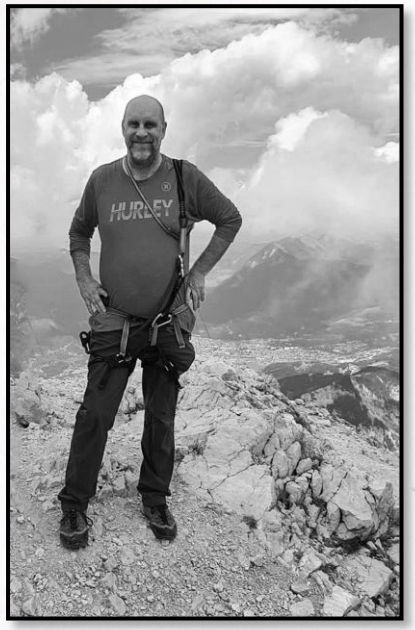
DYNAMICSPACT
Global Microsoft Dynamics 365

Maximizing the value you can take from FastTrack for Dynamics 365

Paul Maré
Global Lead: CXG Expansion

MOUNTAINEER

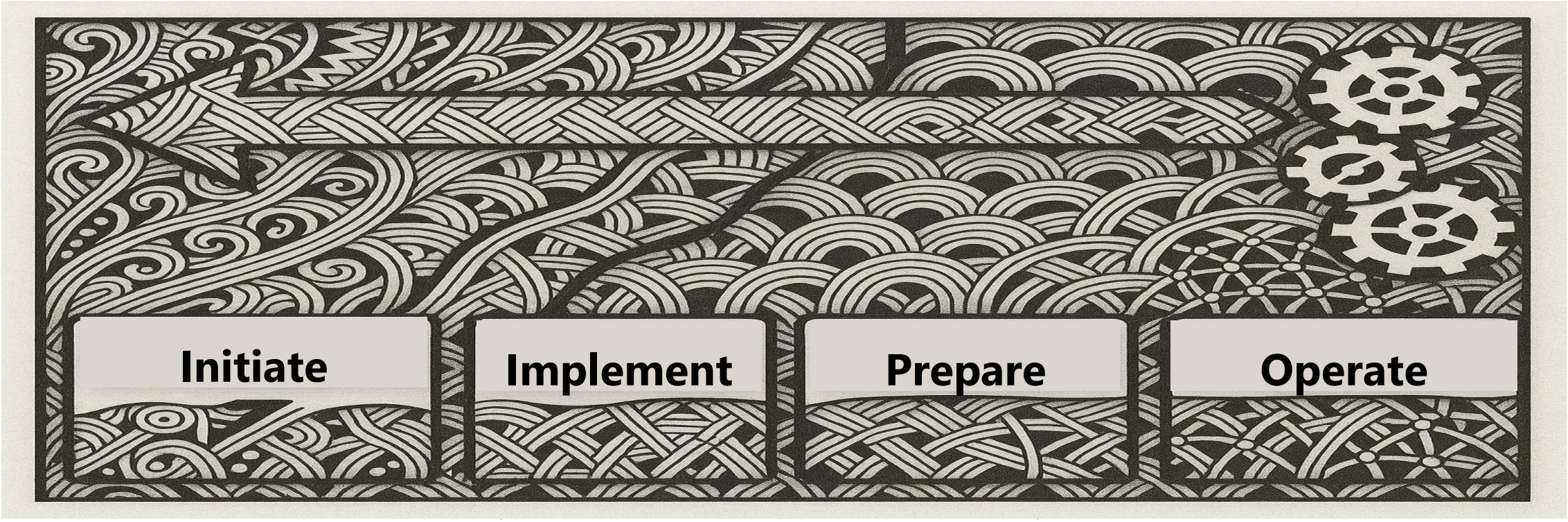


MAGICIAN

Paul Mare

FastTrack for Dynamics 365

FastTrack started in 2015 with a small team of Dynamics 365 Solution Architects handling escalations close before or after go-live. It quickly became apparent that **most issues were entirely avoidable**, so the program shifted towards **pro-active architectural and product guidance earlier in the project life cycle**.



Based on learnings from 8000+ cloud deployments, the Dynamics Engineering team built and recommends **Success by Design**, a prescriptive guidance framework to architect, build and deploy Dynamics 365 solutions.

Based on Success by Design

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

Dynamics 365 Implementation Guide

Designed around three core principles:

