CHAPTER 2: IMPLEMENTATION PHASES AND OFFERINGS

Objectives

The objectives are:

- Describe the purpose of the phase planning activity, preconditions, and deliverables in the implementation methodology
- Describe the key activities, deliverables, and best practices for the Diagnostic phase.
- Describe the key activities, deliverables, and best practices for the Analysis phase.
- Describe the key activities, deliverables, and best practices for the Design phase.
- Describe the key activities, deliverables, and best practices for the Development phase.
- Describe the key activities, deliverables, and best practices for the Deployment phase.
- Describe the key activities, deliverables, and best practices for the Operations phase.
- Describe the offerings supported by Microsoft Dynamics® Sure Step.

Introduction

Each phase in Microsoft Dynamics Sure Step consists of activities, tasks, and subtasks. When users perform these activities and tasks, they create a set of documented deliverables at the end of the phase. Because Microsoft Dynamics Sure Step defines a systematic and phased approach to implementation, the deliverables of one phase provide the information that is required to complete the later phases successfully.

Microsoft Dynamics Sure Step also supports several offerings, which are "packaged" parts of the implementation methodology that you can sell to customers. Offerings consist of the activities in a single phase or a combination of phases. In a sense, offerings let you mix and match components of the implementation methodology in a flexible way so that you can best apply Microsoft Dynamics Sure Step to customer needs.

After determining the best offering for a specific implementation project, you can configure Microsoft Dynamics Sure Step to support the specific offering.

Overview of the Implementation Methodology

As stated previously, Microsoft Dynamics Sure Step model consists of six primary phases that outline an implementation project:

- Diagnostic
- Analysis
- Design
- Development
- Deployment
- Operations

Each phase consists of activities that progress through the phase in sequence. Most activities consist of tasks, and some tasks consist of subtasks. In most cases, you complete one activity before starting the next. The work that results from an activity or task provides guidance and input into the next activity.

Cross Phases

In Microsoft Dynamics Sure Step you must perform certain processes in a number of different phases across the project's lifetime. These processes, called cross phase processes, consist of a number of related activities. Understanding the relationship between the activities in a cross phase helps clarify the purpose of the individual activities and provides each project team member a clear understanding of his or her role, responsibilities, and requirements, and how these impact other team members.

Viewing activities by cross phase highlights dependencies within the cross phase, and interdependencies with other cross phases.

The Microsoft Dynamics Sure Step methodology has nine cross phase processes, which are further grouped into three areas.

- *Organization*: The Organization cross phase processes include:
  - Program Management
  - Training
  - Business Process Analysis

- *Solution*: The Solution cross phase processes include:
  - Requirements and Configuration
  - Custom Coding
  - Quality and Testing

- *Technology*: The Technology cross phase processes include:
  - Infrastructure
  - Integration and Interfaces
  - Data Migration

Phase Planning Activity

Each phase in Microsoft Dynamics Sure Step starts with its own planning activity. This activity consists of the tasks and deliverables necessary to plan the work to do in that phase. Planning tasks include:

- Reviewing deliverables from the previous phase.
- Identifying resources.
- Scheduling phase activities.
- Assigning approval responsibilities for the decisions that are determined during the phase.

These phase planning activities are an example of how project management processes integrate within Microsoft Dynamics Sure Step.

Preconditions

Microsoft Dynamics Sure Step defines pre-conditions that you must meet before performing any activity or task. Pre-conditions identify any dependency necessary to perform a phase, activity, task, or subtask. Because of the systematic nature of Microsoft Dynamics Sure Step, post-conditions for one step become the pre-conditions for the next step, whether that step is a phase, activity, task, or subtask.

Deliverables

Information and knowledge that result from the work completed in an implementation phase are usually documented in a deliverable. Some of these are "working deliverables" that provide input into a larger, more formal document. For example, information from the work breakdown structure provides key information for the project plan.

Other deliverables, such as the Functional Requirements document or the Solution Design document, record the final and most important results from the work performed. The customer must approve these key deliverables before the project moves on to the next phase. These key deliverables also provide important input and information in the following phase. In a way, a list of the deliverables produced during a phase function as a checklist for that phase.

Diagnostic Phase

The first phase described in Microsoft Dynamics Sure Step is the Diagnostic phase. The high-level planning and high-level analysis of the customer's business processes and infrastructure carried out during the Diagnostic phase are an important part of the sales cycle.

The purpose of the Diagnostic phase is to collect information to define a high-level project scope and then create a customer proposal for the implementation project. The Diagnostic phase maps to the Solution stage of the Microsoft Sales Solution Process (MSSP) and culminates in project proposals accepted by the customer. Typically, performing the Diagnostic phase activities will build customer confidence in the validity of the proposed solution before the implementation begins.

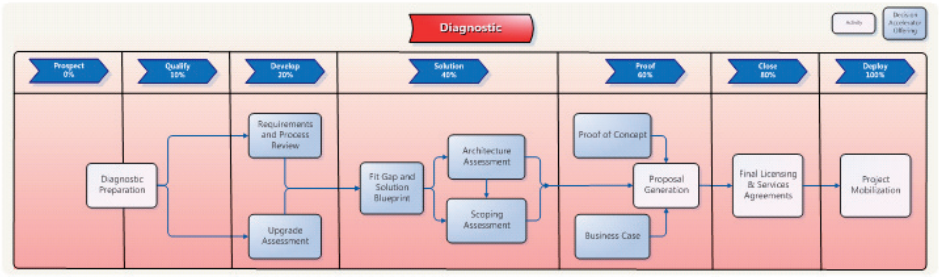

FIGURE 2.1 DIAGNOSTIC PROCESS FLOW

During the high-level diagnostic activities, the project team can determine that a more detailed analysis of business processes is required, a proof of concept of the solution, or an assessment of the customer infrastructure is desired. In such situations, the Microsoft Dynamics Sure Step Diagnostic phase provides Decision Accelerator (DA) offerings to help the customer with their due diligence process; you can start by creating a new proposal for this activity.

Under certain circumstances, this detailed analysis of a selected business process can be part of the original scope of the Diagnostic phase proposal as requested by the customer. The use of Decision Accelerators can require a separate proposal to be defined and accepted by the customer. However, Decision Accelerator offerings are optional, and might not be performed for every project. If the detailed analysis activities are not performed during the Diagnostic phase, they will typically be performed during the Analysis phase.

Another key activity is creating a preliminary project plan and budgetary estimate that guides the subsequent implementation project.

Based on the results of the Diagnostic phase and the customer's acceptance or rejection of the project proposal, possible next steps include moving directly into a standard, enterprise or rapid implementation project. If the customer rejects the proposal, the proposal can be re-evaluated or the project will close.

Diagnostic Phase: Activities and Decision Accelerator Offerings

The Diagnostic phase consists of the following activities:

- Diagnostic preparation:
  - Microsoft Dynamics Solutions
  - Industry Solutions
  - Cross Industry/Horizontal Solutions

- Optional Decision Accelerator offerings:
  - Requirements and process review
  - Upgrade Assessment
  - Fit Gap and solution blueprint
  - Architecture Assessment
  - Scoping Assessment
  - Proof of Concept
  - Business Case

- Proposal Generation
- Final Licensing and Services Agreement
- Project Mobilization

Diagnostic Preparation

This activity is primarily an information gathering exercise that allows partners to define the skills required for the project and identify suitable resources or skills gaps. When the customer has accepted the implementation proposal, use the information gathered to form the project team, and to brief the newly formed team on the project requirements. This activity consists of the following tasks:

- Review Request for Information, Request for Proposal, or Request for Quotation.
- Review additional requirements identified in customer meetings and discussions.
- Identify additional information requirements.
- Gather relevant documentation and summarize as appropriate.
- Define the appropriate skill requirements and indentify suitable resources.

The key benefits gained by performing this activity are:

- An understanding of the customer's situation and needs.
- The identification of skill requirements and resources for activities in the Diagnostic Phase.
- The assignment and preparation of a project team.

While completing due diligence with the customer for product selection, there are two tools that can be used by sales and pre-sales to position and select the right product to meet the customer's visions and needs:

- **Microsoft Dynamics Playbook**: This tool allows sales roles to ascertain the right modules of a Microsoft Dynamics solution that are applicable to a Customer based on a series of questionnaires posed to the customer stakeholders. Microsoft Dynamics Playbook addresses the core Microsoft Dynamics solution.
- **Industry Playbook and/or Solution Finder**: This tool(s) provides the sales roles access to various information, which includes industry pain points, competitive intelligence, and more. Industry Playbook addresses the Independent Software Vendor (ISV) solutions required for the corresponding industry.

Unleash Your Potential

The Microsoft Dynamics Business Solution Roadmap tool was developed to help partners unleash the potential of their existing Dynamics customers by helping identify new business areas for system expansion. Used correctly, the tool can help boost business success for existing customers—and add-on services and license revenue for partners.

This innovative tool is assists in aligning customers' business software needs and goals with specific business areas, processes, and roles within their company. This intuitive process enables partners to:

- Assess a customer's long-term business objectives.
- Align those business objectives with a customized Microsoft Dynamics ERP solution.
- Create a one-to-four-year implementation roadmap that tailors their solution with their specific business needs.

The tool is designed to run stand-alone on a laptop computer to facilitate the interview process, or you may print a copy of the questions for use with customers, and enter their answers later. It supports all four Dynamics ERP products, and may be downloaded from PartnerSource free of charge at:

https://mbs.microsoft.com/partnersource/marketing/campaigns/existingcustomer/unleash.htm

Industry Solutions

An Industry Solution provides support to sales and implementation teams for implementing teams for positioning and deploying Microsoft Dynamics solutions in specific industries. This does include guidance at vertical and subvertical levels. It provides end-to-end enterprise solutions for organizations in key industries including manufacturing, distribution, retail, professional services and across the public sector.

Examples of the industry and vertical areas that are supported with access to detailed guidance and valuable tools, templates and links include:

- Process Industries for Microsoft Dynamics AX Solutions
  - Chemicals
  - Food and Beverage Industry
  - Life Sciences and Pharmaceuticals
  - Meat / Pork / Poultry
  - Non-durable Consumer Packaged Goods (CPGs)
  - Primary Metals
  - Pulp and Paper

- Public Sector for Microsoft Dynamics CRM
  - Government
  - Health
  - Education
  - Non-profit Organizations

Cross Industry/Horizontal Solutions

This solution provides support for deploying "composite" Microsoft Dynamics Solutions delivered through the use of platform enabled customization or other Microsoft Dynamics technologies extensions. Microsoft Dynamics Sure Step provides diagnostic and implementation guidance at a horizontal solution level.

