

# Success by Design

FastTrack for Dynamics 365 implementation portal



# Getting there...

[experience.dynamics.com/FTimplementationportal](https://experience.dynamics.com/FTimplementationportal)



**Microsoft** FastTrack for Dynamics 365 implementation portal Contact Us | Darren Liu

**Engagements** ^

- Home
- Projects
- Partner
- Nomination
- Help & Support ^
- Knowledge Articles
- Help
- Contact Us
- Administration ^
- Users

**Projects**

Projects Going Live In Next 30 Days v

| Project ID                | Customer  | Start Date | Project Type | Phase | Lead      | Status | Country        |
|---------------------------|-----------|------------|--------------|-------|-----------|--------|----------------|
| [FT]Test New_Project      | Microsoft | 10/29/2020 | D365 CE      | New   | Initiate  | Green  | United Kingdom |
| [FT]Test Project - Sonali | Microsoft | 10/30/2020 | D365 CE      | New   | Implement | Yellow | United Kingdom |
| [FT]Test Project Rakib    | Microsoft | 10/30/2020 | D365 CE      | New   | Operate   | Yellow | United Kingdom |
| [FT]Testing Project -     | Microsoft | 10/31/2020 | D365 CE      | New   | Initiate  | Green  | United Kingdom |

Projects by Overall Status

- Green
- Yellow

Projects by Project Status

- Blocked
- In Progress

**Tracking**

Active Cases

| Case Title         | Customer  | Project                | Case Type        | Severity | Go Live Blocker? | Is Escalated |
|--------------------|-----------|------------------------|------------------|----------|------------------|--------------|
| Testing Risk input | Microsoft | [FT]Test Project Rakib | General Feedback | Low      | No               | No           |
| Malware            | Microsoft | [FT]Test Project Rakib | General Feedback | Low      | No               | No           |

# Navigation and Home Page

What's recent and what's next

Left Navigation

More Features will come here

The screenshot shows the Microsoft FastTrack for Dynamics 365 implementation portal. The header includes the Microsoft logo, the page title 'FastTrack for Dynamics 365 implementation portal', and user information 'Contact Us | Darren Liu'. The left navigation menu is highlighted with a red box and contains the following items: Engagements, Home, Projects, Partner, Nomination, Help & Support, Knowledge Articles, Help, Contact Us, Administration, and Users. The main content area is divided into three sections: 'Projects Going Live In Next 30 Days' (a table of upcoming projects), 'Projects by Overall Status' (a pie chart showing Green and Yellow status counts), and 'Projects by Project Status' (a bar chart showing Blocked and In Progress counts). The bottom section is 'Tracking', which includes a table of 'Active Cases' with columns for Case Title, Customer, Project, Case Type, Severity, Go Live Blocker?, and Is Escalated.

| Project ID                | Customer  | Start Date | Project Name                | Phase | Status    | Lead              | Overall Status | Country        |
|---------------------------|-----------|------------|-----------------------------|-------|-----------|-------------------|----------------|----------------|
| [FT]Test New_Project      | Microsoft | 10/29/2020 | D365 CE FastTrack Expansion | New   | Initiate  | Rupali Nareshrao  | Green          | United Kingdom |
| [FT]Test Project - Sonali | Microsoft | 10/30/2020 | D365 CE FastTrack Expansion | New   | Implement | Sonali Gupta      | Yellow         | United Kingdom |
| [FT]Test Project Rakib    | Microsoft | 10/30/2020 | D365 CE FastTrack Expansion | New   | Operate   | Saikh Rakif       | Yellow         | United Kingdom |
| [FT]Testing Project -     | Microsoft | 10/31/2020 | D365 CE FastTrack           | New   | Initiate  | Abhishek Tripathi | Green          | United Kingdom |

| Case Title         | Customer  | Project                | Case Type        | Severity | Go Live Blocker? | Is Escalated |
|--------------------|-----------|------------------------|------------------|----------|------------------|--------------|
| Testing Risk input | Microsoft | [FT]Test Project Rakib | General Feedback | Low      | No               | No           |
| Malware            | Microsoft | [FT]Test Project Rakib | General Feedback | Low      | No               | No           |

