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CountryMark.

CASE STUDY

CountryMark's Path to Mastering D365 Finance and Supply Chain Upgrades

AXIA Consulting partnered with CountryMark to develop internal processes, train teams, and implement a structured approach to managing D365 Finance and Supply Chain upgrades.

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Company: Countrymark Cooperative Holding Corp.

Industry: Manufacturing - Discrete and Process

CountryMark – Internal Leadership of D365 Finance and Supply Chain Upgrade Processes

Introduction

CountryMark, an American-owned oil exploration, production, refining and marketing company, produces a complete line of premium quality liquid fuels with light, sweet crude oil, which is refined to the highest specifications at the CountryMark refinery in Mt. Vernon, Indiana. For the past 4 years post-D365 Finance and Supply Chain Management (“D365”) implementation, AXIA has been engaged as the primary Application Maintenance and Support provider.

After working with AXIA, CountryMark achieved the following:

Stabilization of D365 in support of operations post hypercare

Implementation and ownership of a strategic best practice D365 evergreen upgrade cadence

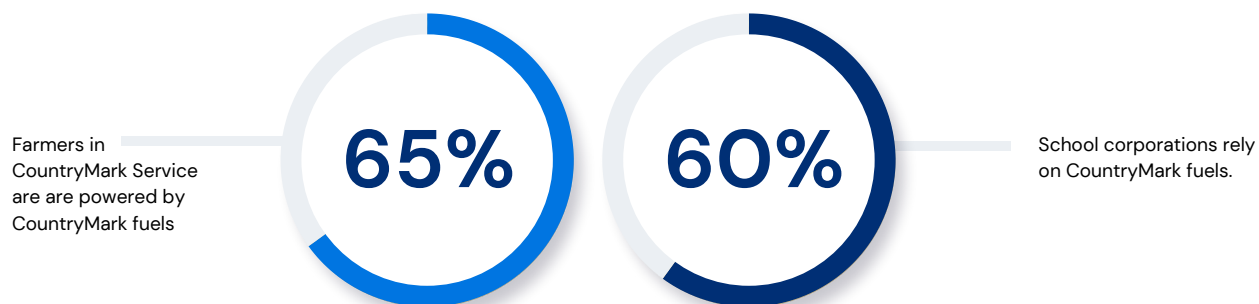
Transformation from D365 issue resolution to strategic prioritization of system evolution to support company growth

Organized issue identification and resolution through best practice support processes and associated use of Azure DevOps (“ADO”)

The Story of CountryMark

Background

CountryMark is an American-owned oil exploration, production, refining and marketing company and has been a farmer-owned cooperative since 1919. It was recognized in 2022 as the 27th largest cooperative in the nation. The company's complete line of premium quality liquid fuels begins with light, sweet crude oil, which is refined to the highest specifications at the CountryMark refinery in Mt. Vernon, Indiana. Fuel quality is protected as it travels north along a 238-mile private pipeline. State-of-the-art blending technology at each CountryMark fuel terminal ensures that biodiesel and ethanol blended fuels are formulated for optimal driving performance and winter operability. Equaling CountryMark's fuel quality is the company's complete line of high-quality lubricants, which are sold as CountryMark Advantage Lubricants. CountryMark also carries API-certified TerraCair Diesel Exhaust Fluid (DEF).



Today, there are more than 200 CountryMark branded delivery routes and more than 100 CountryMark-branded fuel stations. More than 65% of farmers and 60% of school corporations in the CountryMark service area are powered by CountryMark fuels. CountryMark's upstream business includes an impressive team of petroleum exploration professionals, geologists, production engineers, drilling specialists and reservoir managers. CountryMark's oil exploration and production group operates more than 900 oil wells producing ~1,100 barrels of oil per day.

The Need to Establish Internal Ownership for D365 Upgrades

Migrating from AX2012 to D365 has its challenges and advantages. Microsoft's desire to provide a rapidly updated platform to support growing ERP needs for businesses drives a change in how businesses need to incorporate, monitor and react to new and changing functionality within the system.

