

Dynamics 365 Finance & Supply Chain Management Upgrade Assessment



Goals

- Introduce you to the Dynamics 365 solution set
- Identify your current processes and pain points
- Discuss upgrade opportunities for your business processes
- Discuss modifications, integrations, and third-party solutions
- Review data migration requirements for your upgrade
- Answer your questions about the upgrade process

Your Role in this Process

- Demonstrate the system with your current processes
- Discuss current pain points
- Describe how you use the system
- Show any offline processes (Excel, manual, other systems, etc.)

Sample Onsite Agenda

Day	Time	Event	Participants
Tuesday	9:00 - 9:30	Kick Off - All	Core Team and Executive Sponsor
	9:30 - 11:00	Overview Demo	Core Team and All Subject Matter Experts, Executives Optional
	11:00 - 12:00	IT Landscape, major mods, implementation overview, preview for integrations, Modifications, Reporting, and Third Parties	Technical Team
	12:00 - 1:30	Lunch	Working Lunch, continue discussion
	1:30 - 3:00	Company Structure, Accounting GL, Finance, Budgeting, Fixed Assets, Tax, Financial Reporting	Core Team and Financial
	3:00 - 3:45	Accounts Receivable	Core Team and AR
	3:45 - 4:30	Accounts Payable	Core Team and AP
	4:30 - 5:00	Scoping Review	Core Team and Executive Sponsor
Wednesday	9:00 - 10:00	Item Setup	Core Team and Item Team
	10:00 - 12:00	Sales and pricing - budgeting - costing	Core Team and Sales
	12:00 - 1:00	Lunch	Lunch
	1:00 - 2:00	Warehouse Tour	Core Team and Warehouse
	2:00 - 4:00	Warehousing, Inventory Control, Kitting	Core Team and Warehouse
	4:00 - 5:00	Scoping Review	Core Team and Executive Sponsor

Day	Time	Event	Participants
Thursday	9:00 - 10:00	Procurement	Core Team and Procurement
	10:00 - 11:00	Master Planning	Core Team and Planning
	11:00 - 12:00	Open	
	12:00 - 1:00	Lunch	Lunch
	1:00 - 3:00	Scoping Review and Strategy Session for Code and Data	Core Team and Technical
	3:00 - 4:30	Upgrade Technical Discussion	Core Team and Technical
	4:30 - 5:00	Scoping Review	Core Team and Executive Sponsor
Friday	9:00 - 11:30	Integrations, Modifications, Reporting and Third Parties	Core Team and Technical
	11:30-12:00	Scoping Review	Core Team and Executive Sponsor

Upgrade Assessment Outcomes



- Upgrade Assessment Document

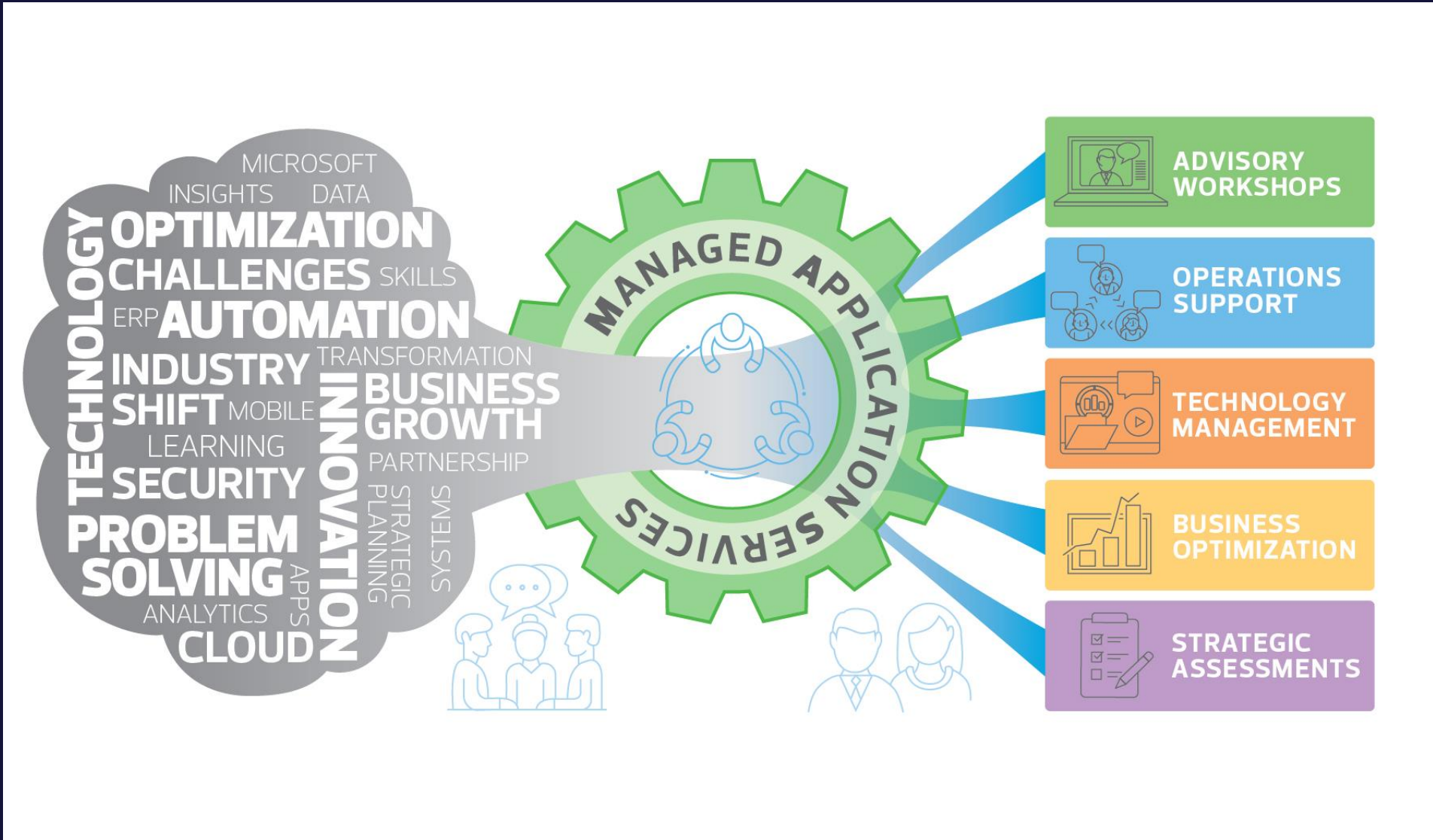


- Statement of Work



- Project Plan and Staffing

Managed Application Services



Managed Application Services - Five Pillars



ADVISORY WORKSHOPS

- Instructor-led training
- eLearning platform
- Custom design



OPERATIONS SUPPORT

- Client success manager
- 24/7 Functional Application Support
- Consulting on demand
- Code promotions
- Microsoft escalations



TECHNOLOGY MANAGEMENT

- Dynamics 365 deployments
- ISV deployments
- Environment design
- Environment management
- Cloud hosting
- Version migrations
- Application security



BUSINESS OPTIMIZATION

- Microsoft roadmap strategy
- RSAT design and maintenance
- Feature enhancements
- Microsoft update management
- Data analytics
- Custom dashboards and reporting



STRATEGIC ASSESSMENTS

- Post go-live assessments
- Solution assessments
- Upgrade assessments
- Envisioning workshops



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