ORBIS STANDARD MIGRATION ASSESSMENT (SMA)

WHY ORBIS MIGRATION ASSESSMENT?

a migration assessment, is the first step, outlining the added value and the path to a modern cloud solution:

- Preparation for a possible cloud migration project

- Clear summary of the optimisations required in advance order to migrate the system with as little effort as possible

- Receipt of a detailed status report of the current on-prem crm system.

- Illustration of the individual advantages of a cloud solution

- It supports in linking business objectives with the possibilities of Dynamics 365

- It helps the migration process to focus on the reduction of effort and optimise costs

ASSESSMENT MAIN COMPONENTS

1. INITIATE

Customer estimated time commitment: 1 - 3 hours

In order to successfully launch the standard migration assessment it is essential the Client prepares themselves by reviewing the documentation they received in the Welcome email:

1

SMA Client Questionnaire:
We request you to fill this out prior to the Functional Demo. In the document we have provided instructions on how and who should fill out this document.

2

SMA Client Tool Instructions:
We request you to review the instructions and bring any questions you may have to the Kick-Off Meeting.

3

SMA Client Roles and Responsibilities:
We request you to review the roles and their responsibilities to assist your organization through this process.

KICK-OFF MEETING

We will be providing an overview of the Standard Migration Assessment program and will be going over the following:

1. Introduction

2. Project Team, Roles and Responsibilities

3. Migration Assessment Overview

4. Migration Assessment Timeline

5. Rated Areas, Risk Level and Sample Findings

6. Actions Items and Next Steps

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ASSESSMENT MAIN COMPONENTS

2. DISCOVER

 Customer estimated time commitment: 2 - 3 hours

This component examines your current business processes and use of system components throughout your organization. This assessment is designed to understand how CRM is being utilized and the amount and complexity of existing configurations, customizations and integrations.

THIS ASSESSMENT INCLUDES

1

2

Functional Demo: You will demo a "day in the life" use of your CRM system so we can learn how you are currently using the system.

Questionnaire Follow Up: We will be reviewing the response from the SMA Client Questionnaire to gain a better understanding of the functional and technical customizations within your environment. The goal of this meeting is to review the following:
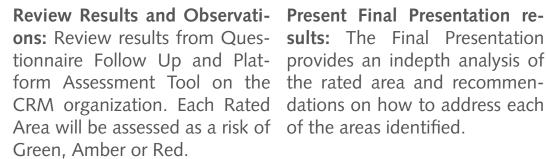
- Understand in more detail your current configurations supporting your business processes.

- Review customizations within your environment. The goal is to assess the expected effort and identify the business dependencies involved when migrating to Dynamics 365.

ASSESSMENT MAIN COMPONENTS

3. ANALYSIS

Customer Participation is
Not Required

During this stage Microsoft will be using the output from the Platform Assessment Tool and response from SMA Client Questionnaire to develop an analysis of your environment and determine how it can be best leveraged in Dynamics 365.

Microsoft will not access – nor will you provide access – to Personally Identifiable Information (PII) that is housed within your current Dynamics CRM On Premises solution.

4. REVIEW

Customer estimated time
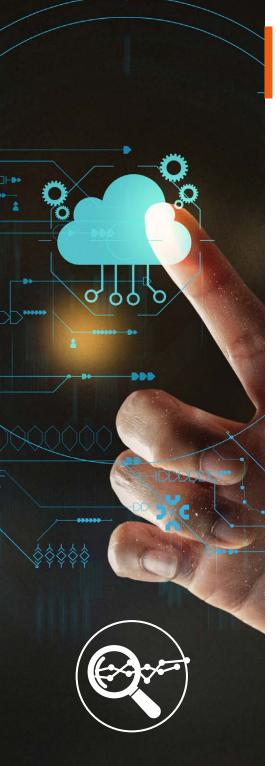commitment: 1.5 - 2 hours

1

Review Results and Observations: Review results from Questionnaire Follow Up and Platform Assessment Tool on the CRM organization. Each Rated Area will be assessed as a risk of Green, Amber or Red.

2

Present Final Presentation results: The Final Presentation provides an indepth analysis of the rated area and recommendations on how to address each of the areas identified.

