

Dynamics 365 Adoption Planning Workbook

Our Adoption Planning Workbook will guide you through the adoption planning process

Assemble your team

Tap into the technical and business change agents. Recruit multi-disciplinary teams of executive sponsors, technical talent, core stakeholders, change agents and champions.

Partner with your team to clearly outline business strategy and key success metrics. Align business and technical needs to maximize outcomes.

Define strategy and scenarios

Assess readiness

Determine the overall organizational readiness including leadership alignment, user groups, technical, governance, support and feedback channels.

Build plan

Plan the rollout cadence based on early adopter pilot program, Champion readiness and planned scope of change.

Onboard employees

Build awareness, deployment, training and feedback collection into the plan to continuously drive engagement and usage.

Assemble your team

We have identified four key teams that are critical to a successful adoption effort. Each stakeholder group has a specific role in the implementation and should be engaged early and often.



1. Executive Sponsors



2. Success Owners



3. Early Adopters



4. Champions

Use the following slides to identify key stakeholders and others involved in the adoption effort.

Identify your team members

	Role	Responsibilities	Department	Team Member Identified for Role
Key Roles	Executive Sponsor	<i>Help identify and prioritize top HR needs. Connect monthly with HR and IT leaders across the organization. Actively participate in and use the Dynamics 365 capabilities to help drive and reinforce adoption</i>	VP, HR	Jane Doe
	Success Owner			
	Program Manager			
	Champions			
	Training Lead			
	Department Leads (Stakeholders)			
	IT Specialists			
	Communication Lead			
	HR Manager			
	Community Manager			

Identify and prioritize your Scenarios

Use the following slides to identify the business scenarios you plan to enable with Dynamics 365, then work through the prioritization exercise.

Leverage this content to develop key messaging in your Awareness and Training engagements.

Explore the Dynamics 365 Content Library

Free webinars, ebooks, analyst reports and more to help you learn how Dynamics 365 can optimize your company.

<https://explore.dynamics.com/>

Scenario Identified:

- *Be productive on the road.*

How it applies to my organization:

- *Provides field sales teams ways to easily store, share, and update customer data from any device during travel.*

Meet with your team members

Host a workshop...

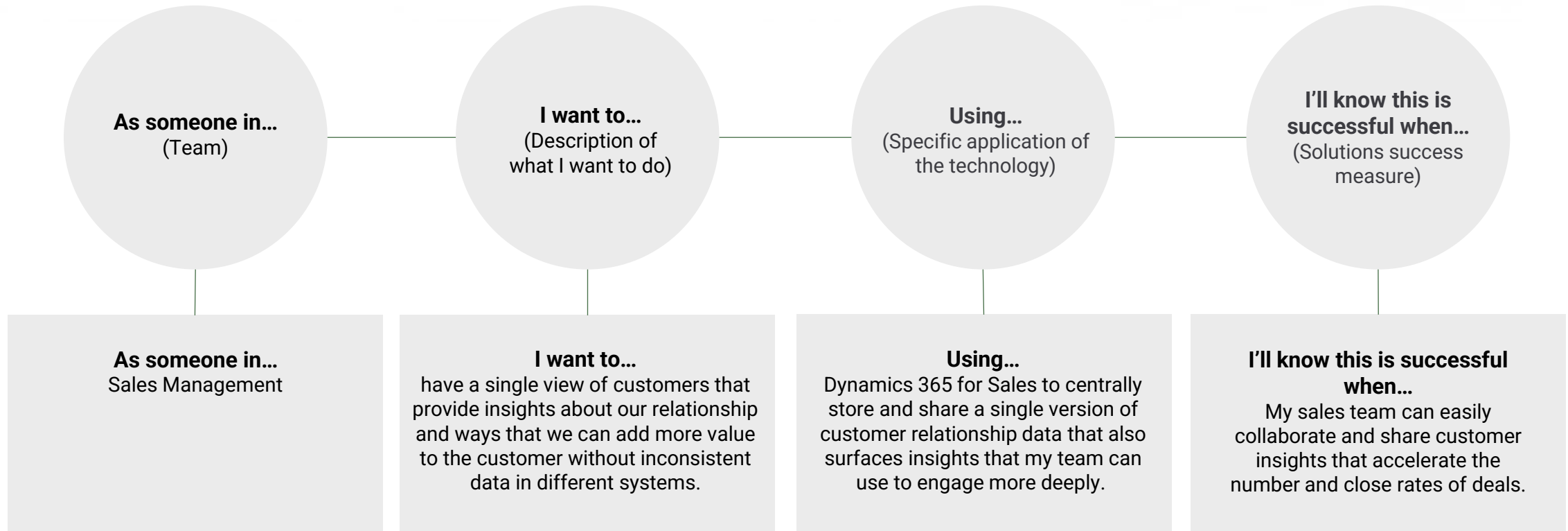
to delve deeper into current challenges, strategies and goals. Include department leads, lines of business, IT and other stakeholders who can help brainstorm how Dynamics 365 can be used in your organization. Leverage your *Scenario* examples in the conversation.

