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Microsoft Dynamics Sure Step 2012

Supplementary Training Material

Version 5.0

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Course content

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Module 0 – Course Content and Plan

Objectives

The key objectives of this course are to enable you to understand the benefits and value of Dynamics Sure Step and to understand how the Sure Step method can be used in Dynamics projects.

What this course covers

- The Sure Step Methodology

- Components of Sure Step

- Navigating and Using the Sure Step tool

- Document Flow within Sure Step

What this course does not cover

- How to manage a project

- How to plan a project

- How to estimate a project

- How to implement Dynamics

- How to customise Dynamics Sure Step

- How to adopt Dynamics Sure Step in your organisation

- Understanding of each document template in the Sure Step tool

Course Plan

This course takes two days to complete and prepares for the Managing Microsoft Dynamics Implementations certification exam

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Course Modules

1. Introduction to Projects

2. Introduction to Sure Step

3. Project Planning and Initiation

4. Delivering Decision Accelerators

5. Proposal Generation

6. Project Management Library

7. Waterfall Delivery

8. Agile Delivery

9. Deployment Phase

10. Operations Phase

11. Rapid Project Type

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Resources

Delegate PC

Your PC is running Windows 2008. The password is **Pa$$w0rd**

On the desktop of the PC is a shortcut to the SureStep tool.

Virtual Machines

The course employs a Virtual Machines running on Hyper-V:

- Sure Step Client. This is a Windows 7 computer with the Sure Step tool already installed

You start virtual machines by starting Hyper-V Manager and right-clicking on the virtual machine and selecting Start.

All passwords are **Pa$$w0rd**

Courseware

This course uses the Microsoft Official Curriculum 80450A: Delivering Microsoft Dynamics Solutions with Sure Step. This manual provides supplementary material to the Microsoft courseware.

SkillPipe

The Microsoft electronic courseware is accessed via Skillpipe at **https://skillpipe.courseware-marketplace.com/reader/en-GB**

Web Sites

You will need access to the following websites for this course.

Windows Live: If you do not have a Windows Live account you need to sign up via https://signup.live.com

Skillpipe: https://skillpipe.courseware-marketplace.com/reader/en-GB. You will need to register and confirm you email address.

Microsoft Dynamics PartnerSource: https://mbs.microsoft.com/PartnerSource. You may need to request access from your organisation's administrator

Or, Microsoft Dynamics CustomerSource: https://mbs.microsoft.com/CustomerSource. You may need to request access from your organisation's administrator

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e-Learning

Dynamics Learning Portal https://mbspartner.microsoft.com

Microsoft Dynamics e-Learning https://itacademy.microsoft.com

Introduction to Sure Step http://go.microsoft.com/fwlink/?LinkID=182558&clcid=0x409

Books

Microsoft Dynamics Sure Step https://www.packtpub.com/microsoft-dynamics-sure-step-2010/book

Customer Success with Microsoft Dynamics Sure Step https://www.packtpub.com/application-development/customer-success-microsoft-dynamics-sure-step

SureStep Online

The SureStep application will no longer be updated and the SureStep is now online at https://mbs2.microsoft.com/Surestep

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Exam

The Managing Microsoft Dynamics Implementations exam, MB5-705, is a Microsoft certification exam and is taken online in one of the testing rooms off the Firebrand reception and refreshments area.

Registation

You will need to register with Pearson Vue via https://www.microsoft.com/learning. You will need to create a profile. Firebrand will register you for the exam.

Id

You will need two forms of id; one with a government issued photo id e.g., a passport or driving license and the other with your signature e.g., a debit/credit card.

Exam Format

The exam has 48 multiple choice questions and you are allowed 90 minutes.

Exam Preparation

Your instructor may provide access to a Sure Step Self-Test tool. You can use this self-test to prepare for the exam.

Skills Measured

The exam is a test of your knowledge of the Sure Step method, the Sure Step tool, and general project management principles.

Explain projects and project management (10-15 percent)

- Define a project
- Explain project lifecycle planning and pitfalls
- Define project management
- Describe agile and waterfall models

Define Microsoft Dynamics Sure Step (10-15 percent)

- Describe Sure Step tools and templates
- Create a project repository

Initiate a project and prepare for the diagnostic phase (10-15 percent)

- Use solution envisioning and describe the diagnostics phase
- Explain the use of Decision Accelerators

Deliver Decision Accelerators (10-15 percent)

- Complete a requirements and process review
- Complete a fit gap and solution blueprint

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Generate a proposal and final licensing and services agreements (10-15 percent)

- Describe the proposal generation process
- Describe the steps after proposal generation

Describe project management disciplines (10-15 percent)

- Manage risk
- Manage quality
- Manage communication
- Manage scope
- Manage resources

Use waterfall delivery (10-15 percent)

- Manage the analysis phase
- Manage the design phase
- Manage the development phase

Use agile delivery (10-15 percent)

- Prepare for agile delivery
- Run an agile project

Manage the deployment and operations phases (10-15 percent)

- Manage deployment activities
- Perform testing
- Go-live with the project
- Manage operation activities
- Close the project

Feedback

You will need to complete two sets of feedback at the end of the course. One is for Firebrand and is available on your PC; http://www.firebrandtraining.co.uk/feedback. The other is for Microsoft and your instructor will give you the link to the KnowledgeAdvisors MetricsThatMatter website that Microsoft uses for feedback.

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Exercises

Exercise 0A

In this exercise you will find the Sure Step area in PartnerSource/CustomerSource

1. Login to PartnerSource or CustomerSource

2. Search for SureStep

Module 1 – Introduction to Projects

Objectives

The key objectives of this module is to understand why Microsoft developed Sure Step and how Sure Step fits in the Sales->Delivery->Support model.