The tree areas to be supported are:

- **X Relationship Management (XRM)**: The official positioning of the platform components underlying Microsoft Dynamics CRM. It relates to any relationship that needs to be managed, such as vendors, employees, suppliers, prospects, dealers, and other types of business relationships including properties, assets, legislation, and more. XRM and CRM consists of:
  - Relationships and interactions.
  - Relationships that are business process driven.
  - Relationships that are collaborative.

Additional Cross Industry/Horizontal Solutions will be included in future releases.

Optional Decision Accelerator Offerings

Within the Diagnostic phase, there are defined sets of services called **Decision Accelerators (DA).** They provide a due-diligence process for selecting or "diagnosing" the right solution to meet business requirements. They allow implementers to position the requirements and process review as an 'offering' that is independent of any particular Microsoft Dynamics solution. Documentation for requirements and processes for each decision accelerator offering can help organizations better evaluate and deploy Microsoft Dynamics solutions.

Requirements and Process Review Decision Accelerator

The purpose of the Requirements and Process Review DA is to identify the business processes within the project scope. The results of this analysis provide input into determining a solution that supports the customer's business requirements and processes. This analysis provides input into project scoping, solution design, and project proposal, and consists of the following tasks:

- Project kick-off with the project sponsor and subject matter experts (SMEs).
- Gather all customer business requirements (and wish lists) for a new ERP or CRM system.
- Analyze the customer's current (as-is) business processes and document the future (to-be) processes with the new ERP or CRM system.
- Review any additional technical requirements, or Information Systems/Information Technology (IS/IT) strategies, defined by the customer.
- Generate and deliver the requirements and process review report.

The key benefits gained by performing this activity are:

- Full list of business requirements for the new ERP/CRM system are documented, which is of high value to the customer regardless of the solution that is eventually chosen for deployment.
- The future (to-be) processes with the new ERP/CRM system are documented, which is of high value to the customer regardless of the solution that is eventually chosen for deployment.

Upgrade Assessment Decision Accelerator

The Upgrade Assessment DA is an umbrella offering that provides an assessment of the enhancements, risks and complexities of a desired system upgrade. The Upgrade Assessment report includes details about the scope of the upgrade, a list of areas enhanced in the new system, and an examination of the complexity of each area. The report recommends an approach to the upgrade.

This DA is an important grouping of upgrade assessment activities in the Development stage of the Opportunity Management process within the Microsoft

Solution Selling Process (MSSP). The two distinct offerings/activities within the Upgrade Assessment are as follows and can be completed separately or be bundled together:

- **Upgrade Assessment**: Perform an assessment of the overall configuration, customizations, integrations, interfaces and physical architecture of the implementation and provide findings and recommendations as to the optimum upgrade approach.
- **Upgrade Readiness**: Prepares the customer for a successful upgrade of their Microsoft Dynamics Solutions through best practices.

The key tasks in this activity are:

- Perform an assessment of the overall configuration and customization of the existing implementation.
- Perform an assessment of the interfaces that are configured within the existing implementation.
- Perform an assessment of the existing infrastructure and architecture configuration.
- Ascertain any new functionality desired in the upgraded system.
- Ascertain any new interfaces desired with the upgraded system.

The key benefits gained by performing this activity are:

- An overview of the complexity of the implementation is ascertained.
- An evaluation of the effort required for the project is ascertained.
- Areas of particular concern or risk are emphasized before the upgrade commences.
- A recommended approach for the upgrade is identified.

Fit Gap and Solution Blueprint Decision Accelerator

The purpose of the Fit Gap and Solution Blueprint DA is to identify any gaps between the customer's requirements and the application functionality. The results of this analysis provide input into determining a solution that addresses the gap. During this activity, a Degree of Fit estimate and a Fit Gap and Solution report is produced that describes how to use the Microsoft Dynamics product to meet the customer's requirements. This activity consists of the following tasks:

- Project kick-off with project sponsor and SMEs.
- Review the output from the Requirements and Process Review DA.
- Meet with business decision makers to determine project scope.
- Conduct Fit Gap analysis workshops.
- Production of a Fit Gap Analysis worksheet.

- Production of a Solution Blueprint report.
- Review the Fit Gap Analysis worksheet and the Solution Blueprint report with project sponsor.

The key benefits gained by performing this activity are:

- An understanding of the Degree of Fit of the Microsoft Dynamics solution to the customer's requirements.
- An initial view of the business and IT requirements and how they will be addressed.
- An initial fit gap breakdown, which is used in estimating the effort required for the configuration and customization of the Microsoft Dynamics product.

Architecture Assessment Decision Accelerator

The purpose of the Architecture Assessment DA is to explain to the customer the infrastructure required to support the chosen Microsoft Dynamics solution. The Architecture Assessment provides a report that details the infrastructure and hardware specifications that will be required. This activity includes assessing the existing infrastructure and then defining infrastructure requirements for the proposed solution.

This assessment is an umbrella offering of an important group of activities in the Solution stage of the Opportunity Management Process within the Microsoft Solution Selling Process (MSSP). The three distinct offerings/activities can be completed separately or as bundled activities:

- **Architecture Assessment**: Evaluates what type of physical infrastructure and hardware specifications (including hardware) the customer requires to support their Microsoft Dynamics solution. It provides a comprehensive report that details performance projections, assumptions and recommendations.
- **Proof of Concept Benchmark**: Ensures that performance and scalability capabilities of the solution addresses the business requirements of the customer. Designed to reduce risk, utilize best practices, provide expert advice and simulate user experience.
- **High Availability and Disaster Recovery Assessment**: Presents the customer with a "deep dive" into the Availability, Recoverability, Maintainability and Reliability of their Microsoft Dynamics solution. It provides an audit and analysis of the current state pertaining to these areas, and resulting recommendations to assist the customer in meeting their high availability and disaster recovery goals.

Microsoft Dynamic Solutions

This activity introduces the suite of Microsoft Dynamics products as comprehensive business management solutions including end-to-end, industry specific functionality. The Microsoft line of business (LOB) management

solutions provide Enterprise Resource Planning (ERP) and Customer Relationship Management (CRM) capabilities, to help customers automate their unique business processes for the core Microsoft Dynamics applications:

- Microsoft Dynamics® AX
- Microsoft Dynamics® CRM
- Microsoft Dynamics® GP
- Microsoft Dynamics® NAV
- Microsoft Dynamics® SL

This activity consists of the following tasks:

- Conduct meetings with the customer to understand:
  - The business requirements (if the Requirements and Process Review DA and Fit Gap and Solution Blueprint DAs were executed, the output of that will be reviewed by the team).
  - How Microsoft Dynamics will support the business.
- Analyze key data points.
- Create a formal recommendation for the customer's production deployment infrastructure and hardware requirements.
- Review the recommendation with the client and incorporate input.

The key benefits gained by performing this activity are:

- An understanding of the infrastructure required and the associated costs.
- Assurance that the solutions will scale to meet the client's needs.

Scoping Assessment Decision Accelerator

The Scoping Assessment DA assesses the customer requirements in depth, so that you can detail the scope, and schedule cost and resource requirements for the Microsoft Dynamics solution. The Scoping Assessment results in a detailed report, which makes an overall recommendation of how the project needs to proceed. This report will include implementation cost, resource, task, organization, and role breakdowns, and alternative options where appropriate.

The key tasks in this activity are:

- Analyze the customer requirements and fit gap analysis to gain an insight into the scope of the project.
- Analyze the outputs from any other DA offerings that are completed.
- Analyze inherent constraints in the processes to understand the logical business activities that are performed.
- Analyze any imposed constraints on the Microsoft Dynamics implementation approach.

The key benefits gained by performing this activity are:

- An overall view of the available implementation options.
- An analysis of the costs associated with each option.
- An evaluation of the number and type of resources required and their role in the project.

Proof of Concept Decision Accelerator

The purpose of the Proof of Concept DA is to demonstrate how Microsoft Dynamics products meet specific high-level requirements. Areas of particular concern and high-level requirements are partially configured during the Proof of Concept to ensure that they are achievable. During this activity, you perform a demonstration of the desired configuration and produce a report detailing the Proof of Concept. This activity consists of the following tasks:

- Review the outputs from the Fit Gap and Solution Blueprint DA.
- Define which Functional requirements are to be configured, and the level of configuration that must be achieved, to satisfy the Proof of Concept.
- Define any non-functional or other technical requirements that are to be addressed as part of the Proof of Concept.
- Define key processes that are to be configured.
- Define key acceptance criteria to ensure that the objectives of the Proof of Concept are met.
- Gather input and update the Fit Gap and Solution Blueprint where necessary.

The key benefits gained by performing this activity are:

- Validation that the solution supports key functionality.
- A better understanding of how the solution works.
- Build consensus around Microsoft Dynamics as the solution of choice.

Business Case Decision Accelerator

The Business Case DA provides an assessment detailing the direct and indirect benefits that a Microsoft Dynamics implementation will create for a customer and projects the expected Return on Investment (ROI) of the implementation. The Business Case activity produces a report detailing the ROI, Total Cost of Ownership (TCO) and expected payback periods for the implementation, and an ROI modeling spreadsheet.

The key tasks in this activity are:

- Review any previously completed Sure Step service offering outputs.
- Meet with the project sponsor to confirm the scope of the business case.
- Collect data from SMEs and business decision makers.
- Collect industry and benchmark data.
- Populate the ROI tool to generate relevant estimates.
- Generate and calibrate a business case report.
- Obtain SME buy-in on the business case report.
- Calibrate overall report with business sponsor.
- Obtain approval and acceptance from business sponsor.

The key benefits gained by performing this activity are:

- An estimate of the ROI for the project validated with the business, benchmarked, and validated against similar implementations.

Proposal Generation

The purpose of the Proposal Generation activity is to summarize and repackage the information gathered in the previous activities or offerings. During the Proposal Generation activity, the high-level project documentation is prepared. It is necessary to document scope delimitations and any previous Agreement activity. This activity consists of the following tasks:

- Summarize the high-level scope based on the requirements, identified, defined, and documented in the previous Diagnostic activities. These include at a high-level the Business Processes, Functional and Non-functional requirements, and the Integration and Interface requirements.
- Develop the initial Project Charter document with the information gathered from the first task.
- Perform an assessment of a suitable Implementation approach (Standard, Enterprise, Rapid, Major Upgrade or Rapid Upgrade) and prepare a recommendation, including assumptions.
- Based on the assessment, develop the high-level Project Plan for the implementation.
- Perform an assessment of skills requirements and proposed roles, responsibilities, and an overall project governance model.
- Make a initial Risks assessment and attempt to identify and outline a mitigation activity against each.
- Perform an assessment of time required to execute the implementation, including any dependencies owned by the customer and outside of direct project control.