Early Detection

Proactive Guidance

Predictable Success

Methodology agnostic

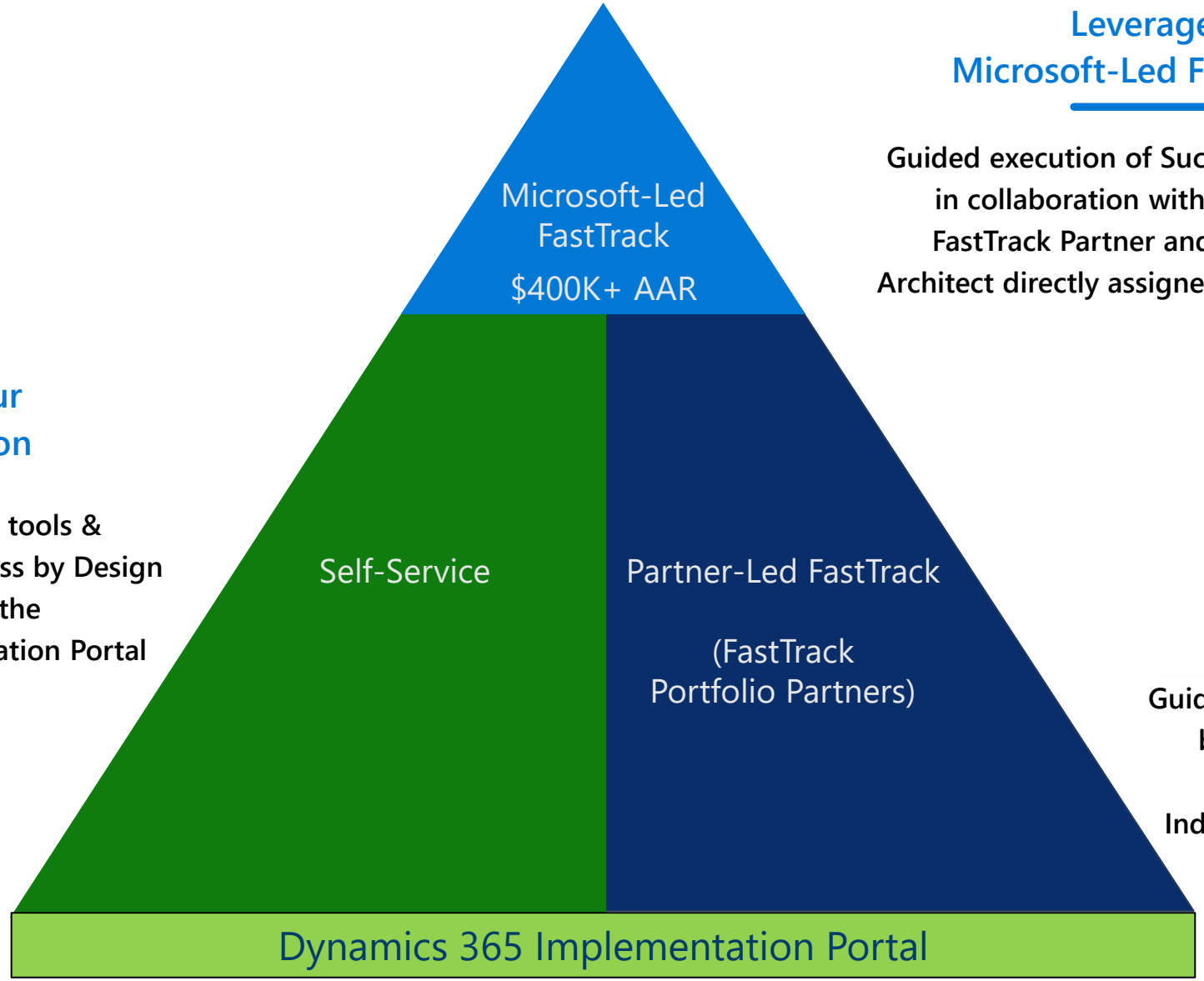
Not impacted by the duration of the project

Engage before start of build

A key challenge for us all

2X

FastTrack Engagement Models



Leverage Microsoft-Led FastTrack

Guided execution of Success by Design in collaboration with a qualified FastTrack Partner and a Solution Architect directly assigned to the Project

Self-drive your implementation

On-demand guidance, tools & resources, aligned to Success by Design and delivered via the Dynamics 365 Implementation Portal