Overall project status

Project issues tracking

# Project Navigation

Everything related to a project

Everything in FastTrack for Dynamics 365 implementation portal

The screenshot displays the Microsoft FastTrack for Dynamics 365 implementation portal. The top navigation bar includes the Microsoft logo, the page title "FastTrack for Dynamics 365 implementation portal", and user information "Contact Us | Darren Liu". The left sidebar, highlighted with a red box, contains the following navigation items: Engagements, Home, Projects, Partner, Nomination, Help & Support, Knowledge Articles, Help, Contact Us, Administration, and Users. The main content area shows the project details for "[Primary] Montepio Project". The breadcrumb trail is "Home / Projects / [Primary] Montepio Project". The project name is "[Primary] Montepio Project". The summary section includes "Overall Engagement" (yellow dot), "Active Risks 9" and "Active Cases 8", a progress bar with stages "Initiate", "Implement", "Prepare" (highlighted), and "Operate", "Success Measures" (0, 2, 0, 1), and "Tenant MONTEPIO". The project details are organized into three columns: Project Summary, Engagement Description, and Timeline. Project Summary includes fields for Customer (Montepio), Project Name ([Primary] Montepio Project), Project Type (New), Partner (Accenture - United Kingdom), Subsidiary Name (United Kingdom), Products (2 selected), Tenant Id (0f172980-1261-4323-ab7a-c89b472843d7), and Start Date (8/13/2020). Engagement Description includes Overall Engagement Status (Yellow), Project Phase (Prepare), Project Status (In Progress), and Executive Summary (testesddd). Timeline includes entries from "about a month ago" by Gonçalo Antunes, including a test note with an attachment (MS.png, 6.81 KB) and a PDF document (Forrester-TEI-Of-Microsoft-Dynamics-365-CRM-Cloud-Migration\_Final.pdf, 859.29 KB).

Project health overview

Project information

# Knowledge Articles

Filter, Search, Export

Microsoft FastTrack for Dynamics 365 implementation portal

Home / Knowledge Articles

Products Reviews Review Topics Review Items

Filter Reset

Search Export to Excel

| Title                    | Modified On        |
|--------------------------|--------------------|
| Do you automate sharing? | 12/24/2020 5:19 PM |

**Do you automate sharing?**

| Products | Review                         | Topic                           |
|----------|--------------------------------|---------------------------------|
|          | CE Security Modelling Workshop | Implemented Security Mechanisms |

