



Dynamics 365 Customer Engagement FY21 Standard Migration Assessment Framework



STANDARD MIGRATION ASSESSMENT FRAMEWORK SERVICES

Services to be provided are predefined below. These are the minimum required milestones that partners should complete to be eligible for the ECIF funding.

A "SMA Partner" must deliver Solution Migration Assessment (SMA) to the customer to showcase the scope and value of Dynamics 365 Customer Engagement migration project on the following:

1. Engagement, planning and initial setup activities including pre-analysis

Commencement of Services. Preparation for Kick-off Meeting, resources allocation

- **Kick-off Meeting.** The Kick-off Meeting is the first meeting with the project team (Partner and Customer) arranged in order to align mutual understanding on the base elements for the project, introduce the members of the project team, review functionality, discuss analysis steps and deliverables. Kick-off Meeting will be arranged On-line using conference calls via "Teams™", "Skype for Business™" or similar communication program, or in any other mutual agreed method. Review and confirmation of prerequisites required to deliver Services, build of project plan, allocation of resources. Including discussion on D365 value for the business, company vision and priorities
- **Prerequisites gathering.** Review and confirmation if prerequisites required to deliver Services are delivered

2. Dynamics 365 Customer Engagement solution Functional and Technical migration analysis value proposition

Functional Migration Assessment

- Get a high-level functional review of the current Dynamics CRM system
- Provide an assessment of the new capabilities and enhancements in Dynamics 365 relevant to the customer
- Share knowledge on the general transition methods and strategies, their pros and cons if it applied for the future Dynamics 365 solution
- Review initial assessment results and discuss the potential scope with the customer: provide guidance on the best path for the modifications, data consistency and risks
- Address customer questions that need further clarification on the customers journey to the cloud

Technical Migration Assessment

- Solution customization analysis: Provide overview of current customizations, give a high-level overview of the efforts to move/re-implement customizations. Discuss customization considerations and risks
- Conduct a preliminary run of the code through the platform assessment tool to assess the items affecting a migration
- Review existing integrations in Microsoft Dynamics 365 for Customer Engagement
- Provide assessment and joint review of upgrade tool results
- Provide a high-level assessment of the third party (ISV) solutions in the customers current environment
- Address customer questions that need further clarification on the customers journey to the cloud

3. Acceptance Criteria and Proof of Concept of D365 Customer Engagement migration analysis

- **Welcome Email:** describing agreed project items to be sent before starting the assessment
- **SMA Assessment Report** consisting of functional and technical information
 - Code analysis summary, including customization information
 - Risk/effort analysis
 - Migration overview
- **Solution Assessment Presentation** performed on-line and delivered to related parties
 - High risk/effort areas for migration
 - Overview of findings
 - Value proposition of moving online
 - Demo of relevant online capabilities (as relevant/necessary to customer)



MILESTONES

Milestone #	Brief description of services to be completed	Due on or before
1	<p>Engagement, planning and initial setup activities</p> <ul style="list-style-type: none">• Initial Questionnaire: Customer to complete questionnaire that will uncover information relevant to the migration effort• Platform Assessment Tool Execution: Customer to execute SQL tool that captures relevant technical information about the existing CRM environment.	Week 1
2	<p>SMA to the customer to showcase the scope and value of Dynamics 365 Customer Engagement migration project</p> <p>Agenda:</p> <ul style="list-style-type: none">• Functional Solution overview: Get a high-level functional review of the current Dynamics CRM system and understand customer current business processes that are being managed in Dynamics CRM• Technical Solution overview: Microsoft team to inquire about and clarify technical details discovered from the Questionnaire and tool execution.• Detailed review of Solution Assessment results; Initial recommendations• Assessment of the new capabilities and enhancements in Dynamics 365• Share knowledge on the general transition methods and strategies, their pros and cons if apply for the Solution• Review of features that require modification to support the online version where the version upgrade modified or removed a used feature or a pattern that no longer works in online due to changes in architecture.• Third party (ISV) implemented solutions review	Week 2