Leverage Partner-Led FastTrack

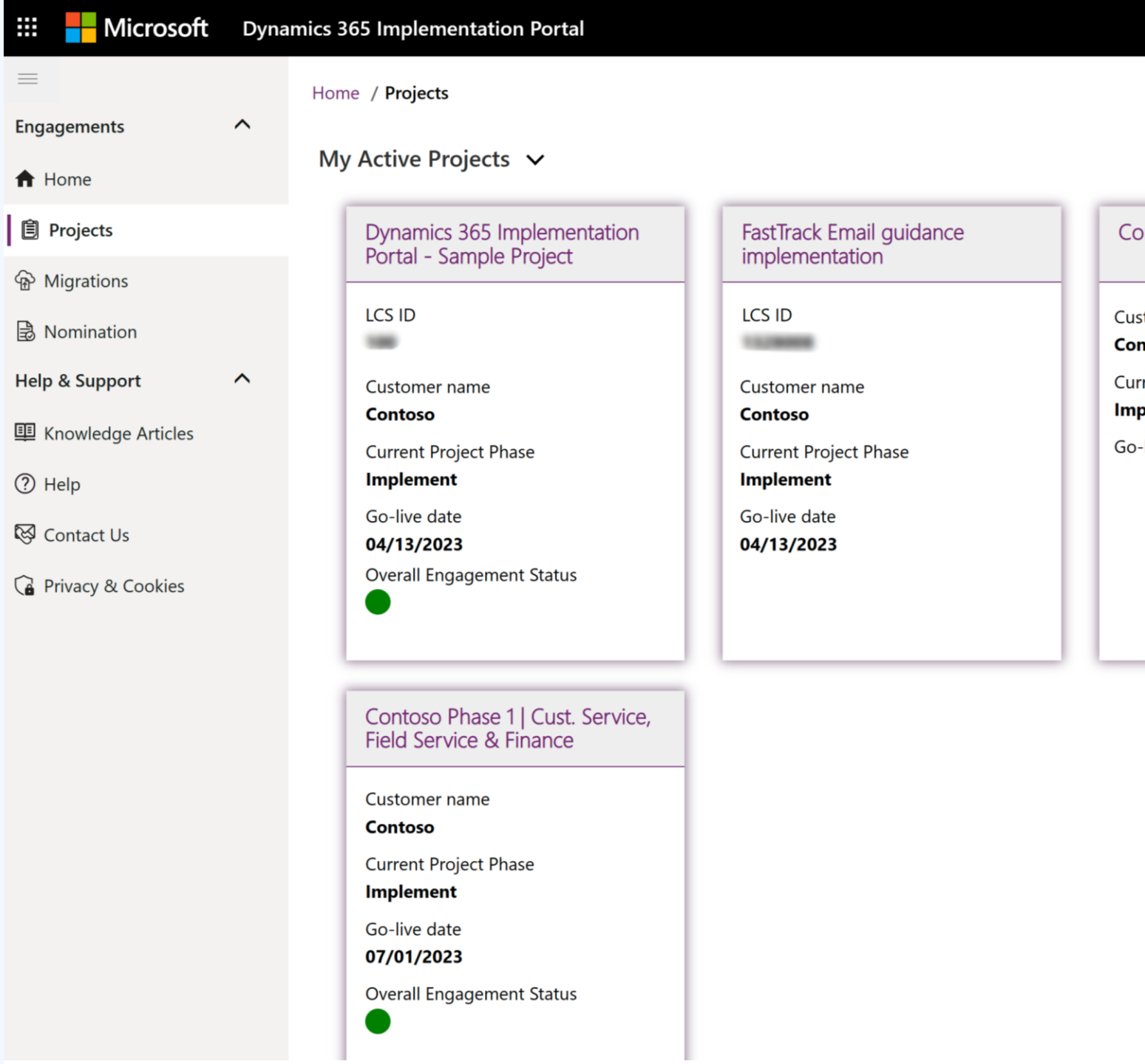
Guided execution of Success by Design by the Center of Excellence of a FastTrack Portfolio Partner. Indirect model, backed by Microsoft.

Dynamics 365 Implementation Portal

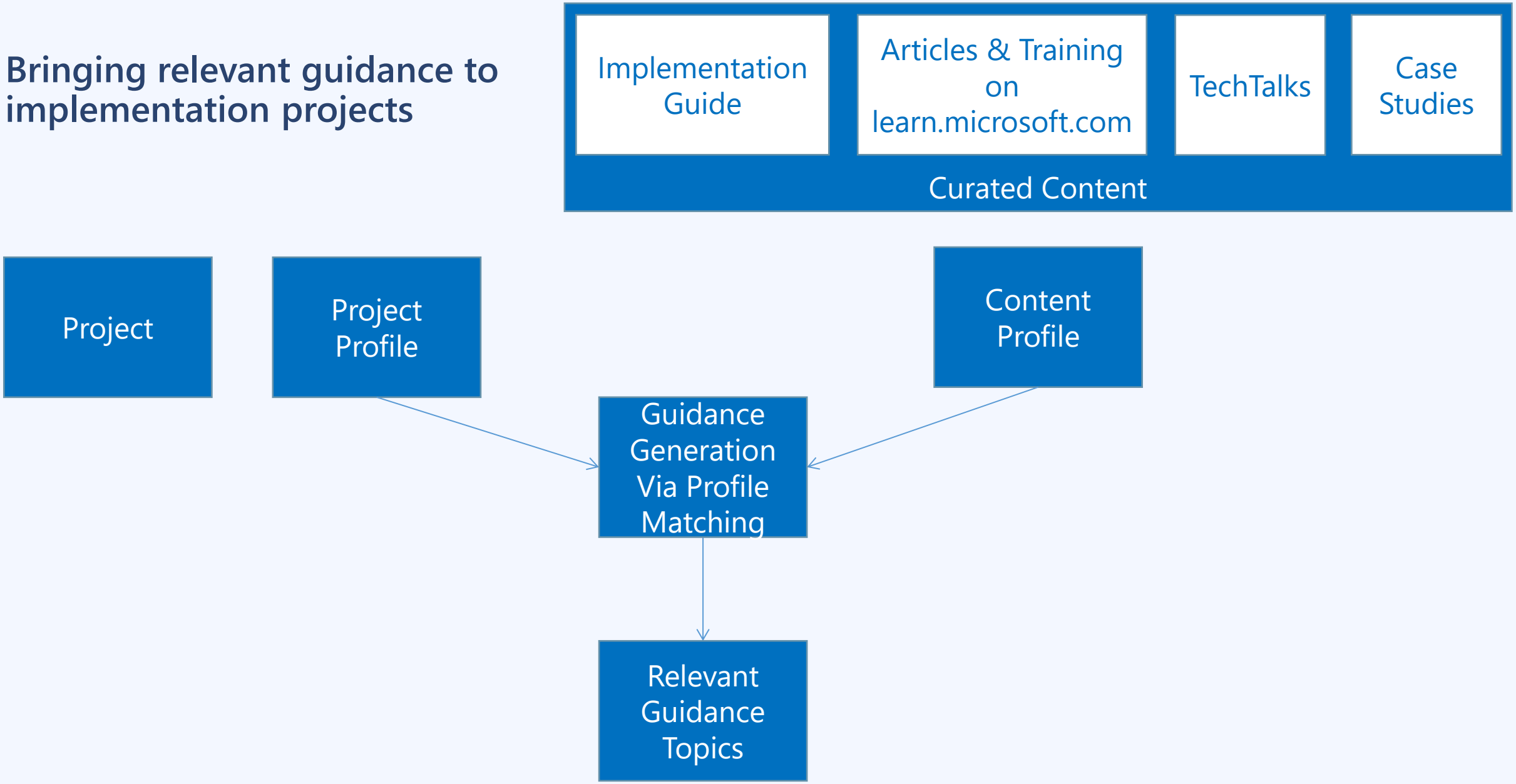
Helps you implement solutions with Dynamics 365 successfully based on the Success By Design framework

