Microsoft Dynamics 365

Success by Design

Solution Blueprint Review

An Overview of Solution Blueprint Review

Solution Blueprint Review

◈ Why?

- Ensure that the solution scope and details are understood in a structured manner

- Ensure that the solution design concepts are sound

- Drive communication within the implementation team

- Prevent issues and mitigate risks at an early stage of the project

- Provide a baseline understanding to plan other Success by Design activities on

◈ When?

- The Solution Blueprint review should be run at or near the project start or the Initiate phase of the project, just before the primary implementation activities start
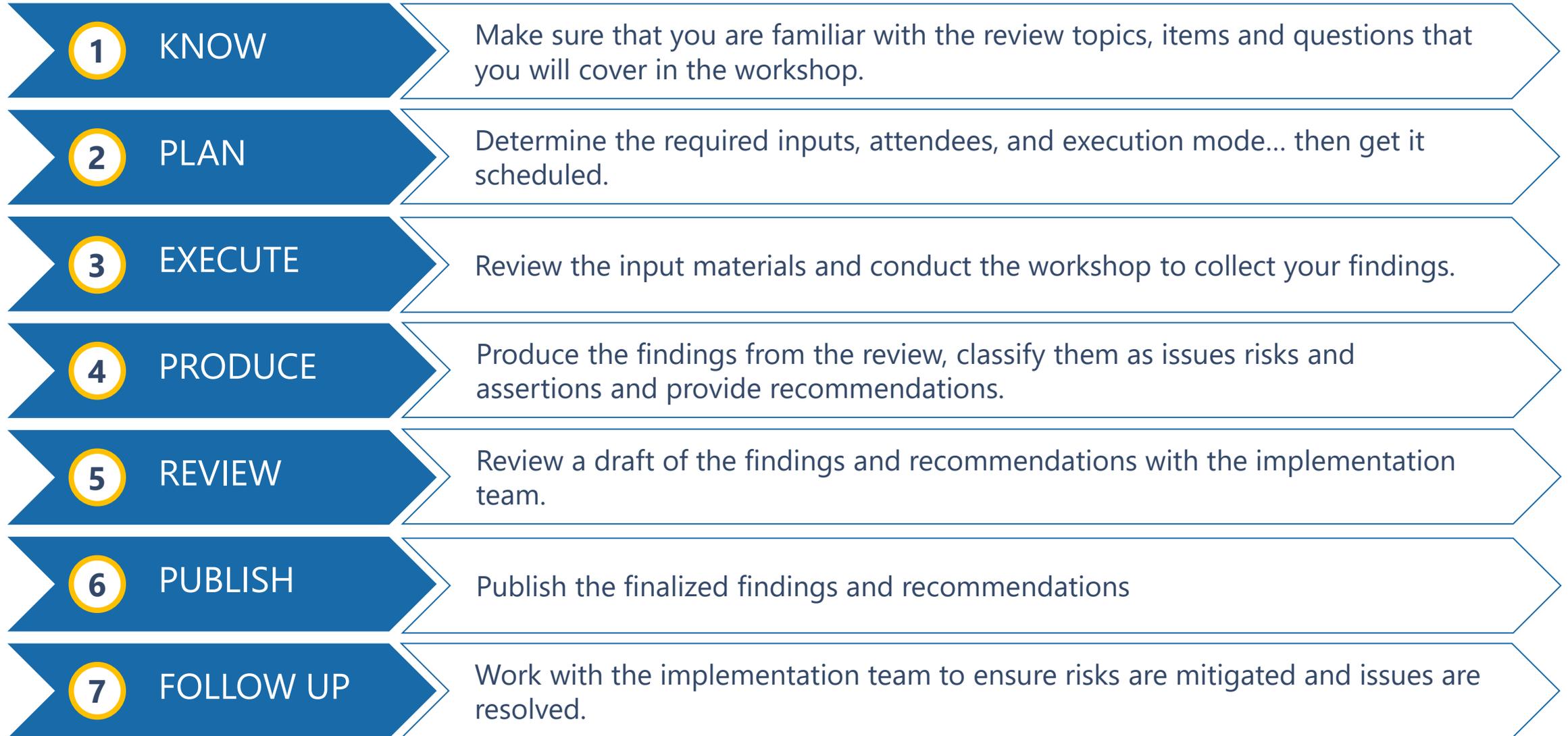
◈ How?

