

TechTalk Series: Business Process Catalog and Guidance

Part 6: Conducting Process-Centric Discovery (DTV043EXT)

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TechTalk Series

- Part 1: Introduction to the Dynamics 365 Guidance Hub – November 30th
- Part 2: Introduction to Business Processes – December 14th
- Part 3: Using the Business Process Catalog to Manage Project Scope and Estimation – January 11th
- Part 4: Authoring Business Processes – January 18th
- Part 5: Authoring Business Process Patterns – January 25th
- Part 6: Conducting Process-Centric Discovery – March 11/12th ←
- Part 7: Introduction to Process Governance – March 21st
- Part 8: Authoring Reference Architectures – TBD

Agenda

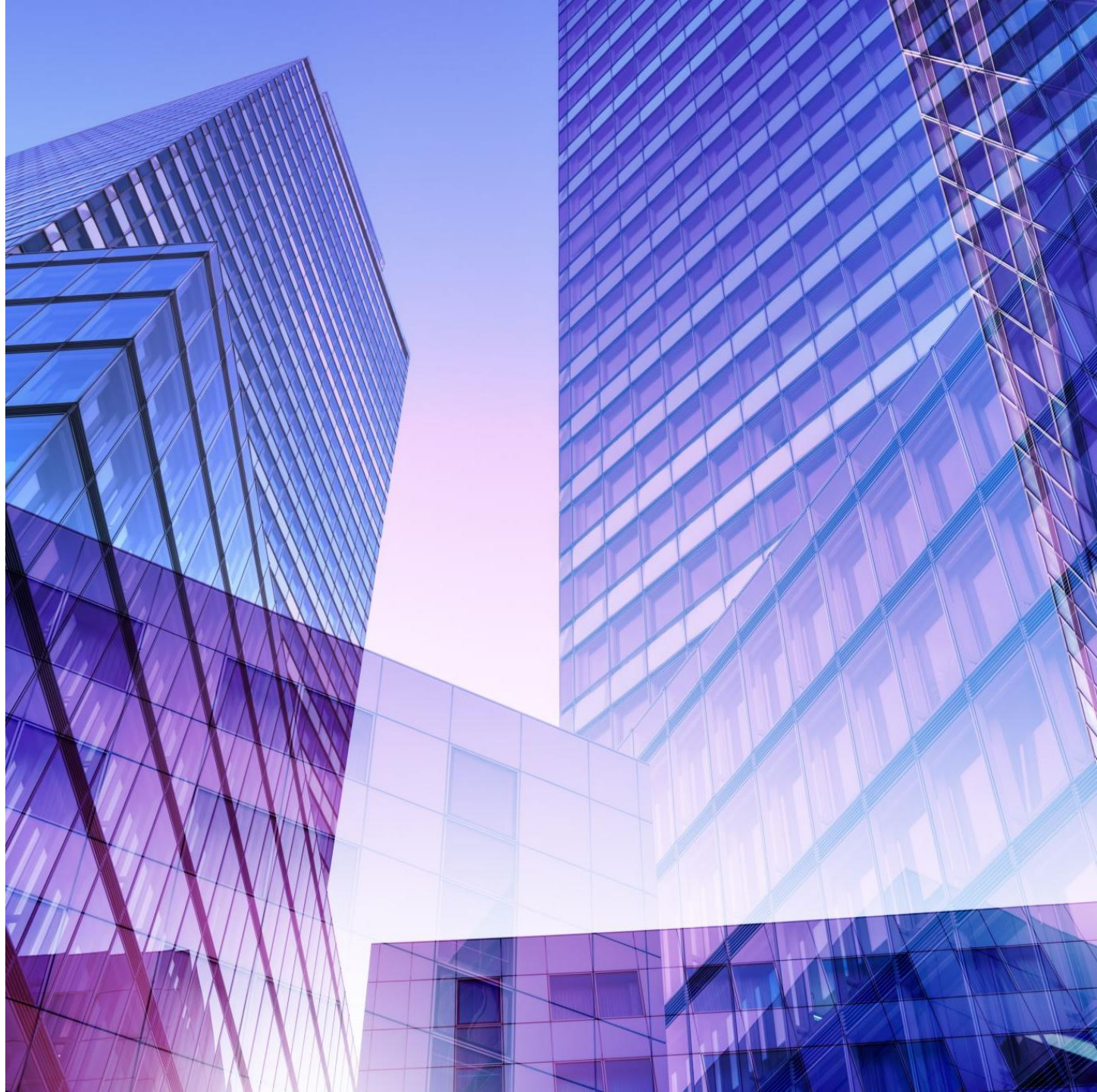
- Components and importance of process-centric discovery
- Using the business process catalog
- Mapping and visualizing processes
- Process for discovery
- Sample discovery questions
- Q&A

