

E-book

# How X3 Expert Services can help you achieve enterprise planning excellence

**The Sage X3 Expert Services is a team of highly skilled consultants with vast knowledge of Sage X3 functionality and deployments, a team with the ability to support complex and unusual businesses requirements, ultimately providing partners with a competitive advantage through a Centre of Excellence service.**

These services are provided by Sage, the market leader in cloud business management solutions supporting millions of small and medium-sized businesses globally.

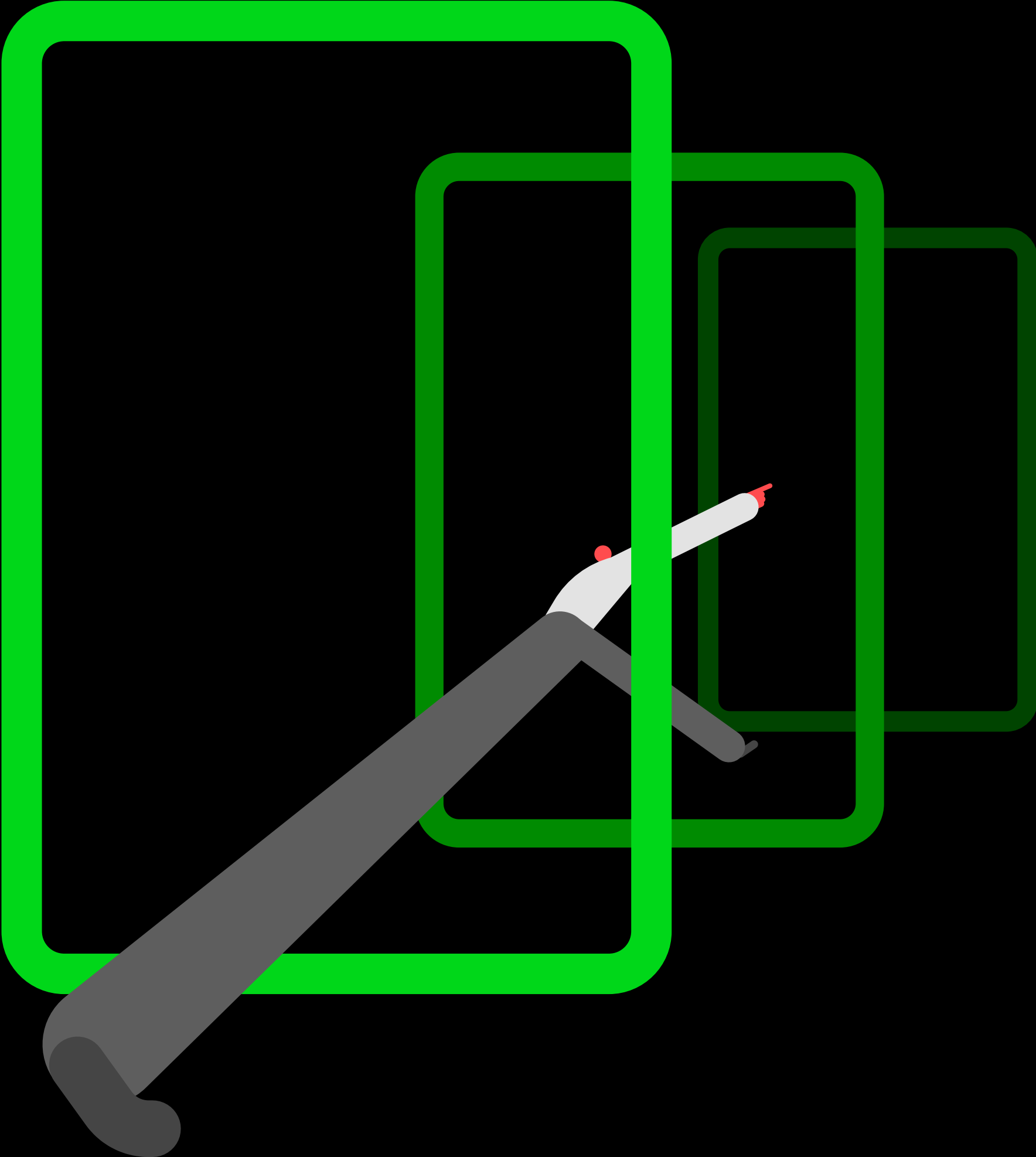
**Sage**





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# Introduction: Who we are and what we do



## Who we are:

As you know, deploying and adapting enterprise software to support your complex businesses requirements can prove challenging. Fortunately, Sage X3 Expert Services – a team of highly skilled and experienced consultants – is on hand to help you ensure maximum success. You can gain hands-on expert services from regional Sage X3 Centres of Excellence. This will give you the ability to deliver your businesses goals more easily and so achieving strong competitive advantages.