Provides access to implementation guidance that is tailored specifically to your project

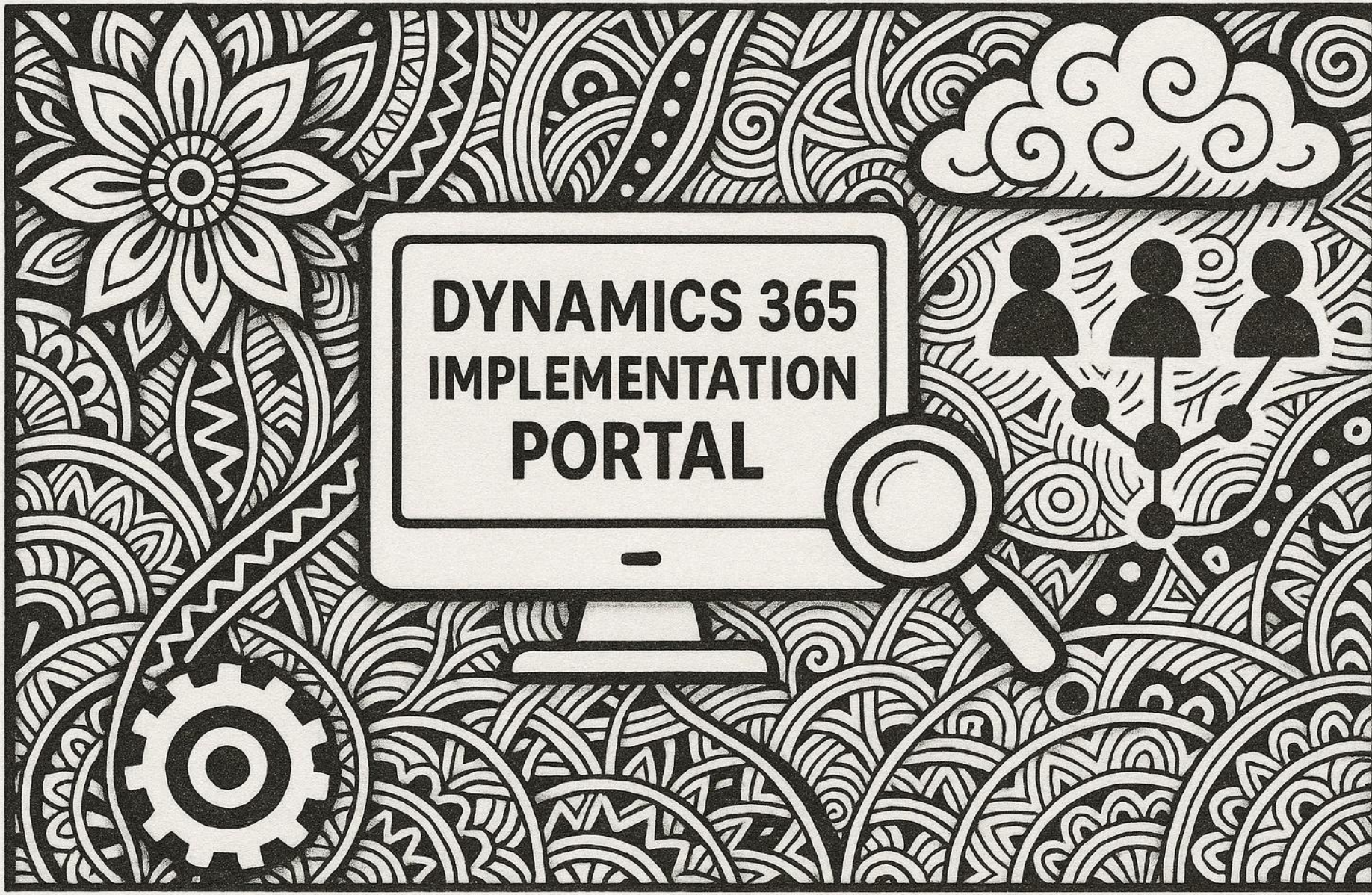
Provides tooling for driving project reviews, identifying and managing risks



Bringing relevant guidance to implementation projects



Walk-Through Dynamics 365 Implementation Portal



Microsoft Dynamics 365 Implementation Portal

1 | Paul Maré

- Home
- Manage Projects
- Create/Join a Project
- Telemetry
- Help and Support

Welcome to the Dynamics 365 Implementation Portal

Your go-to hub for managing Dynamics 365 Implementation Projects, gaining product specific Implementation guidance, leveraging project reviews and gaining Insights using telemetry-driven assessments to spot and mitigate risks early in the project lifecycle