Components and importance of process-centric discovery



Discovery scenarios

- 1) Presales, scope definition, or envisioning discovery
- 2) Detailed estimate (phase zero)
- 3) Ongoing solution architecture development
- 4) Training and change management
- 5) Continuous improvement



Purpose of discovery

Determine customer goals



```
graph TD; A[Determine customer goals] --> B[Map goals to objectives]; B --> C[Map objectives to high level solutions]; C --> D[Refine solutions to meet customer needs];
```

Map goals to objectives

Map objectives to high level solutions

Refine solutions to meet customer needs

Outcomes of well-executed process-centric discovery



Well defined goals in
business language



Relevant business
process KPI's identified



More accurate
estimates aligned to
business goals



Clear communication
and solutions



Fewer change orders



Increased adoption

Process-centric discovery goals

01

Capture and qualify
the customer's
business outcomes

02

Define or clarify
solution scope in
business terms

03

Achieve clarity with
customer with regards
to the solution

04

Provide project
estimates aligned with
both fits and gaps

05

Capture and qualify
change management
requirements

06

Ensure the customer
understands their own
level of commitment
and readiness
required to be
successful

Begin with the end in mind: Goals of presales discovery workshop

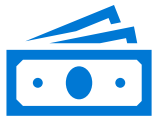
What does the SELLER care about?



Business
outcomes



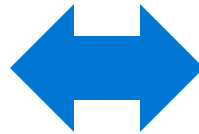
Stakeholder
buy-in



Revenue
impact



Building your
pipeline



What does the CUSTOMER care about?

- Business outcomes
- Business value
- Personal/Business unit success
- Serving customers
- Create value over competition
- How will technology help me?
- Maximize value from technology investment

Guidance for making estimates

RFP/RFI-based estimates:

1. Use the information in the **RFP/RFI** as the initial requirements.
2. **Cross check** with the business process catalog.
3. Use the **catalog** to propose a business process model
4. Determine which features products **support requirements**.
5. Use **past learnings** as a starting point to build estimates.

Discovery-based estimates:

1. Use the ADO work items from the ADO business process catalog template.
2. Build detailed estimates based on t-shirt sizes.
3. When the discovery is at a high level, use a combination of information from the phase along with industry knowledge
4. Align the priorities of the user stories or requirements with the customer as an input to the overall sprint and release models.

Solution Modeling-based estimates:

1. Use the ADO work items from the ADO business process catalog template.
2. Build detailed estimates based on t-shirt sizes.
3. Use the customer requirements and prioritizations gathered from discovery.
4. The level of detail should be traceable at a granular level in the next phases of the project.

Multi- solution/phase estimates



- Consider end-to-end process rather than individual products
- Map out the overall data model
- Plan the roll-out strategy
- Create workstreams with end-to-end processes that deliver business value for each phase
- Align estimates with workstreams and deliverables
- Review for shared resources (people, environments, etc.)

Mapping and visualizing processes



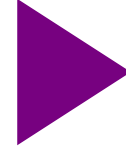
Mapping process

Presales



- High-level
- Focus on customer goals
- Tell a story of a full end-to-end process
- Show the critical Dynamics components that have highest impact to customer goals
- High-level solution blueprint deliverable

