Proposal

Dynamics 365 Sales

A five-day assessment helping to evaluate the cost and terms, build the implementation path of Microsoft Dynamics 365 Sales and prepare your command for this.

Seattle, USA

ontárg it

Project methodology

Approach & methodology

CRP-based implementation methodology:

Iterative & incremental delivery methodology of Dynamics 365 solution delivery, based on end-to-end (E2E) business processes scope and regular customer feedback (CRP = Conference room pilot)

Methodology details:

- **Master backlog** is defined at the beginning of the project and constantly updated after each Sprint, based on CRP's user's feedback. It contains all project deliverables, including documents, code artifacts, workshops, etc.
- **Conference room pilot** – workshop to demonstrate working system, at the end of each sprint, to give users hands-on experience and collect feedback. New issues and requirements are added to the master backlog and evaluated before each sprint
- Solution delivery is divided into iterations **(sprints).**
  - Sprint goal – ideally to complete E2E process-focused scenario in the system with upfront defined functional scope (subset from master backlog)
  - Each sprint include all activities to build working software – configuration, build, testing, data set migration. Including customer responsibilities
- Customer must have dedicated project team members that works alongside the consulting partner to deliver the solution, based on agreed responsibilities
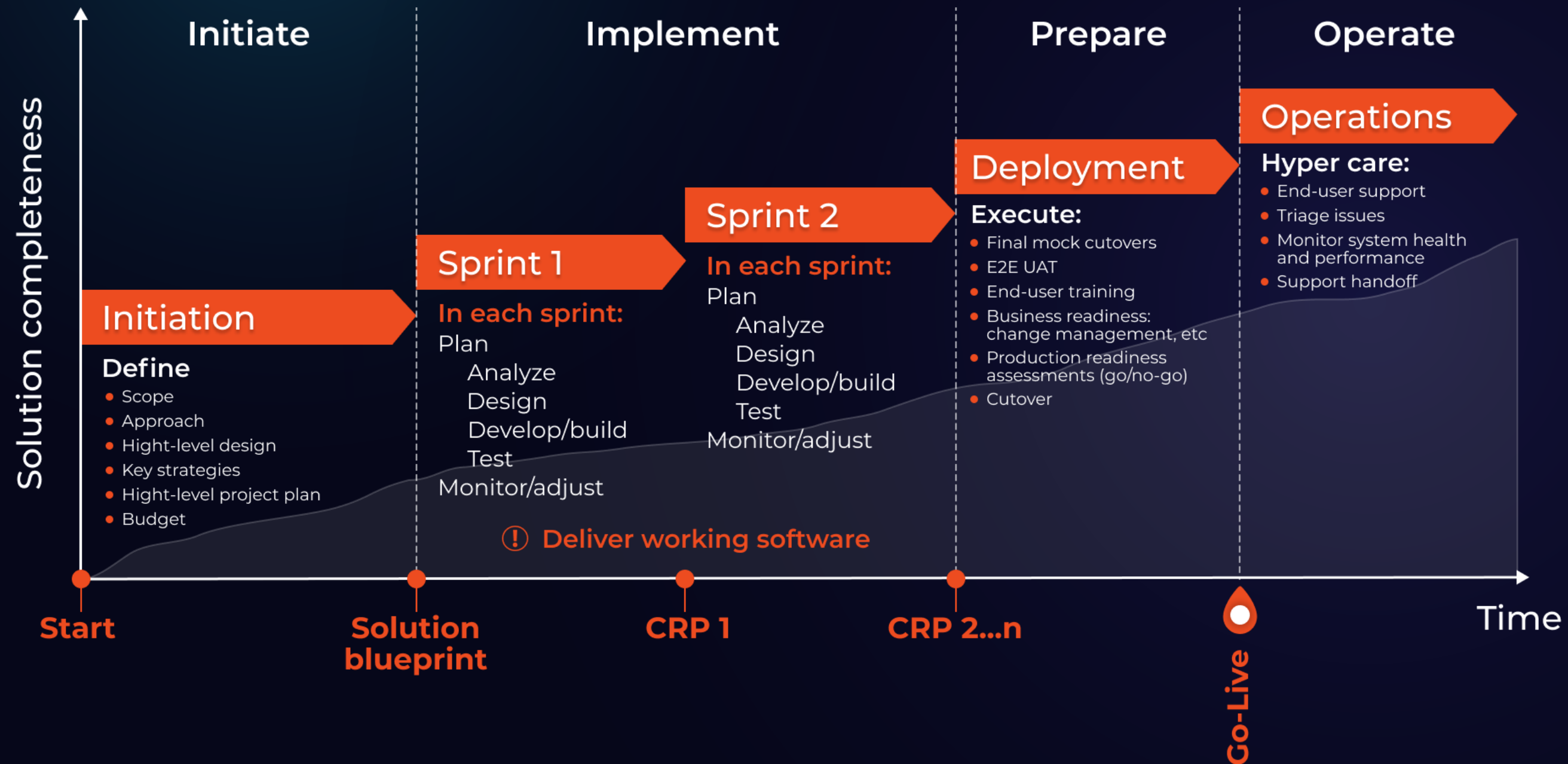
Benefits