- At the minimum, the implementation team must be prepared to share the information in the available Solution Blueprint template

- If the implementation team pushes back, remind them the Solution Blueprint Review is the first step in process and provides context for all other guidance and offer to discuss the high-risk gaps in the review

- Prepare and detail the Solution Blueprint in a common template that the FastTrack team provides

- Present and discuss the details of the Solution Blueprint with FastTrack team

- Collaborate with the FastTrack team in identifying risks and potential issues existing in the Solution

- Take on actionable insights back to the Solution, to reduce the risk and address the issues

Solution Blueprint Review Process

Understand the steps from beginning to end

1 KNOW — Make sure that you are familiar with the review topics, items and questions that you will cover in the workshop.

2 PLAN — Determine the required inputs, attendees, and execution mode... then get it scheduled.

3 EXECUTE — Review the input materials and conduct the workshop to collect your findings.

4 PRODUCE — Produce the findings from the review, classify them as issues risks and assertions and provide recommendations.

5 REVIEW — Review a draft of the findings and recommendations with the implementation team.

6 PUBLISH — Publish the finalized findings and recommendations

7 FOLLOW UP — Work with the implementation team to ensure risks are mitigated and issues are resolved.

Breaking down barriers to participation

Solution Blueprint Review is the first step in process and provides context for all other guidance and offer to discuss the high-risk gaps in the solution blueprint review

We're not ready to review the blueprint yet.... we just started the project...

Most projects have a scope, budget and target go-live date defined as part of the engagement agreement that the customer has with their implementation partner. The presence of these implies the existence of at least a conceptual solution and implementation approach. This forms the basis of the blueprint.

- If we are missing scope, budget or target go-live date there we have inherent risk.
- If we have scope, budget or target go-live date with out a conceptual solution design we have inherent risk

We expect big changes following analysis and solution modeling. Let's wait until we get through those activities to review the blueprint...

This is another way of saying that we have no confidence in the conceptual solution and by proxy the scope, budget and target go-live date.

- It is critical that all parties involved have the same understanding of the state of the solution. Doing a blueprint review will help reinforce that understanding and define non-negotiable constants that cannot change during analysis and solution modeling
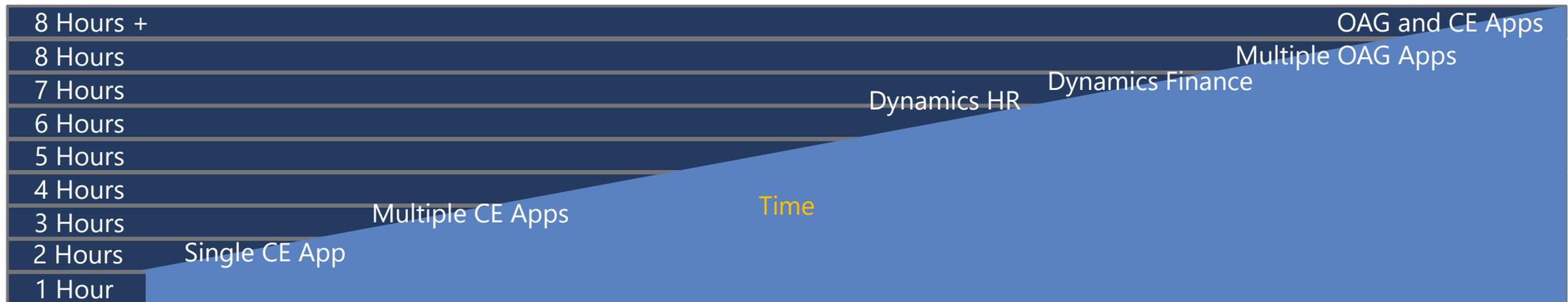
Planning for the Solution Blueprint Review

Solution Blueprint Review Preparation

Prepare for the workshop by gathering the details of the solution such as:

Process Catalog	Data Strategy (Entities / Migration Scope)	Deployment Locations
Process Block Diagram	Integration Strategy (Interface Register)	Project Charter
Application Diagram	Analytical Data Aggregation (Scope)	Project Plan / Schedule
Key Gaps	Environment Strategy	Responsibility Matrix
ALM Strategy	System Usage Profiles	Test Plan / Strategy
Production Instance Strategy	Business Unit / Legal Entity Structure	Security Strategy

How long does a solution blueprint review workshop take?

