Dynamics 365 FastTrack TechTalk

Implementation approach with agile techniques

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About this session

Objectives of this session

➢ To introduce an overview of the approach and some agile techniques to improve implementation speed, business engagement and project outcomes
➢ To share learning across D365 F&O projects on what works and what doesn’t
➢ To start an honest conversation on project approach in the new cloud and SaaS world
➢ This is an overview session; other sessions will follow that will cover the approach components and steps in more detail

What it doesn’t cover

➢ Prescriptive, detailed definition of all methodologies
➢ Demonstration of the project management tools
Contents

# Background
# High-level solution scope, approach and design
# Planning
# Sprinting
# Conference Room Pilot (CRP)
# Monitoring and adjusting
# Q&A
Typical project delivery problems we see in ERP projects

- **Unclear or ever-changing project scope**
- **Late discovery of project slippage**
- **Disputed areas of accountability or responsibility**
- **Low or sporadic end-user and business engagement**
- **Technical issues hiding underlying governance causes**
- **Mismatched expectations between customer and partner**
- **Stakeholders blaming each other: customer, partner, service provider**
- **Delays to Go-Live** (often at a late stage)
The changing world and approach for Dynamics 365 implementations?

**Waterfall**

**Applies well to**
known end-products with predictable execution

**Limitations in ERP:**
- Can lead to a tunnel effect
- Late discovery of design issues
- Harder to deal with changes
- etc...

**"Pure" agile**

**Applies well to**
“blue sky” software development with constant evolution

**Limitations in ERP:**
- Not always well-understood in the ERP or business app context
- Perceived commercial exposure
- etc...

"Waterfall vs Agile" is not always helpful as a “one or the other” distinction in the new cloud world
Benefits of the CRP-based approach

- The project scope, delivery and reporting has a **business process focused definition**
- True, **incremental** understanding of Go-Live readiness for end-to-end business processes and workstreams
- The design, code and testing of the entire solution are done **in a cross-functional, integrated manner**
- **Early and repeated validation** that the processes and scenarios meet the customer’s business needs in **working software**, help **business users gain confidence, experience and increase engagement**
- **Increased and better-informed accountability** from the customer for the solution design decisions, “fitness for purpose” and project timetable
- The supporting activities such as data migration, security setup, configuration etc. are **planned with process delivery in mind**
- **Customizations and complexity can be reduced** with the end-to-end solution reviews and the confirmation of the essential customizations
The key phases of the approach

Initiation
- Define
  - Scope
  - Approach
  - High-level design
  - Key strategies
  - High-level project plan
  - Budget

In each sprint:
- Delivers working software

Solution blueprint

Implement
- Sprint 1
  - In each sprint:
    - Plan
    - Analyze
    - Design
    - Develop/Build
    - Test
    - Monitor & Adjust
  - Deliver working software

Sprint 2…n
- In each sprint:
  - Analyze
  - Design
  - Develop/Build
  - Test
  - Monitor & Adjust
  - Deliver working software

Prepare

Deploy
- Execute:
  - Final mock cutovers
  - E2E UAT
  - End-user training
  - BUSINESS readiness: change management, etc.
  - PRODUCTION readiness assessments (go/no-go)
  - Cutover

Operate
- Hyper care:
  - End-user support
  - Triage issues
  - Monitor system health and performance
  - Support handoff

Operations

Go-Live

Time

Solution completeness
The key components of the CRP-based approach

CRP-based approach

- **End-to-end business process-driven solution view**
- **Incremental readiness** of the business processes
- **Integrated planning** across design, configure/develop test, deploy
- **Technical activities** driven by process delivery
- **Conference Room Pilot** “show and tell” validation at the end of each sprint
The key steps of the CRP-based approach

1. High-level solution scope, approach and design
2. Planning
3. Sprinting
4. Validating via Conference Room Pilot
5. Monitoring and adjusting
1. High-level solution scope, approach and design
2. Planning
3. Sprinting
4. Validating via Conference Room Pilot
5. Monitoring and adjusting
1. High-level solution scope, approach and design

Use the initial discovery phase to consolidate the solution overview and plans
Key steps of the CRP-based approach

1. High-level solution scope, approach and design
2. Planning
3. Sprinting
4. Validating via Conference Room Pilot
5. Monitoring and adjusting
2.1 Planning – Create/refine the initial Macro plan

