

Success by Design Go-To Guide

What is Success by Design?

The Success by Design methodology is a comprehensive framework developed by Microsoft to support and accelerate Dynamics 365 implementations. It's part of the Microsoft FastTrack program and is designed to ensure that projects are delivered with higher usage, higher ROI, and faster deployment times.

Microsoft identified the clear need to change the way we all think about evolving our solutions and services and that it wasn't enough for them to solely design a platform containing a set of features. They needed to also understand what it takes to deliver a fully functioning, end-to-end solution that runs the mission-critical processes of our customers' businesses. From this need, Success by Design was born.



Success by Design is a framework that encapsulates the collective experiences of thousands of real-world Dynamics 365 implementation projects. It provides topic-specific reviews and prescriptive guidance, offering recommended practices and approaches that pave a reliable path to project success. This methodology is designed for use by Dynamics 365 system integrators, independent software vendors (ISVs), and customers, serving as a valuable resource to better architect, build, test, and deploy Dynamics 365 solutions. By leveraging the insights and guidance offered by Success by Design, organizations can enhance the quality and predictability of their Dynamics 365 implementations.

For end-users, Success by Design will help you achieve your project's goals while enabling the desired digital transformation for your organization.

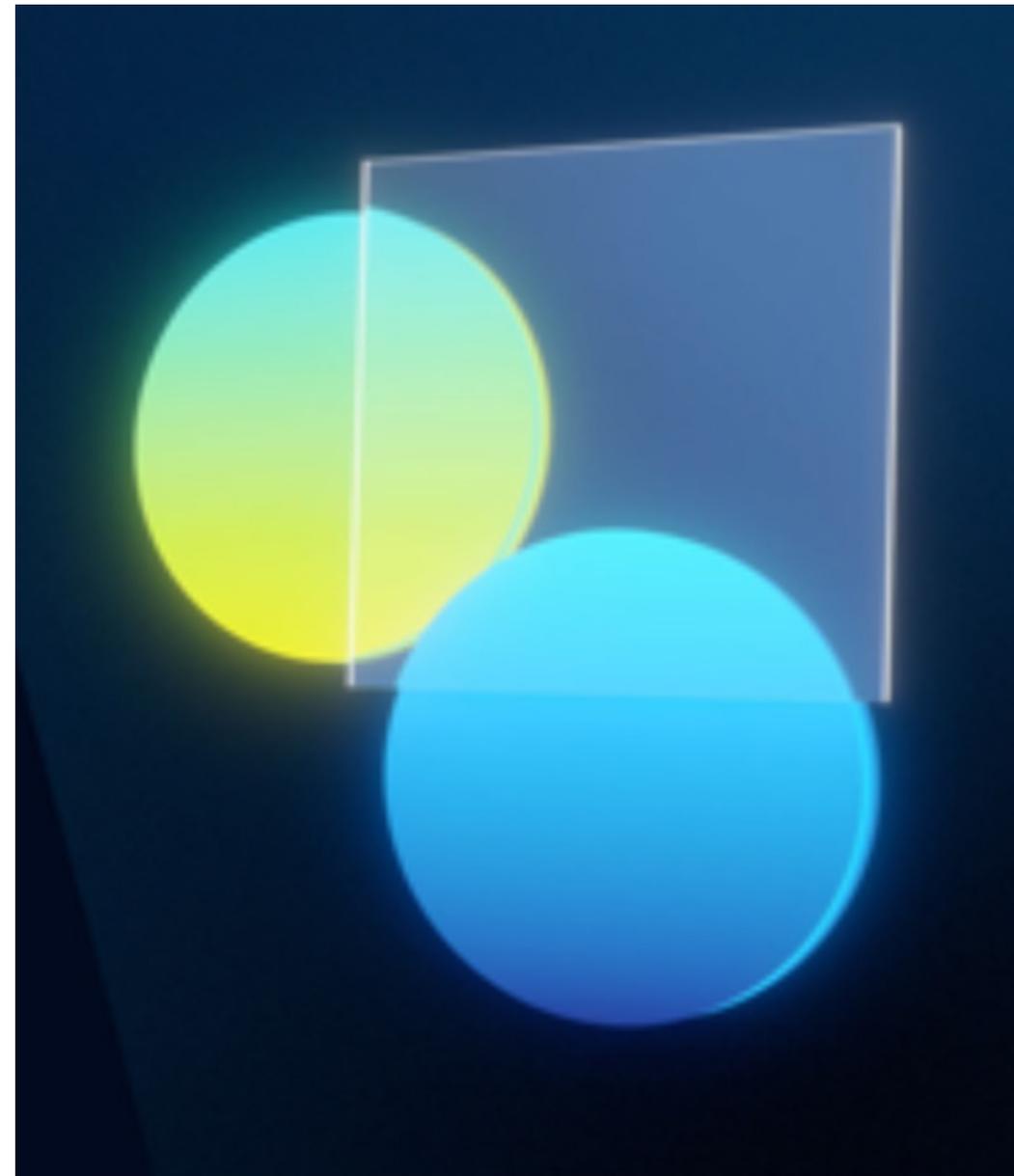
For partners, Success by Design, coupled with your implementation methodology and skilled resources, will increase your team's effectiveness in delivering successful Dynamics 365 projects to your customers.

