

Accelerating growth: Gardner's Microsoft Dynamics 365 optimization and expansion

RSM stabilizes ERP operations and enables rapid onboarding of new business units

KEY TAKEAWAYS

1. Gardner faced delays and disruptions with their initial Dynamics 365 implementation provider.
2. The company chose RSM to stabilize their Dynamics 365 environment and onboard new business units.
3. RSM's approach enabled rapid recovery, successful go-live for new segments and performance gains.

Gardner Inc. is a premier distributor of outdoor equipment parts, supporting a broad network of customers. The company has expanded through the introduction of new business units, requiring the integration of systems, distribution processes and operations.

After nearly 30 years on a legacy enterprise resource planning (ERP) platform, Gardner launched a major technology modernization and transformation initiative by implementing Microsoft Dynamics 365 across finance, operations, commerce and customer engagement.

The challenge: Stabilizing operations after a difficult Microsoft Dynamics 365 implementation

Gardner's initial transition to Microsoft Dynamics 365 proved significantly more difficult than anticipated. With their original implementation provider, the project extended beyond planned timelines and budgets and post-go-live operations faced substantial disruption.

Key challenges included:

- Post-go-live operational instability: Widespread disruptions occurred, including difficulties in shipping orders and stabilizing operations.
- Heavy customization and complexity: Significant customization and additional configurations resulted in a cumbersome and less efficient system.

- High resource turnover: Frequent changes in implementation personnel led to loss of knowledge and reduced continuity.
- Limited visibility and governance: Lack of clarity with requirements and design decisions, and their impacts, created confusion during implementation.

Gardner's go-live was significantly behind schedule, and once live, the business struggled to meet customer demands and get back to normal operations due to system instability.

In addition, Gardner needed to onboard two newly acquired business units into an already complex and heavily customized system without introducing further disruption.

The solution: System recovery, structured implementation and strategic advisory

After evaluating multiple potential consulting advisors, Gardner selected RSM to help stabilize its [Microsoft Dynamics 365](#) environment and integrate the new business units.

RSM's combination of technology capabilities and industry acumen were differentiators during the selection process. "Gardner appreciated our credentials and experience," says



RSM Director Curtis McDonald. "We have a lot of distributor and commerce experience, as well as CRM [customer relationship management] knowledge that helped develop trust and credibility."

"We just felt really good about RSM coming out of the evaluation process," says Gardner Vice President of IT Matt Davis. "We knew we had two more implementations to go, so we were really trying to find an advisor who could support us but also complete the two remaining companies that we had left to bring on. So those three things were pretty significant, and we needed to find the right people to get us across the finish line."

The RSM managed application services team immediately stepped in and helped Gardner transition from their previous provider, building trust, alleviating the pain points the company initially faced and reshaping their Dynamics 365 solution to align with their business objectives before extending the platform to the new business units.



We've been very impressed by all of the leadership at RSM and the engineers we work with have also been excellent so far. We're happy to work with RSM and we intend to continue to do so.

Matt Davis, Vice President of IT, Gardner Inc.



RSM established a managed application services model to support Gardner beyond initial stabilization. This included a dedicated team providing ongoing support, governance and enhancement delivery, enabling a shift from reactive issue resolution to a proactive, continuous improvement model. By embedding within Gardner's operations and maintaining long-term system knowledge, RSM delivered consistent execution, accelerated enhancement timelines and provided the technical depth required to support an evolving and growing business.

"Originally, they helped us clean up a number of issues we had. And we are still actively engaged with support every day," says Davis. "But we're in a space now where things are very stable. We're working more toward enhancements and optimization than break/fix, which is the best place to be."

Key elements of RSM's Dynamics 365 stabilization and implementation approach included:

- **Structured requirements and design:** RSM established a clear requirements-gathering and validation process, including defined sign-offs and alignment. The team reviewed requirements for business impact, with a focus on using out-of-the-box functionality instead of customization.
- **Robust testing:** The RSM team conducted end-to-end testing and multiple conference room pilot sessions, helping identify user training gaps and ease any potential readiness issues.
- **Data management:** RSM supported data migration into the new system, including loading a significant volume of historical data from legacy systems.
- **Reduction in unnecessary customization:** The RSM team minimized additional customization, improving overall system performance.

"RSM was more structured in how we had sign-offs along the way and we had a very clear requirements-gathering process," says Davis. "Those requirements were vetted to understand what's the business impact of this? Why do we need to do this? Can we find a way to do something out-of-the-box without customization and without adding on an additional module? I feel like that part was really excellent and laid really a good foundation for the rest of the project."

Outcomes: Rapid recovery and measurable performance gains

RSM's structured approach enabled Gardner to quickly steady operations and achieve a successful go-live for its new business units.

Key outcomes included:

- **Strong post-go-live performance:** Gardner achieved high shipping fulfillment shortly after go-live, reaching full shipping levels within the first week.
- **Faster stabilization:** Operational metrics returned to expected levels within a few weeks, supported by active tracking and regular review.
- **Improved system stability:** The overall platform is now stable, with the team working more on enhancements rather than break-fix issues.



- Effective testing and user readiness: Conference room pilot sessions and end-to-end testing helped identify user training gaps before and after go-live.

The RSM team's deep industry perspective delivered value for Gardner during the Dynamics 365 project beyond the ERP support. "When we were adding the additional two business units, we were able to include advisory on warehouse operations for their existing sites," says RSM Manager Jessica Jaramillo. "The services for best approaches throughout was a value add throughout the project, and Gardner appreciated that additional step of care that we were providing when we were designing out the solution."

"RSM has really been a refreshing change and they're integral to how we operate," says Davis. "We have internal knowledge, people who understand the business and the system, but we don't have developers on staff. So, RSM has become pretty integrated into our business when we perform customizations or changes."

Looking ahead: Driving efficiency and long-term value

Gardner's Dynamics 365 ERP environment is now stable and efficient, with the team focused on enhancements rather than break-fix activities. The organization continues to work through a broader technology roadmap with multiple transformation initiatives underway.

For example, one of these projects includes RSM removing Gardner's current intricate and costly pricing platform and transitioning the key process to the unified and default pricing functionality within Microsoft Dynamics 365. This effort is expected to deliver immediate savings, reduce complexity, simplify maintenance and improve system performance.

Gardner's experience highlights several key elements for a successful Dynamics 365 implementation:

- A strong support organization, to help the organization quickly shift from stabilization to optimization
- A clear requirements-gathering and validation process, including defined sign-offs at each stage
- Evaluation of requirements to determine business impact and whether they can be achieved using out-of-the-box functionality
- End-to-end testing and conference room pilot sessions to validate processes and identify user training gaps
- Active monitoring of operations post go-live to support stabilization and return to expected performance levels
- Collaboration with experienced advisors with deep industry knowledge to support enhancements, system improvements and continued optimization

Gardner and RSM worked closely throughout the Dynamics 365 engagement, with teams collaborating regularly to address issues and support ongoing initiatives. RSM continues to provide active support and assist with system and process enhancements, enabling a trusted and stable environment for Gardner to continue generating long-term value and strategic growth.

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