Click here to learn more about the new updates on the Dynamics 365 Implementation Portal

Click here to learn more about the new capabilities of Telemetry Insights

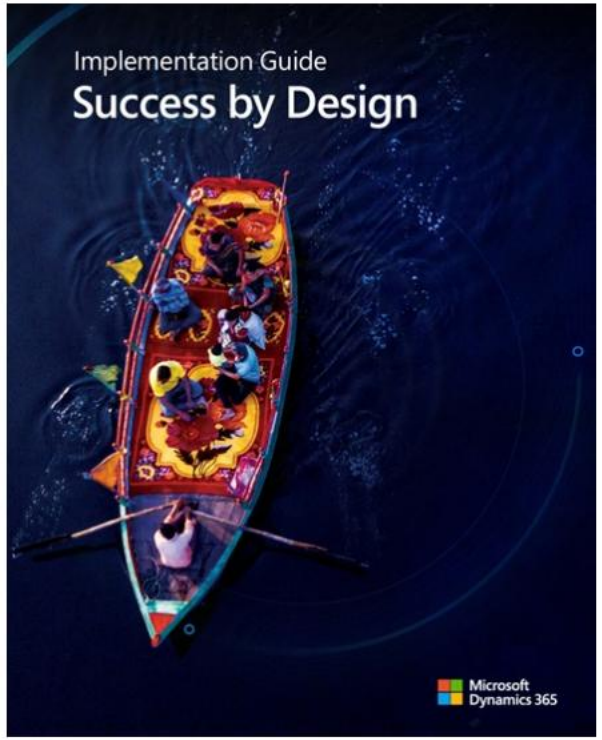
Create or Join a Project

Manage Active Projects

Telemetry Insights

Power Platform Admin Center

Profile



FastTrack Implementation Guide

Previous

Next

[UI/UX] Contoso Test Project

View/Edit Project Details

Summary | Project Profile | Implementation Guidance (179) | Telemetry Insights | Admin

Green	1	0
STATUS	RISKS	ISSUES

Discovery — Initiate — **Implement** — Prepare — Operate

EST. GO-LIVE DATE

04/26/2023

CURRENT STATUS DESCRIPTION

Normal

Implementing Dynamics 365 Field Service for Contoso.

Save

In order for us to provide more targeted guidance, could you indicate:

Business Model | New Annual Dynamics 365 Revenue Spend | Partner Permission

Submit | Dismiss

Tell us more so that we are able to provide more tailored/targeted guidance
Why this is important?

Dynamics 365 | Guidance Documentation & Resources

Find proven guidance and best practices to help you implement and manage business solutions with Dynamics 365 apps. This is your Guidance Hub for everything!

Field Service | Copilot Playbook

The Copilot in Field Service Playbook is a one stop location for information about everything Field Service Copilot. The playbook contains relevant links and guidance around the Field Service Copilot features for Admins, Implementers and users.

Field Service | Copilot Training Material

The purpose of this content is to provide basic training on Copilot in Field Service, which can help customers to quickly and easily train their end users. It also addresses the requirements of administrators, who customize the product, and managers, who track its usage.

App Insights | Dataverse Ilogger | Power Apps

The Dataverse platform captures the Dataverse and model-driven app telemetry data and exports it to your Application Insights resource. There's some latency between the time it was captured and when it becomes available to you in Application Insights. Because Microsoft gathers this telemetry, you don't need to write any code to enable it.

Template | App Insights | Dataverse Implementation Assets

Implementation assets or components in Dataverse for installation

Template | App Insights | Analytics implementation assets for Field Service

Assigned Solution Architect: Jeremy Freid

REVIEWS

+ Create New Review
+ Create New Go Live Readiness Review

Title: test1
Type: Solution Blueprint Workshop
Status: Discover

Title: Test Review
Type: Solution Blueprint Workshop
Status: Planned

Microsoft Dynamics 365 Implementation Portal

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- Home
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Home / Projects / [UI/UX] Contoso Test Project

[UI/UX] Contoso Test Project

View/Edit Project Details

Summary | Project Profile | Implementation Guidance (179) | Telemetry Insights | Admin

Save Profile | Cancel

Choose **Edit Profile** button to update Products, Features and Characteristics for this implementation project. Choose **Save Profile** to save project profile changes and see updated implementation guidance on the Implementation Guidance tab.

