



Dynamics Pact



Mallorca 24 – CEO Conference

What is Microsoft's Dynamics Methodology?

Microsoft Methodologies



Success By Design – not quite a methodology



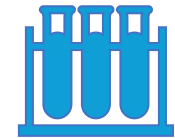
Microsoft Professional Services have their own SureStep 365



SureStep – is a near enough full methodology - now archived



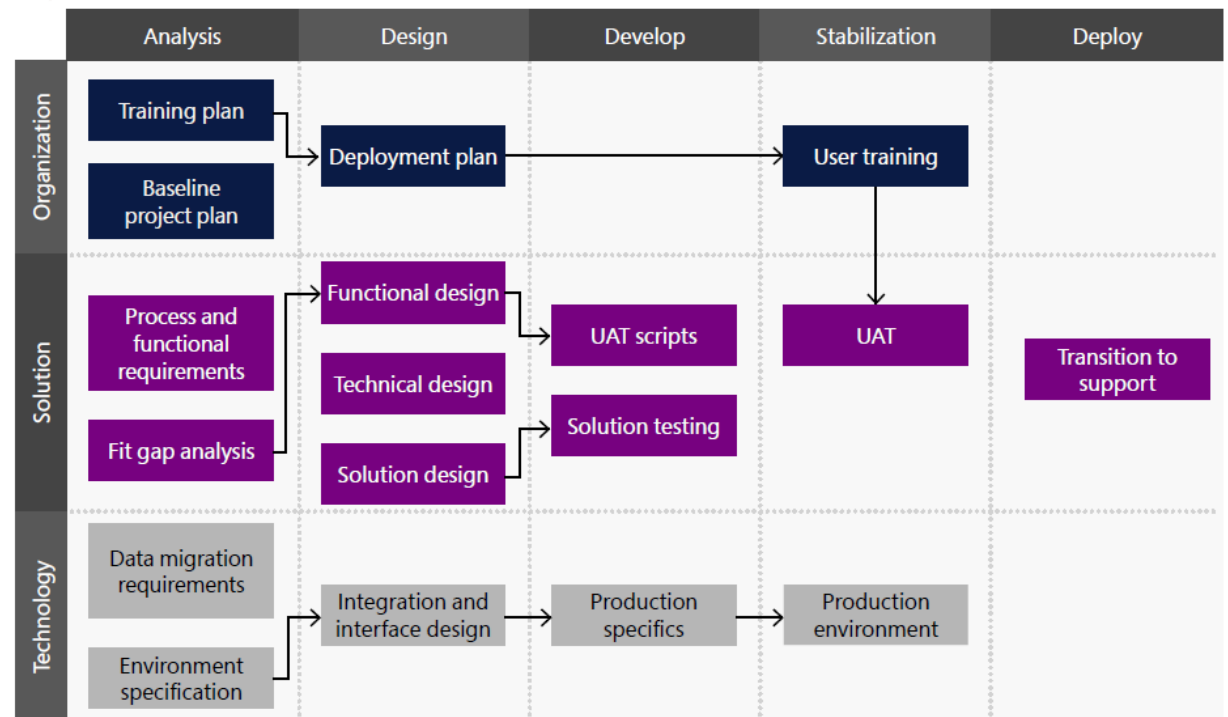
LCS – Not a methodology



FastTrack – not a methodology

SureStep (considered retired with AX2012)

Or you could read my book 😊 [My Book!](#)



Microsoft Dynamics Lifecycle Services (LCS)

Expand table	
Use an out of the box methodology	<ul style="list-style-type: none">• Sure Step Agile Our base methodology, Sure Step Agile provides a planning phase, and multiple sprints.• Default The default is available so that your existing projects won't be forced into a methodology. The default methodology does not provide any structure.
Create a methodology	Any user in an organization can create a methodology for use on their projects.
Modify or create a methodology to be shared across your organization	To share a methodology, a user with organization admin rights can log in and use Manage Methodologies from the Lifecycle Services home page to promote a methodology created by any member of their organization.

Refers to their retired Sure Step!