Microsoft has put equal emphasis on the need to provide you the prescriptive guidance and recommended practices to ensure a smooth implementation project and a properly designed and built Dynamics 365. Microsoft believes that customer success is the precursor to every Dynamics 365 product development decision and solution that successfully transforms business operations. This push has also resulted in the transformation of Microsoft's FastTrack for Dynamics 365 service, which makes certain that our community of Dynamics 365 implementers, customers and partners, has access to Success by Design.

What is Microsoft FastTrack?

Microsoft FastTrack is a service provided by Microsoft to help customers deploy and adopt Microsoft cloud solutions, such as Microsoft 365, Azure, and Dynamics 365. It is a customer success program run by Microsoft's Dynamics 365 product engineering team that helps customers implement Dynamics 365 apps and realize business value faster. It is designed to assist organizations in moving to the cloud with confidence by offering guidance and best practices throughout the deployment process. The practice of Success by Design is fundamental to FastTrack's approach, but the Success by Design framework is also available for use on any Dynamics 365 implementation project.

Every organization comes with a unique set of challenges, opportunities, and priorities. No matter where you are in your digital transformation or implementation, Microsoft FastTrack offers the guidance, perspective, questions, and resources to help you drive a successful Dynamics 365 implementation, and harness data for insights that lead to the right actions and the right business outcomes across any business process.



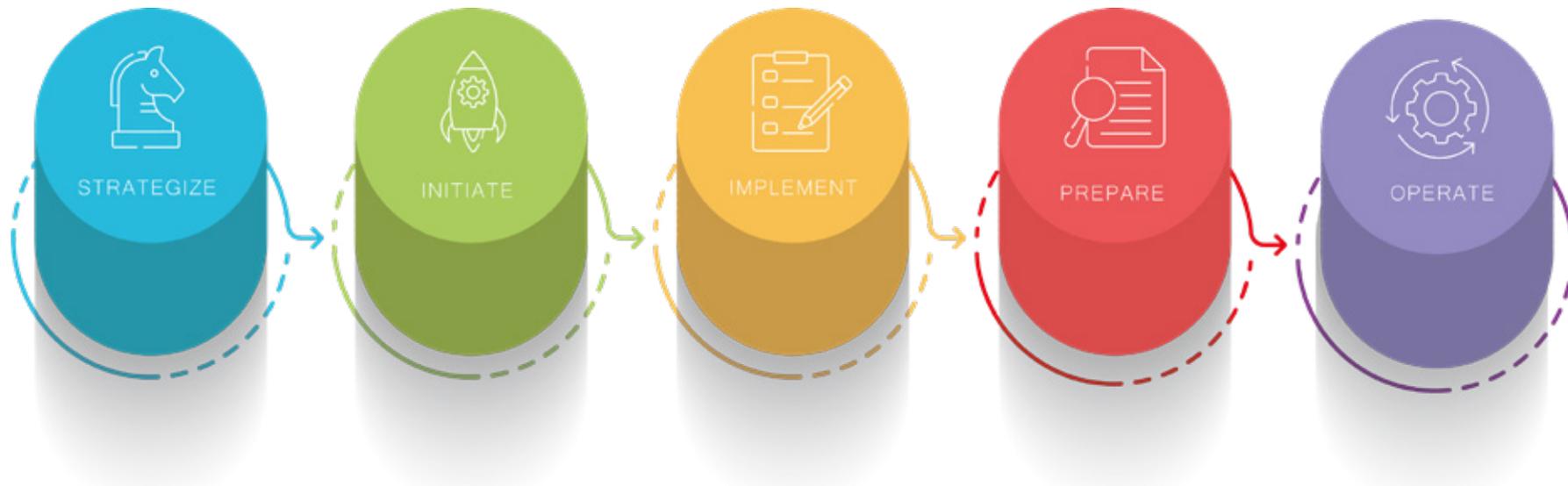
What are the phases of Success by Design?