<https://explore.dynamics.com/>

- What are some of the major challenges or pain points that exist in the team and process today?
- What data systems do you rely on? Are there bottlenecks?
- If you had a magic wand - what would you change?
- What steps and process do you consider unnecessary or a waste of time?
- What are the areas in which our organization would like to improve?
- What are our strategic initiatives or current transformation projects that Dynamics 365 can support?

Organize and document each scenario

Consider using the framework below to document business scenarios for each department.

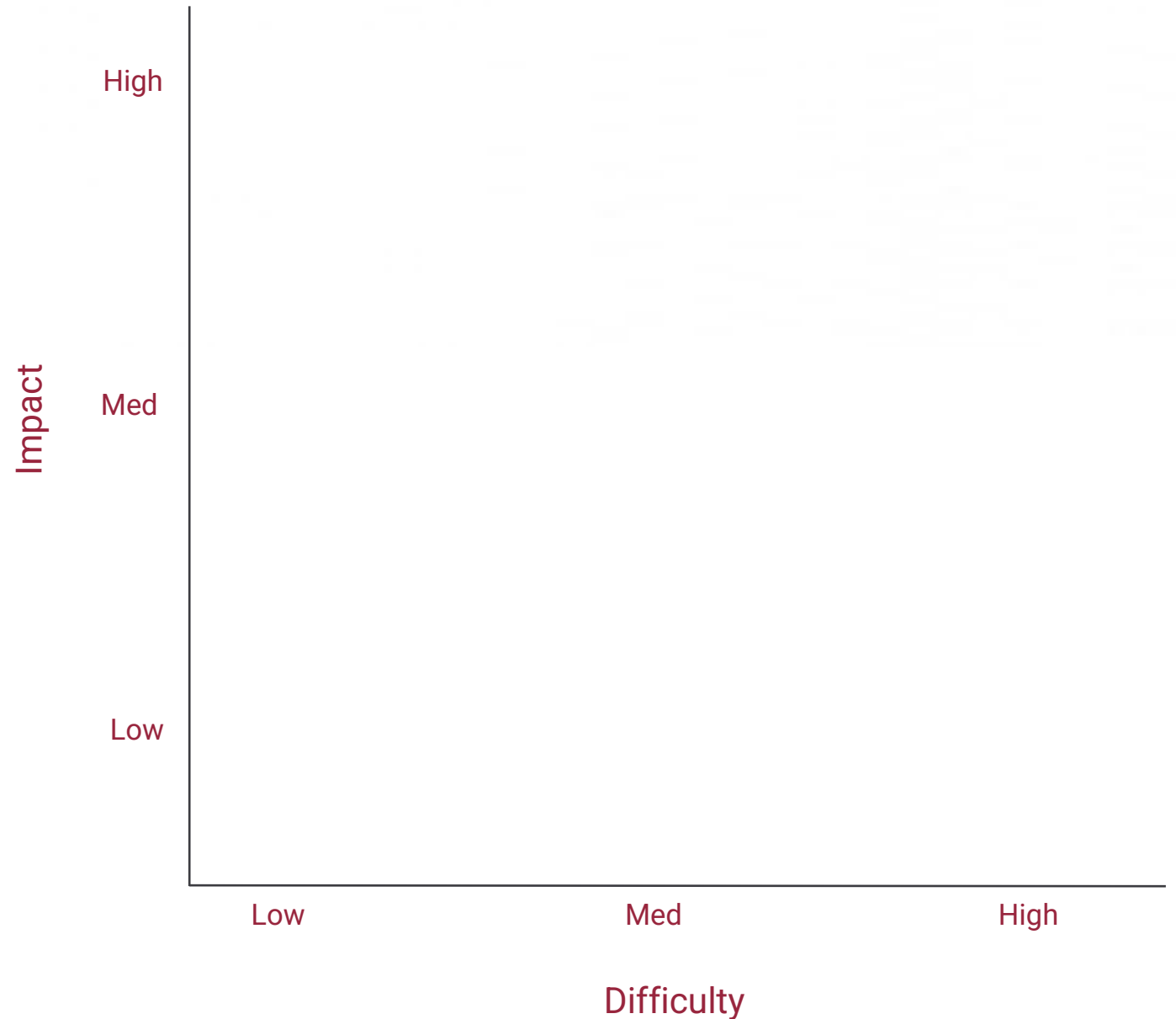


Identify and prioritize your Business Scenarios

Gauge impact and difficulty

Use the graph to prioritize scenarios.

Place your scenario markers on the graph to chart the impact and difficulty of each scenario. Remember, this is different for every business, so take time to consider the resources and time required for each scenario.



Establish KPI benchmarks and reporting plan

Capture each expected business value of Dynamics 365 along with the KPIs and targets for each business scenario.

Identify how you will measure and report against KPIs to gauge adoption.

Definitions to help build your success criteria

KPI Measure/Name	A high-level summary for the measure. For example, the number of employees that are members of Teams.
KPI Reporting Frequency	The cadence that reporting runs on for this metric.
KPI Formula	The details of the calculation ensuring it's connected to the data sources and instruments below.
Data Sources	Details on exactly where the data is coming from. How many people? Which groups? Which systems?
Data Gathering, Transformation, & Analysis Process	How is the data being pulled from the data sources? For example, is this a dynamic pull at 7 a.m. the first Monday of the quarter, or is this an extract from a static file that is always two weeks old? If this is people, for example, are we surveying them using a specific instrument delivered in a specific way?
