

AI BUSINESS APPLICATIONS · DYNAMICS 365 · POWER PLATFORM

# The **Rescue** Implementation Playbook

A practical reset for Dynamics 365 and Power Platform projects that went live but did not finish the job.

The diagnostic, the triage, and the 90-day plan we actually run.



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WHEN A SYSTEM IS LIVE BUT NOT DELIVERING

# Most teams do not need a new system.

**They need a partner who will look at the one they have, ask better questions, and rebuild the parts that quietly broke.**

This playbook is the exact process we run when a TruNorth client says their Dynamics 365 or Power Platform setup never quite hit the finish line. It is built for operations leaders, controllers, and project sponsors who are living with a system that works on paper but fights them every day.

No scare tactics. No giant pitch deck. Bring the messy version: the spreadsheets holding the workflow together, the report no one trusts, and the customization nobody remembers asking for. That is usually where the best next step becomes clear.

**Use it as a self-assessment, an internal reset framework, or a structured agenda for a 30-minute conversation with us.**

PUBLISHED BY  
TruNorth Dynamics

BUILT FOR  
Ops leaders · Controllers  
Project sponsors &  
admins

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# Going live is a **milestone.** Not the finish line.

We diagnose, triage, and reset in a focused 90-day plan. You do not start over. You take a clear look at what is working, what is not, and what to fix first.



DAYS 1-14

Assess  
& triage

DAYS 15-45

Core  
fixes

DAYS 46-90

Stabilize  
& scale

# The post go-live stuck pattern.

Most stalled implementations share the same **five patterns**. If any of these sound familiar, this playbook will help you find the next step.

Training was built around features, not real workflows.

No one owns the post-go-live improvement list.

Power users quietly became the support plan.

Customizations exist, but documentation does not.

Reporting gaps pushed people back into spreadsheets.

## THE POINT

None of these require you to start over. They do require a clear look at what is working, what is not, and what should be fixed first.

# The 12-point **rescue** assessment.

We run this during week one of every rescue engagement: 12 questions across four areas. Answer honestly and check the boxes you can answer with confidence.

## 01-03 Process & ownership

- Does every core workflow have a documented owner?
- Can the owner explain the workflow without opening the system?
- Are there workflows that live in spreadsheets or email instead of the system?

## 04-06 User adoption

- Are end users using the system as designed, or working around it?
- How often are power users carrying knowledge that is not written down?
- When did someone last train a new hire on the actual workflows?

## 07-09 Data & reporting

- Do the standard reports match what leadership actually asks for?
- Are reports being rebuilt manually outside the system every week?
- Is there a known list of data quality issues, or are they found in frustration?

## 10-12 Customizations & integrations

- Is there a current list of customizations, who built them, and why?
- Do customizations have tests or docs, or just tribal knowledge?
- Are integrations stable, or do they fail quietly and require manual cleanup?

**If more than half of these are unclear, your implementation needs a reset - not a replacement.**

# User adoption triage.

Adoption problems rarely show up as one big issue. They show up as small **avoidances**.

## Look for these

1 Users open the system, complete one task, and leave. **The system is a record-keeping stop, not the work itself.**

2 Workarounds are normalized. Someone says, “We just do it in Excel,” and nobody questions it.

3 New hires get trained by whoever has time, not by the team that designed the workflow.

4 Support tickets cluster around the same three to five issues every month - and nothing changes.

### FIX PATH

Identify the top three avoidances, redesign or retrain on those workflows specifically, and document the result. Adoption usually recovers within 60 days when the friction points are addressed directly.

# Data & customization review.

Two parts run in parallel. One looks at the records and reports the business depends on; the other looks at the code and configuration layered on top.

## RUN IN PARALLEL · PART A

### Data review

- Pull the master records - customers, vendors, items, accounts - and look for duplicates, blanks, and obviously stale records.
- Check whether the chart of accounts still reflects how the business reports *today*, not how it reported at go-live.
- Identify the three reports leadership uses most. Confirm they match the source data in the system.

## RUN IN PARALLEL · PART B

### Customization review

- Inventory every customization. Note who built it, when, and the original business reason.
- Flag any customization that no longer has a user or owner. These are candidates for removal.
- Identify which customizations could be replaced by out-of-the-box features.

**The platform moves faster than most custom code. Some of what you maintain by hand today is now a setting.**

# The 90-day reset plan template.

Most rescues follow a 90-day shape. Yours may vary based on size and complexity, but the sequence holds: assess, fix, stabilize.

## DAYS 1-14

### Assessment & triage

- Run the 12-point assessment. Interview three to five business owners.
- Build the current-state map: workflows, customizations, data, reports, adoption.
- Deliver a written triage report with prioritized fixes.

## DAYS 15-45

### Core fixes

- Address the top three workflow or adoption issues directly.
- Clean master data. Rebuild or retire the customizations on the fix list.
- Stand up the three most-needed reports.

## DAYS 46-90

### Stabilize & scale

- Retrain the team on the redesigned workflows. Document everything.
- Hand off a maintained backlog and a working support rhythm.
- Define the next 90 days: optimization, expansion, or maintenance.

#### THE SHAPE, NOT A SCRIPT

The first two weeks shape the rest of the plan. Everything after day 14 is scoped based on what the assessment actually finds, so you are not paying to figure out the same problem twice.

# Fixed-fee **scoping** options.

Two practical paths follow a rescue. Both are scoped from the assessment, so the number reflects the real work, not a guess.

## OPTION A

### Fixed-fee System Review

System Optimization gives you a practical roadmap for what to fix, improve, retire, or rebuild next.

The goal is simple: turn system friction into a clear, prioritized plan your team can actually act on.

DEPENDING ON COMPLEXITY

## OPTION B

### Ongoing TruNorth support

Success Plans give you flexible support hours, proactive guidance, and a clear improvement path.

Use them for fixes, optimization, training, advisory support, and the next right step as your system evolves.

Monthly Subscription Cost.  
Various Tiers Available.

**Pick the path that fits how you want to work: a defined project with a clear end date, or an ongoing Success Plan that keeps your system improving.**

# What to do next.

Read the 12-point assessment again. Mark every question that is unclear or an honest no.

**6+**

unclear or honest-no answers? Your implementation needs a reset. Start with the 14-day assessment.

**30**

minutes is all the next step takes - a practical conversation about where you are stuck and what we would look at first.

No pitch deck. No scare tactics. Just a structured look at what you found and a clear recommendation for where to start.

## About TruNorth Dynamics

TruNorth Dynamics implements Dynamics 365, Power Platform, and AI solutions, and rescues projects that stalled after go-live.

Manufacturing

Distribution

Professional services

Accounting & advisory

Managed service providers



BRING THE MESSY VERSION

# Live, but **not** delivering? Let's fix that.

You do not need a new system to get unstuck. Send us the scenario, and we will help you figure out whether a, System Optimization or Roadmap is the right next step.



Talk with our team to get help  
[SalesTeam@TruNorthDynamics.com](mailto:SalesTeam@TruNorthDynamics.com)