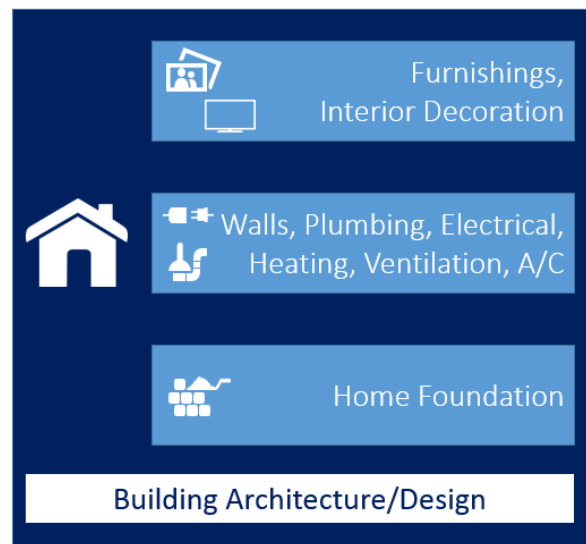
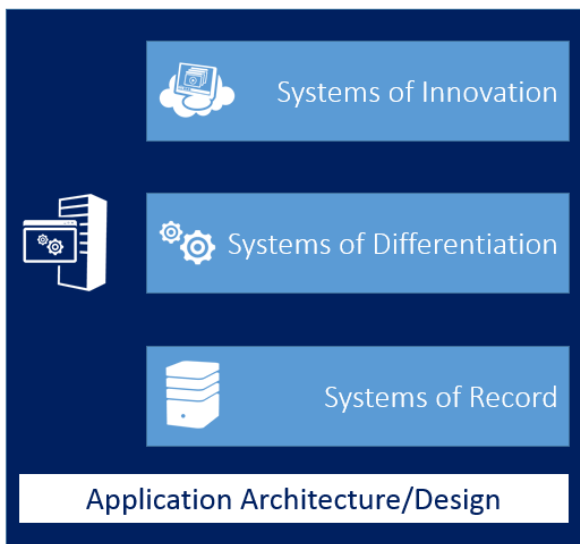