The key benefits gained by performing this activity are:

- Development of the high-level Project Charter and Project Plan.
- The documentation of conclusions and implementation proposal content.
- The documentation of scope delimitations and risk assessments.

Final Licensing and Services Agreements

Final Licensing and Services Agreement is an activity that you execute across many phases of the project. The purpose of the activity in the Diagnostic phase is to document the overall scope of the implementation and gain the agreement of the customer. This activity produces two key deliverables:

- The Statement of Work (SOW), which details the scope of the implementation.
- The Budgetary Estimate Proposal, which provides details of the cost components.

The key benefits gained by performing this activity are:

- A presentation and walk through of the SOW and Budgetary Estimate Proposal.
- The opportunity for the customer to review and provide feedback on the SOW and Budgetary Estimate Proposal before acceptance.

Project Mobilization

The Project Mobilization activities provide the team with a clear understanding of the business drivers behind the project and the key metrics the implementation is measured by.

The key activities in this task are:

- A formal internal Kick-Off workshop covering the following:
  - Introduction of team members.
  - A detailed review of the SOW.
  - Review of the agreed implementation proposal and methodology.
  - Review and assign roles.
  - Identify training requirements and agree on the schedule.
  - Review and gain input on the project governance model.
  - Discuss the customer's mission and goal, drivers behind the implementation, and other critical factors.
  - Discuss and document the known project risks, constraints and assumptions.
  - Walk through the Conditions of Satisfaction, as defined by the customer.

The key benefits gained by performing this activity are:

- Formation and briefing of the project team.
- Preparation for the project, including filling any skills gaps.
- Providing an opportunity for team members to ask questions.
- Gain buy-in and commitment from the team.

Diagnostic Phase: Deliverables

The work performed in the Diagnostic phase results in several key deliverables. Because of the systematic nature of Microsoft Dynamics Sure Step, these deliverables provide important input into the phases of the implementation process.

The following table lists some of the key deliverables created in each activity in the Diagnostic phase. You can customize the deliverables for a particular Microsoft Dynamics product.

Activity	Deliverables
Requirements and Process Review	• Requirements and Process Review report • Review Findings presentation
Fit Gap and Solution Blueprint	• Solution Design and Blueprint report • Fit Gap Analysis worksheet • Findings and Review meeting
Proof of Concept	• Conference Room Demonstration - the Proof of Concept presentation • Updated Fit Gap Analysis worksheet and Solution Blueprint report
Architecture Assessment	• Architecture Assessment report
Scoping Assessment	• Microsoft Dynamics Costing worksheet • Implementation Plan report
Business Case	• Business Case report
Upgrade Assessment	• Upgrade Assessment report
Proposal Generation	• High-Level Project Charter • High-Level Project Plan for desired project type
Final Licensing and Services Agreement	• Statement of Work • Budgetary Estimate Proposal
Project Mobilization	• Recruitment and/or Training Plan for implementation team members

Diagnostic Phase: Best Practices

When performing activities in the Diagnostic phase, consider the following best practices:

- **Ensure that the hand off from Sales includes all the information they gathered in the sales process.**
  This is done prior to starting the Diagnostic phase, and at the end of the Diagnostic phase prior to starting the implementation project. Hand off at the end of the phase is the key to having the implementation phases start in the right direction. Sometimes when beginning a new project, key information gathered during a sales process is frequently not communicated before the implementation team interaction with the customer. This can result in duplication of effort in obtaining information about the customer, and can reduce your credibility with the customer.

  Set time aside to meet with the sales group that closed the sale to obtain all relevant information to ensure the implementation process is new and exciting to the customer.
- **Ensure you understand the customer's motivation for pursuing the implementation project so that all project objectives will support that motivation.**
  Customer expectations are set during the sales process. Ensure that the project team understands all commitments, expectations, and concerns communicated during the sales cycle so that the implementation project can meet the customer's expectations.
- **Show the customer the type of deliverables that you will create during the Diagnostic phase.**
  Showing the customer examples of Diagnostic documents and deliverables will help them understand the type of work to be performed, how the deliverables will be used in later phases of the implementation project, and how the customer will benefit from their investment in the Diagnostic phase.
- **Reference a Work Breakdown Structure and/or project plan from a previous project as a template for a new project.**
  If the implementation type is the same, items such as phases and deliverables might be similar and can help reduce administrative project time.
- **Determine the level of infrastructure analysis based on implementation type.**
  If you decide to conduct a rapid implementation project, define the infrastructure completely in the Diagnostic phase. Performing a more detailed analysis of the infrastructure is possible because you will have sufficiently defined the scope and details of the business solution during the Diagnostic phase.

- **Present the Diagnostic results and proposal in person to the customer.**
  Prepare a brief, focused presentation that highlights the proposal and presents the benefits in terms of meeting customer requirements and expectations. Do not e-mail a proposal then wait to hear back from the customer.

  Also, ensure all project team members review the documentation and proposal before delivering it to the customer.

Analysis Phase

The Analysis phase marks the official start of the implementation project. The activities in the Analysis phase help identify the decisions the customer must make that will guide the implementation. This phase builds on the Diagnostic phase activities, and involves:

- Reviewing the customer's as-is business processes to develop the to-be (future state) processes.
- Determining and documenting the functional requirements for the solution in the Functional Requirements Document (FRD).
- Describing improved business processes.
- Describing any modifications needed for the system to support future business processes.
- Acquiring customer sign off of the documented and finalized FRD.

However, the analysis work in this phase goes into much more detail than the high-level analysis performed in the Diagnostic phase.

You will gather additional information for all areas that are in the scope of the project to help identify a solution that meets all the customer's requirements. At the end of this phase, customers will have a detailed understanding of the proposed Microsoft Dynamics implementation. This includes the project cost, deliverables, and milestones.

The specific activities in the Analysis phase are customized dependant on the project type. In this section, some of the key activities in the Analysis phase will be described. The Analysis phase contains the following activities:

- Project planning
- Risks and issues management
- Communications management
- Proposal management
- Resource management
- Quality management
- Gather key user training requirements

- Detailed business processes analysis
- Review business requirements (FRD) and Document Gaps
- Build Sandbox & Training Environments
- Gather integration and interface requirements
- Gather data migration requirements

Each activity is a characteristic of the Enterprise and Standard project type except risks and issues management, communications management, proposal management, resource management and quality management which are activities included within the Enterprise project type only.

Project Planning

The purpose of the Project Planning activity is to finalize the project charter and the project plan. Project planning exercises are usually performed jointly with the customer.

This activity within the Enterprise and Standard project types includes the following tasks:

- Conduct the executive Kick-Off meeting and project planning sessions.
- Finalize the Project Charter.
- Finalize the Project Work Breakdown Structure (WBS).
- Finalize the Project Plan.
- Ensure that the customer reviews and approves the deliverables.

The Project Planning activity produces two deliverables:

- A finalized Project Charter.
- A detailed Project Plan.

Risk and Issues Management

The purpose of Risk management is to understand the potential risks involved in a project and the actions that you can take to mitigate them. As a project begins, risk management processes include identifying, analyzing and responding to project risks. As the project progresses, monitoring, and controlling risk become ongoing risk management processes.

Issue management is the process of tracking and documenting issues from identification to resolution. A formal issue management process is used to handle important issues and to synchronize with scope, time and cost management.

Important aspects for the management of issues are:

- Issues must be proactively managed. Issues that are not resolved in an appropriate timeframe cause further detriment to the project.
- Get the required support for resolving issues by ensuring that the appropriate team members and stakeholders are aware of any issues and probable consequences of leaving those issues unresolved.
- Issues can have an impact for legal and contractual requirements.
- Severe issues are likely to have an impact on the project scope, timeline and budget.

The Risk and Issues Management activity produces the following deliverables:

- Risk Register
- Issue List
- An updated Project Plan

Communications Management

The purpose of Communications management is to manage the communication needs of the project team and project stakeholders to ensure timely and appropriate project information.

Communications Management involves the following activities:

- Establishing a Communications Strategy and Plan.
- Reviewing and approving the Communications Strategy and Plan.
- Project Kick-off preparation.
- Project Kick-off (internal).
- Project Kick-off (customer).
- Project Performance Reporting.
- Project Status Reporting.

The activity produces three deliverables

- Communications Strategy and Plan
- Project Performance Reporting
- Project Status Reporting

Proposal Management

Proposal Management is a Program Management cross phase activity; its purpose is to control the scope of the project. During the Analysis phase, changes to the project scope are documented, analyzed, and approved as part of the Proposal Management activity.

This activity consists of the following tasks:

- Create a change control plan.
- Review and approve the change control plan.
- Manage change requests.
- Review and approve change requests.

The Proposal Management activity produces two deliverables:

- Change Control Plan
- Updated Project Plan

Resource Management

The purpose of Resource Management is to establish, organize and manage all resources involved in the project. The main types of Resources are human resources (people that do the work on the project) and material resources (physical objects that are used or consumed as the project progresses) but can also include equipment resources. Involvement of human resources (project team members) early in the project enhances the commitment and adds expert knowledge.

Resource management activities include:

- Requesting and assigning the Project Team Resources.
- Assigning and refining team skills.
- Identifying equipment, facilities and material resources.
- Managing project resources.

The deliverable of this activity will be ongoing management of project resources.

Gather Key User Training Requirements

The purpose of gathering Training Requirements is to identify training needs within the project team, and within the end-user community. During this activity a roadmap for technical and functional training for the project team and the customer's key users is prepared. This activity within the Enterprise and Standard project types includes the following tasks:

- Defining training for key users.
- Determining training logistics.

The deliverable of this activity will be a Key User/Core Team Training Plan that addresses the training scope, team roles and responsibilities and defined logistics of the training sessions. The Training Plan will:

- Identify the Key Users and their level of existing knowledge and skills related to the area that they will represent on the implementation team.
- Define the type of training that will be required for each business area.
- Assign an Application Consultant to deliver the Microsoft Dynamics Solution training for the new functionality and features.
- Assign Application Consultant(s) to deliver any ISV Solution training for the new version.
- Determine the dates, times and location to administer the training.
- Determine the training documentation that will be needed.