Approach & methodology

Why CRP-based approach?

- Early user engagement and new systems hands-on experience helps better clarify requirements and solution design and see what's possible in new system that can benefit users.

- Early system hand-on helps reduce number of customizations, set more accurate priorities, and familiarize users with out-of-box capabilities.

- Focus on working software as fast as possible, reduced effort on ever-outdated project documentation, preparation and approvals

- Transparent representation of project deliverables (business process coverage) and project success measures

- Given the level of process automation maturity, this approach will make better alignment between consultants, developers and customer on what must be delivered.

- This hybrid approach complies with Microsoft's "Success by Design" principles, that recommended by vendor for Dynamics 365 apps implementation

CRP based approach

Solution completeness (y-axis) · **Time** (x-axis)

Initiate · **Implement** · **Prepare** · **Operate**

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

Sprint 1
In each sprint:
Plan
    Analyze
    Design
    Develop/build
    Test
Monitor/adjust

⚠ **Deliver working software**

Sprint 2
In each sprint:
Plan
    Analyze
    Design
    Develop/build
    Test
Monitor/adjust

Deployment
Execute:
- Final mock cutovers
- E2E UAT
- End-user training
- Business readiness: change management, etc
- Production readiness assessments (go/no-go)
- Cutover

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

Start · **Solution blueprint** · **CRP 1** · **CRP 2...n** · **Go-Live**

Implementation stages & deliverables

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Initiation

- Project kick-off
- Business process discovery & analysis workshops
- High-level design and solution blueprint
- Prepare high-level project plan and perform sprint sizing
- Outline business process scope (level 2+)
- High-level Fit/Gap analysis
- Development & Test environments deployment

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Preparation

- User acceptance testing
- Triage issues
- User access & security setup in Dynamics 365
- Production environment setup & solution deployment
- Final data migration
- Cutover planning
- Business readiness & change management