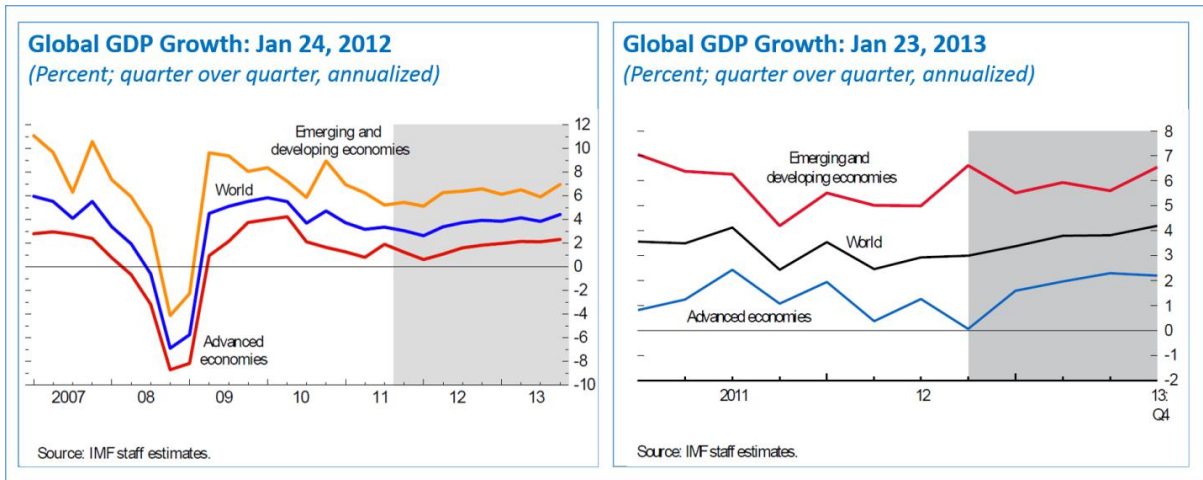
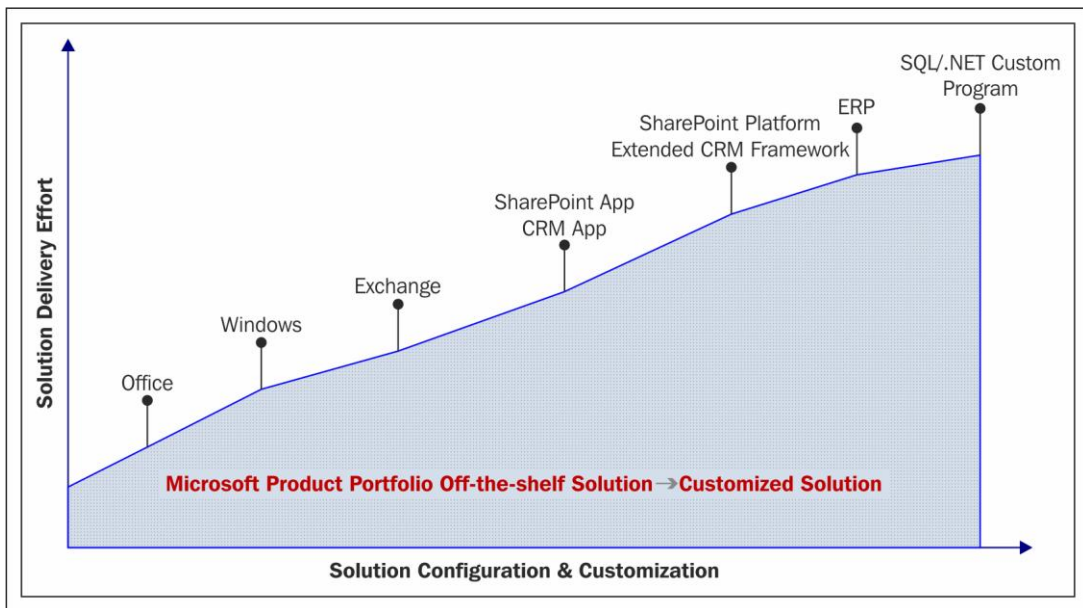
