

**Phase Zero with Mavim — Smoother  
Handover from Business to IT/Project  
Teams for End Customers**



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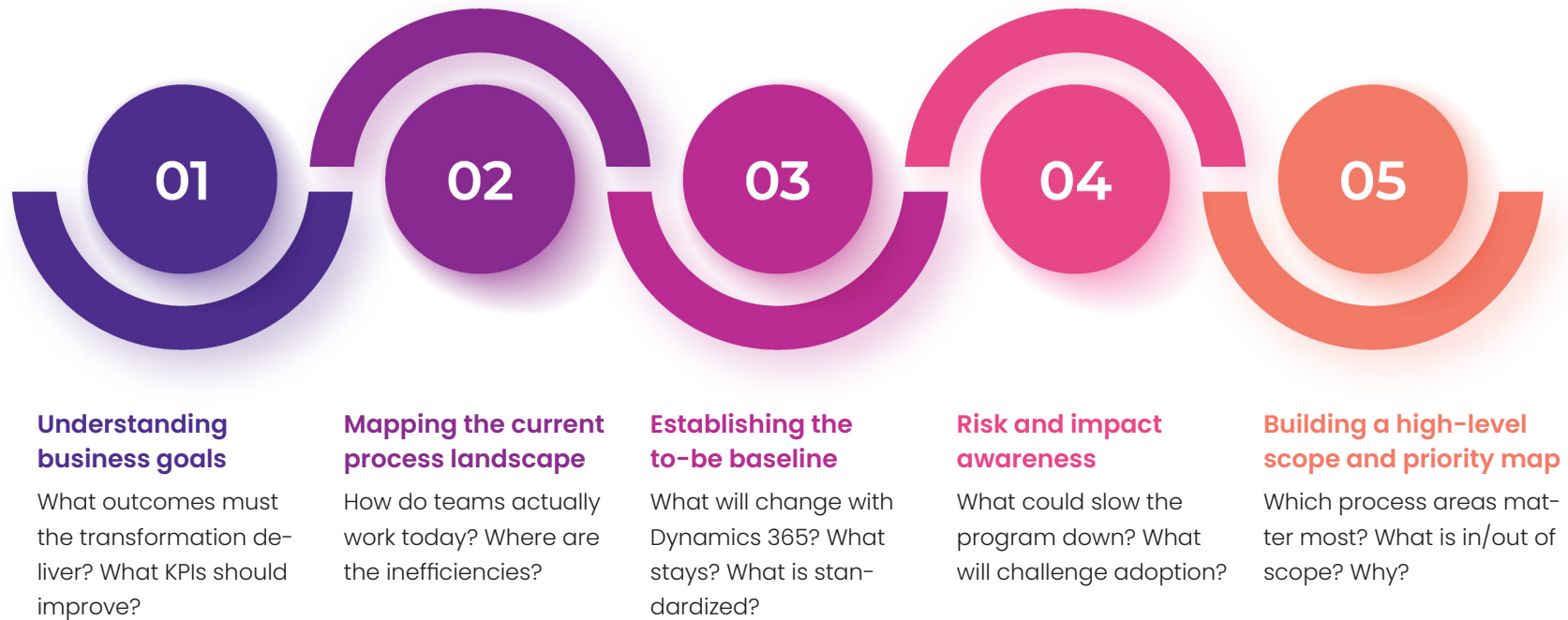
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# What Phase Zero Really Is

Phase Zero sits before Microsoft's Success by Design Strategize and Plan phases. It prepares the organization by clarifying direction, aligning stakeholders, and defining what the transformation intends to achieve.

Phase Zero focuses on five core activities:

