

Deep Dive: Using the Objectives Hierarchy in the Microsoft Business Process Catalog

Presenter & Moderator

Rachel Profitt – Principal Program Manager

Presenter:

Mandi Toves – Senior Program Manager



Rachel Profitt

Principal Program Manager

Microsoft

Rachel.Profitt@microsoft.com

<https://Dynamics365Lady.com>

<https://twitter.com/rachelprofitt>

<https://linkedin.com/in/rachelprofitt>

<https://youtube.com/c/Dynamics365Unboxed>



Agenda

1. Importance of objectives
2. Recommended practices for documenting objectives
3. Demo – Objectives in Azure DevOps
4. Demo – Objectives in Mavim

Importance of objectives in a project



Why Objectives Matter

Every project must answer one fundamental question — "Why does this project exist?" — and objectives are that answer.



From Strategy to Sprint

Objectives form a hierarchy — from executive-level business goals down to sprint-level tasks — ensuring every action connects back to strategic intent.

- Executive objectives define the business outcome (e.g., reduce order-to-cash cycle time)
- Project objectives translate strategy into measurable project goals
- Tollgate or program increment objectives align to specific functional areas or departments and describe the success measure for the overall project
- Sprint-level objectives ensure day-to-day work directly supports higher-level targets
- When this hierarchy breaks, teams deliver working software that fails to move the needle on business value

Executive Objective

Business outcome and strategic intent



Project Objective

Measurable project-scoped goals



Tollgate/Program Increment Objective

Actionable day-to-day deliverables



Sprint Objective

Actionable day-to-day deliverables

Outcome-Driven Delivery

Success is measured by validating impact, not just confirming completion — a delivered feature is not a delivered outcome.

- Traditional delivery validates "Did we build it?" — outcome-driven delivery validates "Did it work?"
- Success by Design shifts the definition of done from deployment to adoption and measurable business impact
- Teams should define success measures at the start and validate against them continuously, not only at go-live
- Risk of skipping this: projects that are technically complete but fail to deliver promised business value



Recommended practices for tracking objectives



Make Tooling Your System of Record

Objectives should live in your delivery tooling, not in offline documents that go stale after the first meeting.

Offline Artifacts

Static

Outdated the moment they are shared

Fragmented

Scattered across spreadsheets, decks, and emails

Stale

No connection to live progress or work items

System of Record

Live

Always reflects the current state of objectives

Connected

Objectives linked directly to work items and progress

Current

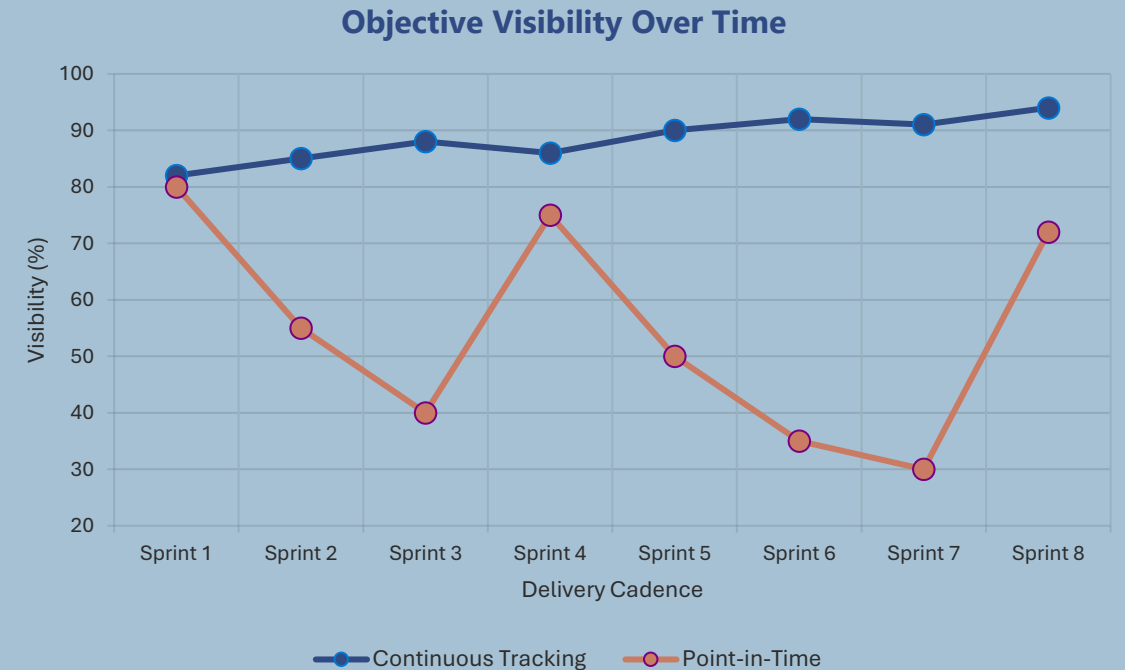
All stakeholders see the same single source of truth