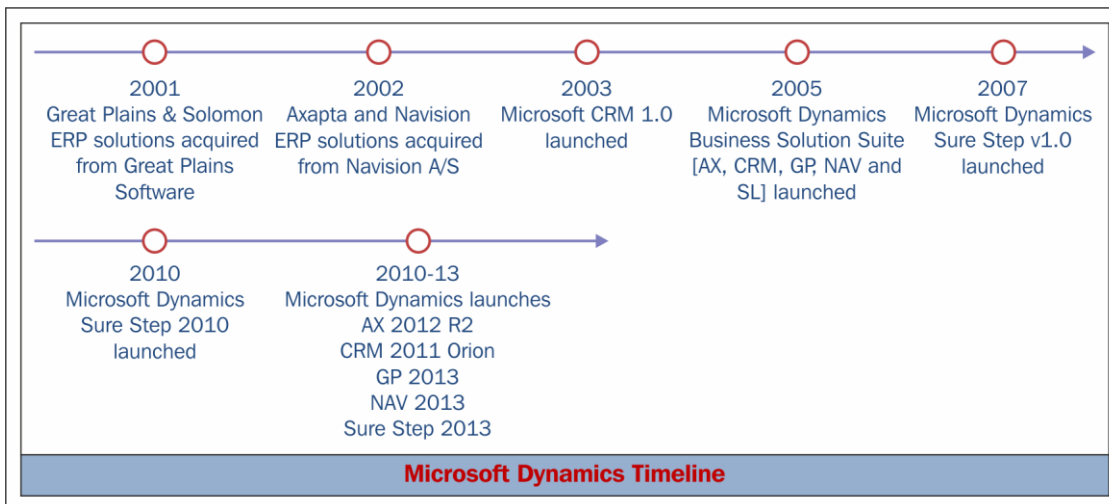
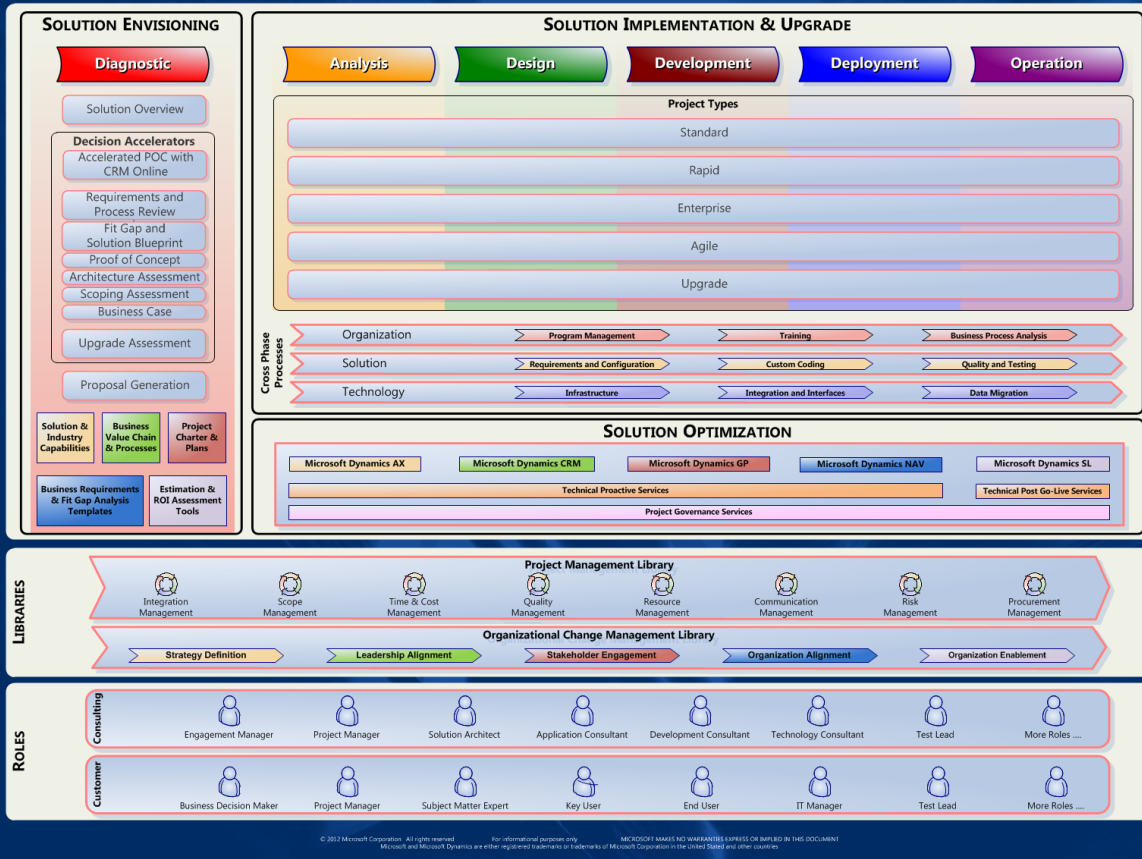