It isn't a methodology – it just refers to the need for one and allows you to create the simplest of schematics within their tool. **Being superseded by the Dynamics Implementation Portal.**

Microsoft Consulting Services (MCS)

Industry Solutions ▾ Product

Consumer goods

Defense and intelligence

Education

Energy >

Financial services >

Government >

Healthcare >

Manufacturing >

Media and entertainment

Microsoft Cloud for

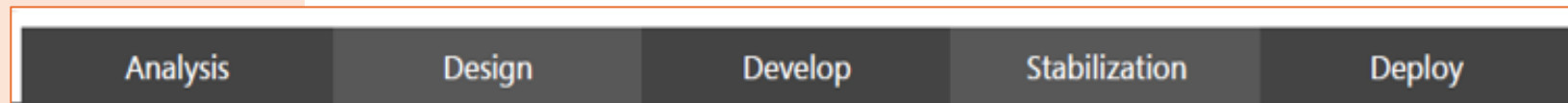
- Now Microsoft Professional Services (MPS) (Industry Solutions Delivery - ISD)
- ISD is where we now meet MCS (I think!)

Project Phases

Success by Design



SureStep



Microsoft Professional Services [MPS] (incl. Industry Solutions Delivery [ISD])

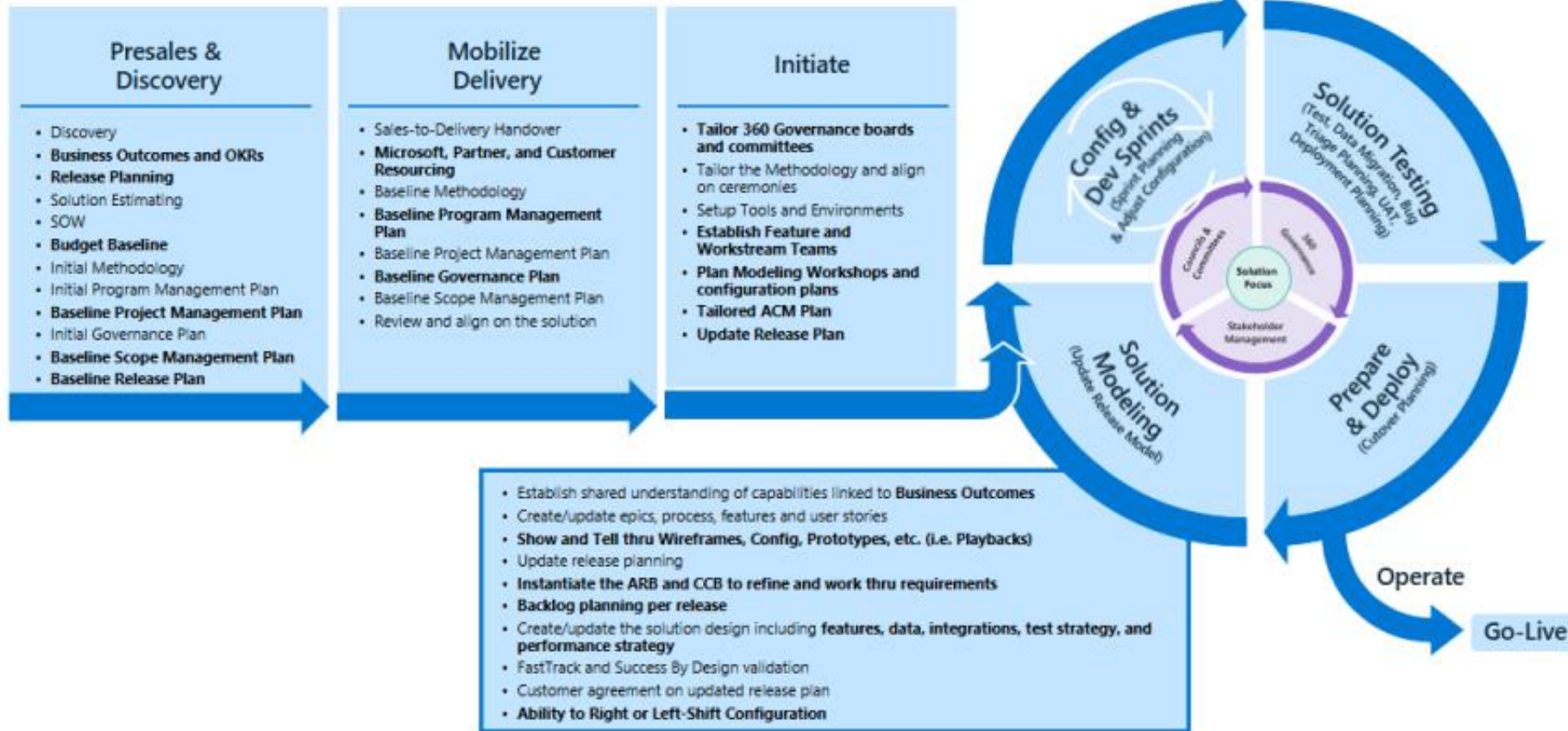


Note these phases are quite different - yet largely overlapping

Project Phases (cont.)