This this module we will cover:

- Why Microsoft developed Dynamics Sure Step

- Projects and Project Management

- Selling Project Management

Microsoft Dynamics Sure Step

Why Microsoft developed Sure Step

Microsoft believes that Microsoft Dynamics Partners main failing is in the delivery of Dynamics solutions.

The highest root cause of Dynamics customer escalations to Microsoft are not product related but implementation issues.

How Microsoft developed Sure Step

Dynamics Sure Step has been developed over a number of years initially within Microsoft Consulting Services and then from feedback from partners who have adopted Sure Step.

Projects and Sure Step

Dynamics Sure Step is not just focussed on implementation but on the selling and handing over to support.

Microsoft Partner Network

The Managing Microsoft Dynamics Implementations exam is a requirement for the CRM and ERP competencies within the Microsoft Partner Network.

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Projects and Project Management

Labs

Lab 1.1: What is a Project?

List characteristics of a Project

- _____
- _____
- _____
- _____
- _____
- _____
- _____
- _____
- _____
- _____

Lab 1.2: What causes Projects to fail or succeed?

List factors that Influence Projects

- _____
- _____
- _____
- _____
- _____
- _____
- _____
- _____

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Lab 1.3: List Project Management Best Practices

List three best practices that are important for successful delivery

- _____

- _____

- _____

Selling Project Management

There are many issues with selling time for project management:

- Project Managers are expensive

- Project Management is hard to sell

- Customers do not want to pay

    - Project Management (along with Training) is first thing to cut!

Still have do Project Management anyway someway somehow

Sure Step helps to sell Project Management as it shows the value of the method and the Project Manager role.

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Answers

Lab 1.1: What is a Project?

A Project is/has:

- <u>Temporary</u>; it has a defined beginning <u>and</u> end
- <u>Unique</u>
- Scope
- Objectives
- Measurable
- Planning
- Financials
- Resources
- Control
- Phases
- Profit
- …

Lab 1.2: What causes Projects to fail or succeed?

List factors that Influence Projects

- Scope
- Budget
- Time
- Resources
- Perception
- Quality
- Communication
- …

Lab 1.3: List Project Management Best Practices

List three best practices that are important for successful delivery

- Methodical approach
- Enforce Process and Control
- Define Deliverables
- Obtain Sign Offs
-
- …

Module 2 – Introduction to Sure Step

Sure Step Diagram

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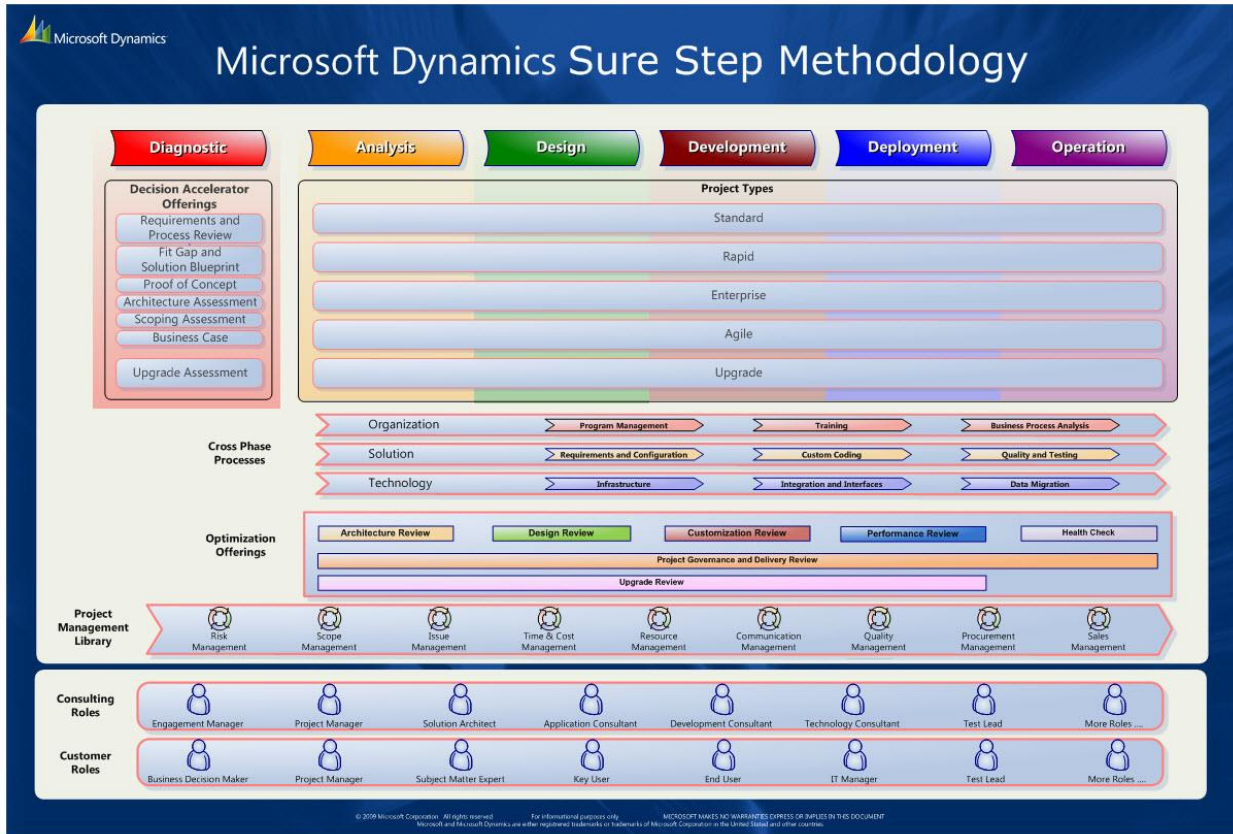
Exercises

Exercise 2A

List the Cross Phase Process Ids for Training for a Standard Project

Under which Project Management Discipline can Change Requests be found and in which phases (list the Process Ids) are change requests included on an Enterprise Project

Which Diagnostic Offerings are recommended to be completed before a Scoping Assessment Decision Accelerator?