Sage X3 Expert Services are provided directly by Sage, the market leader in cloud and on-premises business management solutions – supporting millions of small and medium-sized businesses like yours, globally.

## What we do:

Whether you're a Sage partner or customer, you can take advantage of Sage X3 Expert Services. Through our global network of regional Centres of Excellence, you can get help and support from Sage consultants that are experts in their field. They work alongside and complement Sage Partner Professional Services.

Ultimately, the aim is to maximise returns on investment for Sage customers, and to help you develop Sage X3 strategies that support business growth and ambition. You can therefore expect advice on how to exploit and extend the capabilities of your Sage X3 solutions. And, if you're an end customer working with a Sage partner, you can continue to rely on that partner's account management, technical and consultancy teams' support.

The Sage Centre of Excellence can support your leadership team in defining an optimal deployment strategy to accelerate your return on investment and reduce implementation risks.

**Sage X3 Expert Services are tailored to your precise needs.**





# Introduction:

## Why you should work with us

Working with Sage X3 Expert Services, you open the door to consultants with vast knowledge of Sage X3 functionality and deployments.

They can provide support on business strategy, highly complex requirements, and help you elevate the Sage X3 application beyond a standard implementation – to meet your precise needs. Crucially, that will give you opportunities to differentiate your business through improved operations, creating strong competitive advantages.

### The main benefits of working with Sage X3 Expert services are:

- Faster time to value, giving you access to expert resources for enhanced project delivery
- Greater engagement, so you have greater power in the delivery process and in shaping the outcome
- Minimized project risk, from a globally consistent approach using Sage Experts to support project delivery.





# Chapter 1:

## Get set for success – the Sage X3 Expert Service offering

With Sage X3 Expert Services, you get a wide and deep range of tailor-made service packages. They enable you to target specific areas of your Sage X3 implementation – from project governance to functional and technical expertise – to help unleash the benefits above.

To give you an idea of what's possible, just two of the Sage X3 Expert Services – Health Check and Expert Consulting – are described below. Please contact your regional Centre of Excellence to discuss your own business needs.

### **Health Check: Review the technical performance of your Sage X3 application**

Health Check helps you ensure optimal Sage X3 application performance for the best possible user experience.

The service enables you to proactively ensure that everything is running efficiently. You can identify the causes of poorly performing Sage X3 solutions and also take measures to prevent problems impacting your end users. Your IT team will be consulted to set out what performance levels are necessary to deliver the user experience and the potential for growth that your business aspires to. Sage X3 Expert Services will then capture data on the performance of your server resources over the course of several days. This is best done during busy periods when your systems are under normal and heavy load. You can then see the impact of application usage on those server resources and so potentially identify performance bottlenecks.

Current platform architecture and settings will be reviewed, along with measurement of throughput using the Sage X3 performance indexing tool. Network, processor, disk, memory and database performance will be monitored over a period of time.

If you're running your application on virtualized- or third-party-hosted hardware, Sage X3 Expert consultants will collaborate with the providers of your platform to understand its impact on that part of your application too.

The review also takes account of the volumes of transactions processed by each business function, the operating cycle of your business, and hours of operation.





**Deliverables:**

You will receive a report that details the findings and recommendations of the review, followed by a meeting to discuss those.

**Post-review next steps**

If you're a customer, you'll be able to implement the recommendations of the Health Check in collaboration with your Sage Partner. If you're a Sage Partner, you can guide your customer through the process with the support of Sage Expert Services.

Sage may also recommend an additional review of customisation code where this is impacting performance.

Moreover, you can continue to engage Sage X3 Expert Services through the 'Function Performance Optimization' service pack. That's another Sage X3 Expert Service that makes additional recommendations focused on specific processes.

**Follow-up review meeting**

You will also have a session to discuss the findings of the health check. As well as the technical performance review and next steps.

**Indicative Effort**

Five days, depending on the project scope and complexity:

- Review current architecture with customer IT and/ or service provider
- Data collector setup. Analysis and review of current architecture utilisation and Microsoft SQL Server Database, plus documentation of findings and recommendations
- Activity planning, initial meetings and follow-up review meeting.



**Expert Consulting Services:**  
**Optimize the performance of specific functions in your Sage X3 deployment**

Expert Consulting Services aims to help you implement continuous business process improvement. Sage will assist in optimising response times in the functions you enhance so you can increase overall operating efficiency. For example, it might be possible to speed up your Material Requirements Planning (MRP) processes through targeted configuration updates, technical changes or both.