Microsoft has adjusted its upgrade cadence of D365 over the years and companies are required to upgrade at least twice per year. CountryMark recognized the importance of transitioning internal business owners and IT staff to adopt the mandatory upgrade cadence, recognized the need for internal standard operating procedures to change, and the need to understand upgrade best practices before full ownership of the process was accepted.

Why CountryMark Chose AXIA

CountryMark chose AXIA because of the company's breadth of experience with comprehensive pre-ERP approach, program management capabilities, OCM for ERP experience, D365 Finance and Supply Chain experience, and track record of successful ERP projects and support.

AXIA assisted CountryMark with pre-D365 implementation Organizational Change Management ("OCM"), with business consulting activities related to business process optimization, and with the systems integrator selection. Additionally, AXIA assisted CountryMark with the implementation utilizing AXIA's Client Advocate Project Management and D365 Functional Support services. Finally, CountryMark chose AXIA to lead post-implementation D365 Application Maintenance and Support services. CountryMark has continued to rely on AXIA to support post go-live system stabilization activities, to research and remediate higher priority issues discovered post-implementation, and with the education of best practice methods to coordinate, schedule, and execute D365 upgrades. This has allowed CountryMark time to prepare the changes required internally, as well as a gain a full understanding, knowledge and experience of the best practices required to successfully execute the required upgrade cadence within standard company operational expectations.

How AXIA Responded

AXIA engaged with CountryMark to provide full Application Maintenance and Support services, which includes management of the D365 and related ISV upgrade process. Over time and through the experience of many upgrades, AXIA worked to train CountryMark team members in the most efficient manner and approach to complement and synergize CountryMark's daily operations. Additionally, AXIA encouraged CountryMark to begin to take over the process and incorporate it as a part of their annual operational plan.

Specifically, AXIA recommended, established, and assisted with the following:

- An “annual” global view to the process vs. a myopic upgrade-by-upgrade view.
- Understanding and analyzing release notes to determine which system changes would be most pertinent to CountryMark's specific business needs.
- Understanding and analyzing how ISV's would be affected by upgrades and ensuring they will be supported in future releases.
- Internal management cadence to establish annual upgrade dates in accordance with Microsoft dates to minimize disruption to the business, as well as committing to those dates as a business to provide sufficient time for the business to prepare for testing.
- Creating an Azure/LCS environment cadence to correspond with testing and releasing upgrades to production.
- Creating appropriate testing plans and utilizing automated testing where appropriate.
- Prioritizing retrospectives to capture missed opportunities, celebrate successful changes introduced, and set reasonable improvement goals for the next upgrade event.

The Results

CountryMark has experienced a structured, measured, and appropriately timed establishment of direct responsibility of D365 upgrades within a timeframe that met the company's ability to take overall responsibility. This has been achieved by both the business, which is responsible for conducting testing, as well as IT who now understand all technical and environmental aspects of supporting the process.

This has resulted in:

CountryMark ownership of the process

Establishment of an internal process that has now been incorporated into "daily" business

Technical understanding of the D365 environment

Need help with your ERP project?

AXIA Consulting is a premier provider of business consulting solutions, specializing in change management, enterprise resource planning, and IT transformation. With expertise in platforms like Oracle Cloud and Microsoft Dynamics 365, we deliver tailored solutions across various industries, including Supply Chain Management, Retail, Utilities, Government, and Life Sciences. As an employee-owned company, we are deeply committed to client success, driven by a team of talented consultants dedicated to delivering excellence with passion and integrity.

If you're ready to embark on an ERP implementation journey or have concerns about your ongoing implementation, reach out to our expert consultants today. Let AXIA guide you toward a successful ERP implementation that empowers your organization for future success.

AXIA provides a wide range of ERP consulting services including:

- ERP Program Management
- ERP Project Recovery
- OCM for SAP, Oracle, MS D365 and others
- Oracle Implementations
- D365 Implementations
- ERP Client Advocate Services
- Software Selection

Contact AXIA to discuss how to setup your ERP program for success.



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