Module 3 – Project Planning and Initiation

Objectives

The key objectives of this module are to:

- Understand Why and When Diagnostic Phase is used

- How to use the Diagnostic Phase

- Overview of the steps and processes in the Diagnostic Phase

SureStep 2012

The Diagnostic phase has been renamed as Solution Envisioning.

Why

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.
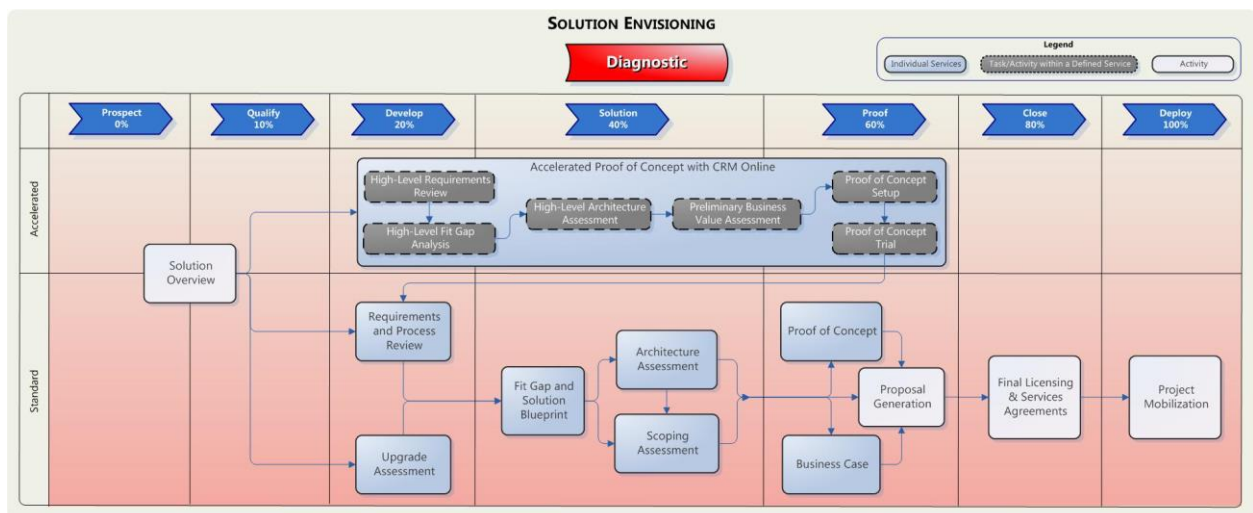
How

The Diagnostic is executed using Decision Accelerators:

- Value to customer

- Reusable for customer

- <u>Due diligence</u> for customer AND partner

- Reduce risk for customer

- Seven Different Accelerators

- <u>Adaptable Value Proposition</u>

- If generate value then can invoice for it!

- Do not sell as pre-implementation package

Overview of Activities

The Diagnostic phase consists of the following activities:

- Diagnostic preparation

    o Sales Documents
    o Knowledge Transfer from Sales
    o Decide which Decision Accelerators to use

- Execute Decision Accelerators:

    o Requirements and process review
    o Upgrade Assessment
    o Fit Gap and solution blueprint
    o Architecture Assessment
    o Scoping Assessment
    o Accelerated Proof of Concept with CRM Online
    o Proof of Concept
    o Business Case

- Proposal Generation

    o Choose Project Type
    o High Level Project Plan
    o Project Charter
        ▪ Conclusions from DAs
        ▪ Objectives
        ▪ Key Success Factors
        ▪ Benefits

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- Scope
- How manage project
- Stakeholders, roles, responsibilities
- Align Teams (internal and client)

- Final Licensing and Services Agreement

  o Budgetary Estimate of Costs
  o Statement of Work

Deliverables

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

Best Practice

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.

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Class Exercises

Exercise 3A

Decide which Decision Accelerators to use

Your instructor will provide example opportunities and you will choose the Decision Accelerator(s)

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Module 4 – Delivering Decision Accelerators

This module consists entirely of labs

Module 5 – Proposal Generation

This module focuses on the post decision accelerator activities i.e., Project Charter and Statement of Work

Extended RACI Matrix

R - Responsible, implying the main responsibility in doing or delivering effort and skill.

A - Accountable, implying management (overrides R when both are implied).

C - Consultative, implying assistance (both active and advisory).

I - Informed, implying a requirement of the one responsible to report on the task.

V - Verifying, implying a check against the defined scope and conditions of quality standards.

S - Signing-off, implying the actions of review, validation, and acceptance.

Class Exercises

Exercise 5A

Project Type Selection

Your instructor will provide example project criteria and you will choose the Project Type

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Module 6 – Project Management Library

Objectives

The key objectives of this module are to understand the following in Sure Step:

- Risks, Issues and Changes

- Issue Management

- Risk Management

- Scope Management

- Project Monitoring

- Project Status Reporting

- Consultant Status Reporting

- Project Performance Reporting

- Tollgate Review

- Conditions of Satisfaction (CoS)

Risks, Issues and Changes

Definitions

Risks are potential or **future** events with uncertainty that could affect the project.

Issues are **actual** problems arising during the project that could affect progress of the project.

Changes are issues and gaps that alter the **scope** of the project.

Risk 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, analysing and responding to project risks.

Sure Step provides

- Risk Checklist in Excel

- Risk Identification Checklist in Word

- Example Risk Register

These include typical risks for projects.