Microsoft's Success by Design is the recommended Dynamics 365 implementation approach that consists of five phases that are the backbone of limiting implementation risks and costs. Each phase is integral as to how this approach is executed and made to work so seamlessly. Within the phases are different types of reviews called 'Success by Design Reviews.' Success by Design reviews are exercises in reflection, discovery (observations), and alignment (matching to known patterns) that project teams can use to assess whether their implementation project is following recommended patterns and practices.

Reviews also allow project teams to identify (and address) issues and risks that may derail the project.

Success by Design should be used as an adjunct to the project team's chosen implementation methodology for reduced risk due to early detection of problems and alignment to recommended practices.

The five phases are the following: Strategize, Initiate, Implement, Prepare, Operate



Strategize

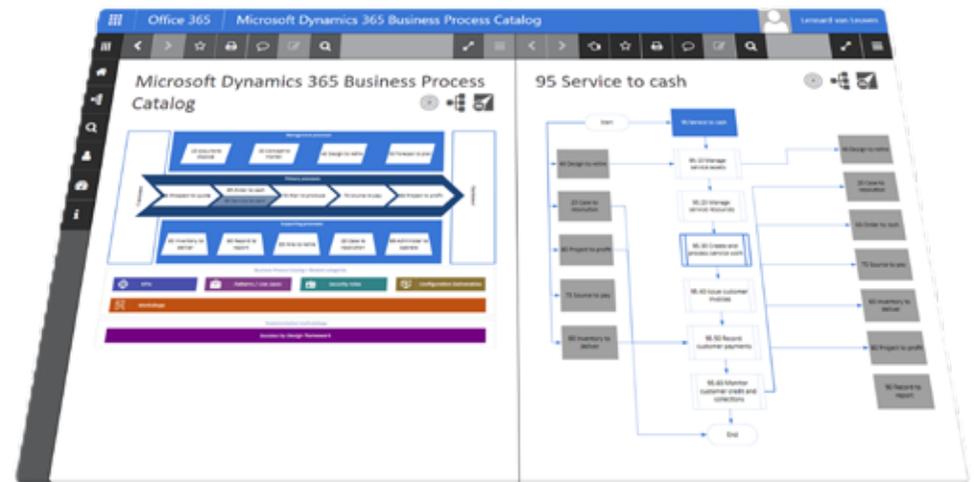
The Strategize phase of Success by Design is a foundational step in Dynamics 365 implementations, and is one often forgotten of without a specific approach. During this phase, the project team collaborates with stakeholders to understand the organization's business goals, challenges, and opportunities through discovery and envisioning sessions.

A comprehensive assessment is made of the current state, including processes, systems, and data, to identify gaps and areas for improvement. Based on these insights, the team develops a high-level strategy outlining the best approach for the implementation, including scope, timeline, and resources required.