 **Best practice:** Link objectives directly to work items so progress is automatic, not manually reported.

Track Continuously, Not Point-in-Time

Objective tracking must be a continuous practice woven into delivery cadence, not a periodic checkpoint exercise.

- Point-in-time reviews create blind spots between assessments
- Continuous tracking means objectives are reviewed at every sprint review and decision point
- Leading indicators should surface early warnings before lagging results confirm failure
- Embed objective health into regular delivery cadence



Evolve Success Measures During Delivery

Success measures defined at project start must be revisited and refined as delivery progresses and the business learns more.

- Initial success measures are hypotheses based on pre-project assumptions
- As delivery progresses, teams gain new insight into what is achievable and what matters most
- Updating measures is not scope creep — it is responsible adaptation to new information
- Recommended cadence: revisit success measures at each major milestone, and formally revalidate with sponsors at phase transitions

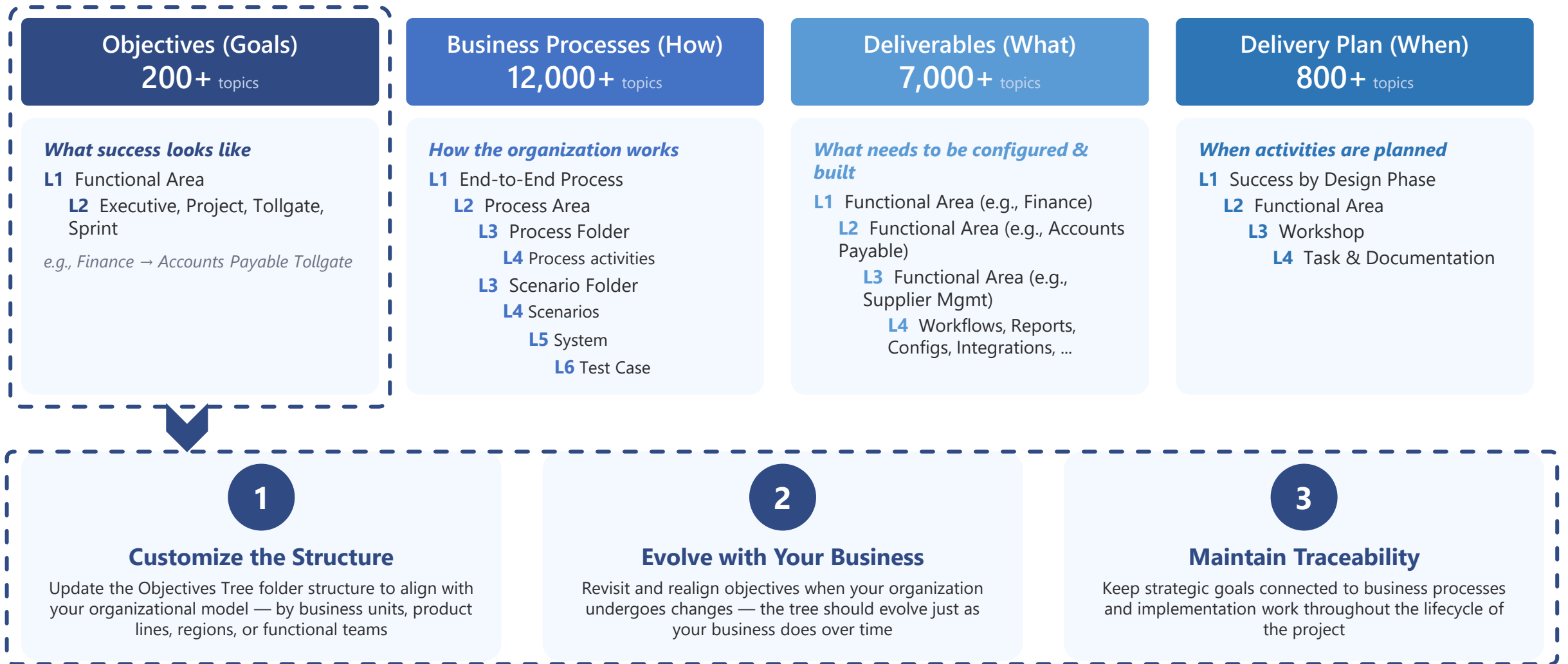


Using the objectives hierarchy in your project



The Catalog Structure in Mavim

Four interconnected pillars organize your implementation from strategic goals through execution planning — each with a hierarchical topic structure.



Types of Objectives

Four distinct types operating at different altitudes within your organization, creating a clear line of sight from strategy to execution.



Executive Objectives

Strategic transformation goals that often originate outside the project itself. They ensure the implementation contributes to broader business outcomes and long-term transformation priorities — not just delivering new technology.



Project Objectives

More focused and typically aligned to specific functional areas such as sales, service, finance, or supply chain. They define what success looks like within the scope of the implementation.



Program Increment Objectives

Align priorities across implementation phases and ensure teams are progressing toward measurable outcomes. They break larger goals into deliverable improvements validated across sprints or workstreams.



Sprint Objectives

Near-term outcomes that can realistically be delivered within a sprint cycle, helping teams stay aligned and ensuring day-to-day work supports higher-level goals.

Examples



Executive Objectives Examples

Executive objectives connect the Dynamics 365 implementation to the organization's strategic vision. They define the "why" behind the investment.

- **Accelerate global financial close** – Reduce the monthly close cycle from 12 days to 5 by consolidating ledger operations across all subsidiaries into a single Dynamics 365 Finance instance.
- **Unify the customer experience** – Deliver a single, 360-degree view of every customer by replacing five disconnected CRM tools with Dynamics 365 Sales and Customer Insights.