PRODUCTS

- [x] Dynamics 365 Commerce
- [ ] Dynamics 365 Contact Center
- [ ] Dynamics 365 Customer Insights - Data
- [x] Dynamics 365 Customer Insights - Journeys
  - [ ] Analytics & insights
  - [ ] Asset library
  - [ ] Consent & compliance
  - [ ] Copilots
  - [ ] Customer journey design
  - [ ] Customer Voice integration
  - [ ] Email Authoring
  - [ ] Event planning & management
  - [ ] Event triggers

CHARACTERISTICS

Show All

- Size
  - Go-Live Active Marketing Contacts
- Outbound to Real-time
- Growth
- Business Process Adoption
  - Using a Process Catalog: Microsoft Catalog
  - Using Process Flow Templates: Custom Templates
  - Using Workshop Templates: Microsoft Templates
- General
- Project
- Complexity
- Customer
  - Type of Business: Service Centric

BUSINESS PROCESSES

- [ ] General
- [x] Design to retire
- [x] Concept to market
  - [x] Define service costing
  - [x] Define service offering and strategy
  - [x] Introduce new services
  - [x] Manage service lifecycle
  - [ ] Manage service pricing
- [ ] Administer to operate
- [ ] Acquire to dispose
- [ ] Case to resolution
- [ ] Forecast to plan
- [ ] Hire to retire

Microsoft Dynamics 365 Implementation Portal

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Home / Projects / [UI/UX] Contoso Test Project

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- [x] Dynamics 365 Customer Insights - Journeys
- [x] Dynamics 365 Customer Service
- [x] Dynamics 365 Field Service
- [x] Dynamics 365 Finance
- [ ] Dynamics 365 Human Resources
- [ ] Dynamics 365 Project Operations
- [ ] Dynamics 365 Sales
- [ ] Dynamics 365 Supply Chain Management
- [x] Finance and operations cross-app
- [ ] Microsoft Cloud for Financial Services

CHARACTERISTICS

Show All

- Telemetry - App Insights
  - For Dynamics 365 Finance: Planned
- Globalization Requirements
- Complexity
- Business Process Adoption
- General
- Project
- Customer
- Lighthouse - Deal Acceleration
- Customer Story

BUSINESS PROCESSES

- [ ] General
- [x] Design to retire
- [x] Concept to market
  - [x] Define service costing
  - [x] Define service offering and strategy
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  - [ ] Manage service pricing
- [ ] Administer to operate
- [ ] Acquire to dispose
- [ ] Case to resolution
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Contoso implementation

Success by Design Phase | Implement
New

The Implement phase is the second phase in the Success by Design framework. It is described in 8 chapters in the implementation guide, with each providing a deep dive on a specific implementation topic.

Dynamics 365 Human Resources | 2022 release wave 5
New

The 2022 release wave 2 plan covers all new functionalities planned to be delivered to market from October 2022 to March 2023. In this article, you'll find the product overview and what's new and planned for Dynamics 365 Human Resources.

Success by Design | Chapter 1 | Introduction to Implementation...

Microsoft believes that every business is in the business of creating great customer experiences. To achieve that, business applications must do more than just run your back office, marketing, or supply chain, or even field operations as discrete entities. Organizations need to...

Checklist | Prepare for go live
New

Go live is a critical milestone during a deployment, every plan and test is validated at this stage. This checklist helps you identify key activities for go-live readiness and underpins important aspects like best practices, tips and tricks, and how to avoid common...

Dynamics 365 Commerce | Channels overview
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This article presents an overview of channels in Microsoft Dynamics 365 Commerce. It includes information about the tasks that you must complete both before and after you set up each channel.

Dynamics 365 Finance | Asset leasing overview
New

This article lists the help topics that are available for Asset leasing, and includes links to specific topics. Asset leasing is an advanced capability for managing, tracking, and automating financial transactions for leased assets in Microsoft Dynamics 365 Finance.

Dynamics 365 Finance | Public sector overview
New

You can enable business processes that are common to both the public and private sectors, such as budgeting, purchasing, accounts payable, and accounts receivable tasks.
Use the Public sector functionality to meet the rules, r...

Dynamics 365 Human Resources | Task management
New

Task management lets you create tasks that must be completed to hire (onboard), terminate (offboard), and transfer (transition) employees. Task management uses the concept of checklists. A checklist is of a list of onboarding, offboarding, or transition tasks. Task...

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Power Platform & Power Automate | Deprecations

The announcements and deprecations described in this article apply to Power Apps and Power Automate. Admins and IT professionals can use this information to prepare for future releases. This article was first published on June 27, 2017.

Finance and operations apps | Integration patterns and practices
New

This article describes integration patterns, integration scenarios, and integration solutions and best practices.

Finance and Operations apps | Performance troubleshooting usin...
New

This article describes how you can troubleshoot and mitigate performance issues using the tools available in Microsoft Dynamics Lifecycle Services (LCS).

Dynamics 365 Commerce | Testing and performance issues
New

Template | Cutover Strategy Workshop

Microsoft Power Platform | Working with the admin portals

Microsoft Power Platform | General platform guidance

In the workshop, the solution architect explained that environment planning is not a one-time, set-it-and-forget-it event. Rather, it's a continuing activity that requires close collaboration between key stakeholders. Careful planning aligned with the project schedule ensures that the team can be productive, conduct important activities concurrently without environment contention, and achieve milestones on time, within budget, and with the desired level of quality.

Next, the project team charted out an environment plan to document the different environments, their purpose, the exact project phase for which they were needed, and how long they would be needed. For example, they acquired a high-grade testing environment for three months just to conduct their performance testing. They also identified key activities that might affect the environment plan and incorporated recurring reviews of the environment plan into the project plan. This simple but important exercise helped the team feel confident that they understood and accounted for all important implementation requirements, and that they were prepared to procure the needed environments on time to reach all milestones.

The development team also worked on configuring DevOps for multiple release branches, with a separate pipeline of sandboxes to facilitate go-live phases and ongoing support for each one.

