Success by Design

Overview
FastTrack for Dynamics 365 is a customer success program powered by the Microsoft engineering team to enable organizations to accelerate Dynamics 365 implementations and go-live with confidence.

“We’re very impressed with the FastTrack collaboration with PowerObjects. In partnership with Microsoft, both teams were able to navigate and overcome unexpected challenges with the greatest zeal.”

– Liz Pham
Director, Global Product Management
HCL-PowerObjects
FastTrack for Dynamics 365 by annual spend

<table>
<thead>
<tr>
<th></th>
<th>&lt;$100K</th>
<th>$100K - $300K</th>
<th>&gt;$300K</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dynamics 365 adoption resources</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
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<tr>
<td>Success by Design on-demand training</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
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<tr>
<td>Product TechTalks</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
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<tr>
<td>Success by Design execution</td>
<td></td>
<td>✓ Partner-Led</td>
<td>✓ Microsoft-Led</td>
</tr>
<tr>
<td>Qualified implementation partner required</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Customer nomination required</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>FastTrack Solution Architect backed</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
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*Based on total billed spend over the contract coverage period*

GCC customers are currently served only in the $300K and above threshold
Based on Success by Design

The Dynamics 365 engineering team brings you the learnings and experiences from 3000+ cloud deployments through Success by Design.

Success by Design (SbD) is the prescriptive guidance (approaches & recommended practices) and framework for designing, building and deploying a Dynamics 365 solution.

It is grounded in fundamentals of good solution architecture and design, product capabilities, and proven approaches to business process transformation and implementation.

Designed around three core principles:

- Early detection
- Proactive guidance
- Predictable success

2.2x higher usage of Dynamics 365
Another project methodology? Do we really need that?

Not an uncommon reaction to our first internal presentations of Success by Design. But while Success by Design is all about our projects, it’s less about theory and more about ensuring the best outcome for our daily business.

At ORBIS, we deliver successful Dynamics projects for more than fifteen years, but we always look for ways to improve. Success by Design provided us with a clear cut, comprehensive, yet simple template for quality assurance that helps our team and improves our cooperation with Microsoft in FastTrack engagements.

Best of all—instead of having to change our existing workflows and adding convoluted methodology requirements (here’s looking at you, SureStep!), Success by Design easily integrated with our preferred practices and works well with different methodologies.

What’s not to like?

— Martin Fahrnberger
Managing Partner, ORBIS Austria GmbH
Success by Design vs Implementation Methodology

**Implementation Methodology**
- Drives the structure of the implementation and related activities. It defines the means of governing those activities and it prescribes the approach and techniques that will be used to execute.
- Typically provided by the implementation partners
- Typically based on one of several base models, e.g. iterative, waterfall, etc...

**Success by Design**
- Provides a body of guidance and a framework for engagement with an implementation, running under any methodology, to infuse recommended practices.
- Defined by Microsoft
- Designed to work with a variety of implementation methodology models
Workshops and engagements form the basis of Success by Design guidance.

Workshops

Workshop questions serve as “inspection points” that allow assessment of (and action on) project and technical risks identified.

Patterns, Findings, Recommendations

Comprises the experience and patterns of 3000+ of successful implementations which are shared to intentionally veer the project in the direction of success.
Success by Design Workshops

- The Solution Blueprint workshop serves as the starting point of Success by Design.
- Implementation workshops offer opportunities to dive deeper where necessary.
- The Go-live Readiness workshop is the last stop for assessing any remaining risks before go live.
## Align with the proven Success by Design guidance

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<th>Initiate</th>
<th>Implement</th>
<th>Prepare</th>
<th>Operate</th>
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<tbody>
<tr>
<td>Get ready to start</td>
<td>Design &amp; Build</td>
<td>Deploy</td>
<td>Live</td>
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<tr>
<td>Requirement Analysis</td>
<td>Code</td>
<td>Testing &amp; Acceptance</td>
<td>Solution health</td>
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<td>Project Governance</td>
<td>Configure</td>
<td>Go-live planning</td>
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<td>Fit-gap analysis</td>
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<td>Maintenance</td>
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<td>Data Model Design</td>
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<td>...</td>
<td>Integration Design</td>
<td>...</td>
<td>Post Go-live</td>
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<tr>
<td>Solution Blueprint</td>
<td>Solution Performance</td>
<td>Go-live readiness</td>
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Findings & Recommendations

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"FastTrack for Dynamics 365 gave us access to experts and saved us a ton of time."

– Russel Palmer
Director of Applications
USI Insurance Services

Note: The activities shown are a subset of a complete implementation project.
The Success By Design approach relies on workshops.

Workshops are exercises in discovery and alignment that project teams leverage to assess whether the implementation is following recommended patterns and practices.

They also allow project teams to identify and highlight issues and risks that may derail the project.

If the project team is unable to allocate time for the workshops, it is not possible to deliver Success by Design effectively. In such cases, the project should be withdrawn from the FastTrack program.
Success by Design Output

The workshop outcomes are provided as a formal written deliverable shared with the entire implementation team.
Success by Design Results

Quality Findings Contain Three Components:
- ✓ What we saw
- ✓ How we think about it
- ✓ What we recommend

**ASSERTIONS**
Findings that are either neutral or represent a recommended practice which can be verified over time.

**RISKS**
Findings that have the potential to cause negative impact to the implementation if not mitigated.

**ISSUES**
Findings that are currently impacting the implementation negatively or that will impact the implementation if not resolved.
Success Measure Tracking

Fundamental to Success by Design, Success Measures are a structured set of findings that are tracked for every project and used to highlight project risk areas as well as the project's probability of success.
Thank you!