Chapter 1

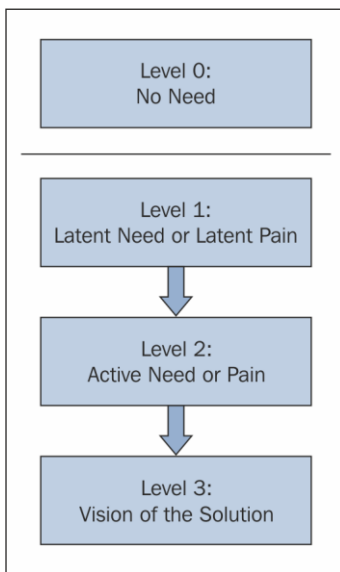
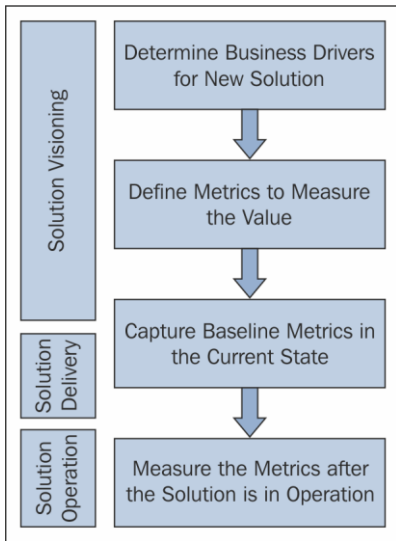


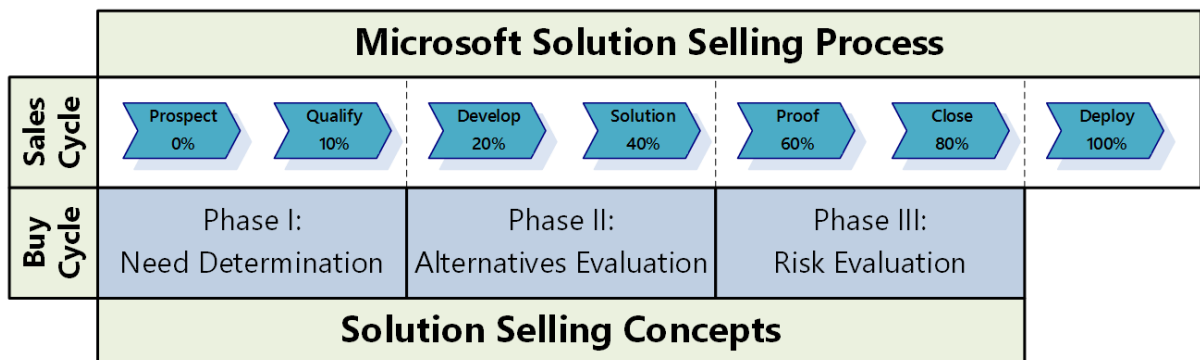
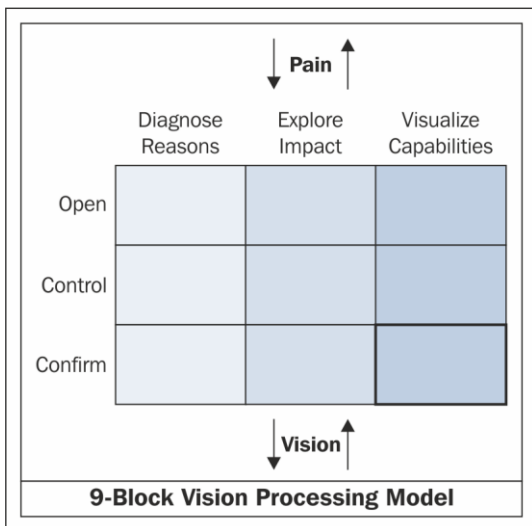
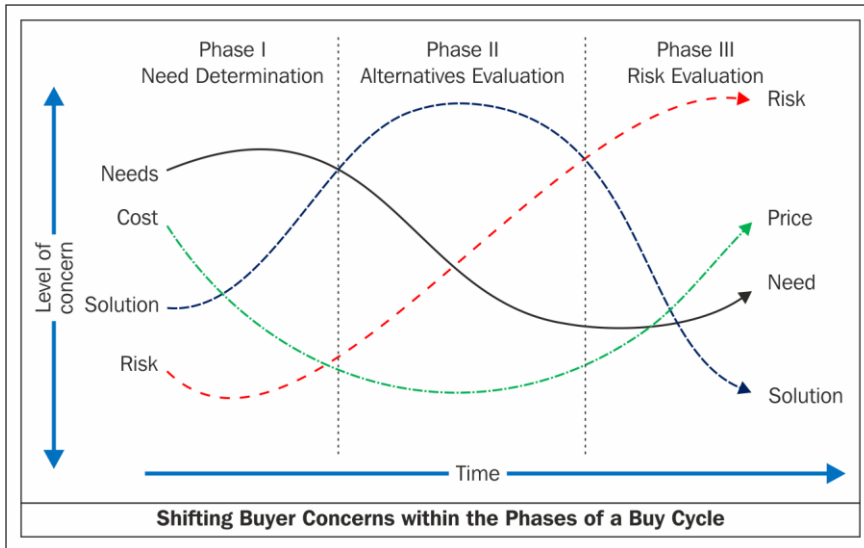