**Description:**

**SCENARIOS**

Scenario 1. Automating sharing

**Products**

**Review**

CE Security Modelling Workshop

**Topic**

Implemented Security Mechanisms

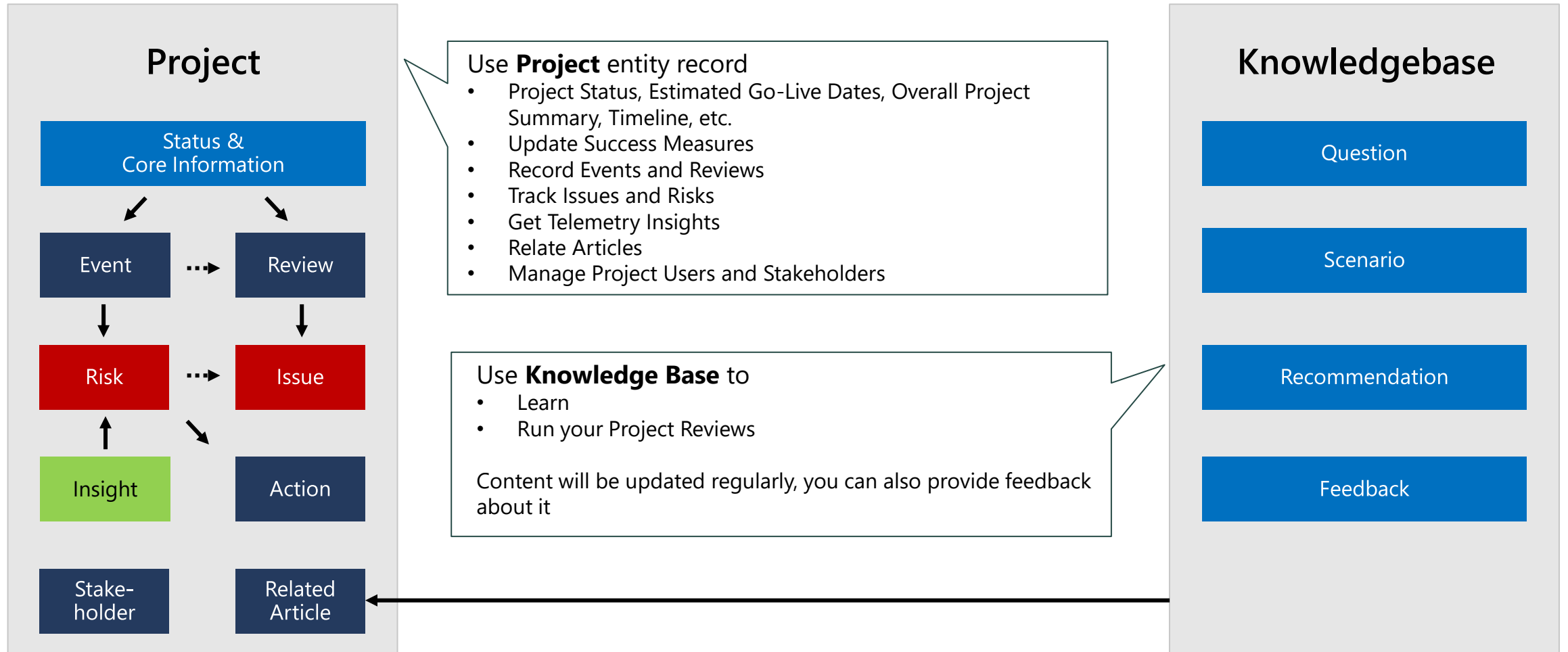
**Description:**

**Recommendation:**

Automating sharing at scale can cause performances issues (the PrincipalObjectAccess – POA – entity gets filled with exceptions to the standard security model). Sharing should typically remain a manual process to grant exceptions to the security model in place and should be avoided at scale. While it's easy to adjust user's business unit, teams and roles, it can be complex to do a data migration on custom sharing rules after a re-organization.

Question > Scenarios > Recommendations

# FastTrack for Dynamics 365 implementation portal



# Typical portal update events

Any aspect could be updated based on any interaction, but these are the typical update events:

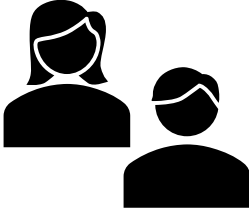
|                            | Executive Overview | Project Status | Success Measures | Risks | Issues (Case) | Escalation | Actions | Documents |
|----------------------------|--------------------|----------------|------------------|-------|---------------|------------|---------|-----------|
| Partner Kickoff            | ✓                  | ✓              | ✓                | ✓     | ✓             |            | ✓       |           |
| Customer Kickoff           | ✓                  | ✓              | ✓                | ✓     | ✓             |            | ✓       | ✓         |
| Solution Blueprint Review  | ✓                  | ✓              | ✓                | ✓     | ✓             | ✓          | ✓       | ✓         |
| Implementation Workshops   |                    | ✓              | ✓                | ✓     | ✓             | ✓          | ✓       | ✓         |
| Follow Ups and Touchpoints |                    | ✓              | ✓                | ✓     | ✓             | ✓          | ✓       | ✓         |
| Go Live Readiness Workshop |                    | ✓              | ✓                | ✓     | ✓             | ✓          | ✓       | ✓         |
| Post Go Live Review        |                    | ✓              | ✓                | ✓     | ✓             | ✓          | ✓       | ✓         |

# Demo

# The Fundamentals

# Overview

Imagine you  
ran into your  
leaders in your  
organization



# Executive Overview – What to include?

- **Link to company home page**
- **Short description of the business** (e.g. ....is a manufacturer of... ....is a division of... ....focuses on....)
- **Noteworthy business attributes** (e.g. ....is the largest firm in.... ....is a leader in.... ....is a key supplier for....)
- **Business scenario** (e.g. ....is a startup.... ....was recently spun off.... .... is growing rapidly.... ....is downsizing....)
- **Functional scope** (e.g. ....implementing apps.... ....implementing modules.... ....migrating from Salesforce and....)
- **Rollout scope** (e.g. ....is the first of several divisions.... ....deploying 10k users.... ....deploying to 15 countries....)