**PREREQS**
- Confirmed end-to-end business processes
- Solution Blueprint
- Roles, resources and capacity vs backlog
- Effort and dependencies

**STEPS**
1. Start with end-to-end business processes
2. Storyboard
3. Allocate stories/work packages to sprints
4. Prioritize core processes

**GOAL:** Generate a Macro Plan with the sprints required to build the solution
2.1 Planning – Create/refine the initial Macro plan

**IMPORTANT**

- PM(s) expert at scope and planning
- SA(s) expert in D365 & business solution
- Excellent collaboration needed
- Customer resource commitment

**TOOLS**

- Visio* for storyboards
- MS Project* for Macro plans and management
- DevOps* for task assignment
- Excel* for simple capacity planning

* or similar applications
2.1 Planning – Storyline example
2.1 Planning – Project plan example
2.2 Planning – Create/refine the Sprint plan(s)

**GOAL:** Generate a sprint plan detailing the activities for the sprint based on work packages

**PREREQS**
- Level-3 or 4 business process flows
- Target solution design for the sprint
- Constrained capacity for the sprint
- Backlog, effort and dependencies

**STEPS**
- [PMO+SAs] Detail the sprint plan with stretch goals
- Absorb related activities (data migration, test preparation, ...)
- [Team+leads] Commit to complete tasks with “stretch goals”
- Build day-by-day task delivery map with a clear Critical Path ahead of sprint starting
2.2 Planning – Create/refine the Sprint plan(s)

**IMPORTANT**

- Assume 75-80% of available capacity per sprint
- Allow for an extra “empty” buffer sprint
- “Main” processes first, then variations
- Customer commitment and availability
- No Snow-ploughing

**TOOLS**

- Visio* for storyboards
- MS Project* for sprint plans and management
- DevOps* for task hierarchy and breakdown
- Kanbans for daily standups/triage

* or similar applications
Sample pictures – critical path example
1. High-level solution scope, approach and design

2. Planning

3. Sprinting

4. Validating via Conference Room Pilot

5. Monitoring and adjusting

CRP-based approach
3. Sprinting

**GOAL:** Complete the delivery of processes as "working software" so that they can be meaningfully and rapidly validated by the business

**STEPS:**

1. Deliver work packages across workstreams according to the sprint plan
2. Design, code/build and test the targeted processes for the sprint
3. Do daily standups/triages and focus on critical path
4. Continue to map the requirements to delivered tasks
5. Every 3 sprints or so, plan for end-to-end testing
6. Demonstrate the working processes to a selected audience for validation
3. Sprinting

Minimum handovers and maximum focus on review/decision

Make sprinting very repeatable

Initial sprints are simpler (core processes)

Later sprints are more “production like”

Prioritize functioning process over documents, data, etc.

Sprint workstream is “jointly responsible” for delivery

Communication is in-person, not via email

Document only what matters (requirements, key functional design, solution blueprint, …)
1. High-level solution scope, approach and design
2. Planning
3. Sprinting
4. Validating via Conference Room Pilot
5. Monitoring and adjusting
4. Conference Room Pilot (CRP)

**DEFINITION - Conference Room Pilot**

The process of **validating the readiness of business processes for production use** by an **invited business audience** by showing the incrementally improving readiness across the all components (design, development, data configuration, data migration, security, etc.) in the system as **working software**.

**OBJECTIVE - Conference Room Pilot**

The objective of the Conference Room Pilot is for **the business to regularly validate the incrementally emerging solution**. The beneficial side-effects are that it promotes significantly better business engagement, **business ownership of the solution** and channels the project team to focus their work away from technology and jargon and on making the solution usable and efficient for business. Ultimately, this **results in a better-quality solution**.
GOAL: Validate the readiness of working business processes for production use with an invited business audience

**PREREQS**
- A set of working business processes
- Time reserved to practice the CRP script
- Time reserved for the CRP execution
- Business SMEs ready to run the CRP demos

**STEPS**
- Prepare the script based on the processes planned in this sprint
- Invite the right audience from the business
- Business SME shows the system in context with process
- Ask for actionable feedback and respond rapidly