MICROSOFT DYNAMICS SURE STEP METHODOLOGY

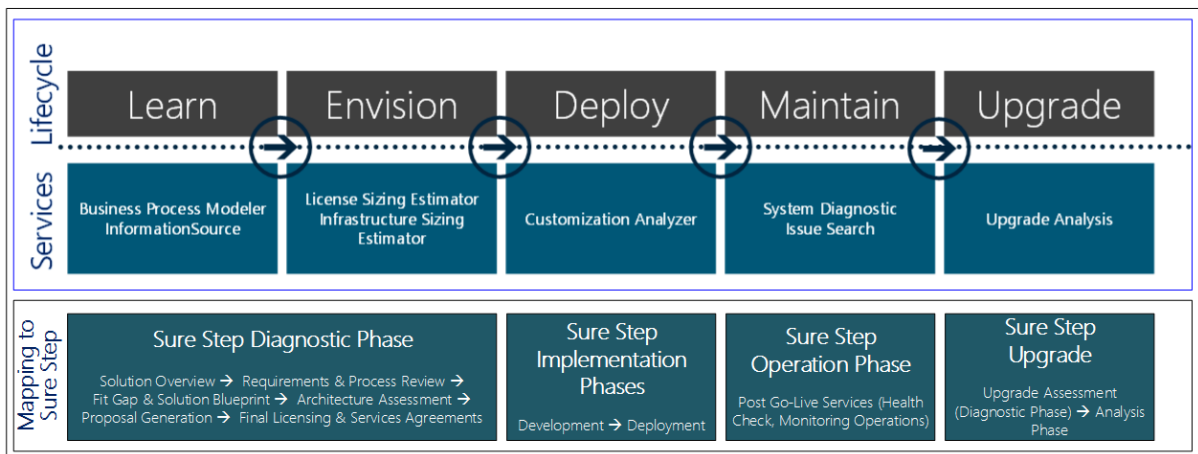
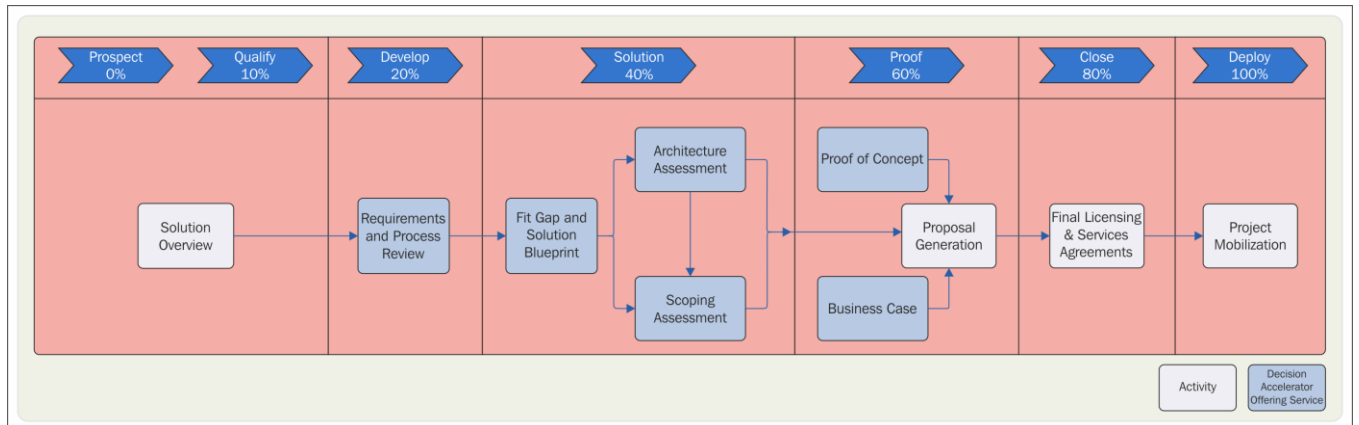