Detailed Business Processes Analysis

The purpose of a detailed analysis of business processes is to identify and define future business processes and identify where you will use specific Microsoft Dynamics functionality. Ideally, this activity consists of a workshop for each business area, involving key users from the customer's business. Each workshop will:

- Review the template process models and use them as a basis to document the future business processes.
- Identify where changes will need to be made to the existing customer's business processes.
- Identify the job roles that will perform the individual activities.

The process of performing a detailed analysis of business processes will generally result in a detailed flow diagram for each business process.

The Detailed Business Processes Analysis activity included in the Enterprise and Standard project types produces one deliverable:

- The Business Process Overview report, which details:
  - The business processes.
  - Any gaps and the associated resolutions.
  - The business process interfaces.
  - Any interface gaps.

Review Business Requirements

The purpose of gathering business requirements is to identify and document the customer's business requirements. This process is split into two activities: conducting the Business Requirements Workshop and documenting the functional requirements of the project.

The purpose of the Business Requirements Workshop is to identify and document the complete set of functional requirements for the implementation of the Microsoft Dynamics solution. This activity within the Enterprise and Standard project types is required to identify the customer's functional business requirements that relate to the proposed Microsoft Dynamics solution. You must define and document how the solution meets each business requirement, and reach agreement on your intended approach to the project.

The results of the Business Requirements Workshop are analyzed and the business processes and information captured during the workshops is used to create the Functional Requirements Document (FRD). The FRD forms the main deliverable for this activity, and is a necessary input into the Fit Gap Analysis worksheet.

Conduct Fit Gap Analysis

The purpose of conducting a Fit Gap Analysis is to identify and document gaps between the customer's requirements and the business solution. The project team must find resolutions or propose a work around for the documented gaps. This activity consists of the following steps:

- Review the customer requirements for the business solution to determine the Fits and the Gaps with the solution functionality.
- Document the Fits, including the standard features and those needing configuration.
- Document gaps between the customer requirements and business solution.
- Analyze gaps and identify solutions or workarounds.
- Document gaps, resolutions and workarounds.

The detailed Fit Gap analysis is conducted based on the priority the customer has identified for each business requirement. This activity within the Enterprise and Standard project types produces one deliverable:

- The Fit Gap Analysis spreadsheet. Each business requirement is confirmed as a Fit or defined as a Gap in this spreadsheet.

Analysis Phase: Objectives and Milestones

The Analysis phase marks the start of the project implementation, and incorporates those activities required to effectively plan and initiate the entire project.

The key objectives to achieve during the Analysis phase are:

- Finalization and approval of the Project Charter.
- Finalization and approval of the Project Plan.
- Finalization of the Change Control Plan.
- Execution of executive and project team kick-off meetings.
- Documentation and approval of the Functional Requirements Document.
- Execution and documentation of Fit Gap Analysis, and approval of the Fit Gap Analysis Worksheet.

You can track progress through the Analysis phase against the major milestones:

- Formal Project Kick Off Meeting.
- Customer Approval of Project Charter, Project Plan and Change Control Plan.
- Customer Approval of Functional Requirements Document and Fit Gap Analysis Worksheet.
- Infrastructure and Environment definition.

Conduct a review at the end of the Analysis phase to ensure you have achieved all the milestones and provided all the deliverables to the required standard.

Analysis Phase: Deliverables

Although the deliverables for the Analysis phase will vary slightly dependant on the project type, they will include:

- Project Kick-off
- Project Charter
- Project Plan
- Risk Register and Issues List
- Change Control Plan
- Communications Plan
- Training Plan
- Future State Business Process Workflows
- Functional Requirements Document (FRD)
- Fit Gap Analysis Spreadsheet
- Development Standards
- Quality and Testing Standards (Test Plan)
- Infrastructure Scope Document
- Infrastructure Design Document

- Integration and Interface Requirements
- Data Migration Requirements

***NOTE**: For more information on each deliverable, refer to the appropriate activity in Microsoft Dynamics Sure Step. Use the **Locate in Sure Step** option in **Documents view** to find the activity associated with a particular deliverable.*

Analysis Phase: Best Practices

When you perform activities in the Analysis phase, consider the following best practices:

- **Determine the level to which detailed analysis must go and then identify an appropriate analysis strategy.**

To analyze business processes at a detailed level, set up the business solution in the sandbox environment, train key users, and then execute actual business processes.

At this detail, you can reveal the exact details of missing functionality and identify how to optimize the business solution.

If the purpose of the detailed analysis is to find resolutions for functionality, consider rapid prototyping.

This might help prove to the customer that the required functionality will be available and will satisfy the requirements of the proposed business solution.

- **Keep a project on track by deciding early in the Analysis phase if system enhancements will be added to the scope of the current project or if they have to be deferred to a future project.**

Frequently, the Analysis phase is the first area where a project timeline begins to slip. The reason is that customers who have undertaken training in the new solution might want to spend additional time analyzing it, they might find additional enhancements that can be important to the solution, which you have not yet scoped. Address these quickly to keep the project on schedule.

- **Include visual diagrams to depict business processes in the Functional Requirements document to show how the solution will enhance the processes.**

Pictures can more effectively communicate the vision of the solution better than text descriptions or long bulleted lists.

- **Do not underestimate the importance of the project scope statement.**
  The project scope statement is included in the Project Charter document, and must reflect the level of complexity of the project. You must ensure that the customer signs off on this statement. The project scope statement explicitly identifies for all stakeholders what is in scope and, more important, what is out of scope for the project.

  This sets expectations and boundaries for the project going forward and allows the project teams to work under a shared set of expectations. Ensuring customer sign off also helps mitigate risk if the project starts to experience "scope creep."
- **Maintain a list of ISV solutions that your organization has approved and implemented.**If you are using an ISV solution that is new to your consulting organization, consider including a representative from that ISV on the project team.
- **Communicate the purpose of business process analysis to customer employees.**

  Business process analysis usually involves interviews with a wide variety of customer employees. Ensure that you work with your customer's management team to develop a consistent, non-threatening message that communicates to employees the purpose of the analysis.

Design Phase

Building on the deliverables created during Analysis, this phase consists of determining the design for the overall Microsoft Dynamics implementation. The Design phase also consists of designing solutions for specific customizations, integrations, and data migration needed to satisfy business requirements identified during the Analysis phase. The primary deliverables from this phase are a high-level design specification and a detailed technical design specification, both that satisfy the high-level decisions determined in the previous phases. These design specifications will guide the development activities in the following phase.

The specific activities in the Design phase are customized dependant on the project type. In this section, some of the key activities in the Design phase are described. You can find the following activities in the Design phase:

- Project planning
- Proposal management
- Document the configurations in the Functional Design Document - Fit (FDD-Fit)

- Create the customization design in the Functional Design Document - Gap (FDD-Gap)
- Create Technical Design Documents (TDD) for each of the Gaps
- Create the Solution Design Document (SDD)
- Design integration and interface components
- Begin data migration design

Each activity is a characteristic of the Enterprise and Standard project type except Proposal Management and Creation of the Solution Design Document. These are related to the Enterprise project type only.

Project Planning

In the Design phase, Project Planning activities within the Enterprise and Standard project types focus on monitoring and tracking the progress of the project against the Project Plan, and making any adjustments that are required to ensure the project remains aligned to the plan.

Project Planning includes the following tasks:

- Update the Project Plan to reflect any changes that have occurred in the project timeline, milestones, and resources.
- Create the Knowledge Transfer Plan.
- Create the Deployment Plan.

FIGURE 2.2 PROJECT PLANNING PROCESS FLOW

The Project Planning tasks produces two deliverables:

- The Knowledge Transfer Plan, which defines the process for the project team to hand over the solution to the customer.
- The Deployment Plan, which describes the rollout of the system to the end-users.

Proposal Management

The purpose of the Proposal Management activity in the Design phase is to ensure that any changes in project scope are analyzed, documented, and approved by the project team and the customer.

This activity consists of the following tasks:

- Manage change requests.
- Review and approve change requests.

The Proposal Management activity produces two deliverables:

- Approved Change Requests.
- Updated Project Plan.

Document Configurations in Functional Design Document – Fit

The purpose of the Functional Design Document (FDD)-Fit is to capture configuration and parameter settings required to meet the corresponding functional requirements. The relevant configuration and settings are identified as "fits" during the Fit Gap Analysis.

In this activity, the Application Consultant and the appropriate Key User begin the documentation of configuration and parameter settings required for the standard functionality and any Independent Software Vendor (ISV) solutions to fully meet the business requirements. This is documented in the Functional Design Document - Fit.

The Key User provides appropriate business scenarios to test the selected design and configuration. These business scenarios will be documented as a part of the Identify Process Test Scenarios activity and are used in the Quality and Testing cross phase.

A key deliverable for the Design phase is the FDD-Fit, which captures all required configurations and parameter settings.

Create Configuration Design in Functional Design Document – Gap

The purpose of the Functional Design Document - Gap is to document the custom code development that must take place to fill any business requirements gaps identified in the Fit Gap Analysis phase.

This activity consists of the following tasks:

- Application Consultant works with the appropriate Key User to begin the documentation of business requirements which will be met with custom code development.
- Business rules and practices affecting the custom code design are documented.
- Custom code requirements are documented in the Functional Design Document (FDD-Gap).

This activity produces one form of deliverable:

- The FDD - Gap (multiple FDDs might be produced for each of the corresponding Gaps).

Create Technical Design Document

The purpose of the Technical Design Document is for the developers to document the methods and code that will be generated to meet the corresponding business requirement. The Technical Design Document (TDD) details each system modification or enhancement included in the proposed solution. A TDD is created for each corresponding FDD - Gap.

This activity consists of the following tasks:

- Create the TDD
  - Document the specific user interface, business and data layer components required to deliver each proposed system modification.
  - Review the design security.
  - Identify additional security requirements.

The Create Technical Design Document activity produces one form of deliverable:

- The TDD; multiple TDDs might be created for each of the corresponding Gaps.

Create Solution Design Document

The purpose of the Create Solution Design Document activity is to collate and document all the elements of the solution design into one comprehensive document. The Solution Design Document (SDD) presents a summary of the solution, describing the proposed solution flow and the capabilities enabled by the solution. The SDD is created in business language, so it includes elements of the FRD, Fit Gap Analysis and FDDs. The SDD is initiated in this phase, and is finalized in the Development phase. This activity consists of the following task:

- Create the SDD

The SDD deliverable includes some or all of the following information:

- Company background.
- Vision and scope of the project.
- High-level architectural design.
- Integration information.
- Data migration design.
- Audit and security requirements.
- Test requirements.
- Training requirements.