Workshop Duration Differs By Project

Duration		Project
8 Hours +		OAG and CE Apps
8 Hours		Multiple OAG Apps
7 Hours		Dynamics Finance
6 Hours		Dynamics HR
5 Hours		
4 Hours		
3 Hours		Multiple CE Apps
2 Hours		Single CE App
1 Hour		

Time

Other Factors

How much is known up front?
How early in the project is the workshop?
How complex is the implementation?
How standard is the approach?

On FastTrack engagements for customers investing $100K - $300K, the Microsoft FastTrack architect does not attend this workshop. Microsoft FastTrack spends approximately 45 minutes reviewing the workshop outcomes.

Solution Blueprint Workshop Execution Modes

Option 1 - Onsite

Delivering the workshop onsite and in person can be a great way of meeting the implementation team and building a working relationship.

When done onsite the workshop is generally compressed into a single session with a set agenda to allow subject matter experts to join as needed.

Session 1
Program Strategy
Test Strategy
Business Process Strategy
Application Strategy
Data Strategy
Integration Strategy
Intelligence Strategy
Security Strategy
ALM Strategy
Environment & Capacity Strategy

Option 2 - Remote

When executed remotely via Teams the workshop can be broken up into smaller sessions that can be more flexibly scheduled over the course of a few days.

This example shows how you might break down an 8-hour review into multiple 2 hours sessions.

Session 1
Program Strategy
Test Strategy

Session 2
Business Process Strategy

Session 3
Application Strategy
Data Strategy
Integration Strategy

Session 4
Intelligence Strategy
Security Strategy
ALM Strategy
Environment & Capacity Strategy

Workshop Participants

Mandatory

Customer Project Manager

Customer Architect

Partner Project Manager

Partner Architect

As Needed

Partner Subject Matter Experts

Customer Subject Matter Experts

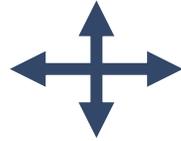Team members in implementation leadership roles should plan to attend the entire review.

Team members with specialist roles may only attend sessions specific to their role.

Workshops that exceed 10-12 participants may struggle with efficiency.

For $100K - $300K customer implementations, the partner organization should provide both the architect that is responsible for the implementation as well as an architect that is responsible for conducting Success By Design for the implementation. These are not the same person.

Executing the Solution Blueprint Review

Solution Blueprint Review Execution Tips

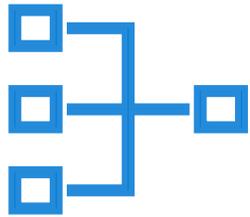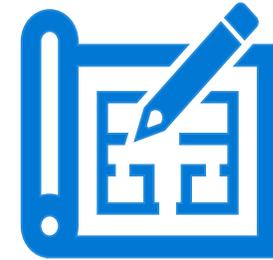| Balance Breadth and Depth	"I don't know" is a Finding	No Partial Reviews
Go deep enough to find a problem. Don't solve it in the workshop.	Not covering something is different then asking and not getting an answer	The solution blueprint is by design a wholistic exercise to establish context
• Its better to get through each topic at a high level than 1 topic in detail • Once you identify the risk or issue move on • "Parking Lot" large areas of uncertainty for follow deep dives	• If the team is not ready to discuss a topic at all the assumption should be that there is no plan in that area. • Lack of the ability to make an assertion means there is uncertainty.	• The solution blueprint establishes a baseline on which you base the rest of the program • It is risky to provide advice on any topic without context

Solution Blueprint Content

The Workshops

Workshops and engagements to create opportunity for impact

The Questions

Inspection points to allows us to activate the opportunities

The Patterns

The knowledge that can be shared to drive impact for customer success

The following section provides examples of key points within each topic and some of the elements that a reviewer might be looking for. These are not an exhaustive list of questions. The baseline questions are meant as a starting point to drive a conversation in which there will be opportunities to discover potential issues and risks. This conversation will be slightly or significantly different depending on the individual implementation.