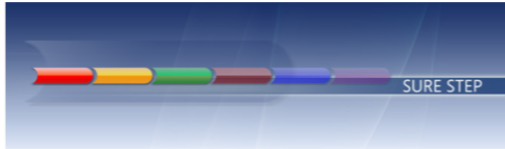
Chapter 2





Chapter 3





Microsoft Dynamics® AX2012 Role-Tailored Questionnaire – General

Prepared for
[Customer Name]

Project
[Project Name]

Prepared by
[Author Name]

Contributors
[Document contributors]

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Sure Step 5. Cost Accountant

- 5.1 Costing Methods and Variables
 - 5.1.1 What are the various Item Groups? In terms of the GL Accounts that are affected when sales, purchases or other inventory related transactions occur? How do you classify / group your items in this regard?
 - 5.1.2 What are the costing methods you use? Example: Standard, FIFO, LIFO or Weighted Average, etc.
 - 5.1.3 What costing method is used for inventory and cost of goods sold?
 - 5.1.4 Do all of these costing methods post their transactions to the GL?
 - 5.1.5 What cost variances do you track and how are they tracked?
 - 5.1.6 Between Legal Entities in your organization, is there intercompany trade? How are the various inventory costs determined at each entity?
 - 5.1.7 If you stock the same item in two different warehouses within a legal entity, might those costs be different? If so, what makes the cost different and what calculations are used?
 - 5.1.8 Upon the receipt of a purchased item, do all of the costing methods you listed above accrue a liability upon receipt?
 - 5.1.9 Are there items or groups of items where you need to keep track of the landed cost? If so, please list the cost elements needed.
 - 5.1.10 What costs elements are maintained for an item? Example: Material, Overhead, etc.
 - 5.1.11 Do you inventory, use or consume any Customer Owned Material? That is, Material that is owned by your customers and should not be valued in your inventory.
 - 5.1.12 Do you have any Vendor inventory that you do not want include in the valuation of your inventory? This is typically called Vendor Managed Inventory (VMI)
- 5.2 Managing Costs and Pricing
 - 5.2.1 If you use Standard Costing, how often are those costs updated?
 - 5.2.2 What is the process you use to update a Purchased Item's standard cost?
 - 5.2.3 Are sales prices based on an item's cost or are the sales prices determined by another method?
 - 5.2.4 For items that are not on a standard cost basis, do you ever need to make adjustments to inventory costs or value?
- 5.3 Period End Closing
 - 5.3.1 What are the processes that you go through at the end of each accounting period?
 - 5.3.2 What are the processes that you go through at year end?
- 5.4 Reports
 - 5.4.1 What report do you have that displays all of the needed cost elements?
 - 5.4.2 What are the key reports that you use?