SureStep 365

Sure Step 365 Model | Multi-Release Approach



- Differs to the last slide
- Both are very recent/current

What's a Microsoft Global BlackBelt

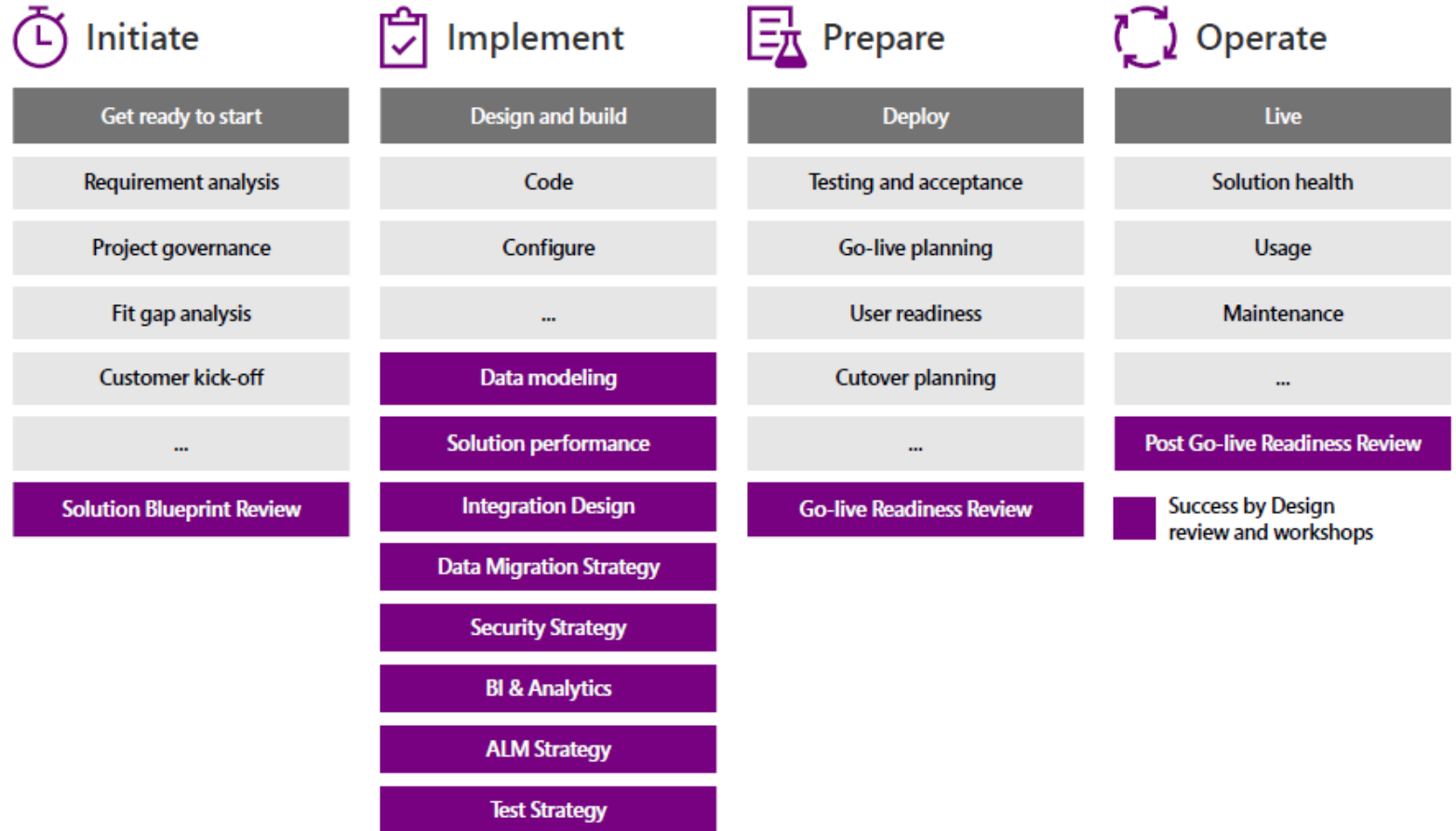
Global Black Belt Assistance

Global Black Belts (GBBs) are a technical resource available during the pre-sales engagement period to help grow Azure consumption, increase MAL penetration, and land multiple projects across the solution areas together with partners (SI, MSP, ISV, Channel) in every account.