Data Gathering Instruments	Do we need to create any instruments (surveys, feedback forms) or create guides on data transformation to collect the data we want?
Data Gathering Owner	State which person, or group of people, is assigned to each part of the data gathering, transformation, and analysis process.

Establish KPI Benchmarks

Use the framework below to define your own success criteria. Remember to make them specific, measurable, attainable, relevant and timely.

Success criteria	Method	Goal
<p>Cross-sell & Up-sell Capture & share cross-sell opportunities for related products with cross-department sales teams, customer 360 with AI-based recommendations</p>	<p>Quantitative Dynamics 365 for Sales</p> <ul style="list-style-type: none"> • Improve Revenue per Customer • Improve Up-Sell Opportunities • Increase Order Value / Attach Rate • Create up-sell leads 	<p>New revenue from existing customers increasing from 15% to 20%</p>
<p>Cost to Serve Increase efficiency of agents serving customers with a more productive user experience, using lower-cost channels such as Bots and increased self-service.</p>	<p>Quantitative Dynamics 365 for Customer Service</p> <ul style="list-style-type: none"> • Lower cost channel shift • Increase first-time resolution • Reduce resolution times • Increase service efficiency 	<p>60% of customer cases resolved in (first) one call.</p>
<p>Increase Production Capacity Increase production output with pre-emptive issue avoidance and increased visibility and insight to feed improved capacity planning.</p>	<p>Quantitative Dynamics 365 for Finance & Operations</p> <ul style="list-style-type: none"> • Increased Plant Utilization • Reduce Downtime Costs • Optimize production plans • React faster to production issues • Minimize setup/change-over times • Optimize long-term capacity 	<p>Increase gross margin from 50% to 60% by increasing output with existing production facilities.</p>

