Success by Design

Implementation Workshops
Implement – Implementation Workshops

Provide timely guidance across functional, technical and implementation aspects of the solution.

Solution Modeling & Integration

Functional and technical design guidance

Migration & Implementation best practices
Align with the proven Success by Design guidance

Initiate
- Get ready to start
  - Requirement Analysis
  - Project Governance
  - Fit-gap analysis
  - Customer-Kick-off
  - Solution Blueprint

Implement
- Design & Build
  - Data Model Design
  - Integration Design
  - Solution Performance
  - Security Model Design
  - Test Strategy
  - User Experience Design
  - Application Lifecycle Management Strategy
  - Data Migration Strategy
  - Gap Solution Design
  - Cutover Strategy
  - BI and Analytics Design

Prepare
- Deploy
  - Testing & Acceptance
  - Go-live planning
  - User readiness
  - Cutover planning
  - Go-live readiness

Operate
- Live
  - Solution health
  - Usage
  - Maintenance
  - Post Go-live

Workshop supporting materials:
- Recommendation
- Knowledgebase (RKb)
- TechTalks
  - https://community.dynamics.com/365/b/techtalks
**Implementation Workshops**

**Are they the same across Apps?**
There are two types of differences. Each app has some app specific workshops. For example, F&O does not execute a User Experience workshop. Beyond that the content of common workshops will differ in some cases based on the technical details of the application platform.

**Are they mandatory?**
Implementation workshops are mandatory but will differ based on the implementation. Based on SBR you may determine certain workshop topics have been covered sufficiently or are irrelevant to the implementation. The series of deep dive workshops to be executed for any program will be determined by the Solution Architect running the Success By Design program.

**Seems like overlap with the SBR?**
There are areas of overlap with the SBR by design. The SBR will review the scope and conceptual design across the broader solution. The implementation workshop will take a more detailed look at each area once additional design / planning work has been completed.

**When do they occur?**
This depends on the implementation and the type of methodology being employed. The Solution Architect that is reviewing the implementation will work with project management to find the most opportune time to execute each workshop.
Implementation Workshops

Implementation Phase

- Requirements and Solution Modeling
  - 01
  - 02
  - 03
  - 10

- Design and Build Iterations
  - 04
  - 05
  - 06
  - 07

- Stabilization
  - 11
Preparing for Implementation workshops

Ahead of the workshop, the implementation must complete the workshop templates and share the relevant project artifacts.

The duration of the workshops will vary depending on the workshop and the complexity of the solution and can be executed as a series of remote sessions.

When preparing for an implementation workshop, if the prerequisite artifacts from the implementation team demonstrates a clear lack of readiness, make relevant observations regarding the lack of readiness as risks or issues depending on implementation scenario and postpone the workshop.
# Data Migration Strategy

## Objective

Best practices to avoid data migration performance issues, understanding of business goals and awareness on realistic throughput.

## Attendees

Key stakeholders from the customer and partner teams. Solution architects, functional and technical leads are mandatory.

## Requirements

Data migration strategy accounting for the volume and cut over time available, pre-filled workshop template

## Expected Outcome

Identify areas where common implementation pitfalls often occur in order to reduce risks and help ensure a successful deployment.

## Agenda

- Migration Strategy & General Information
- Data Volume
- Tooling
- Network Latency
- Performance
- Multithreading
- Testing

Format: 2+ Hr Teams call
Security Model Design

**Objective**
Understand the unique needs of organization security requirements and review granularity of access control, administrative ease, and impact on scalability.

**Attendees**
Key stakeholders from the customer and partner teams. Solution architects, functional and technical leads are mandatory.

**Requirements**
High-level view of the security model, pre-filled workshop template

**Expected Outcome**
Identify areas where common implementation pitfalls often occur in order to reduce risks and help ensure a successful deployment

**Agenda**
- Basics & Security Model Overview
- Business Units & Teams
- Implemented Security Mechanism
- User Interface
- Scalability, Performance, Maintainability
- Security Testing
- Security Monitoring
- Regulations and compliance
- Security Beyond Dynamics 365
# Solution Performance

## Objective
Assess different areas of the solution, any additional configuration and customizations and the impact it may have on the overall performance of end-user experience.

## Attendees
Key stakeholders from the customer and partner teams. Solution architects, functional and technical leads are mandatory.

## Requirements
Customer's basic application has been developed and preliminary QA must have been completed; pre-filled workshop template.

## Expected Outcome
Identify areas where common implementation pitfalls often occur in order to reduce risks and help ensure a successful deployment.

### Agenda
- Forms, Views and Searching
- Customizations
- Test Strategy
- Integrations
- Geo Location Strategy

**Format:** 1+ Hr Teams call
### Objective
Review and discuss various integration scenarios and considerations with Dynamics 365 and other systems.

### Attendees
Key stakeholders from the customer and partner teams. Solution architects, functional and technical leads are mandatory.

### Requirements
Complete integration strategy and planning; pre-filled integration strategy workshop template.

### Expected Outcome
Identify areas where common implementation pitfalls often occur in order to reduce risks and help ensure a successful deployment.

