



EXECUTIVE SUMMARY

WHEN REPORTS BREAK THE SYSTEM

How a Workflow Diagnosis Prevented a \$1M Mistake

A Workflow Analysis & ERP Performance Case Study

Published by The Digital Efficiency Consulting Group

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When Reports Break the System

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~15%	5–20 sec	40+	\$34K
Intake Error Rate	Per-Order Delay	Live Reports Running	Total Engagement Cost

The Situation

A large public company began experiencing inconsistent order entry performance within Microsoft Dynamics 365 Finance & Operations. A twelve-person team entered approximately 560 orders per month, but system responsiveness fluctuated and productivity appeared uneven. Leadership initially suspected a staffing problem or a system limitation requiring replacement — either of which could have cost hundreds of thousands to over a million dollars to address.

What Went Wrong

The issue was not technology or people. It was two invisible process constraints operating in parallel:

- **Unnecessary Workflow Processing:** The ERP performed a product validation lookup on every single order — but only 1 in 1,000 products actually needed it. This added 5 to 20 seconds per transaction and compounded under load.
- **Reporting System Overload:** More than 40 report variations pulled live transactional data and rebuilt large historical datasets each time they ran. During peak periods — especially month-end — these calculations consumed system resources and slowed order entry for the entire team.
- **The Cascade:** What looked like an employee performance gap was actually the system working against itself. Leadership was ready to approve a system replacement project without knowing the real cause.

The Solution

The unnecessary lookup was redesigned to run only when required — immediately eliminating the per-order delay. In parallel, a centralized data farm was implemented: nightly processes consolidated data from multiple enterprise systems into pre-calculated reporting tables, and a new dashboard interface retrieved results instantly rather than rebuilding datasets on demand.

The engagement cost approximately \$13,000 in diagnostic and consulting work and \$21,000 to implement the data farm and reporting infrastructure — a combined investment of \$34,000, compared to an alternative that could have exceeded \$1.5 million.

Throughput	Report Runtime	System Cost	Fin. Close
+15% / +50%	90 min → 3 sec	\$1.5M Avoided	1 Day Faster

The Lesson

This organization did not have a technology problem — Dynamics 365 was working. It did not have a people problem — the order entry team was competent and doing their best. It had a process problem: two specific workflow inefficiencies that were invisible without stepping inside the actual work. The fix was not a system replacement. It was a targeted, surgical correction of two specific constraints — delivered at a fraction of the cost of the alternatives and producing measurable results from day one.

Key Takeaways

- **The Bottleneck Is Rarely Where You Think:** The problem looked like a technology or staffing issue. It was neither. The true constraint was invisible until someone followed the workflow step by step.
- **You Don't Have to Replace What Works:** Dynamics 365 stayed. The fix worked within the existing system, preserving every downstream workflow and integration.
- **Measure the Constraint, Fix the Constraint:** Two targeted interventions increased throughput by 15–50%, cut report runtime from 90 minutes to 3 seconds, and avoided a seven-figure replacement project.
- **Speed Matters:** The diagnostic engagement moved quickly. The longer a process constraint sits unaddressed, the more it costs — in dollars, staff morale, and leadership confidence.
- **Process First, Tools Second:** The solution had nothing to do with buying new technology. It was about understanding how work actually moved and where it got stuck.

The Digital Efficiency Consulting Group

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