Success criteria scorecard example

Goal			Measurement				
Business Value	Type of Value	Business Owner	KPI Measure	Data Source	KPI Formula	KPI Baseline	KPI Target
Cross-sell & Up-sell Capture & share cross-sell opportunities for related products with cross-department sales teams, customer 360 with AI-based recommendations <ul style="list-style-type: none"> • Improve Revenue per Customer • Improve Up-Sell Opportunities • Increase Order Value / Attach Rate • Create up-sell leads 	Increase sales	John Smith	Up-sell / Cross-sell as % of Revenue	Dynamics 365 for Sales	[New Revenue from existing customers / Total Revenue]	15%	30%
Cost to Serve [Agent Efficiency] Direct volume to lower cost channels through customer self-service portal, community, social and text channels	Reduce costs	Bob Bardot	First Call Resolution Rate	Dynamics 365 for Customer Service	[Number of customer cases resolved in one call / number of customer cases]	40%	60%
Production Capacity Increase production output with efficiency gains that grow revenue faster than costs. <ul style="list-style-type: none"> • Increased Plant Utilization • Reduce Downtime Costs • Optimize production plans • React faster to production issues • Minimize setup/change-over times • Optimize long-term capacity 	Reduce costs	Jennifer Motts	Gross Margin	Dynamics 365 for Finance & Operations	[(Revenues - cost of goods sold) / Revenues]	60%	70%

Define your success criteria details

KPI Measure/Name	
KPI Reporting Frequency	
KPI Formula	
Data Sources	
Data Gathering, Transformation, & Analysis Process	
Data Gathering Instruments	
Data Gathering Owner	

Document your approach to reporting success

Who will your report success to?	<i>Dynamics 365 solution Steering Committee</i>
How often?	<i>Monthly meetings</i>
In what format?	<i>Share success scorecard during live meeting and post to Teams channel after monthly meeting for access by all key stakeholders</i>
Using which vehicles?	<i>PowerPoint</i>

Assess technical and organizational readiness

Leverage this content to develop key messaging in your Awareness and Training engagements.


Key factors that will tell you how ready your team members are for the transition to the Dynamics 365 solution.



Clear vision for the organization to adopt



Clear vision for the individual to adopt



Level of overall change



Executive alignment

Access organizational factors

KPI Measure/NThink about a time when your organization adopted a new technology. What made that adoption successful or not successful?

Moved file storage to the cloud two years ago using OneDrive. Employees shared that they knew ahead of time the change was coming and were told specifically how it would impact their role. In some cases, the impact was minimal, which reduced anxiety.

Employees may not be able to focus on the new Dynamics 365 solution if they are focused on other changes. Are there key initiatives taking place during the rollout that should be considered in your planning?

What type of internal resources exist within your organization that can be leveraged for the adoption effort? This includes communications channels, change network, training cadence and leadership events.

What are the perceived risks and benefits of the Dynamics 365 solution? How can you highlight benefits? How can you mitigate risks?

Understand your “why”

When planning for adoption, users need to understand why the change is occurring for the organization and how Dynamics 365 will help individual employees achieve more. This includes ensuring they understand why the change is happening, what’s in it for them, and why they’re being asked to change. Capture these reasons below and use this content to build your communications and engagement content.

How will Dynamics 365 solution benefit your organization?

- *Our company vision statement has always been to be customer obsessed. Now our customer tracking and service solutions will be integrated for an always up-to-date 360-degree customer view.*

How will Dynamics 365 solution benefit employees?

Identify key changes for each item

Create a list of things that will change for your team members with the implementation of the new Dynamics 365 solution. This includes the new technology as well as new ways of working and engaging. Make sure to incorporate these key changes in your Awareness and Training plans.

Team: Sales

- *Sellers will use Dynamics 365 for Sales for customer tracking instead of the old, on-prem CRM system.*
- *Security requirements will change for all mobile devices accessing Dynamics 365*

Identify areas of alignment

To ensure that leaders demonstrate support, there must be alignment on key project goals, timelines and objectives. Use this worksheet to capture areas of alignment and misalignment and the implications of both.

Executive alignment

Move to cloud services has been a goal of IT and business units for the last two years. All key leaders are on board with decision to move to Dynamics 365.

Executive misalignment

Core business functions have shared that the IT timeline is too aggressive for teams like Sales and Marketing, who need to focus exclusively on driving sales until the close of Q4. There are concerns about the current plans to launch new technology during that time period.

Key implications

Consider current change climate for each business group and plan user readiness activities accordingly. Communicate adoption and usage risks to Program Manager.