Design Integration and Interface Components

The purpose of this activity is to design the Integration and Interface elements of the solution. The design elements are captured in the FDD - Gap documents, and corresponding TDD's are created.

To successfully design the Integration and Interface components of the solution, you must perform the following sub-activities:

- Identify a method for sending and receiving information across interfaces that is compliant to security and other requirements for the solution.
- Identify the sets of data and transformations that are required to allow effective exchange of information.
- Identify the operational requirements that must be met.

The key deliverables from this activity are the TDDs corresponding to each Integration and Interface design element.

Begin Data Migration Design

The purpose of Data Migration Design is to map data fields from existing sources and to design the data migration process by identifying the migration tasks to perform. You will also design the process for performing the actual data conversion. This activity consists of the following tasks:

- Evaluate the quality of the source data and determine Data Cleansing Requirements.
- Map data.
  - If a data field cannot be mapped to a single source, attempt to derive the field from multiple source fields.
  - If a data field cannot be sourced or derived, meet with customer representatives to determine an alternate source or assign responsibility for providing the data values.

Certain Microsoft Dynamics products require a specific data migration path. For example Microsoft Dynamics GP requires you to perform the data migration in a specific order.

The Begin Data Migration Design activity results in a single deliverable:

- A Data Migration Data Mapping Worksheet.

Design Phase: Objectives and Milestones

The primary deliverables from the Design phase are the design specification and the technical design specification. These specifications will provide the input into the Development phase.

The key objectives to achieve during the Design phase are:

- Core team training.
- Functional design specifications for:
  - Fit Gap solutions.
  - Integration and Interfaces.
  - Data migration.
- Technical design documents.
- Initial draft of the Solution Design Document.

You can track progress through the Design phase against the major milestones:

- Core team training complete.
- Customer accepts the Design Specifications.
- Customer approves the development time and cost estimates.

Conduct a review at the end of the Design phase to ensure you have achieved all the milestones and provided all the deliverables to the required standard.

Design Phase: Deliverables

Although the deliverables for the Design phase will vary slightly dependant on the project type, they will include:

- Core Team Training
- FDDs for Fits (configurations)
- FDDs for Gaps (customizations)
  - FDDs for Requirements identified as Gaps in the Standard Solution
  - FDDs for Integration and Interface Requirements
  - FDDs for Data Migration Requirements
- TDDs
- Process Test Scenarios
- Non-Production Environment Specification

***NOTE**: For more information on each deliverable, refer to the appropriate activity in Microsoft Dynamics Sure Step. Use the **Locate in Sure Step** option in **Documents view** to find the activity associated with a particular deliverable.*

Design Phase: Best Practices

When you perform activities in the Design phase, consider the following best practices:

- **Assign the development resource involved with the design specification to assist in the completion of the technical design specification.**

This will help minimize the need to reassess or reanalyze the decisions that are made in the high-level design specification or to spend additional time on bringing someone else up-to-speed. If the development resource is not involved in the design specification, be sure there is interaction with the authoring application consultant to maintain continuity.

- **Plan the data migration carefully and thoroughly.** Data migration planning is the most important part of data migration. The plan must consist of:
- A schedule of events.
- Customer and consultant tasks.
- A list of data sources and the specific information to be migrated.

- Any business rules that are decided - such as amount of data to be migrated.
- How to identify duplicate records.
- Ensuring the data migration consultant works directly with a key-user who understands the data that will be migrated. This helps ensure that the team identifies any risks or possible corrupted data up front.
- **Clearly set customer expectations for the data migration during the data migration planning activity.**

Be sure to make the customer aware of what and how much data will be migrated, how you will validate the data and the approximate timelines for when major milestones of the migration will occur.

- **Schedule the appropriate consulting resource to step through the test plan carefully before delivering it to the customer.**

Customers tend to take every step carefully and might not fully understand the solution if each step is not clearly written. To keep the steps in the test plan as straightforward as possible, remove any assumptions and acronyms from the test plan.

- **Consider less costly alternatives to the migration of all current and historical data to the new system.**

  Many customers insist on complete migrations of current and historical data. This can become a costly, time-consuming task, especially if there are major changes to data structures. Understand the project objectives and consider alternatives such as summary-only data migration or maintaining legacy data in an inquire-only format.
- **Ensure that the data migration plan has a detailed exception-handling component, as the incoming data might not be well formatted.**

  For example, define the customer's responsibilities for validating data before you start to run the migration and define their responsibilities for reconciling data after the migration is complete.
- **Educate your customer about the maintenance implications of your proposed solutions.**
  For example, explain the possible impact on the solution that results from future product or service pack releases.

Development Phase

The purpose of the Development phase is to develop the customizations, integrations, and data migration processes defined in the design specifications created and approved in the Design phase, and to complete the setup and configuration of the standard solution and any ISV solutions. The deliverables of the Development phase are the completed and tested setup, configurations, customizations, reports, integrations, and any data migration programs and processes. Each component developed in this phase is tested and verified to be functioning as defined by the Functional requirements, design specifications, and testing criteria.

An important feature of the Development phase is that development activities, such as individual features, integrations, or data migration, can continue through the Development phase at the same time. This depends on the size and complexity of the project and the number of resources available to work on individual components.

The specific activities in the Development phase are customized dependant on the project type. This section will describe some of the key activities in the Development phase.

You can find the following tasks in the Development phase:

- Create Training and Additional Documents
- Complete System Configuration and ISV Solution Setup
- Begin Custom Code Development
- Conduct Unit Testing and Function Testing
- Execute Process and Integration Testing
- Hand over Non-production Environments
- Begin Interface and Integration Development

Each activity is a characteristic of the Enterprise and Standard project type except Conduct Unit Testing and Function which is related to the Enterprise project type only.

Create Training and Additional Documents

The purpose of the Create Training and Additional Documents activity in this phase is to ensure all training documentation, including supporting documents, such as user guides, are prepared for delivery to the customer.

This activity consists of the following task:

- Create process driven training documentation for end-users. Include:
  - Explanations of business scenarios, processes and activities.
  - Workflows and notifications.
  - Usage test scripts that describe the interactions between users and the solution, represented as a sequence of simple steps.

The Create Training and Additional Documents activity produces a number of deliverables:

- Training documents
- Microsoft Dynamics and applicable ISV software documentation
- User guides
- Daily operating procedures
- System maintenance procedures

Complete System Configuration and ISV Solution Setup

The purpose of this activity is to incorporate configuration and ISV solution setup changes that result from issues arising during the testing process.

Issues that require configuration changes are often discovered during testing of standard functionality and ISV functionality through the use of feature and sub-process testing. These changes are documented as a part of the testing process and therefore must be collected, reviewed and incorporated in all environments.

The steps taken to confirm configuration changes are required as part of the Quality and Testing cross phase.

Begin Custom Code Development

The purpose of the Begin Custom Code Development activity is to initiate development of custom code to resolve gaps between the customer's requirements and the Microsoft Dynamics product being implemented.

This activity consists of the following tasks:

- Develop the feature or integration proposed in solution design and technical design documents.
- Assign a lead developer to ensure that developers working on the same function coordinate and communicate.

The Begin Custom Code Development activity leads into the Finalize Custom Code Development activity.

Conduct Unit Testing and Function Testing

The purpose of the Conduct Unit and Function Testing activity is to perform testing to determine if the custom code developed satisfies the criteria and provides the functionality specified in the Functional Requirements Document, the Functional Design Document and the Technical Design Document.

This activity consists of the following tasks:

- Conduct Unit Testing (by the Development Consultant) of the custom code to detect and resolve any issues.
- Conduct Function Testing of the code in a simulated production environment (Test).
- Conduct Function Testing with the Application/Functional consultant to ensure that the code meets the functional design.

This activity is also included in the Custom Code Development Cross Phase Process.

The Conduct Unit and Function Testing activity does not have any deliverable documents, although you must document the test results.

Execute Process Testing

The purpose of process testing is to perform a complete business process test of the configured features of the solution in accordance with the Quality and Testing Requirements created during the Analysis phase. Process testing is performed by executing the Process Test scripted scenarios defined in the Design phase. Prior to performing process testing, review, update and finalize the Process Testing scenarios and scripts compiled in the design phase to ensure they reflect the final development framework. An example of this test is one that ties together the Order-to-Cash and Procure-to-Pay business processes.

The end result of process testing is to ensure that features configured and custom code developed for the Microsoft Dynamics solution are fully tested from a business process standpoint.

This activity is included in the following Cross Phase Processes:

- Requirements and System Configuration
- Custom Code Development
- Training

Execute Integration Testing

The purpose of integration testing is to validate that the Integration and Interfaces support the customer's Business Processes. Integration testing is performed by the Key User and Application Consultant, who execute Integration test scripts for end-to-end business processes. An example of this test is one that ties together any integration/interfaces with third party applications during the Order-to-Cash or Procure-to-Pay business processes.

This testing is conducted in a Test Environment with the application security enabled, to validate the security configuration of the application. The validation of application security is vital if the consulting project team is to maintain the confidence of the customer.

The purpose of this testing is to validate that all aspects of the Microsoft Dynamics solution, including all systems and subsystems that interact with, interface with or otherwise support the customer's business processes produce the expected results. Integration testing also ensures that the introduction of additional interfaces or security does not have a negative effect on the previously validated system.

This activity is included in the following Cross Phase Processes:

- Integration and Interfaces
- Data Migration
- Requirements and System Configuration
- Custom Code Development

Hand Over Non-production Environments

The purpose of the Hand Over Non-production Environment activity is to ensure that the customer's support teams are ready to accept responsibility for non-production environments. A customer's support teams must understand the solution and typical support and operational tasks that are required.

The main activities within this task are:

- Create a detailed Operations guide. This includes, but is not constrained to the following:
  - Overview of the Solution Architecture.
  - Solution performance monitoring and availability targets.
  - Performance tuning and optimization.
  - Escalation paths.
  - Backup and restore process.
  - Disaster recovery failover process.

  - System monitoring and alerting.
  - Additional Reading: Links to Product Platform and Project Specific Documentation.
  - User setup and access configuration.