## What the Executive Overview is not:

- It is not just a cut and paste of their company "About Us" page or their Wikipedia page.
- It is not the current status of the project, that goes in "Current Status Description"

# Current Status Overview – What to include?

- **Description of current and upcoming activities** (e.g. ....just finished SBR and have an ALM workshop scheduled for 7/23.... ....UAT is complete and the customer is prepared for go-live readiness.... ....met with CIO last week about unexpected gaps.... ....Faisal will meet with the customer on 7/25 for an executive touchpoint....).
- **Comment on project state** (e.g. ....the project is progressing on time and on budget.... ....the project is delayed based on customer resource availability.... ....the UAT needs to be redone due to excessive quality issues....)
- **Comment on customer state** (e.g. ....customer seems confident in the solution.... ....customer is struggling with managing scope and budget.... ....quality issues are continuing to cause tension.... ....customer is escalated based on time to resolve Microsoft bugs.... ....the customer is questioning the partner's ability to deliver....)

## What the Current Status Overview is not:

- It is not a restatement of all the detailed risks and issues, not the deep dive into one issue or one aspect of the project, not the details of support case
- It should not contain the text of an error message
- It should never have a code snippet
- In case you were using this field to record any tasks or reminders, it is now recommended to use Actions record any tasks there.

# Key Project Attributes

| Attribute      | Description  | Best Practices   |
|----------------|--|--|
| Project Phase  | Designates the Success By Design phase the customer is currently in. | <ul style="list-style-type: none"> <li>• Initiate – Projects remain in this phase until an initial solution blueprint review has been completed.</li> <li>• Implement – Projects having completed the solution blueprint review but not the go-live readiness assessment are in the Implement phase.</li> <li>• Prepare – Projects having completed the go-live readiness assessment that have not gone live are in the Prepare phase.</li> <li>• Operate – Projects having went live are in the Operate phase.</li> </ul> <p>If a customer goes live and is forced to revert to the legacy system, the phase should be moved back to Prepare.</p> |
| Project Status | Indicates the current status of the engagement.                      | <ul style="list-style-type: none"> <li>• In Progress – This is the state of customers where FastTrack is engaged and executing the Success By Design Program</li> <li>• On Hold – This status indicates that the project is on hold due to one or more implementation factors, but that the customer intends to resume the implementation.</li> <li>• Blocked – Indicated that implementation is on-going, but FastTrack engagement has been blocked.</li> </ul> <p>For projects that are on hold or blocked, the reasons for the project status should be represented in cases. The project status should reflect this state.</p>                 |
| Tenant         | Specifies the customer tenant  |  |
| Region         | Indicates the region where the project is being executed             |  |

# Key Project Attributes

| Attribute                 | Description   | Best Practices  |
|---------------------------|---|---|
| Estimated Go-Live Date    | Is the estimated go-live date for the project.                      | The FastTrack architect should track the estimated go-live date for the project based on the customer projection and what FastTrack knows about the engagement.   |
| Actual Go-Live Date       | Is the actual go-live date of the project                           | This field should remain blank until the project has officially gone live.  |
| Number of Go-Live Users   | Identifies the number of users that will be involved in the go-live |   |
| Overall Engagement Status | Indicates the current customer sentiment level.                     | <p><b>Green</b> – Customer is satisfied with the project progress and has confidence in a successful go-live. Minor issues on the project are unlikely to result in escalation beyond the FastTrack architect.</p> <p><b>Yellow</b> – The customer or Solution Architect has concerns about one or more aspects of the implementation and views the project at risk. The customer’s state is such that minor issues are likely to result in escalation beyond the FastTrack team.</p> <p><b>Red</b> – The customer is currently escalated on one or more issues. The FastTrack team is engaged in actively mitigating perceived issues and risks.</p> |