Build your awareness strategy

Before building your Awareness Plan, take time to understand who needs to be informed, key messages to convey, and preferences for communication channels.

Who needs to be informed?

Groups impacted by the Dynamics 365 Implementation:

- *Sales team*

Audiences who will drive the change forward:

- *Managers*

Support Organizations:

- *IT operators*

What do they need to know?

For the Transition State:

- *Plans for sunseting old system*

In the Future State:

- *Big picture overview of new environment and role in it*
- *New process skills/knowledge*

How do they like to communicate?

Recommended Modalities	<ul style="list-style-type: none">• Email: Use company email to connect individually, through distribution lists, or company-wide• Social: Leverage social networking sites to push out helpful project updates and engage with employees• In-Person: Town Halls, Focus Groups and 1:1 conversations provide leadership an opportunity to answer questions and interact with the team
Preferred Modalities	<ul style="list-style-type: none">• <i>Incorporate all content into employee-preferred all-company memos, current Yammer site and during C-Suite Town Halls</i>
Ideal Timing	<ul style="list-style-type: none">• <i>Include in weekly all-company memo because of high readership</i>
Helpful Resources	<ul style="list-style-type: none">• <i>Dynamics 365 scenario videos</i>

Which content will be helpful for your communication plan?

After exploring Microsoft resources, hyperlink and track content below.

- *Dynamics 365 Resources*

Build your training strategy

Before building your training plan, take time to understand the groups who require training, topics to cover, and audience learning preferences.

Document key training considerations

When you are putting together your training plan, you will need to take into consideration:

Current productivity tools

- *Teams*
- *Outlook*

Technology literacy

- *Employees in general are very comfortable with technology. Exception is operations team that does not rely on technology to complete day-to-day tasks.*

Current change programs

- *Training has launched for new time-tracking software in operations department. Can leverage cadence to introduce Dynamics 365.*

Training preferences

- *Short, on-line, easily accessible training modules*

Who needs to be trained?

Groups impacted by the Dynamics 365 Implementation:

- *Sales*
- *Marketing*
- *HR*
- *IT*
- *Operations*

Audiences who will drive the change forward:

- *Dynamics 365 Early Adopters*
- *Dynamics 365 Champions*
- *Exec Sponsor*
- *Steering Committee*

Support Organizations:

- *IT Help Desk*

What do you need to learn?

For the Transition State:

- *Plans for sunsetting old system*

In the Future State:

- *Big picture overview of new environment and role in it*
- *New process skills/knowledge*

How do they prefer to learn?

Recommended Modalities	<ul style="list-style-type: none">• Face-to-face training – Sponsors (1 hour), Ambassadors Training (1 hour), Change Champions (1 hour), Manager (1 hour)• Web-based training – On-demand webinars, videos, Online Training (OLT) for business applications training• Self-paced training – Review Theodore training activities incorporating persona and scenarios, Frequently Asked Questions (FAQ) sheets
Preferred Modalities	<ul style="list-style-type: none">• <i>Incorporate web-based training modules into Company Training portal for easy navigation</i>
Ideal Timing	<ul style="list-style-type: none">• <i>Avoid scheduling during end of month/quarter/year for sales team</i>
Helpful Resources	<ul style="list-style-type: none">• <i>Dynamics 365 Training Materials</i>

Which content will be helpful for your training plan?

Hyperlink and list the content below for future reference.

- *Dynamics 365 Resources [Microsoft Support Desk](#) contact information*

Early Adopter Program planning checklist

Include the Right Stakeholders in your Early Adoption Program

- Users from across different lines of the business and departments, preferably those that work together on a project or business process.
- Likely Champions or leaders who will become advocates during the broad launch to the entire organization.
- Users who typically struggle with technology – so you can address their needs during the launch.
- IT/help desk team members who will support users during launch.

Pick Scenarios, train and support the team

- Focus on real, high-priority scenarios.
- Train participants on selected Scenarios, including Core Scenarios.
- Use EAP to assess the training approach and materials.
- Use EAP to assess the support approach and materials.