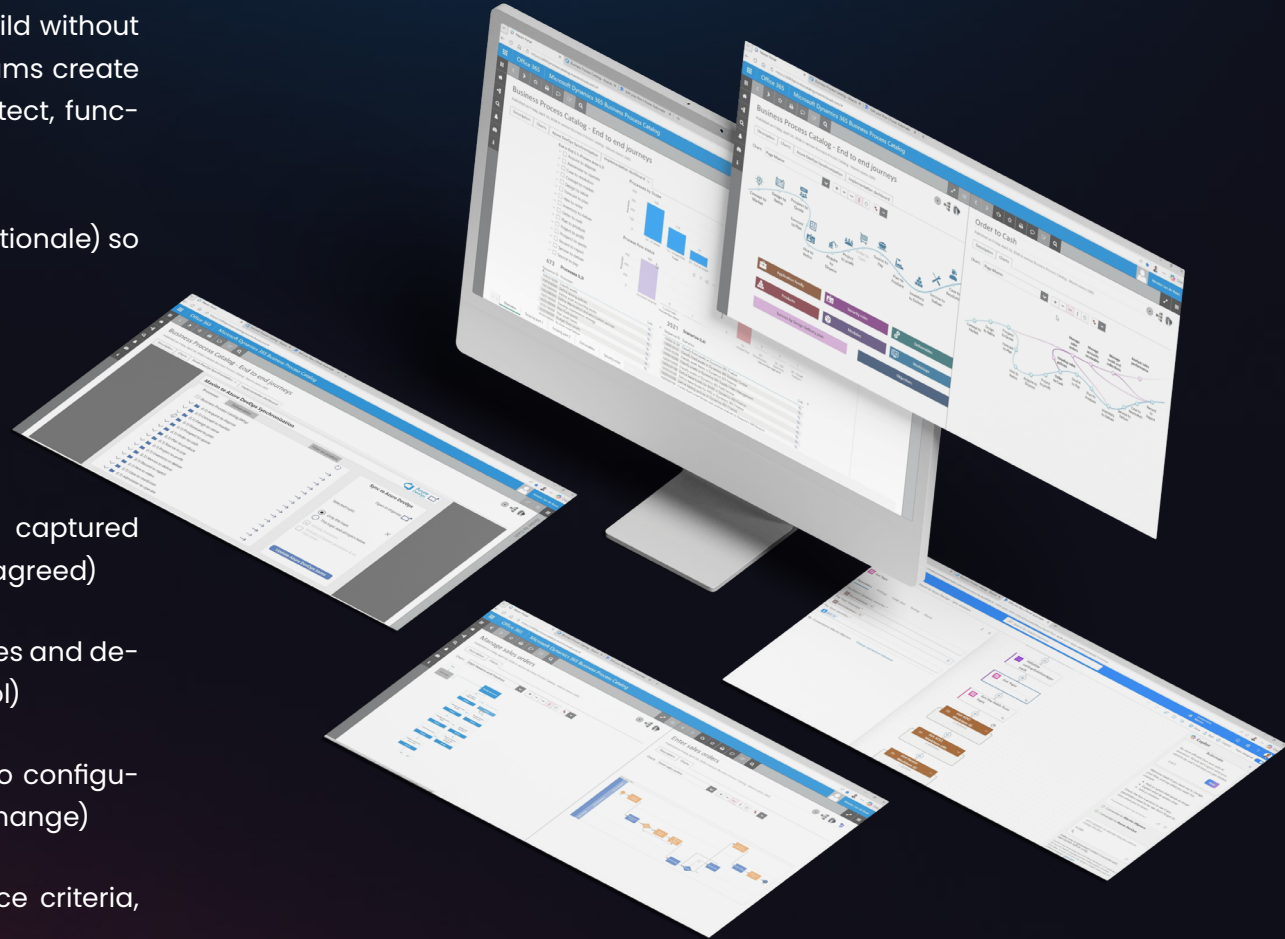


Phase Zero is not about documenting requirements in detail or generating DevOps backlogs. It is about establishing clarity, so that the Strategize, Initiate, and Implement stages run smoothly, without unnecessary rework or interpretation.

# What Phase Zero Produces to Enable a Smooth Handover

A smooth handover isn't a meeting, it's a set of agreed, traceable artifacts that IT can use to start design and build without reworking discovery. In Phase Zero, Mavim helps teams create that package and keeps it usable for the PM, architect, functional leads, and partner team as delivery begins.

- **Validated scope boundaries** (in/out, priorities, rationale) so plans and estimates don't churn
- **Accepted to-be process baseline** mapped to Dynamics 365 (a fit-to-standard starting point business and IT can reference)
- **Decisions, assumptions, and constraints** captured in-context (so teams don't re-litigate what was agreed)
- **Named owners and responsibilities** for processes and decisions (enables governance and change control)
- **Process-to-deliverable traceability** (impacts to configuration, data, integrations, security, testing, and change)
- **Build and AI readiness notes** (initial acceptance criteria, automation candidates,



# The Role of Mavim in Phase Zero

Phase Zero requires executives, business teams, architects, and delivery partners to work from the same definition of “how work should happen.” Mavim provides a single, navigable model that keeps decisions, ownership, and process context in one place—so IT can start build without re-interpreting discovery.

Key Phase Zero capabilities that enable a smooth handover:

- One shared process hierarchy and terminology that business and IT can reference
- In-context capture of scope markers, decisions, owners, and rationale
- Collaborative review and sign-off on the to-be baseline (reduces open questions in Initiate)
- Process-to-deliverable traceability to support planning, design, and backlog shaping
- The result is a validated baseline that stakeholders can reuse immediately in Initiate and throughout delivery.