Program Strategy

What are we talking about?	What are we looking for?
→ Goals and Objective	→ What does customer success look like?
→ Governance and Methodology	→ Is there a known methodology in place?
→ Project Schedule	→ Is it realistic?
→ Requirement Gathering Approach	→ Are we gathering "to-be" requirements from the right sources in the business?
→ Requirement Management Approach	→ Do we have the right process and tools in place to manage requirements and traceability?

Test Strategy

What are we talking about?	What are we looking for?
→ Approach	→ Are the right types of tests planned?
→ Duration	→ Has enough time been allotted to be successful?
→ Schedule	→ Is the testing happening at the right times?
→ Responsibility	→ Are the responsibilities clear?
→ Preparedness	→ Are the responsible parties capable of performing testing?

Business Process Strategy

What are we talking about?

- → Scope
- → Structure
- → Management
- → Complexity

What are we looking for?

- → Are there risks around what is being implemented?
- → Is the process architecture known and structured?
- → How is process used in the management of the solution?
- → Are there factors that complicate the process architecture?

Application Strategy

What are we talking about?

- New Packaged Components

- Legacy Components

- New Developed Components

What are we looking for?

- Which ones and how are the going to be used?

- Which ones and how are the going to be used?

- What and why?

Data Strategy

What are we talking about?	What are we looking for?
→ Master Data	→ Do we know what master data will be managed in the system?
→ Transactional Data	→ Do we know what transactions will be facilitated in the system?
→ Migration Scope	→ Do we understand detailed migration scope (entity & source)?
→ Migration Approach	→ Are responsibilities clear and responsible parties capable?
→ Volumes	→ Do we have volumes that require special consideration?

Integration Strategy

What are we talking about?	What are we looking for?
Interface Scope	Do we understand scope at the interface level?
Interface Technology Approach	Does the team understand the available patterns and usage?
Throughput and Response Time	Do we know the key non-functional requirements?
Middleware	Is there a solid design for integration management?

Intelligence Strategy

What are we talking about?

- → Scope

- → Requirements Approach

- → Technology Strategy

- → Data Sourcing

What are we looking for?

- → Is there a clear scope of the use of BI in the solution?

- → Are requirements tied to process requirements?

- → Does the design include the use of the latest stable technologies?

- → Do the needs for sourcing data for BI add complexities and risk?

Security Strategy

➔ Authentication

➔ Are the capabilities and constraints related to authentication understood?

➔ Network Access

➔ Are the capabilities and constraints related to network access understood?

➔ Compliance

➔ Is the scope of compliance requirements understood?

➔ Data Residency

➔ Are the requirements and constraints related to data residency understood?

➔ Data Privacy

➔ Are requirements and constraints related to data privacy understood?

Application Lifecycle Management Strategy

What are we talking about?

→ Preproduction Instance Strategy

→ DevOps

→ Continuous Updates

→ Configuration Management

What are we looking for?

→ Is there a strategy in place that supports the project approach?

→ Does the team have a strategy for the use of DevOps?

→ Have the requirements and constraints of continuous update been considered?

→ Is the team aware of operating schedules and volumes of the solution?

Environment & Capacity Strategy

What are we talking about?

→ Production Instance Strategy

→ Business Continuance and Disaster Recovery

→ Location Deployment Scope

→ System Volumes and Operating Schedule

What are we looking for?

→ Has the number of production instances been determined and how?

→ Are the BCDR capabilities of the solution components understood?

→ Are there challenges with in-scope deployment locations?

→ Is there a structured approach to managing configurations?

Complete the Solution Blueprint Workshop

Solution Blueprint Outcomes

	PRODUCE	**REVIEW**	**PUBLISH**
$100k - $300k	Partner review architect prepares findings and recommendations and reviews with FastTrack	Partner review architect reviews the findings and recommendation with the customer and partner implementation team	Partner review architect publishes the findings and recommendations to all implementation stakeholders
>$300k	FastTrack architect prepares findings and recommendations	FastTrack architect prepares findings and recommendations	FastTrack architect publishes the findings and recommendations to all implementation stakeholders

Thank you!