You should develop mitigation responses for each risk.

The following table shows the typical risk response strategies for negative risks, or threats.

Strategy	Remarks
Avoid	Proactively avoid the occurrence of a negative event, for example by changing the schedule, or project plans.
Mitigate	If avoiding is not possible, try to reduce the probability and impact of a risk. For example, you may apply less complex processes, perform more tests, or relax time, cost, or scope constraints.
Transfer	Shift the risk to a third-party that takes responsibility for it, such as an insurance company or a subcontractor
Accept	Acknowledge a risk, but take no proactive steps. This might even be the best response, if the impact for the project is low or if no suitable alternatives are available to avoid, reduce, or transfer the risk. This strategy may be passive (take no action) or active (allocate a contingency reserve).

For positive risks, or opportunities, the strategies are slightly different. The following table shows typical opportunity strategies.

Strategy	Remarks
Exploit	Similar to avoiding a negative risk, take proactive steps to guarantee the occurrence of a positive event.
Enhance	Similar to mitigation for negative risks, take proactive steps to increase the probability or impact of an opportunity.
Share	Similar to transfer, allocate ownership to a third-party who has more experience or stronger know-how.
Accept	Finally, if you cannot exploit, enhance, or share a risk, simply acknowledge an opportunity, but take no proactive steps to respond to it.

Quality Management

Quality Management covers both Quality Assurance and Quality Control

Quality Assurance is concerned with "how to perform" the project whereas Quality Control is concerned with deliverables.

Tollgate Review

A Tollgate Review is conducted at the end of each phase in the project lifecycle. This review is a project quality element and represents a necessary quality stop at the end of each phase before the transition to the next phase.

The tendency to quickly slip into the next phase of a project as the desire to keep the team moving forward often compromises the original standards set for the completion of a particular phase. It is often believed that missed deliverables can be completed by running tasks in parallel, or asking for a

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few extra hours from the team. Eventually however, interdependencies between activities create a bottleneck, where so many activities rely on an incomplete task from a previous phase. This causes the entire project to become bogged down in repeated missed deliverables as delays exponentially multiply.

The Tollgate Review presentation is prepared by the Project Manager. It is presented to the customer at the end of the phase, with the core project team in attendance. The core project team includes the project leads, executive sponsor, and key users. The Tollgate Review highlights the current health of the project, key milestones achieved, key deliverables completed, project level issues and risks, and the conditions of satisfaction assessment.

The objective of this review is to ensure that the project team is aligned with the progress of the project and that the team establishes an action plan to address the issues and risks for the next phase.

Conditions of Satisfaction (CoS)

Conditions of Satisfaction are the measures of project success and goals that allow the implementation partner to clearly demonstrate success of the process.

CoS are identified at the beginning of the project and are documented within the Project Charter.

CoS are to be signed off as soon as they are met or at Tollgate Review.

CoS are key to helping the closure of the project.

Communication Management

Kick off Meetings

Kick-off meetings are used to align projects. The number and composition will vary based on project type/culture, but can include:

- Executive Kick Off: this is between the vendor and the customer's teams and does not include the project team members. This meeting begins the detailed planning of the project.
- Project Kick Off (Internal): this provides a high level overview of the project vision and objectives. The project team members meet internally before officially starting the execution of the project.
- Project Kick Off (Customer): this is between the vendor and the customer's project team members and project managers, which officially starts the execution of the project

A Kick Off meeting is the opportunity to meet with all project stakeholders and to overview the project vision, objectives, and environment. The key input to the kick off meetings is the Project Charter.

Project Monitoring

Project Monitoring is a recurring activity executed in all phases of the project. In Project Monitoring we monitor and track progress against the plan and update the plan.

In the Project Management Library you can find details on Ongoing Time and Cost Management.

Project Status Reporting

Project Status Reporting provides the customer with a weekly summary of the project consisting of the accomplishments, decisions, planned work, risks, and issues.

A status report is a document prepared by the Project Manager on a weekly basis using the information provided through the consultant status reports and the updated project plan.

The status report depicts the following information:

- Overall health status of the project

- Tasks accomplished for this week

- Decisions made

- Tasks planned for next week

- Issues and risks

- Vacation schedules

- Forecast and/or actual hours by consultant

Consultant Status Reporting

Provides the project manager with a weekly summary from each consultant:

- Decision Made and Work Completed this Period

- Work Planned for Next Period

- Key Risks, Issues, Decisions or Actions Required

- Scheduling Time Off

Feeds into Project Status Report

Project Performance Reporting

Project Performance Reporting is a recurring activity under Communications Management in project phases. Project Performance Reporting collects and distributes performance information, including:

- Status reporting

- Progress measurement

- Forecasting

Generally, this performance information includes how resources are being used to achieve project objectives. Performance reporting should generally provide information on scope, schedule, cost,

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and quality. Many projects also require information on risk and procurement. Reports may be prepared comprehensively or on an exception basis.

Issue Management

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.

Scope Management

In Scope Management you

- Manage project scope

- Document, analyse, and approve scope changes

Sure Step provides example:

- Change Request Form and Log

Review and Approve Change Requests

- Review with team members

- Review with customer

- Finalise in to project plan

- Inform team members of new schedule

Note: Referred to as Scope in Project Management Library but Proposal Management in Project Phases.

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Exercises

Exercise 6A

Review the Risk Identification Checklist

Exercise 6B

List the tools used in Quality Control

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Module 7 – Waterfall Delivery

Contents

This module describes the Analysis, Design and Development phases of a Waterfall project.

Overview of 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.

Objectives of Analysis Phase

- 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

Analysis Phase Activities

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

Communication Management

Sure Step is very communications heavy and at the start of the implementation you need to start communicating again.