## Accelerating Phase Zero with the Microsoft Business Process Catalog in Mavim

The Microsoft Business Process Catalog is a pre-built reference model for Dynamics 365 based on proven implementation patterns. In Phase Zero, it helps teams align quickly on what “standard” looks like, so the project doesn’t start from a blank page.

Starts workshops from known D365 scenarios, reducing interpretation and rework

- Aligns terminology and process boundaries early
- Accelerates fit-to-standard decisions that stabilize scope and estimates
- Links processes to the work IT must deliver (configuration, data, integration, testing)

Used inside Mavim, BPC reduces early ambiguity so teams move into Initiate with fewer open questions.

## Fit-to-Standard Conversations Before the Project Starts

Fit-to-standard often starts after Initiate, when expectations are already set and changes are expensive. Bringing it into Phase Zero helps teams decide earlier what will be standardized versus where a justified deviation is needed.

With Mavim + BPC, teams can run fit-to-standard as a structured decision cycle:

- Compare current ways of working to D365 scenarios, using the catalog as the reference point
- Make explicit decisions (adopt standard vs. deviate), with owners and rationale recorded for governance
- Capture dependencies and constraints (data, integrations, controls) where architects can act on them during Initiate
- Tag scope boundaries so the PM and partner can estimate, sequence work, and shape the initial backlog

Result: fewer late surprises, more stable estimates, and faster kickoff into Initiate.

# Making Strategy Tangible: From Processes to Actual System Behavior

To support build kickoff, the baseline needs to show not just “what we want,” but what Dynamics 365 must do. Mavim connects each validated process to delivery-relevant details so solution architects and functional leads can turn decisions into build work.

- Configuration and integration implications: what must be set up (and what it depends on) for the process to run in D365
- Roles, controls, and handoffs: who does what, where approvals occur, and what testing/acceptance needs to prove

## Personas Involved — and How Phase Zero Helps Them

Phase Zero works when the same stakeholders who validate the baseline also reuse it during Initiate and build, including:

- Project/Program Manager: uses scope markers, decisions, and risks to stabilize plan/RAID
- Solution Architect: uses process-to-deliverable traceability to shape solution and dependencies
- Functional Leads: validate the to-be baseline and translate it into fit/gap decisions
- Business Process Owners: sign off the future way of working and decision rationale
- Partner Delivery Lead: uses the baseline to accelerate backlog creation and reduce re-discovery

# How Mavim Ensures a Smooth Handover to IT and the Project Team

A common friction point in Dynamics programs is when discovery has to become IT execution. If the handoff is based on slides and scattered notes, backlog shaping stalls and teams re-litigate decisions.

Mavim reduces that risk by carrying Phase Zero outputs into Initiate in a format the PM, solution architect, functional leads, and partner team can use immediately:

- 1 A single, structured baseline (not workshop notes)**  
IT receives a navigable process baseline with context, decisions, and rationale attached to each process. PMs and functional leads use it to confirm what was agreed, and partners use it to onboard delivery resources without redoing discovery.
- 2 Traceability from process to build work**  
Each validated process ties to the configuration deliverables and patterns it depends on. Architects can quickly identify required workstreams (data, integration, security, testing), and PMs can use those links to structure plans and dependencies.
- 3 Scope markers that drive sequencing and estimates**  
Teams tag areas as in-scope, out-of-scope, or “needs investigation.” That gives the PM and partner a clear basis for

sequencing and estimates, and it makes changes explicit when scope evolves.

- 4 A business-validated blueprint to start build with confidence**  
Business owners validate the future process model during Phase Zero, creating an agreed blueprint for build. That reduces open questions in Initiate and gives functional leads a clear basis for acceptance criteria and test scenarios.
- 5 Less key-person dependency**  
Because the structure is predefined and consistent, delivery doesn't depend on a few experts translating intent. When resources rotate, new team members can follow the baseline, see decision history, and continue delivery with less disruption.
- 6 One language, one model—through build and beyond**  
Business, IT, and partners work from the same process hierarchy and terminology. During build, this supports clearer governance and faster decisions; after go-live, it provides a stable reference for enhancements, automation, and AI.

Entering Initiate with an agreed baseline shortens kickoff, improves backlog quality, and keeps decisions traceable as delivery progresses.

# Optional Integration in Phase Zero: Linking to Azure DevOps

Phase Zero doesn't create a full backlog, but it produces the inputs that make backlog creation fast and consistent.