- **Enable scalable supply chain operations** – Support a planned 40% increase in order volume over three years without adding warehouse headcount, using Dynamics 365 Supply Chain Management.
- **Strengthen regulatory compliance posture** – Achieve and maintain SOX and GDPR compliance through built-in audit trails, electronic signatures, and automated data-retention policies in Dynamics 365.
- **Drive data-informed decision-making** – Empower the executive team with real-time operational dashboards powered by Dynamics 365 and Power BI, eliminating reliance on manually compiled spreadsheet reports.

Project Objectives Examples

Project objectives translate executive goals into measurable outcomes for a specific Dynamics 365 workstream or functional area.

- **Automate procure-to-pay processing** – Eliminate 80% of manual invoice matching by configuring three-way match automation and vendor invoice workflows in Dynamics 365 Finance.
- **Standardize opportunity management** – Implement a unified sales pipeline in Dynamics 365 Sales with consistent stage definitions, win/loss tracking, and forecast accuracy above 85%.
- **Centralize warehouse operations** – Consolidate inventory tracking across four distribution centers into a single Dynamics 365 Supply Chain Management instance with real-time stock visibility.
- **Redesign case resolution workflows** – Reduce average case resolution time by 35% by deploying tiered routing, SLA enforcement, and knowledge base integration in Dynamics 365 Customer Service.
- **Deliver integrated project accounting** – Enable real-time project cost tracking and revenue recognition by configuring Dynamics 365 Project Operations with direct general-ledger integration.

Tollgate/Program Increment Objectives Examples

Tollgate/Program Increment objectives define what the team commits to delivering within a planning interval (typically 8–12 weeks) of the Dynamics 365 implementation.

- **Complete order-to-cash end-to-end configuration** – Finish configuring sales orders, pricing rules, picking/packing, invoicing, and payment application in Dynamics 365 Supply Chain Management so the process is ready for user acceptance testing.
- **Deliver first integration milestone** – Stand up bi-directional data synchronization between Dynamics 365 and the legacy ERP for customer master, item master, and open-order data using Dual Write or Data Integrator.
- **Validate security model with business owners** – Define and test role-based security roles, duty assignments, and segregation-of-duties rules across Finance and Supply Chain modules, with sign-off from compliance.
- **Launch field-service pilot for Region 1** – Deploy Dynamics 365 Field Service to 25 technicians in the pilot region with scheduling optimization, mobile work orders, and IoT-alert-driven dispatching enabled.
- **Establish reporting foundation** – Publish the initial set of 15 operational Power BI reports connected to Dynamics 365 Dataverse, covering pipeline health, case backlog, and financial KPIs.