Ultimately, this retailer successfully performed the implementation and rolled out the solution across multiple countries and realized that timely environment planning was a critical factor in that success.

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- Return to Initiate Table of Contents
- Restart Guide 9

Implement

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11 Application lifecycle management
12 Security
13 Business intelligence, reporting, and analytics
14 Testing strategy
15 Extend your solution
16 Integrate with other solutions
17 A performing solution, beyond infrastructure

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Contoso implementation

Summary | Project Profile | Implementation Guidance (69) | Project Users

View/Edit Project Details

---Select a product---

Unread | Read | Pinned | Dismissed | Training | TechTalks | Case Studies | Platform

Search

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Project Review 2023/2/20

Instructions > Participants > Scope > Review Details

Review Questions | Risks and Issues | Messages 1 | Admin

Topic: Commerce 0/29

Item: Modern Point-of-Sale 0/2

Responses Captured: 7/99

Questions (2)

During your initial Modern Point-of-Sale rollout (MPOS) will you be using mass deployment techniques or will you be deploying MPOS manually?

If you do not plan to use a mass deployment tool, then how many stores are you planning to deploy manually?

Response For Selected Question

MPOS will be deployed using mass deployment tools

MPOS will be in deployed manually using a script

Modern Point-of-Sale (MPOS) will be deployed manually

Modern Point-of-Sale (MPOS) will not be used

< Save & Prev Save & Next >

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Cancel Review

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Contoso - Implementation Project

Summary | Project Profile | Implementation Guidance (15) | Telemetry Insights | Admin | Messages

View/Edit Project Details

Products | Environments | Environment Purpose | Search

21 Rules executing for Production
0 Rules executing for Sandbox

Ideas?

Preview

	Environment	Purpose	Last Updated	History	Feedback	
Detection of Slow Forms This rule detects slow performing forms across a 24 hour period.	Contoso - Prod	Production	06 Mar 2024			Read More
Custom Batch Jobs Not Implementing Retries This rule identifies any custom batch jobs that are missing retry logic.	Contoso - Prod	Production	06 Mar 2024			Read More
Frequency of Real-time Integrations This rule detects the over-use of Real-time integrations	Contoso - Prod	Production	06 Mar 2024			Read More
Detect use of General Ledger Balance Feature This rule checks whether the Performance enhancement for general ledger dimension set balance calculation Feature has been enabled.	Contoso - Prod	Production	04 Mar 2024			Read More
Check for Automatic Split of Large Financial Journal Feature Usage This rule checks if the Automatic Split of Large Financial Journal Feature is in use.	Contoso - Prod	Production	04 Mar 2024			Read More

Previous

Cancel Review

[UI/UX] Contoso Test Project

Guidance is generated successfully. ×

View/Edit Project Details

Summary | Project Profile | Implementation Guidance (7) | Telemetry Insights | Admin

Project Users | Partner Users: Microsoft | Data Consent

Add New Partner

Project Admins (2)

+ Add New Admin User

Swamy Narayana
Microsoft Employee
Microsoft
Swamy.Narayana@...
Admin

Paul Maré
Customer
Microsoft GmbH
paul.mare@microsof...
Admin

Project Users (26)

+ Add New User

Georg Glantschnig
Microsoft Employee
Company Name
gglant@microsoft.com
Set as Admin

Darshan Desai
Microsoft Employee
Company Name
Darshan.Desai@microsoft.co...
Set as Admin

R. Seth Kircher
Microsoft Employee
Microsoft
Seth.Kircher@microsoft.com
Set as Admin

Stephane Nyombayire
Company Name
snyomba@microsoft.com
Set as Admin

Roger Gilchrist
Microsoft Employee
Microsoft
Roger.Gilchrist@microsoft.c...
Set as Admin

Julie Strauss
Microsoft Employee
Company Name
jstrauss@microsoft.com
Set as Admin

Peter A. Jensen
Microsoft Employee
Company Name
pjensen@microsoft.com
Set as Admin

Matt Sheard
Microsoft Employee
Company Name
msheard@microsoft.com
Set as Admin

Dana Bourque
Microsoft Employee
Microsoft
Dana.Bourque@microsoft.co...
Set as Admin

Jeff Comstock
Microsoft Employee
Microsoft

Dan Ogren
Microsoft Employee
Microsoft

Ray Smith
Microsoft Employee
Company Name

Roadmap

The Dynamics 365 Implementation Portal follows the standard Dynamics 365 product lifecycle, with major release waves in April and October.

Renaming

Dynamics 365 Implementation Portal / Copilot

Deployments

Represents Post-Go-Live Engagements in a Self-Service Model with Telemetry Insights

Discovery Phase

New tooling and integrations

Move to Power Pages

Improved Performance
Smoother Look and Feel.

Live Project Risk Portfolio

Moving from risks generated after reviews to live risks that are generated/updated as soon as you answer a few review questions

Agentic Experiences

Ask FastTrack
Next level AI
Hundreds of Agents coming to a portal near you ☺

Architect's Eye | Agents

Project Onboarding Agent
Onboards new projects, initializes profiles, and connects to Engagements..

Profiling Assistant Agent
Guides users in assigning Products, Features, and Characteristic Responses..

Ingestion Agent
Pulls project, profiling & risk-related data from uploaded documents.