Using Mavim's integration, teams can synchronize a small set of delivery-critical signals into Azure DevOps, for example:

- Scope markers, key decisions, and process ownership
- Priorities and risks that affect sequencing

- Fit/gap outcomes and agreed deviations
- Acceptance criteria and high-level extension patterns

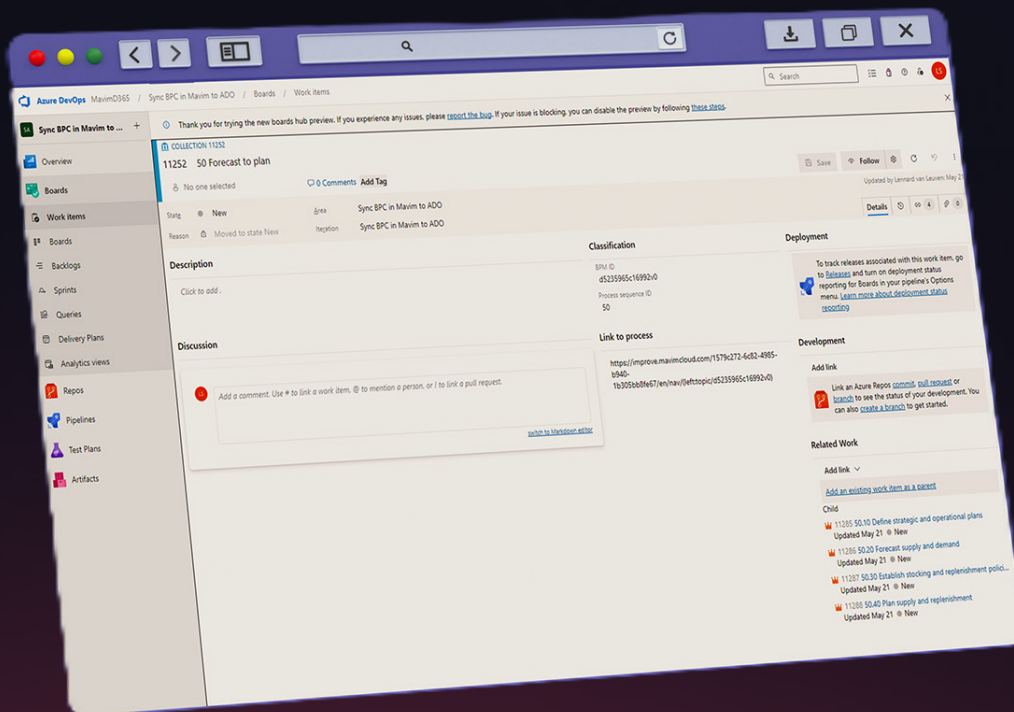
Typically, the partner delivery lead and PM agree which items to sync at the end of Phase Zero so the IT team can start backlog shaping on day one of Initiate—with scope and decisions already traceable.

This keeps the baseline connected to delivery execution:

**Baseline and decisions** ☒ **DevOps inputs** ☒ **Backlog shaping and build kickoff**

At kickoff, the partner and IT team can translate scoped processes into epics/features faster, while the PM keeps scope and decisions traceable as work moves through sprints.

**Why this matters for AI:** clear processes, roles, and controls make it easier to define guardrails, identify high-value automation candidates, and write testable acceptance criteria for copilots and agents.



## How Partner Methodologies and Best Practices Fit In

Most Dynamics 365 transformations use a partner or systems integrator (SI). Mavim + BPC supports partner delivery by providing a Microsoft-aligned process model that fits common SI methodologies (and Success by Design), reducing re-discovery across phases.

- **Repeatable discovery:** start from BPC scenarios to structure workshops and speed fit-to-standard decisions
- **Design clarity:** architects use process-to-deliverable traceability to plan solution workstreams and dependencies
- **Backlog shaping:** scope tags, decisions, and acceptance criteria provide consistent inputs for DevOps epics/features
- **Governance continuity:** decision history and named owners reduce re-litigation in steering and design authority forums
- **Faster onboarding:** new partner resources ramp quickly because context and rationale are preserved

## Customer Use Case: From Legacy ERP to Dynamics 365 with Confidence

A distribution company moving from Dynamics AX to Dynamics 365 had inconsistent warehouse processes, unclear roles, and fragmented documentation—creating delays and rework between business and the delivery team.

**Goals:** standardize core inventory and order-to-cash processes, clarify ownership, and reduce go-live risk.

**Approach:** used BPC scenarios in Mavim during Phase Zero to validate the to-be baseline, capture decisions and scope markers, and carry the baseline into Initiate for faster DevOps backlog shaping.