After the comprehensive assessment of what is already operating, an implementation roadmap is then created, detailing major milestones, deliverables, and a timeline for achieving the desired future state. The team identifies potential risks early on, and mitigation strategies are devised to address challenges proactively. The roadmap is being created while aligning with current operational functions and applications, as well as employees associated or that will be affected.

Ensuring stakeholder alignment with the strategy and roadmap is crucial, and this is achieved through regular communication and validation sessions.

The Strategize phase sets the stage for a successful implementation by providing a clear direction and a well-defined plan, ensuring a smoother and more predictable journey towards achieving business objectives with Dynamics 365.

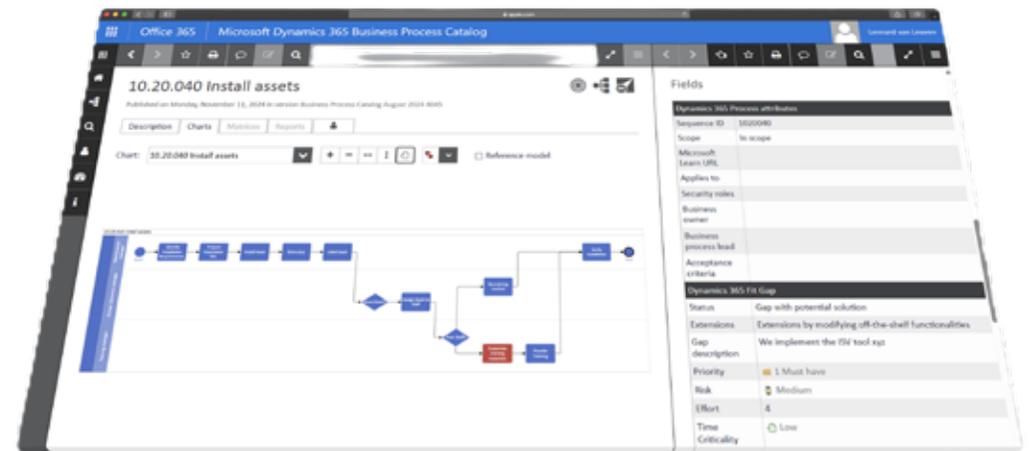


Initiate

The Initiate phase of the Success by Design methodology, the project team focuses on discovery and planning. They gather and validate business requirements, finalize the high-level solution approach, and define all in-scope workstreams. The project plan is then updated to reflect these initial findings and decisions.

Once the high-level solution design is produced and the related project workstreams are defined, the process moves into the **Solution Blueprint Review**. This review is a critical checkpoint where the solution design is evaluated to ensure it aligns with the business requirements and objectives. It's the starting point of the Success by Design framework, setting the stage for a structured and methodical implementation of Dynamics 365.

This approach ensures that the project is built on a solid foundation, with a clear understanding of the business needs and a well-defined plan for addressing them. The Solution Blueprint Review helps to confirm that the project is on the right track before moving forward with the implementation.



Implement

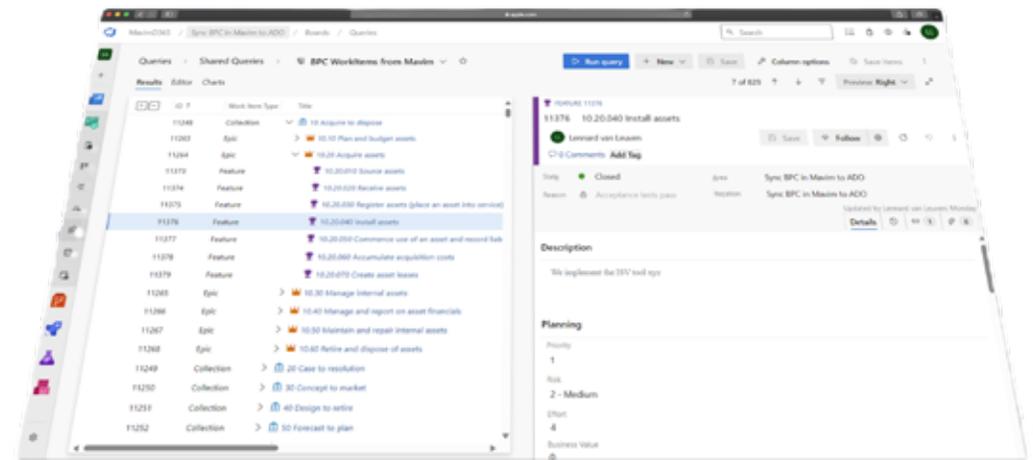
In the Implement phase of the Success by Design methodology, the project team shifts their focus to building the solution according to the agreed-upon design and scope. This phase introduces **Implementation Reviews**, which are informed by the findings and recommendations from the Solution Blueprint Review.