Your usage patterns, application settings and system behaviour will be analysed. Sage X3 Expert Services may deploy tools to optimize the application and associated components such as the database.

**Deliverables**

Your Sage X3 Expert consultant will provide a report with recommendations for:

- Optimization of Sage X3 application settings
- Optimization of Sage X3 implementation by means of standard entry points, where required
- Database optimization, from Sage X3's perspective, where applicable
- Suggestions for potential enhancements or custom developments that may optimize the system further

**Indicative Effort**

Depending on the project scope and complexity:

- Three days per function

**Additional Expert Consulting Services**

Other Expert Consulting Services are available from Sage X3 Expert Services through your regional Centre of Excellence, including:

- Assist and Secure Multi-legislation Implementation
- Core Model Design
- Adding a New Legislation Pack
- Fiscal Year-end Pack
- And more.





# Chapter 2:

# Tune up your skills with Sage University and Practice Factory

**“Education is the most powerful weapon which you can use to change the world.”** Nelson Mandela

To deliver improved business outcomes, Sage partners need to encourage upskilling and reskilling.

Sage X3 Expert Services helps you keep your teams up to date with new tools and functionality through the Sage University and Practice Factory.

## Sage University

The Sage University helps you to improve business outcomes through upskilling – offering benefits to both your organization and its employees.

Sage Partners play a critical role in Sage’s success. As a partner, you gain access to world-class Partner Enablement and Learning offerings that help your business and Sage grow and thrive together.

The Sage University provides support for each phase of your consultants’ learning lifecycles as they progress through their careers.

Moreover, as your business progresses through its transformation, Sage University can adapt to your unique and changing needs.

You can gain access the training you need, when you need it, with a range of options available:

- **New Consultant Bootcamp:** a flexible enablement program to quickly prepare consultants for the field.
- **Expert-level instruction:** courses to help deepen knowledge and build on existing experience – for consultants that have earned their product certifications and had over 12 months of practical experience in the field.

- **Instructor-led virtual training:** step-by-step, practical, ‘how-to’ training, using Sage X3 software and completing exercises
- **Private training:** bespoke training that’s designed specifically to meet your organization’s requirements, delivered online or onsite.
- **eLearning:** self-paced interactive courses that are available whenever you are.

Every one of these options is tailored to your learning journey, with an extensive range of course content available for every level, from getting started to expert.

Sage University’s globally standardized curriculum – with flexible, hands-on training and certification for all specialisations – ensures world-class support and validation for all consultants.







**“A practical and very useful experience! One step ahead to an easier implementation!”**

Sage Partner

### **Sage X3 Certification**

Holding a Sage X3 certification enables consultants with deep Sage X3 skills to set themselves apart from others.

The training enables you to hone your skills, validate your expertise and better support business success. The certification bestows you with credibility, greater earning power, increased job satisfaction and confidence that you’re on the leading edge.

### **Practice Factory: What is it?**

The concept of the Practice Factory is to create a supported, practical, hands-on learning environment. It enables your consultants to build Sage X3 configurations for functionality they are unfamiliar with, using scenarios based on real customers’ business profiles. In these sessions, they are encouraged to act on their own initiative with the support of Sage X3 Experts. Those experts will support the consultant in their approach and provide advice on best practices.

### **Practice factory benefits**

The Practice Factory enables attendees to complete sessions offline, any time that suits them during the assignment days, making it highly flexible. In addition, the delivery of sessions and workshops is streamlined in a number of ways:

- Questions are collected before the interactive sessions
- Interactive sessions stimulate creative thinking from delegates
- Sessions are focused on providing support and advice based on individual consultants’ needs.

### **The Practice Factory process**

The Practice Factory runs on a weekly agenda, as follows:

- First meeting: couple of hours with instructor to present business case and relevant information
- Second and third meetings: an hour or so with instructor to answer questions
- Fourth meeting: half-day session with instructor to exchange business case solution.

Typically, this agenda will begin on a Monday and conclude on a Friday, giving attendees time to develop the business case in between these meetings. To gain confidence in the functional area and complete the simulation delegates will present and discuss their solutions receiving feedback from the Sage Experts to increase their expertise in a targeted and effective manner.

Sessions can also be run as standalone workshops.



# Chapter 3:

# Nurturing Growth with the Partner Mentoring Program

**“If you ask any successful businessperson, they will always have had a great mentor at some point along the road.”**

Richard Branson

Encourage continuous learning among your people through the Sage Partner Mentoring Program. It provides your colleagues with continual support and development so you can foster their ongoing skills growth.