**Outcomes:** smoother Initiate workshops, fewer open questions during build, reduced early-life support issues, and stronger business-to-IT alignment throughout delivery.

## Practical Recommendations to Maximize a Smooth Handover

- **Start from BPC in Mavim:** use standard scenarios to accelerate alignment and reduce re-discovery
- **Define scope with tags:** mark in/out/needs-investigation so estimates and sequencing are credible
- **Capture decisions in-context:** keep rationale attached to the process to prevent re-litigation
- **Name process owners:** assign responsibility for sign-off and change control during build
- **Document fit/gap outcomes:** focus on what will be standard vs. justified deviations
- **Prepare DevOps inputs:** align on acceptance criteria and priorities to speed backlog shaping

## Long-Term Impact: Sustained Business-IT Alignment

When business and IT continue working from the same baseline, it becomes easier to govern change and scale improvements over time.

- Faster Initiate and backlog shaping with fewer clarification cycles
- Fewer change requests caused by late scope discovery
- Clearer governance for enhancements (ownership, rationale, impact)
- Improved onboarding for new team/partner members through preserved context
- Stronger foundation for automation and AI through standardized processes and controls

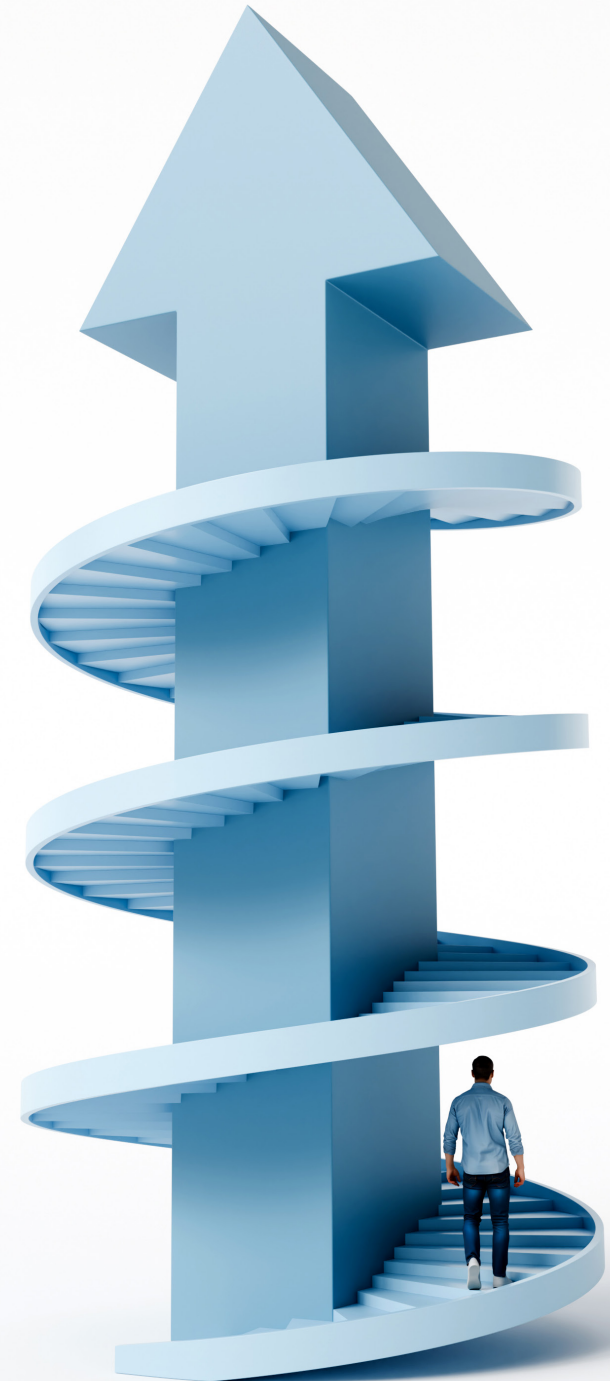
## Conclusion: A Handover-Ready Foundation for Build and Beyond

A Dynamics 365 transformation succeeds when business intent translates cleanly into IT delivery and remains governable as priorities evolve.

Phase Zero with Mavim delivers:

- A validated baseline that teams can execute against
- Clear scope, ownership, and decisions to speed kickoff and reduce churn
- Traceability from process to deliverables and acceptance criteria
- A smoother transition into Initiate and DevOps-backed delivery
- Ongoing alignment for enhancements, automation, and AI

With Mavim and the Microsoft Business Process Catalog, organizations reduce rework and keep business and IT aligned as the roadmap evolves.



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