This is the phase where the technical team is configuring the Dynamics environment based on the business team's requirements. The technical team configures the Dynamics 365 environment to align with the business team's requirements, focusing on customization, integration, security, data migration, testing, and documentation. This phase is crucial as it ensures that the system is tailored to support their unique business processes and objectives, laying the groundwork for a successful implementation.

Implementation Reviews serve a critical role in this phase. They delve deeper into specific aspects of the solution design, such as the data model, security, and integration, as well as implementation practices like Application Lifecycle Management (ALM) and testing strategy. The purpose of these reviews is to thoroughly address any risks identified during or after the Solution Blueprint Review, but before the solution build progresses too far.

By conducting Implementation Reviews, the project team can ensure that the solution is being built correctly from the start, adhering to best practices and aligning with the overall project goals. These reviews help to mitigate risks early on, providing an opportunity to adjust before significant resources are invested in the build process.

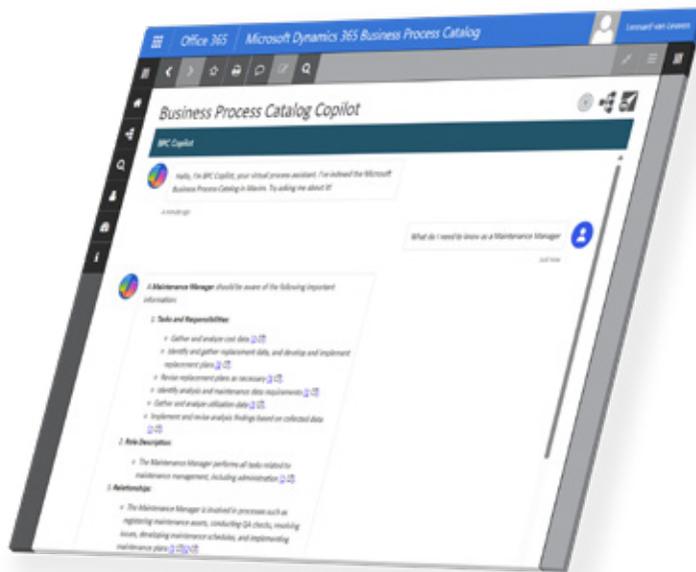
In summary, the Implement phase is where the solution takes shape, and Implementation Reviews are a key mechanism to ensure that the build is on the right track, addressing potential issues proactively and ensuring a higher quality outcome.