The vision is to provide a world-class program for career development for the partner ecosystem. So the Partner Mentoring program is highly structured, setting out defined goals and success criteria, and designed around the needs of your individual consultants.

## **The value of the Partner Mentoring Program**

The Partner Mentoring program promotes excellence within the partner community, delivering high-quality expertise to help your consultants reach their full potential.

For partners, it accelerates the skills advancement – and so value and price – of new consultants. It also frees up your senior consultants from mentoring duties, while still ensuring good advice reaches your consultants on best practice across the entire project lifecycle.

The program accelerates the learning curve for all consultants across the partner network – increasing consultant engagement, and improving skills development and retention rates. For your organization, license revenue will increase and the direct access to your regional Centre of Excellence team will strengthen your relationship with Sage.

## **The mentoring pathway:**

1. Consultants complete a questionnaire to match them with the best possible mentor
2. The chosen mentor will then hold an initial meeting to discuss goals, duration, timeline and methods to be used
3. Over time, recurring mentoring reviews are held to adjust actions and monitor progress against the original goals
4. Also, there are check points at various stages where the mentor, mentee, Partner sponsor and Sage project sponsor meet to adjust the program if necessary
5. The final closing session reviews progress against the original goals and makes decisions on how to move forward.

Finally, monitoring and evaluation also takes place to enable mentors to align, help inform consultants’ self-training, and contribute to the ongoing improvement of the program.



# Summary

The core aim of Sage X3 Expert Services is to assist partners and customers in successfully delivering complex requirements across all Sage X3 disciplines.

Ultimately, it's about supporting the ongoing needs of customers whose business are growing rapidly or undergoing business transformation.

As business transformation becomes the new constant, Sage is focused on supporting partners and customers to transform with agility, expertise and success.

Sage X3 Expert Services enables Sage to offer structured and proven methodologies to achieve that, as well as contributing to the career development of your individual consultants.

The benefits listed here are available to all partners, and the entire Sage X3 Expert Services offering is designed as a value-add resource to help drive the success of all Sage X3-based projects across the partner network.



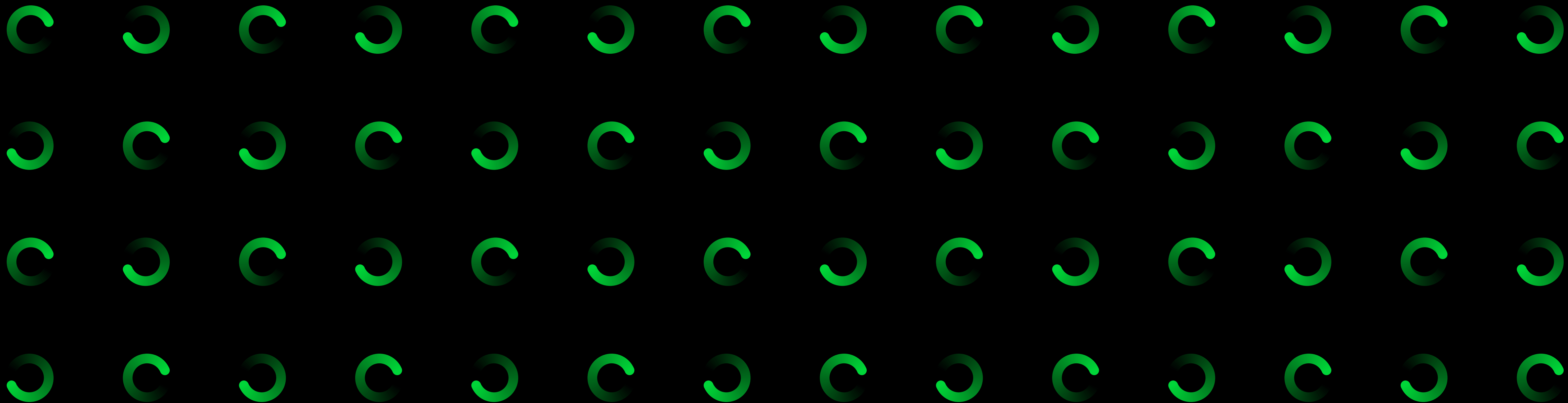
## Next steps

To start reaping the benefits of X3 Expert Services today, contact:

- **Your regional Sage Centre of Excellence**
- **Your partner account manager**
- **Email: [SageExpert.Services@sage.com](mailto:SageExpert.Services@sage.com)**

To understand more details on the various Sage X3 Expert Services and learning services options available to you please visit: [sageu.com/services](https://sageu.com/services)





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