

Modernizing port operations with Microsoft Dynamics

A publicly governed, deep-water port authority, supporting a wide range of terminal operations, property and lease management, utilities, and administrative functions. As one of the Pacific Northwest's major port authorities, leadership recognized that legacy, on-premise systems and manual workarounds were limiting efficiency, visibility, and scalability as the Port plans for continued growth.

THE CHALLENGE

At the time RSM became involved, the organization faced several compounding challenges:

- A legacy on-premise ERP that was no longer supported
- Heavy reliance on Excel spreadsheets and manual processes across departments
- Disconnected systems for finance, procurement, capital projects, HCM, terminal operations, leasing, and grants
- Reporting gaps that required significant manual effort to assemble financial statements, increasing the risk of delays
- Organizational silos that reduced cross-team visibility and collaboration
- A growing operational footprint that existing systems could not scale to support

If left unaddressed, these challenges increased operational risk, maintenance costs, and reliance on unsupported technology.

WHY RSM

The organization selected RSM as a trusted, first-choice advisor based on our ability to act as a one-stop shop throughout the engagement. While the RFP initially focused on ERP and HCM systems, RSM differentiated itself by:

- Bringing deep public sector experience and a proven track record with government entities
- Demonstrating strong Microsoft ecosystem expertise
- Advising across ERP, CRM, HCM, reporting, data migration, integrations, and change management
- Built on the Port's existing Microsoft investments to expand capabilities and position the platform for long-term scalability
- RSM is the sole partner across implementation and ongoing managed services, providing continuity from deployment through long-term support

RSM guided the organization through vendor evaluation, solution design, and long-term platform planning.

THE SOLUTION

RSM designed and delivered a cloud-based, integrated Microsoft solution tailored to the organization's operational needs, including:

- Microsoft Dynamics 365 Business Central as the core ERP streamlining payables, lease management, and grants
- Microsoft Dynamics Customer Engagement (CE) as an operational platform supporting non-standard port processes, including a configured terminal operations solution to replace spreadsheet-based tracking
- HCM advisory services supporting the selection and implementation of Paylocity
- Solver FP&A for improved financial reporting, budgeting, and forecasting
- Azure-based integration layer enabling connectivity across ERP, CRM, HCM, CMMS, and other operational systems
- Data migration services, bringing historical data into the new platform
- Dedicated Organizational Change Management services led by RSM to collaborate and drive adoption planning, communications and training at the scale required
- Program and project management to oversee delivery and governance

This approach enabled system consolidation while maintaining flexibility for future needs.

RSM'S APPROACH

RSM used its Public Sector-aligned program and project management framework to guide the Port through a risk-managed implementation, including:

- Comprehensive discovery and process validation sessions to surface dependencies early
- A requirements traceability matrix mapping RFP items to business processes and solution components, ensuring nothing was lost in translation
- Scenario-based solution verification with Port business users, confirming the solution worked in practice — not just on paper
- Clear governance across five phases: mobilization, solution verification, implementation, deployment, and go-live

This approach reduced risk, surfaced unknown process dependencies, and ensured alignment between requirements and delivery.

BUSINESS VALUE

Through this engagement, the organization achieved:

- Consolidation of multiple legacy systems into a single cloud platform
- Eliminated manual financial statement assembly and spreadsheet based tracking
- Improved visibility, reporting, and audit readiness across all departments
- Streamlined financial, HCM, leasing, grants, and terminal operations processes
- A scalable Microsoft platform that supports future growth

A repeatable solution model for other port authorities and public sector organizations with complex operational requirements

WIN STORY SUMMARY

RSM helped a U.S.-based public port authority transition from fragmented legacy systems to an integrated, cloud-based Microsoft platform. The project demonstrated how Microsoft can serve as an enterprise foundation rather than a point ERP solution. By acting as both strategic advisor and delivery partner, RSM enabled system consolidation, improved operational visibility, and positioned one of the Pacific Northwest's most active public port authorities for long-term scalability.