- Conduct a series of hand over workshops with the support teams, to present and discuss the content of the Operations guides.
- Obtain sign off from the customer accepting the environments.

The primary deliverable from this task is an Operations guide for the non-production environments to assist support teams in the day-to-day running and management of the solution.

Begin Interface and Integration Development

The purpose of the Begin Interface and Integration Development activity is to start the development of integration and interface components using the implementation mechanisms identified in the Design phase.

The main activities within this task are:

- Build of each Integration and Interface component. Development will include the:
  - Data elements.
  - User interface.
  - Underlying business logic.

- Perform unit testing for each Integration and Interface component.
- Coordination and communication with other developers working on the same feature.

The deliverable from this activity is to provide material that can be used to perform integration testing, with the assumption that some further work might be needed to complete all functionality or to support deployment and Operations tasks.

Development Phase: Objectives and Milestones

The purpose of the Development phase is to build and test the system components defined and approved in the Design phase.

The key objectives to achieve during the Development phase are:

- Finalize training guides and documentation.
- Finalize future state business processes.
- Complete security role setup.
- Complete system setup and configuration.

- Finalize the Solution Design Document.
- Complete custom code development.
- Perform testing:
  - Process
  - Data acceptance
  - Integration
- Develop test scripts for User Acceptance Testing (UAT) and Performance Testing, both of which will be executed in the next phase.
- Hand off non-production environments.

You can track progress through the Development phase against the major milestones:

- Training guides complete.
- Process models complete.
- System configuration and setup complete.
- Development complete.
- Test scripts development complete.
- Non-production environments hand off complete.

Conduct a review at the end of the Development phase to ensure you have achieved all the milestones and provided all the deliverables to the required standard.

Development Phase: Deliverables

Although the deliverables for the Development phase will vary slightly dependant on the project type, they will include:

- Training Guides/Documentation
- Final Process Models
- Final System Configuration
- Final Custom Code Development
- Data Acceptance, Process and Integration Testing complete
- Performance Test and User Acceptance Test Scripts developed
- Production Environment Specification generated
- Final Integration and Interface Code Development
- Final Data Migration Code Development
- Final Solution Design Document (SDD)

***NOTE**: For more information on each deliverable, refer to the appropriate activity in Microsoft Dynamics Sure Step. Use the **Locate in Sure Step** option in **Documents view** to find the activity associated with a particular deliverable.*

Development Phase: Best Practices

When you perform activities in the Development phase, consider the following best practices:

- **Update the initial and technical design documents created in the Design phase to reflect the actual appearance and functionality of the developed feature or program.**

The documentation will contain sufficient information to allow for maintenance and upgrade of the feature in future optimization or upgrade projects.

- **Adhere closely to the requirements identified in the Functional Requirements document during the customer testing and user acceptance activities.**

It is common for a customer to request aesthetic or functional changes to the finished product during this phase. Examine all such requests closely so that they do not conflict or expand on the requirements specified in the Functional Requirements document. At this point in the implementation project, you must document any changes considered necessary in a formal change request order.

- **Make sure that the customer's process testing is successful with careful and thorough completion of the feature and function testing.**

Customer testing and acceptance activities are frequently the first time the customer will see the finished product, and it is important that the first impression is a good one.

The product must be as stable as possible. Receiving system errors or having the program crash during initial user testing can severely affect the customer's confidence in the development efforts.

- **During data migration testing, try to involve the actual end-users of the solution to validate and verify the data migration.**

These key end-users are already familiar with the data. They will notice problems and issues more easily than will an outside consultant. The testing is an iterative process; several test passes will help ensure that the data is accurate.

- **Ensure that the testing is performed by using actual user account and security settings.**
  Testers frequently use administrative accounts. Using an account with administrative credentials will not reveal possible issues with the security model or access issues in the proposed production environment.
- **Ensure that the test environment is as similar as possible to the production environment.**
  For example, if the customer will use Remote Desktop Connection to access the application, then the testing must be conducted by using Remote Desktop Connection to connect to the system.
- **Insist that the customer execute the testing plan.**

  The customer must test developed features, data migration, and integration features in addition to the testing performed by the consulting team. Otherwise, have the customer sign off that he or she does not intend to perform this testing.

Deployment Phase

The primary deliverable from the Deployment phase is a functioning live system. Activities in this phase prepare the infrastructure, application environment, and end-users for the cutover to the new system. Activities in this phase include the following:

- Preparing Go-Live plans and system test plans.
- Confirming end-user training plans as part of the finalized deployment plan.
- Configuring the live and test environments.
- Performing system testing and load testing using a subset of the customer's data.
- Preparing and delivering end-user training.
- Completing final data migration and validation.
- Completing all Go-Live activities to launch the new system.

The specific activities in the Deployment phase are customized dependant on the project type. This section describes some of the key activities in the Development phase.

You can find the following activities in the Deployment phase:

- Project Planning
- Conduct End User training

- Go-Live
- Execute User Acceptance Testing

Each activity is a characteristic of the Enterprise and Standard project type except Go Live which is related to the Enterprise project type only.

Project Planning

In the Deployment phase, Project Planning activities focus on finalizing the Deployment Plan, which details the critical tasks you must perform to ensure a successful deployment. Project planning also involves keeping the financial spreadsheet for the project up to date, monitoring and tracking the progress of the project against the Project Plan, and making any adjustments required to keep the project aligned to the plan.

This activity includes the following tasks:

- Finalize the Deployment Plan
- Update the Project Plan
- Update Project financial documents

In the Deployment phase, the Project Planning activity does not produce any new deliverables, but ensures that you update the documents listed above.

Conduct End User Training

The purpose of the Conduct End User Training activity is to provide appropriate training for end-users before the project goes live. Appropriate training is a critical factor in a successful implementation.

The following training options are useful in this activity:

- Deliver short, directed sessions that begin with a broad overview and narrow successively to the end-users' defined job tasks.
- Training can be conducted by:
  - The customer's trainers who have attended the Train the Trainer training.
  - Microsoft.
  - An external third party training vendor.

Additional training sessions need to be made available where necessary, either through replication of the first end-user training, or through e-Learning.

It is useful to document that you have delivered training, so it is recommended that a sign-in or attendance document be available during the training session to confirm attendance. At the end of each session, have the users complete an evaluation form to assess the value of the session.

Go-Live

The purpose of the Go-Live activity is to perform the final tasks required to initiate the Microsoft Dynamics solution in the customer's production environment.

In preparation for Go-Live, verify that the following tasks are completed:

- Finalize Microsoft Dynamics solution setup.
- Make backups of the solution environment, the setup files and the solution databases.
- Ensure financial data is current.

The Go-Live activity consists of the following tasks:

- Go-Live:
  - Verify adequacy of the Database Maintenance Plan.
  - Validate replication functionality, if applicable.
  - Close General ledger.
  - Complete final setup.

Microsoft Dynamics Sure Step provides a Go-Live Checklist, which is a useful guiding document for this activity.

Successfully completing this activity will result in the customer signing off on the deployment.

Execute User Acceptance Testing

The purpose of the User Acceptance Testing in the Deployment phase is to thoroughly test the setup and configuration of the system and obtain User Acceptance sign off. This activity focuses on complete end-to-end testing of the Microsoft Dynamics solution to ensure you meet the customer requirements.

This testing activity consists of the following tasks:

- Perform end-to-end system test.
- Evaluate the results of the system test.
- Perform load test to verify how the system and infrastructure responds under various conditions.
- Obtain system sign off.

User acceptance testing is a cross process activity, which also appears in the following cross phase processes:

- Requirements and Configuration
- Data Migration

- Integration and Interfaces
- Custom Code Development

Even after successful user testing, the customer might still request changes to the feature, data migration, or integration process. Evaluate any changes requested beyond those needed to meet the previously established pass criteria.

Deployment Phase: Objectives and Milestones

The purpose of the Deployment phase is to make a successful transition to the new Microsoft Dynamics solution.

The key objectives to achieve during the Deployment phase are:

- Conduct end user training.
- Execute user acceptance testing.
- Go live.

You can track progress through the Deployment phase against the major milestones:

- Training of Trainers complete
- End User Training complete
- Performance Testing complete
- User Acceptance Testing complete
- Production Environment ready
- Final Data Migration complete
- Obtain Complete System Acceptance
- System Go Live

Conduct a review at the end of the Deployment phase to ensure you have achieved all the milestones and provided all the deliverables to the required standard.

Deployment Phase: Deliverables

The primary deliverables from the Deployment phase include all tasks that are required to deploy the new solution to the live environment so that the customer can start to use it in day-to-day business processes.

Although the deliverables for the Deployment phase will vary slightly dependant on the project type, they will include:

- Deployment Plan
- Train-the-Trainer (TTT) Training
- End User Training

- User Acceptance Test Results
- Final Data Migration
- Production Environment Readiness
- Production Operations Guide
- Go-Live Readiness Review and Customer Sign Off
- Cutover to Production

NOTE: *For more information on each deliverable, refer to the appropriate activity in Microsoft Dynamics Sure Step. Use the* ***Locate in Sure Step*** *option in* ***Documents view*** *to find the activity associated with a particular deliverable.*

Deployment Phase: Best Practices

When you perform activities in the Deployment phase, consider the following best practices:

- **When configuring a test environment, copy the configuration from the live environment to ensure that the test environment is identical to the live environment.**

  After data migrations are tested, leave the test environment available for users to access as a sandbox for testing after Go-live.

- **Install the Microsoft Dynamics sample data to give users access to another area for testing and training.**

  Giving users access to the sample data provides them with more knowledge about how Microsoft Dynamics functions beyond the specifics of their own system requirements and frequently helps promote user adoption. Sandbox and Training environments provide an environment in which the user can learn, without being concerned about possible effects on live data.

- **In a rapid implementation scenario, consider performing end-user training before user acceptance testing.**

  End-users can then perform the system tests themselves to reinforce the training they have received.

- **Complete the live data migration as close as possible to the go-live date.**

  This helps reduce the risk of any double entries that might occur if two applications are running concurrently. Note that the final data migration relies heavily on the Microsoft Dynamics go-live and training timelines.

- **Help customers create communications to their employees, vendors, and customers.**
  This communication will describe the new system and prepare everyone for the new production environment.

Operations Phase

The purpose of the Operations phase is to support the customer technically and functionally during the initial Go Live period for the new system. Additionally, you will perform tasks to close the project. At the end of the phase, you transition the project to the customer, and pursue the opportunity to provide on-going support and continued account management.