There may have been a gap between Diagnostic and the start of Analysis and you need to check if the project is still aligned. This is achieved through Kick-off meetings. The number and composition will vary based on project type/culture, but can include:

- Executive Kick Off: this is between the vendor and the customer's teams and does not include the project team members. This meeting begins the detailed planning of the project.
- Project Kick Off (Internal): this provides a high level overview of the project vision and objectives. The project team members meet internally before officially starting the execution of the project.
- Project Kick Off (Customer): this is between the vendor and the customer's project team members and project managers, which officially starts the execution of the project

A Kick Off meeting is the opportunity to meet with all project stakeholders and to overview the project vision, objectives, and environment. The key input to the kick off meetings is the Project Charter.

Project Planning

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

The Project Planning activity produces two deliverables:

- A finalized Project Charter.
- A detailed Project Plan and Work Breakdown Structure

The project charter documents the entire engagement, including the following key information from the project team, statement of work, and executive kick off meeting.

- Opportunity Overview
- Business Objectives
- Technical Objectives
- Stakeholder Analysis
- Scope
- Timeline

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- Deliverables
- Project Team Structure
- Communications Schedule
- Reporting Structure
- Account Team Information
- Key Performance Indicators
- Business Benefits
- Engagement Exit Criteria

Conduct Solutions Overview

This activity provides the customer with a baseline understanding of the Microsoft Dynamics solution which will increase their ability to contribute as participants in the interactive Business Requirements workshops. The purpose of the solutions overview is to provide the project team members participating in the Business Requirements Workshop a foundation regarding the terminology and processes used within the Microsoft Dynamics CRM solution.

The solutions overview is not meant to be complete formal training on the solution, but should focus on detailed demonstrations and discussions of the Microsoft Dynamics CRM solution for the applicable functional areas.

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 following highlight the key steps in Detailed Business Process Analysis:

- Define Target Processes (To Be)
- Map Existing Processes (As Is)
- Conduct Business Process Gap Analysis

Gather 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 analysed 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.

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
- Analyse 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 produces one deliverable:

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

Change Requests

Detailed Business Process Analysis and Fit Gap Analysis will lead to new requirements.

New Requirements are Changes to Scope that must be managed via the Change Control process

Review and Approve Change Requests
- Review with team members
- Review with customer

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- Finalise in to project plan
- Inform team members of new schedule

Environments

In Analysis the following Environments are built:

- Sandbox
- Training

Gather Interface and Integration Requirements

There are three aims of this activity:

- Identify Integration requirements - focuses on processing and coordination of information among systems, applications, and parties.

- Identify Interface requirements - focuses on the means of communication for sending information to and receiving information from a system, application, or party.

- Establish Integration Strategy

Gather Integration and Interface Analysis

The goal of this activity is to establish the following Integration and Interface requirements:

- The business processes that need integration with systems, applications, and parties beyond the delivered Microsoft Dynamics product.
- All systems, applications, and parties participate in the business processes to be enabled.
- The means of communication (interface) to be used with each system, including the Microsoft Dynamics product.
- The means of coordination (integration) among the interfaces of the systems and applications
- Operational and non-functional system requirements such as Availability, Scalability, Extensibility, Manageability, Monitoring, and Disaster Recovery.
- Candidate middleware, message broker, or other products and technologies for implementing the integrations.

The requirements documented in this activity help establish the Integration Strategy.

Integration Strategy

The scope of the systems, applications, and parties to be integrated should be established in the Diagnostic phase, and further elaborated upon during the preceding activity in the Analysis phase. Before moving into the Design phase, a strategic framework needs to be established to guide design decisions.

Guiding principles in an Integration Strategy address the following questions:

- How much effort should be taken to automate integrations?

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- What integration architecture must be applied: Point-to-point, Message Broker, Integration Hub, Enterprise Bus, or other?
- What is the appropriate functional mode for interfaces: Process, Application, or Data Integration?
- How much weight must be given to operational and administrative requirements versus functional integration requirements?
- Which products and technologies must be used to implement the integrations and interfaces?

In the absence of guiding principles, integration costs can rapidly exceed the value achieved by the Microsoft Dynamics solution, and seriously delay the go-live date when a business starts to receive that value.

Gather Data Migration Requirements

There are two aims of this activity:

- Identify Data Migration requirements

- Identify Data Migration Approach

Analysis 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.

Analysis 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

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- Integration and Interface Requirements
- Data Migration Requirements

Best Practice

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 analyse 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 analysing 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.

Overview of Design Phase

The goal of the Design phase is to define how the customer's business requirements will be implemented.

This phase includes configuration of the overall Microsoft Dynamics CRM solution, the design of specific customisations, 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.

Objectives of Design Phase

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

Design Phase Activities

The Design phase contains the following activities:

- Project planning
- Proposal management
- Core Team Training
- 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

Planning in Design

Deployment Plan

The Deployment Plan documents the key tasks that need to occur for a successful rollout of the application, including:

- Environment Setup

- Data Migration

- User Setup

- End-User Training

Knowledge Transfer Plan

The Knowledge Transfer Plan defines the process for the project team to hand over the solution to the customer.

Project Plan

The Project Plan is updated at the planning stage of the phase.

Training

Core Team Training

The objective is to train the Customer's Core Team resources on the features/functions of the Microsoft Dynamics application and any applicable ISV solutions.

Core Team Training will be conducted following the Business Requirements and Fit Gap Analysis Workshops and may include standard feature/functionality related to the modules to be deployed. Any applicable ISV solutions may also be included in the Core Team Training.

The training will cover both functional and technical requirements and will therefore bring together both the key users and the IT Users of the project.