Contact your PDM or the Azure BG for more information and to find the right expert to help you.

<https://partner.microsoft.com/en-bd/community/seanm-partner-hub/intelligent-cloud/resources>

Success by Design



Success by Design

- If you're familiar with *Sure Step*, you'll find parallels, but *Success by Design* is focused on aligning with Microsoft's current best practices for Dynamics 365 **cloud solutions**.
- *Success by Design* recommends a strategic, prioritized approach for implementing modules, focusing on **business-critical functions** first, and adding functionality (and customisations) later.

Prioritise core features

• Start by implementing the essential modules that deliver immediate value (e.g. Finance, Inventory)

Incremental go lives

• e.g., Roll out modules like Sales, Customer services after deploying and stabilizing core system

Minimise
customisations

• Out of the box features first, customisations after

Frequent reviews

• Continuous Success by Design Reviews to ensure each phase is aligned with business goals and risks identified early

Success by Design

- Success by Design is a framework and practice created by Microsoft to help project teams implement Dynamics 365.
- Based on thousands of real-world customer projects, Success by Design is the sum of our Dynamics 365 implementation experience. It offers topic-specific reviews and prescriptive guidance (approaches and recommended practices), which provide a reliable path to project success. Success by Design is intended to be used by Dynamics 365 system integrators, independent software vendors (ISVs), and customers as a means to better architect, build, test, and deploy Dynamics 365 solutions.
- Microsoft recognizes that Success by Design doesn't guarantee implementation outcomes for our customers. But they are confident that it will help you achieve your project's goals while enabling the desired digital transformation for your organization.
- For our partners, Microsoft is confident that Success by Design, coupled with your implementation methodology and skilled resources, will increase your team's effectiveness in delivering successful Dynamics 365 projects to your customers.
- This article focuses on the fundamentals and practice of Success by Design and its desired result: Dynamics 365 projects whose technical and project risks are proactively addressed, solutions that are roadmap aligned, and project teams that are successful in maximizing their organization's investment in Dynamics 365 cloud services

Success by Design Solution Blueprint

- Iterated at each phase of the project
 - Program strategy
 - Application strategy
 - Data strategy
 - Integration strategy
 - Test strategy
 - Business process strategy
 - Security strategy
 - Application lifecycle management strategy
 - Environment and capacity strategy
 - Intelligence strategy
 - Training and Change Management – I'd add them

Dynamics 365 Implementation Guide

- Focus is on the digital transformation journey
 - BYO methodology (waterfall, agile, hybrid)
 - Success by Design tools & workshops
 - Review points with FastTrack engineer

Microsoft FastTrack



An engagement point
into MS guidance



Leverages the new
Implementation Portal
and materials



Dovetails with SBD using
Solution Blueprint
reviews

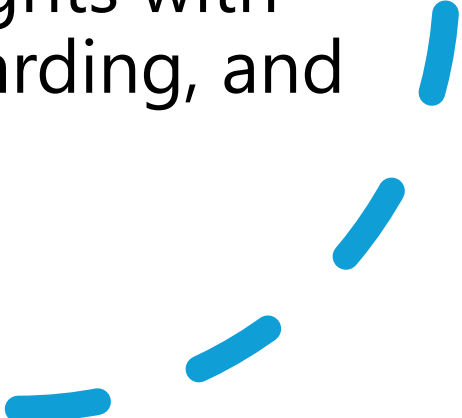


Provides lots of guidance
akin to FAQs e.g.
Integration Workshop



Microsoft FastTrack

“Welcome to Microsoft FastTrack for Dynamics 365, our customer success service designed to help your customers implement and go live so they can realize business value faster. It is an onboarding program run by the product engineering team that offers best practices, tools, resources, and expert advice. Your customer will gain valuable insights with solution implementation, onboarding, and continued education.”



Recommendations

- Adopt/adapt your own methodology
- Stop talking about SureStep and start talking about **Success by Design (SBD)**
- Take part in Success by Design training
- Adopt SBD Phases, with:
 - Initiate (requirements, fit/gap, governance) – [Waterfall](#)
 - Implement (code & configure) - [Agile/sprints](#)
 - Prepare (Test, Train, Go live planning) – [Waterfall](#)
 - Operate (solution health, usage, maintenance) – [Waterfall](#)
- Adopt a Solutions Blueprint
 - Use to engage FastTrack & any third-party reviews
- Check out the Business Process Catalogue in the Dynamics Implementation Portal
- Download Microsoft D365 Implementation Guide for some further reading