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ASSESSMENT MAIN COMPONENTS

4. REVIEW

1. Review of Questionnaire Follow Up

2. Review of Functional Demo

3. Review of information collected using the Platform Assessment Tool

4. Overall Migration Recommendation

5. What's new in D365 CE Online: This is intended as a high-level overview of what's new to Dynamics 365 for upgrade clients.

Risk Level Key

Area	GREEN	AMBER	RED
Environment	There is a low level of complexity.	There is a moderate level of complexity that may require additional effort for online.	There is a high level of complexity that will require additional effort for online.
Workstations	The workstation setup is ready for online.	The workstation setup needs a moderate amount of updates for online.	The workstation setup needs a high number of updates for online.
Configurations	There is a low amount of configurations and complexity.	There is a moderate amount of configurations and complexity. the configurations may need to be updated for online.	There is a high amount of configurations and complexity that to be updated for online.
Infrastructure	There is a low level of complexity with infrastructure to move online.	There is a moderate level of complexity with infrastructure to move online.	There is a high level of complexity with infrastructure to move online.
Integrations	There is a low amount of integrations and complexity.	There is a moderate number of integrations that require more complex update scenarios.	There is a high number of integrations that require more complex update scenarios and requires custom development.
Database	There is a low amount of custom tables, data and user/team complexity.	There is a moderate number of custom tables and data that require more complex data migration scenarios.	There are high counts of custom tables, high row counts, complexity in standard features (example: POA table) or more scenarios that require custom development.
Processes	There is a low amount of processes and complexity.	There is a moderate amount of processes and complexity that may need to be updated for online.	There is a high amount of processes and complexity that may need to be updated for online.
Custom Code	There is little to no custom code in the application. Plugins are sandboxed.	There is a moderate amount of custom C# or JavaScript. The code may require modification to be optimized for online. Plugin assemblies are not sandboxed.	There is a large amount of custom code in the application will require further analysis and refactoring to be relocated Online. There is a high amount of non-sandboxed assemblies. There are complex or potentially unsupported custom code.
Reports	There are little to no custom SSRS reports.	There is a moderate amount of custom reports that need the be assessed/refactored.	There is a large amount of custom reports that will need to refactored for Online Migration.
Security	The is a low amount of complexity in moving security structure to online.	The is a moderate amount of complexity in moving security structure to online.	There is a high amount of complexity in moving security structure to online.
Solutions (ISV. 3rd Party. Managed)	There is a low amount of solutions that will need updated for online.	The is a moderate amount of solutions that will need to be updated/evaluated for online compatibility.	The is a high amount of solutions that will need to be updated/evaluated for online compatibility.
Etc.			

Area: Environment — Risk Level

Total	Risk Level	Observation
1	RED	• You should plan to complete any in-progress work well before the actual migration efforts begin. Please consider that any in-progress work may be able to be accomplished differently/more easily after the upgrade to the cloud.
3	AMBER	• CRM 2013 will undergo three upgrades to get to version 9.0 • Many of the new features of D365 replace the need for external batch processes, further discussion and analysis is needed to determine how to accomplish. • On December 1, 2020, the legacy web client will no longer be available to online organizations. Organizations should make the transition to the Unified Interface as soon as possible to take advantage of Microsoft's ongoing investments in reliability, performance, and functionality.
4	GREEN	• Performance tuning recommendations frequently configured by on-premise customers is handled by Microsoft engineers with the move to the cloud. • Migrations to the cloud typically occur over the weekend to minimize system downtime during normal business operating hours. Additional planning for system downtime is recommended to ensure minimal impact to your business. • Client has a development environment • Clients Testing Environment is closest to their Production Environment

ASSESSMENT MAIN COMPONENTS

TIMELINE AND EXPECTED RESOURCE ENGAGEMENT

While the Microsoft-managed assessment will be performed over the course of 5 days, your total time commitment should fall between 4.5 and 8 hours. See below for further details of what is expected from start to finish.

ORBIS STANDARD MIGRATION ASSESSMENT

We offer you the described SMA for the all-inclusive price 3,900 Euro net.

We thank you for your trust, if we are allowed to accompany you during the migration to the cloud, this SMA is fully creditable.

FOR MORE INFORMATION ABOUT THE ASSESSMENT PLEASE CONTACT US AT

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