The recommended training materials for this exercise are the standard Microsoft Dynamics Training materials provided by the Microsoft Dynamics training organization.

Design

The goal of the Design phase is to define **how** the business requirements will be implemented.

The Fit Gap Analysis activity results in the generation of the Fit Gap Spreadsheet. This is used to determine the business requirements fits that can be met by either the Microsoft Dynamics CRM solution or industry-specific solutions, or the gaps that can be met with custom code development. The Fit Gap Analysis Spreadsheet is a key input into Design.

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 to define and 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.

Information Flow from Functional Requirements to Design Documents

The following graphic illustrates the information flow from functional requirements to design documents.
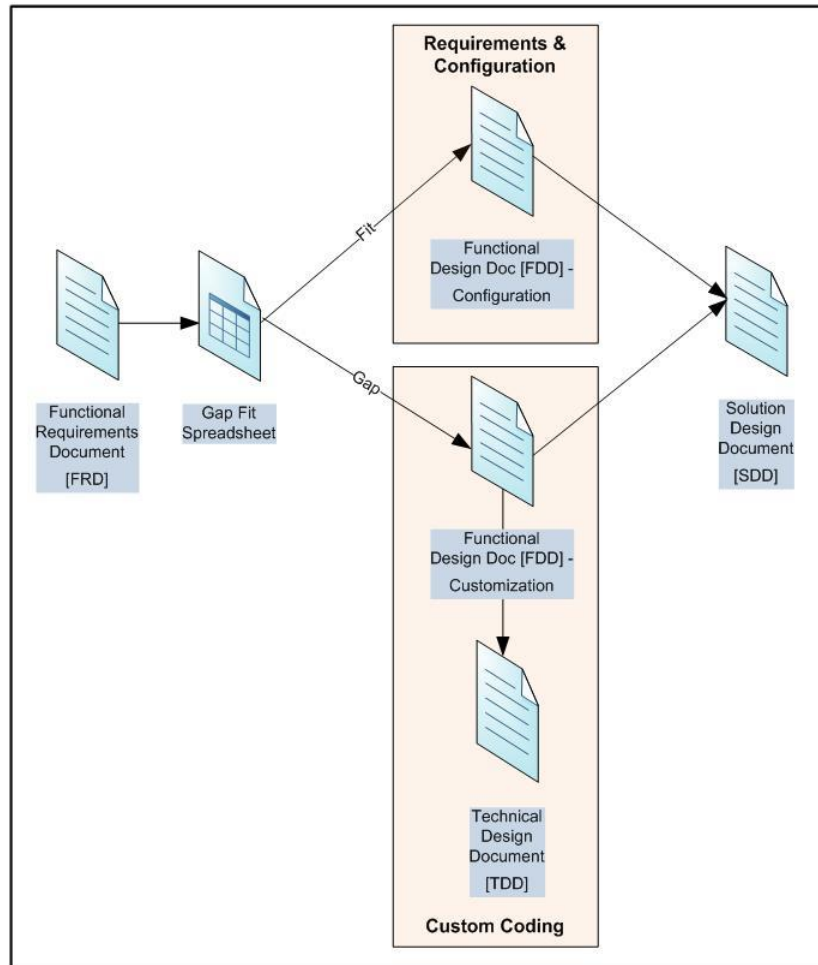
Testing

In Design you work with Key Users to build up their skills.

A number of test activities take place in Design:

- Conduct Feature Testing of Standard and ISV Solution(s), evaluate the results and make the required adjustments to the configuration.

- Create Unit and Function Test Scripts for Custom Code.

- Identify Process Testing Scenarios

Environments

In Design the following Environments are built:

- Non Production Environments

Design Interface and Integration 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

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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.

You will also create a data subset for testing activities in this and the next phase.

Milestones

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

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)
  - o FDDs for Requirements identified as Gaps in the Standard Solution
  - o FDDs for Integration and Interface Requirements
  - o FDDs for Data Migration Requirements
- TDDs
- SDD
- Process Test Scenarios
- Non-Production Environment Specification

Best Practice

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 reanalyse 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:

  - o 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.

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Overview of Development Phase

The purpose of the Development phase is to develop the customisations, 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.

Objectives of Development Phase:

- Built and Tested System Components

Development Phase Activities

The Development phase contains the following activities:

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

Planning in Development

In Development planning continues and the following are updated:

- Deployment Plan
- Project Plan

Training

In Development the following training activities are performed:

- 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.

Custom Coding

In Development the following configuration/coding activities are performed:

- Finalise Configuration
- Custom Coding
    - TDDs are input

Testing

In Development a number of testing activities are performed.

Testing Performed

- Conduct Sub-Process Testing - testing of related features that comprise a defined business process, performed during Configuration by the customer and the Application Consultants.

- Conduct Unit Testing - stand-alone testing of the system modification (custom code), performed during the Development phase by the Development Consultants.

- Conduct Function Testing - stand-alone testing of the system modification (custom code), performed during the Development phase by the customer and the consultants.

- Execute Process Testing - complete testing of related features and functions that comprise a defined business process, performed during the Development phase by the customer and the consultants.

- Execute Integration Testing - integrated testing of business processes performed by the key users prior to system sign-off. This focuses on end-to-end business processes including development, interfaces, reports, and integrations to external systems.

- Execute Data Acceptance Testing (DAT) - testing performed by data owners and key users in the Development phase prior to Integration Testing. During DAT, the customer not only verifies the data migrated but also validates that the data may be inquired upon, reported upon, and transacted upon.

- Develop Performance Test Scripts - testing of business processes and integration. This places a focus on high transaction volume that is anticipated during peak times so as to validate that the system performance meets the business requirements. This testing is performed by the Implementation Project team, typically using test automation software.