Prepare

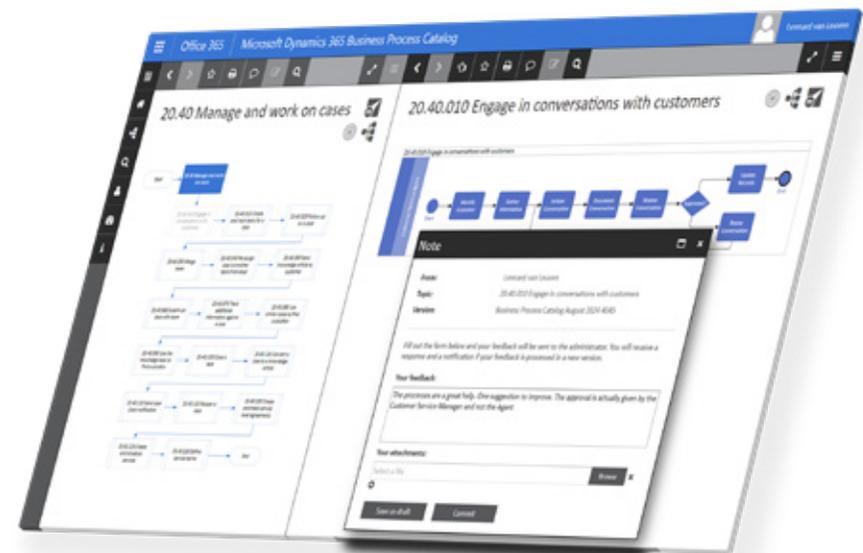
By the Prepare phase, the solution has been built and tested, and the project team is preparing for the final round of user acceptance testing (UAT) and training.

Additionally, all necessary customer approvals have been granted, information security reviews completed, the cutover plan defined (including go/no-go criteria), mock go-lives scheduled, the support model ready, and the deployment runbook completed with tasks, owners, durations, and dependencies defined. At this point, the project team uses the Success by Design Go-live Readiness Review to identify any remaining gaps or issues.



Operate

In the Operate phase, the customer solution is live. The goal of this phase is stabilization and a shift in focus towards functionality and enhancements that are earmarked for the next phase of the project.



Success by Design Reviews for Implementation

There are a couple of different reviews that are necessary within the phases of Success by Design to ensure everything that will be within the project has been assessed and will not be a risk within the project-ed roadmap.

The different types of review are the following:

- Solution Blueprint Reviews (Initiate)
- Implementation Reviews (Implement)
- Go-Live Readiness Reviews (Prepare)

The Solution Blueprint Review serves as the starting point of Success by Design. Microsoft suggests that the Solution Blueprint Review be a mandatory review for the project because findings that come from it led to Implementation Reviews, which offer project teams the opportunity to drill down into topic-specific areas where deeper dives are deemed necessary for further understanding project and solution risk. Finally, the Go-live Readiness Review, which we also suggest as a mandatory review, is the last stop for assessing any remaining risks before go-live.

Reviews are informed by project artifacts (project plans, requirements, fit gap, solution architecture, design documents, and so on) produced by the project team, and other information such as formal or informal

project touchpoints. The availability of such information points to the readiness of the team to schedule and conduct Success by Design reviews. Additionally, project teams may rely on Microsoft for telemetry and other tools to inform review discussions and generate review outputs.

Findings come in three types:

- Assertions: Findings that capture noteworthy aspects of the solution or approach. Assertions highlight what the project team is doing right, typically in line with best practices.
- Risks: Findings that could potentially impact the implementation negatively if not mitigated.
- Issues: Findings that are currently impacting implementation negatively or will do so if not resolved.

Findings should include as much detail as possible and be matched to known patterns. Findings matched to known patterns often yield insights that lead to recommendations or actions necessary to resolve the issues identified.

Conclusion

The Success by Design framework is available for use on any Dynamics 365 implementation project, and Microsoft encourages project leaders to team up with their implementation partner and use a Microsoft integrated product to enable Success by Design within their project.

The Success by Design methodology is a powerful tool for Dynamics 365 implementers, providing a reliable path to project success. By following this framework, organizations can ensure that their Dynamics 365 implementations are well-architected, built, tested, and deployed, leading to successful digital transformations. Success by Design equips project teams with a model for technical and project governance that invites questions and reflection, which leads to critical understanding of risks that might otherwise go unnoticed until too late in the project. Considering the pace of cloud solutions and the investment that organizations make in Dynamics 365 software and implementation costs, even the most experienced customers and partners with the best methodologies will benefit by incorporating Success by Design into their projects.

Learn more about Success by Design with Mavim

Microsoft offers free online training on Microsoft Learn for various roles in an implementation project. Project teams are encouraged to enroll in the Success by Design training to ready themselves for the implementation journey.



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