Phase Zero



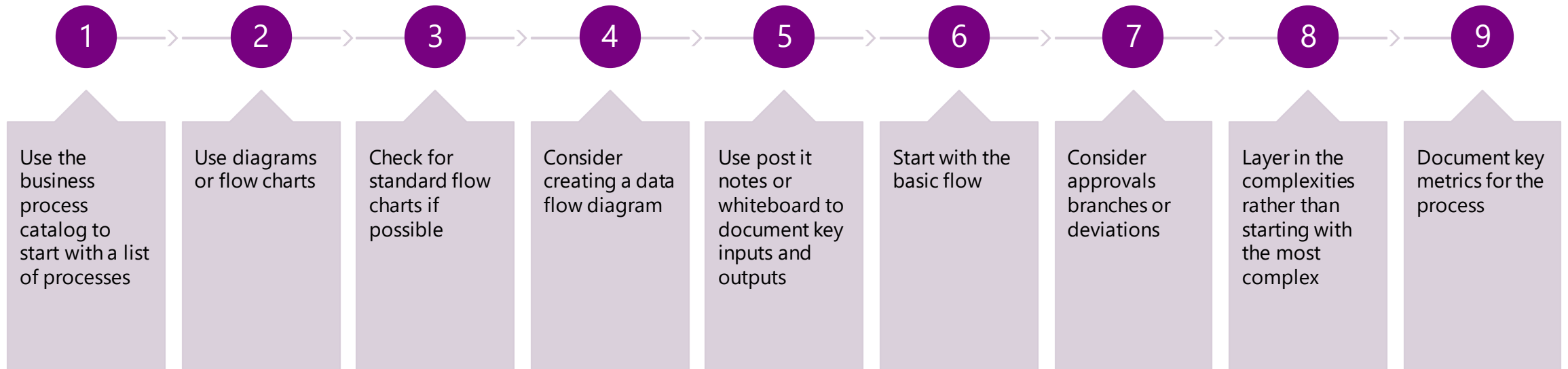
- Start high-level
- Get more detailed
- Tell a story of a full end-to-end process
- Prioritize business critical processes earlier
- Prioritize high-impact change processes earlier
- Solution blueprint deliverable

Iterative/Ongoing



- Start high-level
- Get more detailed
- Becomes most detailed
- Prioritize business critical processes earlier
- Prioritize high-impact change processes earlier
- Refined solution blueprint

Modeling and visualizing



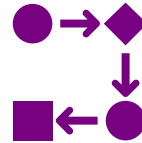
Three T's of business process mapping

Tools



- Sticky notes
- Whiteboard
- Microsoft Visio
- Lucidchart
- Draw.io
- Mavim
- ...etc...

Techniques



- Swimlane diagrams
- Standardize shapes
- BPMN 2.0
- Interactive
- Inclusive

Tips



- Consider audience
- Easy to understand
- Easy to contribute
- Easy to edit
- Accessible repository

Recommended practices for discovery



Ensure the right team is in place to drive discovery outcomes



Capture the solution components and requirements in ADO



Include Change Management workflow in the planning step



Include requirement documentation workshop in the workshop planning



Record the sessions and upload to the project document repository



Capture all relevant information in ADO/repository



The solution blueprint should contain all areas of the solution, including but not limited to external integrations, interfaces, data migrations, and other interactions with Dynamics 365

Recommended practices for configuration and demo

- Avoid demoing the Contoso configuration
- Preserve the initial solution demo and/or the data recorded for the demo for use by the project team during the Solution Modeling phase
- Use Azure DevOps to record all the configurations used for the preliminary solution demo
- Initial solution demo is not intended to be the complete solution with all the requirements
- Limit the number of requirements to demo based on the right sizing of the demo
- Use fit requirements (for core product and ISV solutions) for demo and not focus on gaps in the demo