- Develop User Acceptance Test Scripts (UAT) - final testing performed by the key users prior to system sign-off. The end users selected to perform the UAT must have had appropriate training prior to the start of the UAT.

Test Scripts Developed

- User Acceptance Test Scripts (UAT)

- Performance Test Scripts

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Environments

In Development the following Environments are handed over:

- Non Production Environments

Handing over at Development helps the customer IT department become familiar with Dynamics and drives out any problems prior to deployment.

Interface and Integration Development

To begin and complete the development of integration and interface components using the implementation mechanisms identified in the Design phase.

Data Migration Development

To develop and finalise the data migration scripts in preparation for the execution of data migration.

Development Milestones

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

Development 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)

Best Practice

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.**

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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

Exercises

Exercise 7A

Find Definitions of Environments

Exercise 7B

Find Definitions of Testing in Sure Step

Question 7C

Are TDDs always required?

Exercise 7D

Offshore Working: Find how to handle in Sure Step tool

Question 7E

Which Sure Step Phase do you start Configuration?

Exercise 7F

List Training activities in Design Phase

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Answers

Exercise 7A

Definitions of Environments:

Environment	Description
Sandbox	An environment that allows the project team members and users to test functionality, try what-if scenarios, and demo standard out of the box features to the customer
Training	An environment setup with functionality being deployed, customer data and customer business scenario exercises for conducting Core Team, Train-the-Trainer (TTT) and End User Training
Development	For the setup, configuration and customization of the Microsoft Dynamics solution. Depending on the number of development teams involved, more than one DEV environment may be needed
Testing	For the execution of Test Scripts during Integration testing, Data Acceptance Testing, Performance Testing and User Acceptance Testing. Depending on the complexity of the engagement, separate environments may be necessary for Performance and User Acceptance Testing (UAT).
Staging	To transition setup, configurations and custom code from Development or Testing environments to Production. Other usages of this environment may include the following: for executing UAT, for running a Conference Room Pilot, or for Parallel Testing - to compare results from the existing system with the Microsoft Dynamics solution.
Production	The Final LIVE environment that runs the customer's Microsoft Dynamics solution in production mode

Exercise 7B

Types of Testing (ref 1.6.1):

- Unit Testing
- Function Testing
- Sub-Process Testing
- Feature Testing
- Process Testing
- Integration Testing
- Data Acceptance Testing
- Performance Testing
- User Acceptance Testing

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Module 8 – Agile Delivery

Objectives

The key objectives of this module are to:

- Understand Agile Principles

- When to Use Agile

- Agile Phases

- Roles

Agile Principles

Agile projects follow an iterative, incremental process for developing solutions.

Agile can be difficult for users and a mature customer is required. Additionally, Agile makes huge demands on users to contribute as part of a joint project.

Not all developers can work in an agile way as they may not be used to working without documentation or closely with users.

When to Use Agile

The Agile project type uses an iterative approach to development resulting in a collaborative and responsive solution development process. Agile is suitable for single site flexible and collaborative implementations requiring specific features and moderate-to-complex customizations.

Agile projects give the customer greater control as the direction of the solution development and implementation can be changed from one process to the next. Since Agile does come with its own set of risks and potential problems, it requires clear guidance from the customer and strong management from the implementation team. Frequent and intense communication is high; however, documentation is kept to a minimum.

The Agile project type is typically used where one or more of the following circumstances exist:

- Customer requirements are not fully defined or known at the start.

- Customer requires implementation to be flexible to accommodate changing business priorities.

- Customer focus is on the delivery of a solution and does not require complete documentation.

- Customer-specific features are required.

- Moderate-to-complex customizations are required.

- Independent software vendor solutions are included.

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- Simple-to-moderate infrastructure is involved.

- Customer-specific integrations or interfaces to third-party systems are required.

- Simple-to-complex data migration is involved.

- Small-to-medium number of users will use the solution.

Agile Phases

Under Agile, Analysis, Design and Development Phases are replaced by:

- Agile Preparation

- Agile Execution

Note: Deployment and Operation Phases are still involved in an Agile Project

Agile Preparation

The Agile Preparation phase represents the official start of the implementation. This phase defines the activities required to initiate and effectively plan the entire project. The key objectives for this phase include the following:

- Finalisation and approval of the project charter

- Finalisation and approval of the project plan

- Execution of kick off meetings

- Conduct Solutions Overview

- Gather Business Requirements

- Conduct Fit Gap Analysis

- Definition and Approval of the Solution Backlog

Solution Backlog

The Solution Backlog is a set of requested requirements and is derived from the Fit Gap Analysis worksheet, the Business Requirements (functional and non-functional) and the requirements gathered during the Detailed Business Process Analysis sessions.

The Solution backlog is a dynamic set of requirements that evolve throughout the build process to continually reflect current business priorities. It does not typically include detailed requirement information as requirement details are clarified with the help of the SMEs during their development within the respective sprint cycles.

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Agile Execution

The goal of the Agile Execution phase is to transform the requirements gathered during the Agile Preparation phase into solution deliverables that can be carried forward for User Acceptance Testing and ultimately into a production environment for the customer.

This is achieved through a series of 30-Day Sprint Cycles where the customer and consultant resources work as a team to design and develop a Microsoft Dynamics Solution that meets the customer's requirements.

Sprint Backlog

The Sprint Backlog is the mechanism where all requirements that are to be developed within a 30-Day Sprint Cycle are tracked. Each requirement is broken down into smaller and more manageable tasks of between 4-16 hours in duration.

The creation of the Sprint Backlog is done in preparation for the Sprint Planning Meeting. As part of the Sprint Backlog creation all outstanding requirements for the current release are reviewed and those to be developed during the next 30-Day Sprint Cycle are copied across into the Sprint Backlog.