# Success Measures

# Success Measures

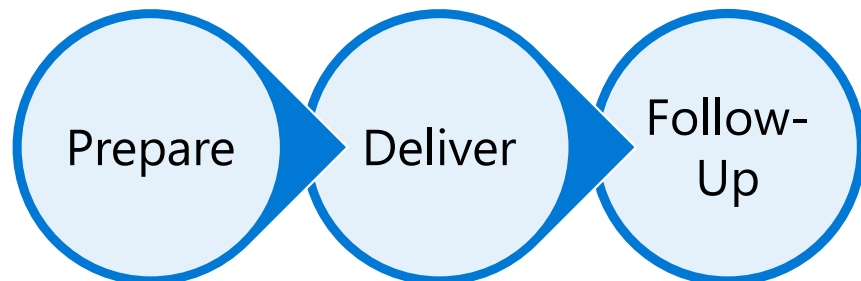
| Group              | Categories                       |
|--------------------|----------------------------------|
| Project Governance | Schedule                         |
|                    | General Governance Approach      |
| Fit for purpose    | Presales                         |
|                    | Product/Solution fit             |
|                    | Under-licensed project           |
| Product            | Product bugs                     |
|                    | Product reliability              |
|                    | Product performance              |
|                    | Feature gaps                     |
|                    | Feature deprecation              |
| Implementation     | Change Management                |
|                    | Testing                          |
|                    | Cutover                          |
|                    | Application Lifecycle Management |
|                    | Fit / Gap Analysis               |
|                    | Continuous Update                |
|                    | Rollout approach                 |
|                    | Business Continuance Planning    |

| Group        | Categories            |
|--------------|-----------------------|
| Architecture | Instance Strategy     |
|              | Application Extension |
|              | User Experience       |
|              | Integration           |
|              | Data Model            |
|              | Data Migration        |
|              | Security              |
|              | Functional            |
|              | ISV                   |
|              | Business Intelligence |
| Competency   | Performance           |
|              | Customer              |
| Support      | Partner               |
|              | Support               |
| Other        | External factors      |

# Every Workshop Leads To Success Measures Insights

- The goal of Success by Design and Success Measures tracking is to gather information and assess overall project quality and/or risks.
- After each Success by Design workshop delivered, you should update the relevant Success Measures for the project.

## FastTrack Success by Design Workshop Delivery Flow



### Success Measure Best Practices

Not every Success Measure gets used every time.

The categories: **Fit for Purpose** and **Product** will typically only get used when there are problems that arise.

The **Other** category should only be used if there is no other relevant option.

No Success Measure does not mean the engagement is green. It means we don't know.

Success Measure Status Description is to be used as a summary or an assertion.

Detailed risks and issues should be input as risks and issues.

Assertions are made when FastTrack says everything looks good. This can be tracked in the status description.

# Risk and Issue

# Introduction to Risk and Case Management

Effective tracking of a project's risks, issues and escalations is critical

| Type       | Definition   | Example(s)   |
|------------|--|--|
| Risk       | An observation or concern that has the potential to evolve into an issue or escalation if not addressed. Risks may require priority action to be taken or be created for proactive monitoring. | The customer is not properly staffing the project.   |
| Case       | A Risk that was not mitigated and is impacting project success. Solution Architect may elevate the existing Risk or create a new issue to document the issue impact.                           | Inadequate staffing on the customer team is causing quality issues and negatively impacting timelines. |
| Escalation | An issue that is severe enough that FastTrack or other Microsoft leadership has been engaged to resolve the issue.   | Inadequate staffing on the customer team has led to a slip in the go-live date.                        |
| Task       | Replacement for Next Steps on the Case record to track what actions need to be taken to resolve a Risk, Issue or Escalation.   | Review customer test plans   |

# Key Risk and Case Attributes

| Attribute       | Description | Best Practices  |
|-----------------|-------------|---|
| Severity        |             | <ul style="list-style-type: none"> <li>• <b>High</b> –go-live is delayed, system usability is affected in a material way</li> <li>• <b>Medium</b> – Impact to cost does not change the overall budget, timeline changes may impact approach but not the go-live, system usability impacted but still viable</li> <li>• <b>Low</b>- Impact to cost and schedule are easily absorbed - no impact to solution usability</li> </ul> |
| Go-Live Blocker |             | Any Risk, Issue or Escalation that if not resolved will block the Go-Live.  |
| Mitigated On    |             |   |
| Resolved Date   |             |   |

# Knowledgebase

# Knowledgebase



Align with Success by  
Design



Reduce Manual Effort



Consist of Review  
questions and Scenarios



Browse and search  
relevant articles

Knowledgebase enables our partners by providing access to centralized knowledge to bring them the learnings and experiences from over 3000+ complex implementations to help deliver high quality consistent engagements for their customers