Recommended practices for estimation



The requirements and solution architecture should match estimates and SOW



Capture the right mitigations upfront as it will impact the estimation process



Capture the assumptions clearly as it will impact the SOW

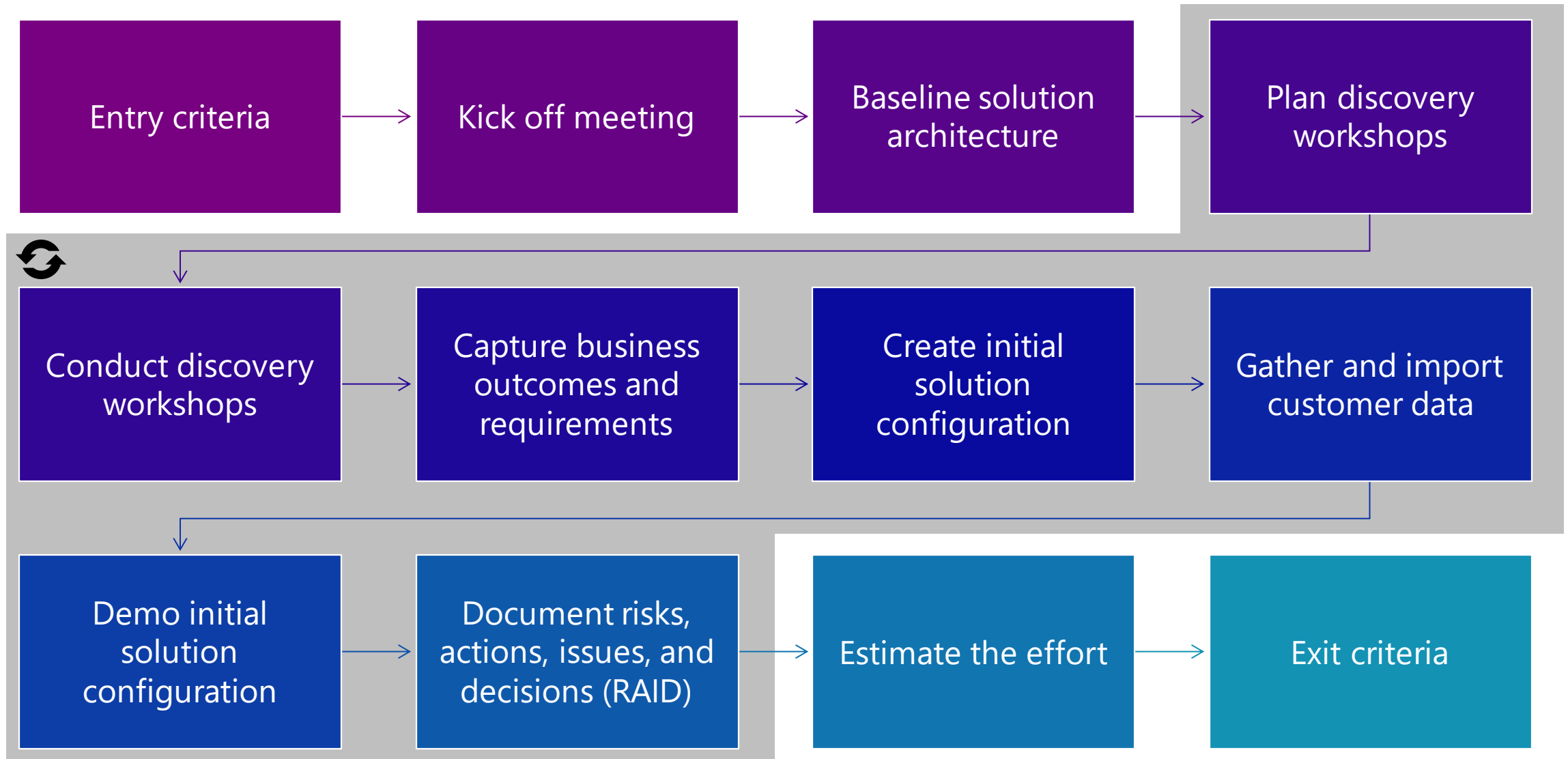


The schedule should contain the level of detail that represents the plan, assumptions, resource constraints, dependencies, and other information that contribute to the go-live date

Process for discovery



The discovery process



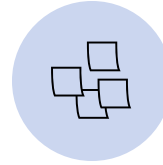
Presales discovery entry criteria check list

Entry criteria	Description
Deal qualified	The deal should be qualified prior to kicking off the Discovery phase
Discovery resources identified	The customer and partner resources for the Discovery phase should be identified.
Product Knowledge	The pre-sales team should have baseline knowledge of Dynamics products and the latest release information needed to complete the Discovery phase. For all complex projects, it is highly recommended to include change management resources.
Tools set up	Resources conducting the Discovery phase should have access to the required project tools. These tools should be set up and ready for use.
Environment(s) set up	Prepare the environments prior to the start of the Discovery phase

Presales discovery exit criteria check list

Exit criteria	Description
Deal package created	The final deal package should be created and should include business process catalog scope, SOW, high-level schedule, deal artifacts, and review outputs
Business outcomes and high-level requirements	Customer business outcomes and high-level requirements should be documented. Include change management requirements and approach as a part of the solution delivery
Solution architecture	The solution blueprint should be updated and include an overview of the customer's solution vision and scope for the application, interfaces, and ISVs
Initial solution demo configuration	The Discovery environment should be configured with the initial solution demo configurations tailored to the customer's requirements (fits only recommended)
RAID log	The risks, actions, issues, decisions, and assumptions should be captured, shared and discussed

Recommended practices for presales discovery



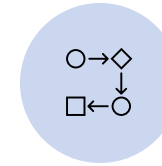
Leverage customer's Azure DevOps to capture RAID



Align the right customer resources that can provide clarity on solution landscape and environments