Get Feedback

- Set up Yammer or Teams channels for feedback.
- Assign people to be available to receive and respond to feedback and share tips during business office hours.
- Monitor usage of the various apps and services to see what your EAP participants are using.
- Collect informal feedback online, 1:1, or in groups.
- Collect structured feedback through surveys.

Adjust and Fine Tune your Plan

- Assess and test any changes you need to make to the scenarios based on EAP feedback.
- Look for program success stories that can be used in your launch communications to get people excited.
- Update launch materials and plan based on changes.

Champions Program planning checklist

- ❑ Find enthusiastic Champions who can commit time and effort.
- ❑ Build a Yammer group for Champions to share updates and successes.
- ❑ Provide materials ready to support their work with teams and individuals (e.g., brown bag sessions).
- ❑ Ensure a regular rhythm for discussions with the Champions on what's working and what's not.
- ❑ Design a program to engage and recognize their effort, such as providing privileged access to relevant events or speaking engagements.
- ❑ Communicate to individuals about the Champions' role and how to find them – remember, Champions are not IT support, but business representatives.
- ❑ Incorporate Dynamics 365 training resources and custom learning into your own internal training site.
- ❑ Create a contest (e.g. scavenger hunts and giveaways) between departments to encourage people to interact with Dynamics 365.

Need more help? Use Microsoft's Champions Program Guide to build your program.

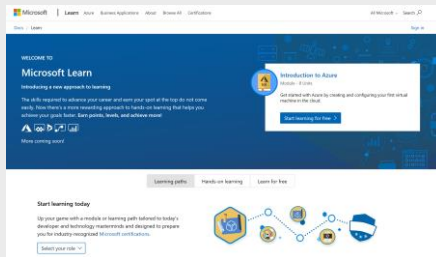
Access learning and training resources

Access free online training resources to help launch your Dynamics 365 solution.

Microsoft Learn provides step-by-step guided learning by job role and product, including videos, tutorials, and hands-on learning resources.

Check in with Microsoft Dynamics community of experts and peers. Get answers by posting questions in the forums, reading blog and how-to articles, and watching videos.

Microsoft Learn



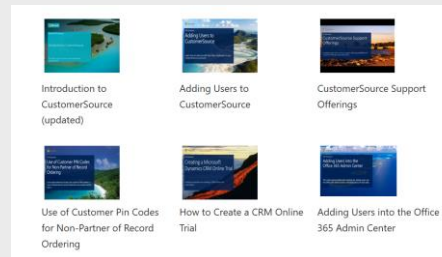
Primary destination for Dynamics 365 learning with videos, tutorials, and hands-on learning.

Dynamics 365 Webinars



Product-based training to help ready people to use the services and apps effectively.

Dynamics 365 Tutorials



Get up and running quickly with the basic info you need to be productive right away.

Dynamics 365 YouTube Channel



Discover how Dynamics 365 can help you grow your business.

Microsoft is here to support you

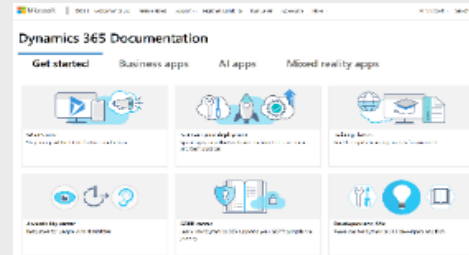
Bookmark these resources to continue driving end user engagement throughout your adoption journey.

Dynamics 365 Community



Dynamics experts and peers in the community. Get answers by posting questions in the forums, reading blog and how-to articles, and watching videos.

Dynamics 365 Complete Docs



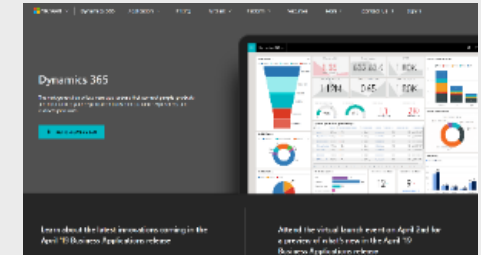
Documentation, blogs, release notes and complete resources for admins, developers and IT professionals.

Dynamics 365 Content Library



Access the free webinars, ebooks, analyst reports and more in our content library to learn how Dynamics 365 can optimize your company.

Product Websites



Product specific websites for additional details.