# Navigation

The screenshot displays the Microsoft FastTrack for Dynamics 365 implementation portal. The top navigation bar includes the Microsoft logo, the page title "FastTrack for Dynamics 365 implementation portal", and user information "Contact Us" and "Edward Kim". A left-hand navigation menu lists categories such as Engagements, Home, Projects, Partner, Help & Support, Knowledge Articles, Administration, and Users. The main content area is titled "Home / Knowledge Articles" and features a search and filter interface. This interface includes four filter categories: Products, Reviews, Review Topics, and Review Items. The "Reviews" filter is currently active, showing "CE Go Lives Readiness" and "Test Strategy" as selected items. A "Filter" button and a "Reset" button are also present. Below the filters is a search bar and an "Export to Excel" button. The main content area displays a table of Knowledge Articles with columns for "Title" and "Modified On". Two articles are listed, both highlighted with a red box. The first article title is "UAT test case coverage? Number of locations covered during UAT? Number of personas covered during UAT? Number of users in UAT?" and the second is "Have all the project stakeholders signed-off on date and time for key Go-live actions?". To the right of the table, there are icons for help and sharing for each article.

| Title  | Modified On        |
|--|--------------------|
| UAT test case coverage? Number of locations covered during UAT? Number of personas covered during UAT? Number of users in UAT? | 9/28/2020 6:57 AM  |
| Have all the project stakeholders signed-off on date and time for key Go-live actions?   | 8/27/2020 12:15 AM |

Advanced Search on RKB articles

List of RKB Review questions

# Navigation

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Microsoft FastTrack for Dynamics 365

Contact Us | Edward Kim

Engagements

Home / Knowledge Base

Products

Products

Title

Has the customer documented the high-level data flows for each of the integration scenarios?

| Products | Review                     | Topic | Item |
|----------|----------------------------|-------|------|
|          | CE - Demo Workshop         |       |      |
|          | CE Data Migration Workshop |       |      |

Description:

SCENARIOS

Scenario 1. The customer has documented the high-level data flows for each of the integration scenarios

| Products | Review | Topic | Item |
|----------|--------|-------|------|
|          |        |       |      |

Description:

Content: It's important to determine the data flow. Dual-write OOB data flows are documented here

Scenario 2. The customer has not (or has partially) documented the high-level data flows for each of the integration scenarios

Close

A quick view of a RKB Review question and its related scenarios

# Insights

# Navigation

Microsoft FastTrack for Dynamics 365 implementation portal Contact Us | Amreek Singh

Home / Projects / [Primary] Montepio Project

[Primary] Montepio Project

Summary Events and Reviews Tracking Success Measures **Insights** KB Search Related Articles Project Users

Insights for last 30 days

| Name ↑                 | Category | Environment          | Green | Amber | Red | Timestamp Start    | Timestamp End      | Execution Start    | Execution End      | Created On         |
|------------------------|----------|----------------------|-------|-------|-----|--------------------|--------------------|--------------------|--------------------|--------------------|
| RUN 2020-10-01 #000063 | ALM      | CEMG - CRM Qualidade | 1     | 0     | 1   | 9/30/2020 12:00 AM | 10/1/2020 12:00 AM | 10/1/2020 11:34 PM | 10/1/2020 11:34 PM | 10/1/2020 11:34 PM |

Close

The insights tab shows insights related to different categories (such as ALM and Performance) and environments. In the above screenshot, the ALM category has 2 insights one of them is green, and the other one is red.

# Navigation

Home / Projects / [Primary] Montepio Project / Insights / RUN 2020-10-01 #000063

Health Indicator



## General

Name \*

RUN 2020-10-01 #000063

Telemetry Category \*

ALM

Project \*

[Primary] Montepio Project

Environment \*

CEMG - CRM Qualidade

Execution Start

10/1/2020 11:34 PM

Execution End

10/1/2020 11:34 PM

Edit

Delete

New ▾

## Query Executions

Name

Health

Query

RUN 2020-10-01 #000176

Red

ALM.Unmanaged.Imports

RUN 2020-10-01 #000177

Green

ALM.Solutions.ImportsSameVersion

Indicates if the solution is using unmanaged solutions

Indicates if the same solution version is imported multiple times

# Navigation

RUN 2020-10-01 #000177



**Best Practices** Description Health Criteria Why are we checking Possible Actions Data

Please use a proper version strategy for the solutions. Use clone solution, patching as required.  
<https://docs.microsoft.com/en-us/dynamics365/customerengagement/on-premises/customize/use-segmented-solutions-patches-simplify-updates>

Provides details about the insight including description, health criteria, best practices and in some scenarios the data used for the insights.

Close

# Thank you!