Align customer solution objectives with the solution roadmap. This should include all interfaces and integrations



Use available Industry Solution models, Dynamics 365 apps, ISVs and Industry Solutions IP to drive solution definition



Conduct reviews with customer and partner stakeholders



Drive product capabilities (solution modeling) during envisioning workshops to align with configure-first strategy



Use an Adoption and Change Management change impact assessment to help successfully land the delivery with the customer



Drive change management strategy, approach and requirements to capture in deal shaping

Presales discovery activities check list

1. Conduct the Discovery Phase kick off
2. Create the initial solution architecture
3. Discovery workshop(s) and work streams planning
4. Conduct Discovery workshop(s)
5. Capture business outcomes and high-level requirements with dependencies
6. Create initial solution demo configuration
7. Load required customer data
8. Demo solution configuration
9. Document risk, actions, issues, and decisions (RAID)
10. Document initial change impact assessment
11. Create an estimate for the project
12. Develop high-level project implementation schedule
13. Create Statement of Work (SOW)
14. Conduct reviews

Sample discovery questions



Discovery questions

- Does this process interconnect with any other processes?
 - Check the L1 and L2 diagrams to see some default interconnectivity
- What triggers this process to start?
 - Multiple patterns may be required if there there are multiple triggers
- What output does the process produce and for whom?
 - Lack of clarity here, may indicate need for process change
- How many ways is the process performed?
 - Multiple patterns may be required
- Is there documentation for the process? And is it current?
 - Do not use documentation of an existing process to design the solution.
- How does this process align with project goals and customer priorities?

Discovery questions, part 2

- Who is responsible to monitor the efficiency and effectiveness of the process?
- What metrics exist for the current process?
 - Consider time, quality, cost, productivity, etc.
- Who is responsible for the change process?
- What do you normally do in the process?
 - Useful when there is no base flow diagram to start the diagram.
- What resources are required?
 - People, products, systems, etc.
- What decisions are required and what policies and rules govern these decisions?

Discovery questions, part 3

- How do you handle your most difficult problem?
- What problems exist with the current process?
- What business application(s) support this process?
- What are the steps in the process, and who is involved?
 - Use this to formulate the swim lane diagram – start from a base flow where possible
- What information is required to complete each step?