3

Implementation

- Sprint (iteration) planning & task allocation
- Finalizing functional design & process details
- System configuration & development
- Unit & Process testing
- Solution increment deployment
- Master Data migration (set)
- Conference room pilot (preparation & execution)
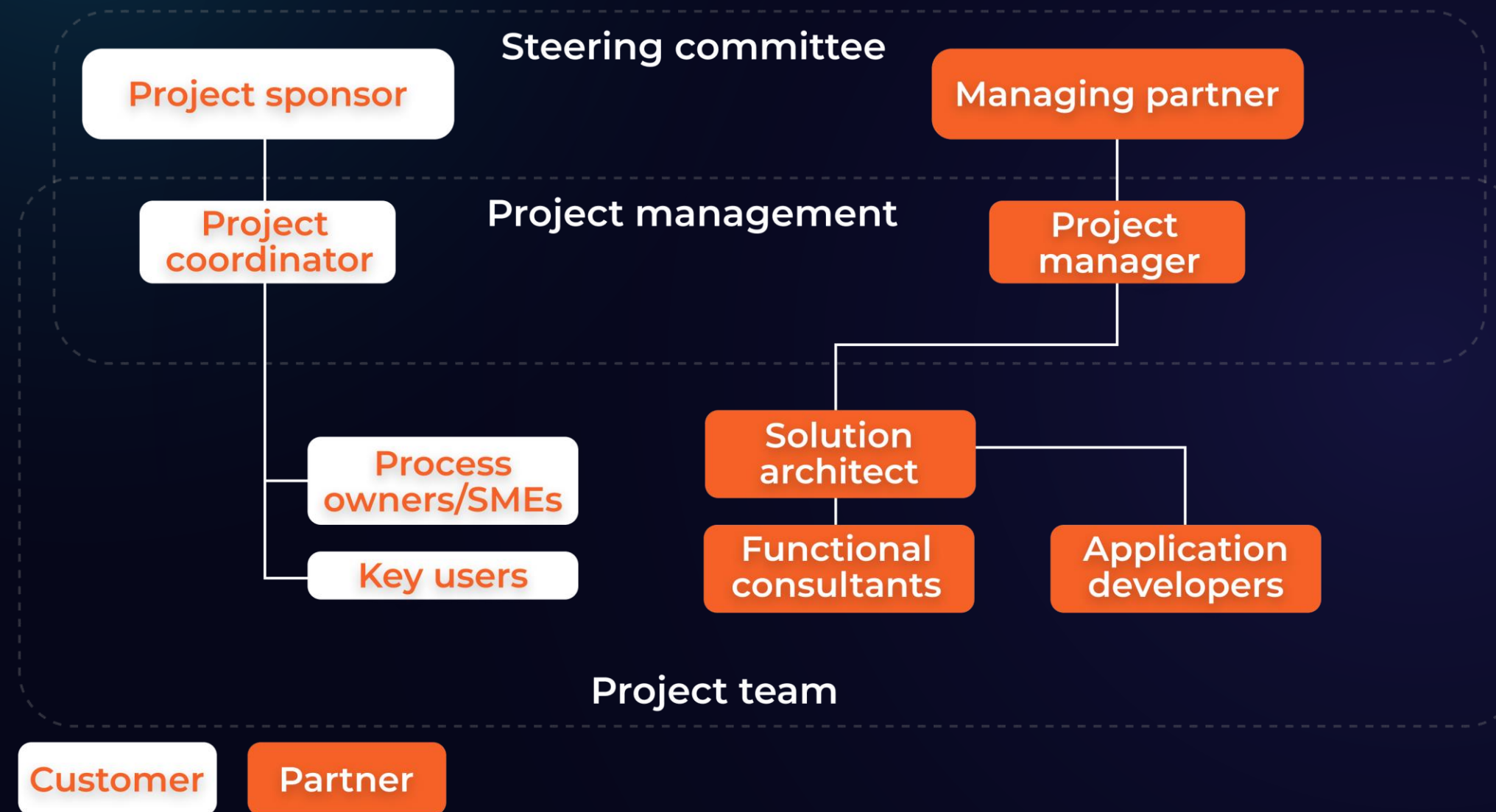- Customer feedback review & backlog updates

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Operation

- Hyper-care (after go-live) support
- Documentation & Knowledge transfer
- Project closure

Team composition & Expertise

All OntargIT members on the project are dedicated experts on Dynamics 365 & Power Platform with 5+ years of solution experience in average.

Project team composition

Ultimate experience

OntargIT is recognized as a leading provider of ERP & CRM solutions, running projects in North America, Europe and the Middle East. Our partnerships allow us to work in around the globe.

At OntargIT, we engage with our clients through every phase of implementation – from needs assessment, installation, and configuration to process redesign, customization, data migration, integrations, and training.

OntargIT enduring client relationships are built on three foundational pillars:

- In-depth industry and technology expertise
- A collaborative team approach
- Prompt and effective support

14+
Years Microsoft Gold Partner

100%
Focused on Dynamics 365 and Power Platform

140+
Customers in 24 countries

70+
Experts in 8 countries

98%
Customer retention

OntargIT provides innovative business solutions

to increase the speed of doing business and boost its customers management efficiency.

Our expertise caters to a wide array of sectors, including manufacturing, automotive, distribution, public sector, retail, professional services, power & energy, and specialized industries.