Roles

There are two additional roles for Agile:

- Sprint Cycle Manager

- Build Manager

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Module 9 – Deployment Phase

Objectives

The key objectives of this module are to:

- Overview of the steps and processes in the Deployment Phase

- Planning

- Training

- Testing

- Go Live

- Environments

- Data Migration

Overview of 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.

Objectives of Deployment Phase:

- Delivery of a functional system

Phase Activities

The Deployment phase contains the following activities:

- Preparing Go-Live plans
- Confirming end user training plans as part of the finalised deployment plan
- Configuring the live environment
- Performing performance 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

Planning

In Deployment you are asking a lot of the customer organisation. Therefore there are a number of planning and communication activities:

- Finalise the Deployment Plan

- Update the Project Plan

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- Update Project financial documents

Training

End User training is performed in Deployment. Appropriate training is a critical factor in a successful implementation.

Training should be job/role focussed. Deliver short, directed sessions that begin with a broad overview and narrow successively to the end-users' defined job tasks.

Notes:

- Sure Step encourages a Train-the-Trainer approach to training.

- Make use of Key Users in training

- Data Migration required

Testing

Two types of testing are performed in Deployment:

- Performance Testing

- User Acceptance Testing

    o Performed by representative subset of End Users

    o Job/Role Focussed

    o Key Users involved

Notes:

- Data Migration required

- Obtain Sign Off – This is a key deliverable

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.

The Go Live Cutover plan (Can be built into Deployment Plan) ensures a planned, documented, and tested cut-over process. You should test cutover at least two weeks before Go Live.

You will assess readiness before go live via the Go Live Readiness Assessment which consists of meetings with the project team and a formal meeting with Executive Steering Committee

A Go Live Checklist is available to assist with this assessment.

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Environments

In Deployment the following Environments are built:

- Production

Data Migration

There are multiple data migrations in Deployment for:

- End User Training

- User Acceptance Testing

- Performance Testing

- Test Cutover

- Go Live

Migration of data from the source or legacy systems is the final critical phase of the project and is the key to success as well as user adoption. Data migrated into Production has to be timed accurately so as to ensure that users see the most recent data when the system is available to them.

The effort is usually split into two phases:

Phase 1—Initial migration of data into Production

The initial migration of data into production is performed to avoid overloading the systems over the go-live weekend and is typically done one week before the actual go-live. This data typically includes static data.

Phase II—Final data migration into Production

The final data migration is done over the weekend prior to go-live. Since most of the initial data is loaded a week before go-live, the final data load will take into account the data entered into the system after the initial data load.

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

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Deliverables

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

Best Practice

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.

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This communication will describe the new system and prepare everyone for the new production environment.

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Module 10 – Operation Phase

Objectives

The key objectives of this module are to:

- Overview of the steps and processes in the Operation Phase

- Planning

- Post Go Live Support

- Transition to Support

- Performance Testing

- Project Closure

Overview of 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.

Objectives of Operations Phase:

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

Phase Activities

The Operations phase contains the following activities:

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

Planning

In Planning you will:

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

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

- 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.

Provide Post Go Live Support

The purpose of Post Live Support is 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.

A period of two weeks is indicated within Sure Step for this activity.

Transition 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.

Establish Ongoing Quality and Testing Strategy

Quality and Testing activities extend from the implementation and deployment of the Microsoft Dynamics solution through to the Operation Phase. Use of the system in Production may expose product or feature defects that were unobserved during the prior testing activities in the Development and Deployment Phases. In addition, hot fixes, service packs or update releases may need to be applied as part of the ongoing maintenance of the Microsoft Dynamics system.

It is important to plan for testing in the Operation phase by:

- Identifying all the necessary testing steps and required approvals as part of an ongoing test strategy

- Creating a system change management process to detail the methods to be used to transport changes from a development and/or test environment to a production environment.

- Identifying ongoing quality and testing resources

- Establishing a permanent Test environment that can be updated with production data and used for regression testing.

- Scheduling future Performance/Load testing to monitor system performance and scalability as the business environment expands.

Performance Tuning

Performance Tuning is an activity identified in Operations Phase and if used should be scheduled soon after Go Live. If there is a danger that Performance Tuning could hold up Project Closure e.g., waiting for quarter end then consider using the Optimisation Offering; Performance Review.

Project Closure

You close the project by ensuring the following are completed:

- Sign Offs of all Deliverable Documents

- Conditions of Satisfaction met

- All Issues Closed

- Review Deliverables against Statement of Work & Change Requests

Sure Step has a Project Closure Checklist and a template Project Closure Report

Environments

In Operations the following Environment is handed over:

- Production

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

Deliverables

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

- Project Closure Report
- Project Deliverables

Best Practice

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.

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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.

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Rapid Project Type

Objectives

The key objectives of this additional module are to:

- Understand differences between Rapid and other Project Types

Used When

Rapid Project:

- No Customisations

- Less than 25 users

- Simple Data Migration

- Small Scope / Single Business Area

- Not AX

Analysis

The activities in Analysis for Rapid Projects are:

- Planning

- Project Charter (Optional)

- Conduct Solutions Overview

- Gather Business Requirements

- Fit Gap Analysis

- Setup DEV and PROD Environments

Design

The activities in Design for Rapid Projects are:

- Configure and Setup ISV Solutions

- Conduct **Conference Room Pilot (CRP)**

- Data Migration Design

Development

The activities in Development for Rapid Projects are:

- Finalise Configuration and Setup

Deployment

The activities in Deployment for Rapid Projects are:

- User Training

- UAT

- Data Migration

- Go Live

Operation

The activities in Operation for Rapid Projects are:

- Transition to Support

- Project Closure