Project Review Agent
Conducts interactive reviews using dynamic prompts and public & private knowledge sources.

Telemetry Insights Agent
Monitors signals (e.g., UAT, PerfTest) and proposes automated findings and risks.

Risk Portfolio Manager Agent
Maintains a single, unified set of project risks across sources and phases.

Notification Agent
Pushes critical risk updates to stakeholders via channels like email or Teams, based on role and urgency..

Governance Agent
Flags missing review stages, inconsistent risk handling, or gaps in Success by Design compliance.

Partner Signal Agent
Analyzes partner-provided inputs (e.g., QA templates, status notes) to detect early delivery concerns.

Prioritization Agent
Scores and ranks risks based on impact, urgency, and project stage — powering the Watchlist.

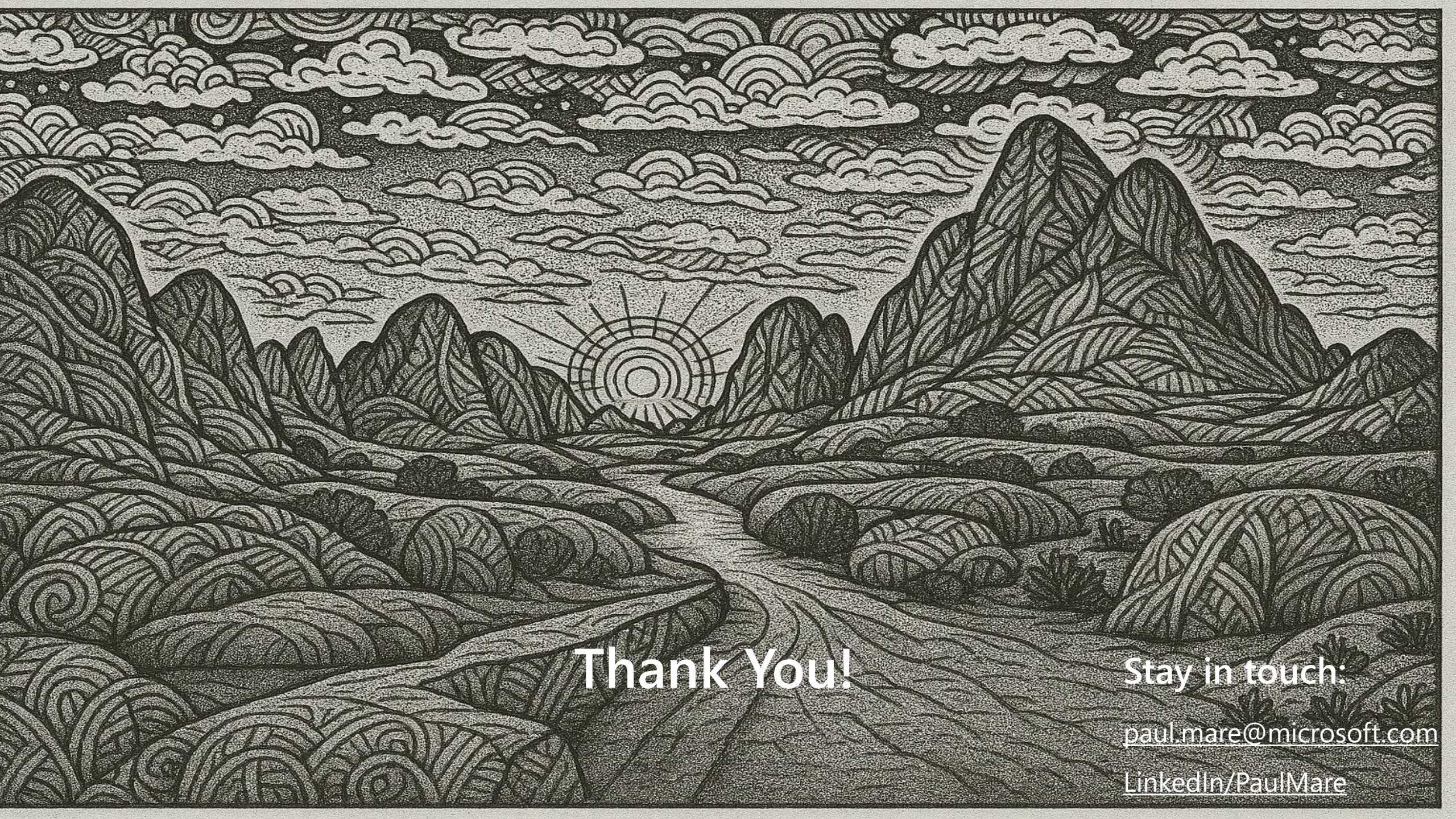
Classification Agent
Tags and categorizes risks by type, product, phase, and delivery domain using consistent taxonomy.

Pattern Detection Agent
Surfaces risk patterns across projects, regions, or partners — enabling systemic mitigation.

Business Process Assistants
Interviews users and Provides Specific Guidance on how to set up a Business Process, e.g.,

Setup Agents
Agents to help set up complex functionality, e.g., Unified Routing Setup Agent

Feature Agents
Agents to help implementation team members adopt the right technical approach, e.g., Fixed Assets Import Agent



Thank You!

Stay in touch:

paul.mare@microsoft.com

LinkedIn/PaulMare