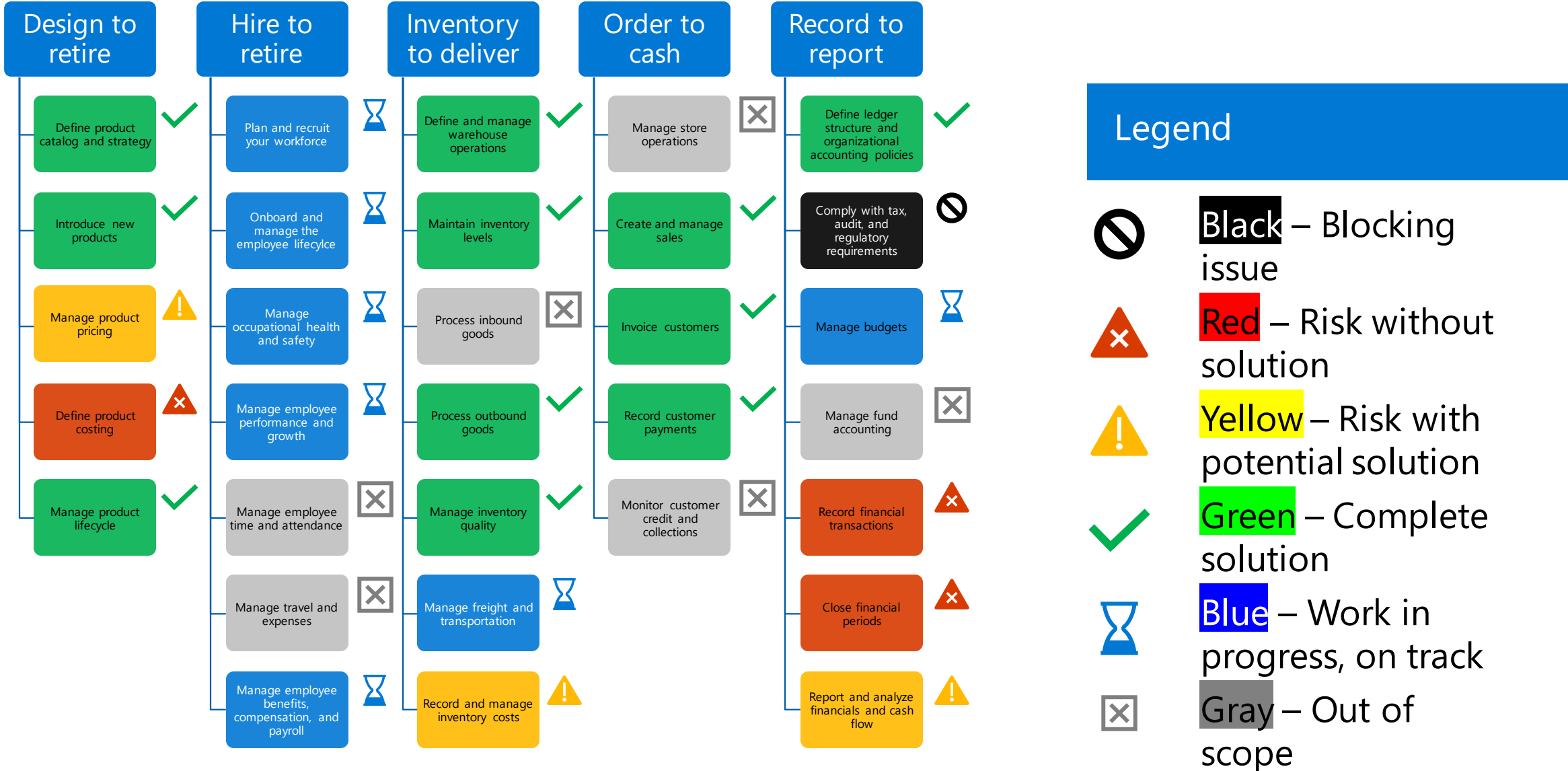
Discovery steps questions to ask

- What input does this step require? Who provides it? How “good” is the input in terms of timeliness and quality?
- What output is created as a result of performing this step?
- Who performs this step?
- Are there any IT applications used to perform this step?
- How often is this step performed?
- Can you identify any business or technical challenges related to this specific step in the process.
- Are there any process measurements taken in this step?
- How much time does it typically take to perform this step?

Discovery steps questions to ask, part 2

- What operations happen in this step? (i.e. micro procedures?)
- Do you know where the outcome of this step is used further in the process?
- What exceptions occur in this step and how are they handled?
- Can the next step begin immediately or is there preparation or waiting time beforehand?

Business process catalog status heat map example



Sample: Collecting and summarizing stakeholder input

Participant	Business Unit	Responsibilities	Connected to corporate Initiative?	Describe current state	Envision future state?	Potential Impact of future state?	Measure-ment now?	Desired measure-ment targets	Relative priority?
Jorge	Marketing								
Elizabeth	Sales								
Robert	Operations								
Sarah	IT								

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Jorge	Marketing								
Elizabeth	Sales								
Robert	Operations								
Sarah	IT								

Sample: Summarizing potential impact

	Current State	Desired State	Measurement goals	Potential Value of future state (ROI)	Shared with...	Dependencies	Relative Priority?
Initiative 1							
Initiative 2							
Initiative 3							
Initiative 4							
Initiative 5							
Initiative 6							

Resources and recommendations



Additional resources

- <https://aka.ms/businessprocesstechtalks>
- <https://aka.ms/oneguidance>
- <https://aka.ms/businessprocesscatalog>
- <https://aka.ms/businessprocesscatalogrequests>
- <https://aka.ms/businessprocesscatalogtemplates>
- <https://aka.ms/businessprocesscatalogsubmit>
- <https://aka.ms/businessprocessflow>
- <https://aka.ms/businessprocesscatalogfeedback>
- <https://learn.microsoft.com/en-us/dynamics365/get-started/contribute>

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Dankie

Faleminderit

Shukran

Chnorakaloutioun

Hvala

Blagodaria

Děkuji

Tak

Dank u

Tānan

Kiitos

Merci

Danke

Ευχαριστώ

A dank

Mahalo

ἰδὶθ.

Dhanyavād

Köszönöm

Takk

Terima kasih

Grazie

Grazzi

Thank you!

감사합니다

Paldies

Choukrane

Aċiū

Благодарам

ありがとうございました

谢谢

Баярлалаа

Dziękuję

Obrigado

Mulțumesc

Спасибо

Ngiyabonga

Ďakujem

Tack

Nandri

Kop khun

Teşekkür ederim

Дякую

Хвала

Diolch