The specific activities in the Operations phase are customized dependant on the project type. This section describes some of the key activities in the Operations phase.

You can find the following activities in the Operations phase:

- Project Planning
- Provide Post Go Live Support
- Transition of Solution to Support
- Review Deliverables against SOW and Agreed Changes
- Conduct Performance Tuning and Optimization

Only Project Planning and Transition of Solution to support are characteristics of both the Enterprise and Standard project type . All other activities within the Operations phase are included in the Enterprise project type only.

Project Planning

The purpose of the Project Planning activity in the Operations phase is to close the project after Go-Live and complete final project tasks. You want to make sure that you delivered as promised, and that the customer is satisfied with the project outcome. This activity consists of the following tasks:

- Finalize the project plan to accurately reflect the timeline, resources and milestones completed.

- Complete the final project activities required to complete a successful closure of the project, such as:
  - Clear any pending items that are discovered before, during, and after Go-Live.
  - Finish any documentation promised to the customer in the statement of work.
  - Determine the need for and conducting additional end-user training, if it is required.
  - Perform a final knowledge transfer to the customer.
  - Document lessons learned.

- Finalize the project financial spreadsheet to accurately reflect the financial status of the project.

The Project Planning activity in the Operations phase produces four key deliverables:

- The Project Status report
- The Project Closeout report
- Project Closeout meeting
- Formal Customer Project Acceptance

Provide Post Go Live Support

The purpose of the Post Go Live Support activity is to provide additional support to assist the customer in using the new Microsoft Dynamics solution. During the Post Go Live activity, the customer is educated on how to use the resources available effectively.

This activity consists of the following tasks:

- Educate the customer.
- Record, triage and manage the resolution of reported issues.
- Monitor the issue resolution process.

There are two methods the project team can use to offer post Go Live support:

- On-site support, where there is a project team member available at the customer site for an agreed duration after Go Live.
- Remote support which is offered by e-mail, phone, or other remote mechanism.

Transition of Solution to Support

The purpose of the Transition Solution to Support activity is to hand over the solution formally from the project team to the on-going support team.

The system is ready for the final sign off. During this time, the customer is using the Microsoft Dynamics solution in the day-to-day activities of the customer, and any parallel Operations with the customer's old system are discontinued. You have completed closing activities and have completed the post live support.

Sign off by the customer's business decision maker or the executive sponsor will indicate the project is finished.

Review Deliverables Against SOW

The purpose of the Review Deliverables against SOW activity is to conduct a final review, comparing the project deliverables with the SOW. This activity is performed by the implementation team, consultants and customers after Go-Live, and consists of the following tasks:

- Conducting the project review meeting. Review the successes and failures of the project and document the customer's issues and concerns.
- Handing off the project to your support and sales teams. The process of selling future business starts at this point, and continues in the on-going account management activity.

At the end of the review, the project deliverables must be completed and ready to hand off to the customer.

Conduct Performance Tuning and Optimization

The purpose of this activity is to tune the solution for optimum performance and to carry out capacity planning as the infrastructure requirements increase through the operational life of the solution.

This activity includes the following tasks:

- A performance optimization task scheduled after go live, which:
  - Ensures that all performance best practices are correctly implemented.
  - Monitors the resource utilization of all components of the solution under actual production load. This allows you to identify bottlenecks and undertake capacity planning to extend the infrastructure if required.
  - Provides a performance baseline for future optimization tasks.

- Optimization tasks carried out proactively on a regular basis. Future optimization tasks need to focus on the changes to the performance of the solution. Typically this includes:
  - Applying updated hot fixes and service packs (after testing in a suitable environment).
  - Updating database statistics and indices and data file disk layout.
  - Archiving old data from large tables.
  - Performing a code review of custom modifications.

Each performance optimization review documents pre and post review performance, including the response times and resource utilization of each component.

Operations Phase: Objectives and Milestones

The purpose of the Operations phase is to close the project, and make the transition to providing post implementation support to the customer.

The key objectives to achieve during the Operations phase are:

- Close the project.
- Transition the solution to the customer.
- Transition the knowledge required to use the solution to the customer.

Track progress through the Operations phase against the major milestones:

- Post Go-Live Support complete.
- Transition of solution to Support complete.

Conduct a review at the end of the Operations phase to ensure you have achieved all the milestones and provided all the deliverables to the required standard.

Operations Phase: Deliverables

The deliverables in the Operations phase relate to closing and reviewing the project. You may also have the opportunity to provide the customer with other deliverables related to cultivating an on-going relationship.

Although the deliverables for the Operations phase will vary slightly dependant on the project type, they will include:

- Project Closure Report
- Project Deliverables

***NOTE**: For more information on each deliverable, refer to the appropriate activity in Microsoft Dynamics Sure Step. Use the **Locate in Sure Step** option in **Documents view** to find the activity associated with a particular deliverable.*

Operations Phase: Best Practices

When you perform activities in the Operations phase, consider the following best practices:

- **Set up a virtual environment that closely resembles the customer's Microsoft Dynamics environment to help your company provide support.**

  Your company's support staff can use the virtual environment to help them troubleshoot customer issues.

- **When preparing the final project documentation, include the source code for all customizations and application development, system administration information, and training information or materials.**

  Use this information to support the fact that you have met all success criteria outlined in the Statement of Work.

- **Be sure to have a support agreement and guidelines in place so that you can formally close the implementation project and then start the on-going support.**
- **Have your account executive or business development manager conduct the project review meeting with the customer.**

  In this manner, fair and honest feedback about the project and project team can occur without anyone feeling uncomfortable. Assuming that all went well, the salesperson can also inquire about future work with the customer.

- **Reach agreement with the customer about how much post-live support you will provide.**

  For example, for Microsoft Dynamics ERP solutions, make sure that month-end, quarter-end, and year-end processes are built into the support contract or are specifically excluded.

Sure Step Methodology Offerings

The offerings defined in Microsoft Dynamics Sure Step support a variety of possible implementation scenarios. Offerings correspond to different phases or a combination of phases in Microsoft Dynamics Sure Step. They allow a partner to select an implementation approach that best meets the customer's specific needs. Offerings define different ways to sell and deliver an implementation engagement.

Microsoft Dynamics Sure Step supports the following offerings:

- Decision Accelerator Offerings
- Standard Implementation Project
- Enterprise Implementation Project
- Rapid Implementation Project
- Agile Implementation Project
- Upgrade Project
- Optimization Offerings

Decision Accelerator Offerings

The Diagnostic phase contains a number of activities designed to help identify the customer's requirements, the scope of the project, and costing information for the Project Charter. The Diagnostic phase includes seven Decision Accelerators, which aim to assist the customer in the decision making process.

The seven Sure Step Decision Accelerators included in the Diagnostic phase are:

- **Requirements and Process Review**: Review current processes to determine the requirements for the future state.
- **Fit Gap and Solution Blueprint**: Determine degree of fit with the Microsoft Dynamics solution.
- **Proof of Concept**: Validate requirements with customer's sample data.
- **Architecture Assessment**: Confirm the architectural design for the Microsoft Dynamics solution.
- **Scoping Assessment**: Estimate high-level cost and resource plan to deploy the Microsoft Dynamics solution.
- **Business Case**: Prepare a business case for implementation of the Microsoft Dynamics solution.
- **Upgrade Assessment**: Review current release of the Microsoft Dynamics solution, to ascertain the best approach to Upgrade to a subsequent release.

Working through each Decision Accelerator offering produces a corresponding deliverable for the customer, detailing the information given and the decisions taken. One or more Decision Accelerators can be used, dependant on the customer's environment.

Implementation Project Types

Microsoft Dynamics Sure Step offers five project types, each designed for a different implementation scenario. You can create your own Microsoft Dynamics Sure Step project based on any of these project types and customize that project to accurately reflect the requirements of a particular implementation.

The following table gives a brief description of each project type:

Project Type	Description
Standard	The Standard project type is suitable for single site implementations, or multiple sites where each site is autonomous. Standard projects can include customer specific features, complex customizations, complex data migration scenarios, and large numbers of users.
Enterprise	The Enterprise project type is suitable for global or multiple site implementations, where each site must be integrated into a core solution. Enterprise projects can include customer specific features, complex customizations, complex data migration scenarios, large numbers of users, and the design and development of custom interfaces or integrations to third-party sources.
Rapid	The Rapid project type uses an iterative approach to development resulting in a collaborative and responsive solution development process.
Agile	The Agile project type is suitable for single site flexible and collaborative implementations requiring specific features and moderate-to-complex customizations.

The remaining project type is designed for Microsoft Dynamics upgrades:

Project Type	Description
Upgrade	The Upgrade project type is suitable for managing upgrades to a customer's existing Microsoft Dynamics software where additional requirements and customizations need to be incorporated.

***NOTE**: For more information on each project type, refer to Implementation Projects in Chapter 5: Implementation Scenarios.*

The Standard, Rapid, Enterprise, and Upgrade project types include all phases. The Agile project type does not have any distinct phases for Analysis thru Development – it does include Development and Operation phases however.

Optimization Offerings

Microsoft Dynamics Sure Step also provides seven optimization offerings designed to help reduce risk and improve overall customer satisfaction. These optimization offerings are particularly useful for large, complex implementations, providing guidance for functional and technical design, and proactive quality management. Each is an umbrella offering of activities that can be both retrospective and proactive.

The seven optimization offerings are:

- **Architecture Review**: Reviews the overall architecture and infrastructure to meet the customer's business requirements.
- **Design Review**: Reviews the design of the customizations and integration between Microsoft Dynamics AX and Microsoft Dynamics CRM with existing systems based on various integration scenarios.
- **Customization Review**: Reviews the custom code to improve performance, increase stability, improve security, and reduce operating and upgrade costs.
- **Health Check**: Delivers proactive problem identification and resolution of issues for selected components of the implementation.
- **Upgrade Review**: Reviews and provides oversight of the customer's upgrade solution including design, customizations, integrations physical infrastructure and architecture throughout the upgrade project.
- **Project Governance and Delivery Review**: Provides customers with proactive project lifecycle governance and delivery execution support for the implementation project.
- **Performance Review**: Reviews performance impact of the design and code based on guidance, tools, methods, and best practices.

Working through each Optimization offering produces a corresponding review report for the customer, detailing the findings and recommendations.

