needed to be cleaned up and that's all going to make the data process a lot easier when we actually get closer to go live."

Leapfrogging AX2012

Cayman stayed within the Microsoft family of ERP products for a number of reasons. "We decided to select Dynamics 365 for Finance and Operations because we built a lot of in-house knowledge around AX4, and there was a lot of familiarity with the product and its processes," says Goeman. "We were excited about the ability to move to Finance and Operations and not only leverage the skills that we had built in AX4 and AX 2009, but also the in-house development talent that we have for SharePoint and Power BI. Dynamics 365 for Finance and Operations is a good way to tie together a bunch of different areas that we've been building expertise in over the last couple of years. We didn't look very hard at other cloud-based ERP platforms. We zeroed in on Finance and Operations early on. After we decided to leapfrog AX 2012, we were anxiously awaiting the release of Finance and Operations."

Alithya functional consultants helped the team identify areas where the company could use core functionality, and where customizations or ISVs would be needed. "When we started the project, Alithya led us through business process workshops and overview training where they teach you about the core product," says Goeman. "This was really valuable to us because we were leapfrogging AX 2012. There was a lot of additional functionality and many changes to the product between AX2009 and AX2012. Then, the infrastructure pieces changed drastically between AX2012 and Dynamics 365 for Finance and Operations."

A Partner to Count on

Cayman has been a long-time customer of Alithya. “We initially selected Alithya, or Fullscope at the time, in 2007 as our partner because of their deep expertise in the process industries area,” says Goeman. “As people may know, they wrote the process industries module which they then sold to Microsoft and is now part of the core product. As Cayman is a process industries manufacturer, we wanted a company that had deep expertise in that specific kind of manufacturing. That was really valuable to us in 2008 when we were a smaller company with an even smaller IT department trying to do a software implementation. It was valuable to us to have Alithya available and not have to explain to them how process manufacturing differs from discrete manufacturing.”

As we approach 2020, Cayman continues to partner with Alithya. “Over time, we’ve been largely self-sufficient, but we’ve continued to rely on Alithya for advice about customizations that we’re making, licensing changes and understanding the changes to the product as we start the Dynamics 365 for Finance and Operations implementation. They continue to be a great partner,” continues Goeman. Cayman appreciates the advice they received from the Alithya team. “When we started looking at core functionality for Finance and Operations, there were definitely some changes from how we did things in AX 2009,” says Goeman. “For each instance of a mismatch between how you currently do things and how the core product does things, it’s a good opportunity to say, ‘Do we really need to write a customization to change the application or can we change the business practice that we have internally so that we can use more stock functionality.’”

Adding Customer Engagement

Alongside its Dynamics upgrade, the team at Cayman is adding Microsoft Dynamics 365 Customer Engagement to their solution. We decided to deploy Dynamics 365 for Finance and Operations alongside the Customer Engagement pieces primarily because our business model has changed pretty drastically since we went live in 2008 with AX4,” says Goeman. “In 2008, we were very much a small process industries manufacturing company that made a pretty standard set of biochemicals, assay kits, and lab reagents effectively. In the 11 years since we went live with AX4, we’ve expanded into a lot of different areas, not the least a robust contract services group. We’re doing a lot of contract research and contract services for the life sciences industry.”

Cayman previously attempted to use the CRM module within AX 2009, but it was challenging. “There is some CRM functionality in AX 2009 which we had extended and customized to try and make it fit the business a bit better,” says Goeman. “Microsoft continues to make improvements in that CRM module, but really the flagship CRM functionality from Microsoft is Customer Engagement. So that was something that the business was really aching to get into, and we’re very excited about that.”

“OVER TIME, WE’VE BEEN LARGELY SELF-SUFFICIENT, BUT WE’VE CONTINUED TO RELY ON ALITHYA FOR ADVICE ABOUT CUSTOMIZATIONS THAT WE’RE MAKING AND LICENSING CHANGES AND UNDERSTANDING THE CHANGES TO THE PRODUCT AS WE START THE DYNAMICS 365 FOR FINANCE AND OPERATIONS IMPLEMENTATION. THEY CONTINUE TO BE A REALLY GREAT PARTNER.”

– Bill Goeman

ALITHYA GROUP INC. IS A LEADER IN STRATEGY AND DIGITAL TRANSFORMATION IN NORTH AMERICA. Founded in 1992, the Company counts on 2,000 professionals in Canada, the United States and Europe. Alithya’s integrated offering is based on four pillars of expertise: strategy services, application services, enterprise solutions and data and analytics. Alithya’s Microsoft practice covers a wide array of capabilities, including Dynamics, Azure, IoT, AI, business and advanced analytics, digital solutions, application development and architecture.