**GOAL:** Validate the readiness of working business processes for production use with an invited business audience
4. Conference Room Pilot (CRP)

**IMPORTANT**

- Focus on end-to-end, not on specific functions or gaps
- CRP is NOT training, NOT for information, NOT testing
- Set expectations that this is “work in progress”
- Validation is required during the meeting

Relate the underlying business process to the system demo
1. High-level solution scope, approach and design
2. Planning
3. Sprinting
4. Validating via Conference Room Pilot
5. Monitoring and adjusting
5. Monitoring, reporting and adjusting

**GOAL:** Monitor and report the current status of the project and adjust accordingly

**STEPS**
- Work with Process Owners & business stakeholders to clear obstacles ahead of the sprint
- Report the current status of a process as if it were in production
- Monitor progress daily against the sprint plan and focus on critical path
- Adjust sprint plans to ensure overall progress is maintained

**PREREQS**
- Critical path clear at ALL times
- Ability to assess the readiness of a business process
- Team empowered to react rapidly to maintain progress
- Reporting templates that visualize progress
## Tracking progress - Kanban board sample

### Kanban Board for Payroll Sprint 5

**T- 6 Days**

<table>
<thead>
<tr>
<th>Goals</th>
<th>To Do</th>
<th>Doing</th>
<th>Done</th>
</tr>
</thead>
<tbody>
<tr>
<td>- Configure PROD for successful Cutover 1</td>
<td></td>
<td></td>
<td>Complete the HR/Worker Spreadsheet</td>
</tr>
<tr>
<td>- Reach Union Configuration Freeze (strategic including local teams)</td>
<td>Knowledge Transfer Workshop on BEN/DE Configuration</td>
<td>Re-Run Configuration Freezes that Don’t Match State</td>
<td></td>
</tr>
<tr>
<td>- Configure and Unit Test State and Local Tax BEN/DEs</td>
<td>Re-Run Unit Test for Tax Filing</td>
<td>Test Local Functionality (LDF)</td>
<td></td>
</tr>
<tr>
<td>- Get Greenshades on track for final testing May 3</td>
<td>Greenshades Unit Test for Tax Filing</td>
<td>Test Greenshades Tax Laws</td>
<td></td>
</tr>
<tr>
<td>- Develop and final P&amp;L reports</td>
<td>Final Review of Payroll Data Presentation</td>
<td>Finalize/Document/Signoff on Greenshades Paperwork</td>
<td></td>
</tr>
<tr>
<td>- All test cases ready for End to End testing – (strategic multi-pass of security testing)</td>
<td>Finalization of Tax Filing</td>
<td>Test Case</td>
<td></td>
</tr>
<tr>
<td>- Prepped for Parallel Payroll</td>
<td>Finalize Test Environment</td>
<td>Get Liki, Test Environment Ready for Parallel Payroll</td>
<td></td>
</tr>
<tr>
<td>- Other...</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Ongoing**

- Delta Stabilization Support

**Blocked**

- Leader 4: Parallel Payroll Validation Workbook

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*Note: The image contains a detailed Kanban board with tasks and goals for a sprint, indicating progress tracking for a payroll project.*
Tracking progress – Functional heatmap reporting examples

Business Process Heat Map

Legend:
- Process design blocked/not started
- Process not complete and not on track
- Process solution in progress and on track
- Process complete, in repair or testing
- Process complete, ready for Next Test Cycle
Benefits of the CRP-based approach - review

- The project scope, delivery and reporting has a business-process focused definition
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- Increased and better-informed accountability from the customer for the solution design decisions, “fitness for purpose” and project timetable
- The supporting activities such as data migration, security setup, configuration etc. are planned with process delivery in mind
- Customizations and complexity can be reduced with the end-to-end solution reviews and the confirmation of the essential customizations
Feedback from Dynamics 365 customers who moved to the CRP-based approach

“Good approach, easy to understand, better than reading 100 pages”

“Presentation provides confidence that we are on the right track, looking forward to next months”

“Much easier to see the system than to review designs”

“Good to see the end-to-end process”

“CRP meetings much, much better than all these books”

“Looks like a real running system”

“Good to see the enrichments”
Q&A
Thank you!

Have an idea how we can improve Dynamics 365?

Please visit https://experience.dynamics.com/ideas/ to share and upvote.