Sure Step Methodology Offerings: Best Practices

When thinking about how to position and sell Sure Step Methodology offerings, consider the following best practices:

- **Illustrate for a customer how risk is reduced as projects move through the implementation methodology.** A customer considering an implementation project can perceive a great deal of risk because there are many unknowns. By completing one or more Decision Accelerators before committing to a particular implementation project, the risks that the customer perceives are reduced. Because they are deployed as part of the sales cycle, the results of the Decision Accelerators typically influence the type of project the customer chooses to implement.

In the Analysis phase, show the customer how they can further reduce risk by performing analysis that is more detailed.

- **Show customers examples of the deliverables that are produced to illustrate the work that is performed in different offerings.** This is especially useful to help customers understand the work done in the Decision Accelerator offerings. You can also show the customer how the deliverables created in these offerings are used in the later phases of the implementation offerings.

Summary

The phases in Microsoft Dynamics Sure Step define a systematic approach to implementing Microsoft Dynamics solutions. Deliverables result from the work performed in the phase. These deliverables provide the necessary input into the next step of the implementation process. A good way to learn the implementation methodology is to track or list all the deliverables that result from each phase. It is an effective way to quickly view and track all the work that happens in an implementation project.

The offerings supported by Sure Step Methodology let you customize the methodology in different ways to meet specific customer needs. You can also mix and match implementation phases to meet your customer's needs.

Finally, the best way to learn this methodology for implementing Microsoft Dynamics products is to use Microsoft Dynamics Sure Step and take advantage of its many tools, templates, and project management features.

Test Your Knowledge

Test your knowledge with the following questions.

1. Put the following phases into the sequence that is supported by Microsoft Dynamics Sure Step.

   Step:

   _____: Development

   _____: Analysis

   _____: Deployment

   _____: Operations

   _____: Design

   _____: Diagnostic

2. In the following list, match the deliverables with the implementation phase in which the deliverable is created.

_____ 1. Diagnostic _____ 2. Analysis _____ 3. Design _____ 4. Development _____ 5. Deployment _____ 6. Operations	a. Process Test Scenarios b. Training guides and documentation c. Go-Live Checklist d. Scoping Assessment Report e. Project Close-Out Report f. Project Charter

3. Match each of the following descriptions with the appropriate implementation offering.

_____ 1. Customer desires an in-depth review and gap/fit analysis for selected business processes. _____ 2. A customer has performance issues with an existing Microsoft Dynamics solution. _____ 3. A customer has a single-site flexible and collaborative implementation with specific features. _____ 4. A customer is interested in implementing a Microsoft Dynamics solution but has no formal requirements. _____ 5. A customer wants to take advantage of the latest features in the newest version of Microsoft Dynamics CRM. _____ 6. After completing the Diagnostic phase, a customer with complex migration requirements wants to move forward with the implementation project.	a. Agile b. Standard c. Diagnostic d. Optimization e. Enterprise f. Upgrade

4. What phases are included in the Standard Implementation offering? Select all that apply.

   ( ) Diagnostic

   ( ) Analysis

   ( ) Deployment

   ( ) Operations

Lab 2.1 - Using Microsoft Dynamics Sure Step

In this lab, you will complete the following tasks:

- Determine what phase the current project is in.
- Determine the offering from Microsoft Dynamics Sure Step that best meets Fabrikam's requirements.
- Determine what deliverables must be completed before moving to the next phase.
- Determine the contract type you will propose to the customer.
- Create a list of activities required to Go-Live with this implementation project.

Use Microsoft Dynamics Sure Step installed on your computer to complete the exercises in this lab.

Scenario

You are a project manager for Contoso, Ltd., a Microsoft Dynamics partner that is well known as an early user of the Microsoft Dynamics Sure Step Methodology. Six months ago, your sales team participated in a competitive proposal for a financial system implementation at a local company called Fabrikam, Inc.

Fabrikam is a locally owned and operated manufacturer of custom furniture, founded thirty years ago by the current CEO, Wilson Pais. They employ over 200 people.

Fabrikam wants to replace their aging accounting system, FastBooks, with a more secure and reliable solution. Their existing solution suffers from old technology and unreliable controls to such an extent that Fabrikam's auditors included special comments on the state of the accounting system. Additional concerns with FastBooks include end-user access, multiuser conflicts, and the enforcement of Generally Accepted Accounting Principles (GAAP). The last point is especially a problem since the auditors found a large number of imbalanced accounting transactions within FastBooks.

Your proposal was well received by Fabrikam, however, another partner, A. Datum, Inc., won the business based on lower cost estimates and shorter deployment timeframes.

You recently received a call from the CEO of Fabrikam. He explained his dissatisfaction with A. Datum, and asked you to take over the project. Fabrikam's specific complaints are focused on A. Datum's project management and communication shortfalls. Fabrikam was led to believe the implementation was going to be straightforward and simple, however, nothing was delivered on time and no milestones were met. Only under the threat of a lawsuit was Fabrikam able to obtain a refund of 90,000 United States Dollars (USD) to use toward the project. Because of other financial pressures, Fabrikam cannot allocate any additional funds to this project.

A. Datum turned over all project documentation and issued the refund check in exchange for a full release executed by Fabrikam. No additional involvement or communication with A. Datum is expected. The existing project documentation indicates that A. Datum tried to salvage the engagement by applying some methodological principles partway through the project. The documents appear to be accurate but incomplete.

Your review of the documents and conversations with Fabrikam personnel indicate the existing infrastructure is ready for the new Microsoft Dynamics system. Additionally, the completed business process analysis indicates few complex requirements or gaps.

Lab Discussion

In this classroom discussion, you will discuss and compare your answers to the lab questions.

- What offering best meets Fabrikam's business needs?
- What is the state of the project? Which phase?
- What deliverables must you complete before the project moves forward?
- What activities are next?

Before You Begin

To prepare for this lab, you will need to copy the Lab files provided to your computer. If you have already copied the Lab files for a previous lab, it is not necessary to do this again.

To extract the files:

1. Double-click Labfiles.exe.
2. This will extract the files into C:\Lab files.

Challenge Yourself!

Use Microsoft Dynamics Sure Step to bring this project under control and produce successful results for Fabrikam. Review the documents that A. Datum delivered and then complete the following tasks:

1. Review the A. Datum documents to evaluate the completed work and determine the best path forward.
2. Determine the current phase for the project.
3. Determine the best offering for the project.
4. Determine the deliverables you must complete before moving to the next phase.
5. List the activities required to Go-Live.

***NOTE**: The documents for this lab are located in the Lab Files folder that you copied to the desktop of your computer.*

Step 1: Review the A. Datum documents to evaluate the completed work and determine the best path forward.

1. Start Microsoft Dynamics Sure Step.
2. Expand the tree structure to display the Diagnostic phase.
3. Compare the A. Datum documents with the activities listed in the Diagnostic phase to help determine the outstanding Diagnostic work.

Step 2: Determine the current phase for the project.

1. In Microsoft Dynamics Sure Step, display the Analysis phase.
2. Using the documents and Microsoft Dynamics Sure Step, complete the following table.

If you find a file that contains a deliverable, then indicate this in the **Present?** column. Enter the name of the file that contains the deliverable in the **File name** column, and indicate whether it is complete in the **Complete?** column. Not all deliverables are present and some deliverables can exist within the same file.

Deliverable	Present? (Yes/No)	File name	Complete? (Yes/No)
Proposal			
Statement of Work			
Initial WBS			
Estimation Worksheet			
Initial Project Plan			
List of Identified Business Processes			

Deliverable	Present? (Yes/No)	File name	Complete? (Yes/No)
Initial Gap/Fit Analysis			
Initial Gap Resolutions			
Detailed Gap/Fit Analysis			
Detailed Gap Resolution			
Initial Description of Interfaces			
Data Migration Scope			
Data Migration Analysis			

3. Based on documents and the activities described in the Diagnostic and Analysis phases of Microsoft Dynamics Sure Step, in which phase is this project?

_____

_____

_____

Step 3: Determine the best offering for the project.

1. In Microsoft Dynamics Sure Step, review the description of the following offerings and compare them to the requirements of Fabrikam's project.
   - Standard Project Type
   - Upgrade Project Type
   - Rapid Implementation

***HINT**: Refer to the Sales Management discipline in the Project Management section.*

---

2. Which offering best meets the requirements of this project? Why is it the best offering?

_____

_____

_____

Step 4: Determine the deliverables you must complete before moving to the next phase.

1. In Microsoft Dynamics Sure Step, review the relevant resources in Additional Resources.
2. Review the deliverables that result from the phase at which you think the project is currently in.
3. Based on your assessment of the project status and your recommended offering, what deliverables and documents must be completed before moving to the next phase?

_____

_____

_____

_____

_____

_____

_____

_____

Step 5: List the activities required to Go-Live.

1. Based on the current phase of the project and the offering and contract type that you proposed, use Microsoft Dynamics Sure Step to determine the activities required to Go-Live with the new system.

2. List these activities in the space provided.

_____

_____

_____

_____

_____

_____

_____

_____

_____

Quick Interaction: Lessons Learned

Take a moment and write down three key points you have learned from this chapter

1.

2.

3.

Solutions

Test Your Knowledge

1. Put the following phases into the sequence that is supported by Microsoft Dynamics Sure Step.

   Step:

   __4__: Development

   __2__: Analysis

   __5__: Deployment

   __6__: Operations

   __3__: Design

   __1__: Diagnostic

2. In the following list, match the deliverables with the implementation phase in which the deliverable is created.

__d__ 1. Diagnostic __f__ 2. Analysis __a__ 3. Design __b__ 4. Development __c__ 5. Deployment __e__ 6. Operations	a. Process Test Scenarios b. Training guides and documentation c. Go-Live Checklist d. Scoping Assessment Report e. Project Close-Out Report f. Project Charter

3. Match each of the following descriptions with the appropriate implementation offering.

__b__ 1. Customer desires an in-depth review and gap/fit analysis for selected business processes. __d__ 2. A customer has performance issues with an existing Microsoft Dynamics solution. __a__ 3. A customer has a single-site flexible and collaborative implementation with specific features. __c__ 4. A customer is interested in implementing a Microsoft Dynamics solution but has no formal requirements. __f__ 5. A customer wants to take advantage of the latest features in the newest version of Microsoft Dynamics CRM. __e__ 6. After completing the Diagnostic phase, a customer with complex migration requirements wants to move forward with the implementation project.	a. Agile b. Standard c. Diagnostic d. Optimization e. Enterprise f. Upgrade

4. What phases are included in the Standard Implementation offering? Select all that apply.

( ) Diagnostic

(√) Analysis

(√) Deployment

(√) Operations