Sprint Objectives Examples

Sprint objectives focus teams on specific, achievable deliverables within a single sprint (typically 1–3 weeks) that advance the broader Program Increment goals.

- **Configure vendor invoice approval workflow** – Build and unit-test a three-tier approval workflow for vendor invoices in Dynamics 365 Finance, including threshold-based routing and delegation rules.
- **Build lead qualification form** – Create a custom model-driven app form in Dynamics 365 Sales with required fields for BANT scoring, automated lead-to-opportunity conversion, and business process flow integration.
- **Complete data migration dry run for chart of accounts** – Execute the first mock migration of the chart of accounts, financial dimensions, and opening balances into the Dynamics 365 Finance sandbox environment and document all exceptions.
- **Develop warehouse receiving process test scripts** – Author and peer-review 12 test scripts covering purchase-order receipt, quality inspection, put-away, and license-plate tracking in Dynamics 365 Warehouse Management.
- **Set up automated case creation from email** – Configure automatic record creation rules in Dynamics 365 Customer Service so inbound support emails generate cases with correct queue routing, priority assignment, and SLA attachment.

Demonstrations



Demo: Creating and Navigating Objectives in Azure DevOps

Demo: Creating and Navigating Objectives in Mavim iMprove

Resources and Recommendations



Business Process Catalog Resources for Objectives

- <https://learn.microsoft.com/en-us/dynamics365/guidance/implementation-guide/success-by-design>
- <https://learn.microsoft.com/en-us/dynamics365/guidance/implementation-guide/solution-architecture-design-pillars-vision-strategies>
- <https://learn.microsoft.com/en-us/dynamics365/guidance/implementation-guide/solution-architecture-design-pillars>
- <https://learn.microsoft.com/en-us/dynamics365/guidance/implementation-guide/solution-architecture-design-pillars-methodology>
- <https://learn.microsoft.com/en-us/dynamics365/guidance/implementation-guide/process-focused-solution>
- <https://learn.microsoft.com/en-us/dynamics365/guidance/business-processes/about-devops-work-items-other>

Microsoft Business Process Catalog Resources

- <https://aka.ms/businessprocesstechtalks>
- <https://aka.ms/oneguidance>
- <https://aka.ms/businessprocesscatalog>
- <https://aka.ms/businessprocesscatalogrequests>
- <https://aka.ms/businessprocesscatalogtemplate>
- <https://aka.ms/businessprocesscatalogsubmit>
- <https://aka.ms/businessprocessflow>
- <https://aka.ms/businessprocesscatalogfeedback>
- <https://learn.microsoft.com/en-us/dynamics365/get-started/contribute>
- Reach out to the team: bizprocessguides@microsoft.com

Next TechTalk...

Deep Dive: using the Business Process Catalog Hierarchy in the Microsoft Business Process Catalog

Thursday, April 23rd

Option 1 – 7:00-8:00am PST

<https://aka.ms/BPETechTalksOption1Join>

Option 2 – 4:00-5:00pm PST

<https://aka.ms/BPETechTalksOption2Join>

<https://aka.ms/BPETechTalksBlog>

Survey

Your feedback is important!

Please take a moment to complete our survey about today's event

<https://aka.ms/BPETechTalksFeedback>

Business Process - Dynamics 365 -
TechTalk Series





QUESTIONS

Dankie Faleminderit **Shukran** Chnorakaloutioun Hvala Blagodaria
Děkuji **Tak** Dank u **Tānan** Kiitos **Merci** Danke Ευχαριστώ A dank
Mahalo הודות. **Dhanyavād** Köszönöm Takk **Terima kasih** **Grazie** Grazzi

Thank you!

감사합니다 Paldies Choukrane Aċiū Благодарам ありがとうございます
谢谢 Баярлалаа **Dziękuję** Obrigado Mulțumesc **Спасибо** Ngiyabonga
Ďakujem **Tack** Nandri **Kop khun** Teşekkür ederim Дякую **Хвала** Diolch



Microsoft Dynamics 365