### Agenda
- Integration Strategy
- General information
- Office 365
- Power Platform
- Azure
- External Systems
- Reporting
Data Model Design

**Objective**
To review the envisioned data model for the customer project. The data model reflects the functional scope and potential complexity of the project.

**Attendees**
Key stakeholders from the customer and partner teams. Solution architects, functional and technical leads are mandatory.

**Requirements**
Designed data model for the implementation and pre-filled data model workshop template.

**Expected Outcome**
Key findings and recommendations if there are areas of improvement or risks.

**Agenda**
- Entity Relationship Diagram
- Out-of-the-Box versus Custom Entities
- Entity Configuration
- Option-Sets, Custom Entities & Localization
- Security, Relationships & Performance
- Fields: Alternate Keys, Calculated and Rollup
- Auditing
- External Data Display or Integration
- User Experience
- Next Steps
## Test Strategy

### Objective
Ensure the customer has planned for the various testing activities throughout the project lifecycle to ensure quality of their solution.

### Attendees
Key stakeholders from the customer and partner teams. Solution architects, functional and technical leads are mandatory.

### Requirements
Existing test plan, pre-filled workshop template

### Expected Outcome
Identify areas where common implementation pitfalls often occur in order to reduce risks and help ensure a successful deployment.

### Agenda
- Testing Strategy and Schedule
- Unit and Functional Test Strategy
- System Integration Test Strategy
- Data Migration Validation Test Strategy
- User Acceptance Test Strategy
- Performance Test Strategy
- Security Test Strategy
- Regression Test Strategy
- Mock Cutover Test Strategy
- Tools

Format: 1-3 Hr Teams call
# User Experience Design

## Objective
Identify key goals and design elements the customer is leveraging to deliver an optimal User Experience

## Attendees
Key stakeholders from the customer and partner teams. Solution architects, functional and technical leads are mandatory.

## Requirements
UI/UX strategies and designs, pre-filled workshop template

## Expected Outcome
Recommendations that can drive toward the most fluid user experience based on the most relevant and current design objects

### Agenda
- Ease of Use – Legacy system Mapping
- Ease of Use – Simplicity/Efficiency
- Aesthetics – ISV Alignment
- Aesthetics – Corporate Branding
- Performance – Speed
- Consistency of Experience
Application Lifecycle Management Strategy

Objective
Understand how the partner plans to go about the process of building, testing, validating and deploying the solutions

Attendees
Key stakeholders from the customer and partner teams. Solution architects, functional and technical leads are mandatory.

Requirements
Conducted early in the implementation phase to ensure right environment structure and sufficient instances

Expected Outcome
Identify areas where common implementation pitfalls often occur in order to reduce risks and help ensure a successful deployment

Agenda
- General Strategy
- Build Plan
- Test Strategy
- Release/Deploy
- Run Model (post-implement enhance/maintain0
- Storage Management
# Gap Solution Design

## Objective

Review of plans for high impact, high risk extensions to provide guidance on maximizing the use of standard features, alignment to product road map, and general design guidance.

## Attendees

Implementation leadership from the customer and partner. Solution architects, related functional and technical leads are mandatory.

## Requirements

Documentation of the requirements being addressed, work arounds considered, and business justification for the extension along with design plan for the extension itself.

## Expected Outcome

Identification of risks in the planned extension that may impact the customers ability to realize the full benefits of the service at go-live or in the future.

## Agenda

Functional / Technical Design Review

Format: 2+ Hr Teams call
# Cutover Strategy

## Objective

Ensure that the cutover strategy provides a good approach and plan to deliver a well-defined, well-tested, reliable and safe transition from current systems to the new Production systems?

## Attendees

Implementation leadership from the customer and partner along with team members that own elements of the plan.

## Requirements

- Cutover strategy, and cutover plan including business calendar

## Expected Outcome

Identification of risks and issues based on deficiencies in the cutover plan.

## Agenda

- Cutover Responsibility / Ownership
- Environment Management Plan
- Cutover Calendar
- Code Cutover
- Legacy Shutdown
- Data cutover
- Integration cutover
- Site cutover
- Go-no-go decision points
- System Validation
- Rollback / Contingency
- Communication Plan
- Change Management / Hyper-care
- Testing / Mock-cutover
- Timings / Performance
- Remote Go-Live Considerations

Format: 2-3 Hr Teams call
Business Intelligence and Analytics Design

Objective

Ensure that the customers design for providing business intelligence and analytics capabilities in the solution makes use of the best available technologies and patterns and is in line with product roadmap.

Attendees

Implementation leadership from the customer and partner, solution architects and analytics workstream leads are mandatory.

Requirements

Business Intelligence strategy and design documentation.

Expected Outcome

Identification of any risks and issues with the existing business intelligence and analytics design strategy along with opportunities for optimization.

Agenda

- Operational Reporting Design
- BI Process Requirements
- BI Team Structure
- Data Sources and Aggregation
- Data Storage
- Data Model
- Portals and Dashboards
- Volumes
Thank you!
https://aka.ms/SbDTrainingFeedback