Sure Step 6. Materials Manager

- 6.1 Item Master and Bill of Material Creation and Release
 - 6.1.1 What are the various Item Groups? In terms of the GL Accounts that are affected when a sales, purchase or other inventory related transaction occurs, how do you classify / group your items?
 - 6.1.2 Are there any GL account segments / financial dimensions associated with the various items or Item groups?
 - 6.1.3 What Storage Dimension combination(s) of Site (geographic location), Warehouse, Location or Pallet ID need to be setup and attached to items?
 - 6.1.4 Will you need to print or read Bar Coded data? What Bar Code symbologies will you be using? If you are not using UPC codes, do you need the ability to create a Global Trade Item Number (GTIN) for your items?
 - 6.1.5 Do you track Lot / Batch Numbers or Serial Numbers for any of your items?
 - 6.1.6 Does your item master contain items, or groups of items, that should automatically be sent to Quarantine Management upon receipt?
 - 6.1.7 Do you categorize your items by an ABC classification? What determines an "A" item?
 - 6.1.8 Are all of your finished goods items eligible for Consolidated Picking? That is, one Picking List with numerous Sales Order lines on it.
 - 6.1.9 When a picking list is generated for a sales, transfer or production order, will you require that someone (then) actually issues the material via an inventory issue transaction?
 - 6.1.10 Are there any items, or groups of items, that you take ownership of at the point the product is shipped from a vendor? Example: Cargo containers from foreign sources.
- 6.2 Foreign Trade and Country of Origin Requirements
 - 6.2.1 What countries do you presently buy from and ship goods to?
 - 6.2.2 How do you collect and record the information needed for Country of Origin information for Purchased Items?
 - 6.2.3 How do you determine and document Country of Origin information for the products you manufacture?
 - 6.2.4 Have you documented all of the needed Commodity Codes for each of the items you use in international trade? These codes are sometimes called Harmonized Tariff codes that are listed in the US Department of Commerce's Harmonized Tariff Schedule (HTS).
 - 6.2.5 Are any of your facilities in a European Union (EU) member country? Are you required to provide Intra-stat statistics?
 - 6.2.6 For products that you export, what are all of the shipment and export documents that are required? Relative to exports, how is that documentation prepared now.
 - 6.2.7 Do you use Freight Forwarders for all of your export shipments?
- 6.3 Lot and Serial Numbers: Assignment and Processing
 - 6.3.1 Are there any items that need to be tracked by Lot or Serial Number? Are there any items that should be controlled by both a Batch and a Serial number?
 - 6.3.2 Do you record the vendor's Lot number and date of manufacture? Do you assign your own Lot or Serial Numbers for any items you purchase?

Process map (Cross industry)

Activities	Contoso AX Implementation	Description
Core Business Processes		
+ 1 Develop Vision and Strategy (10002)		
+ 2 Develop and Manage Products and Services (10003)		
+ 3 Market and Sell Products and Services (10004)		
- 4 Deliver Products and Services (10005)		
+ 4.1 Plan for and align supply chain resources (10215)		
- 4.2 Procure materials and services (10216)		
+ 4.2.1 Develop sourcing strategies (10277)		
+ 4.2.2 Select suppliers and develop/maintain contracts (10278)		<p>Name 4.2.2 Select suppliers and develop/maintain contracts (10278)</p> <p>Description The process Select suppliers and develop/maintain contracts involves selecting suppliers (typically through a request for information [RFI], request for proposal [RFP], or request for quote [RFQ] process) to create business value, reduce cost, and ensure quality. The process also includes certifying and validating suppliers, as well as negotiating and managing contracts.</p> <p>Modified By</p> <p>Modified At 12/20/2012 5:12:39 AM</p>
- 4.2.3 Order materials and services (10279)		
4.2.3.1 Process/Review requisitions (10292)		
4.2.3.2 Approve requisitions (10293)		
4.2.3.3 Solicit/Track vendor quotes (10294)		
4.2.3.4 Create/Distribute purchase orders (10295)		
4.2.3.5 Expedite orders and satisfy inquiries (10296)		
4.2.3.6 Record receipt of goods (10297)		
4.2.3.7 Research/Resolve exceptions (10298)		
+ 4.2.4 Manage suppliers (10280)		
+ 4.3 Produce/Manufacture/Deliver product (10217)		
+ 4.4 Fulfill customer requirements (10218)		

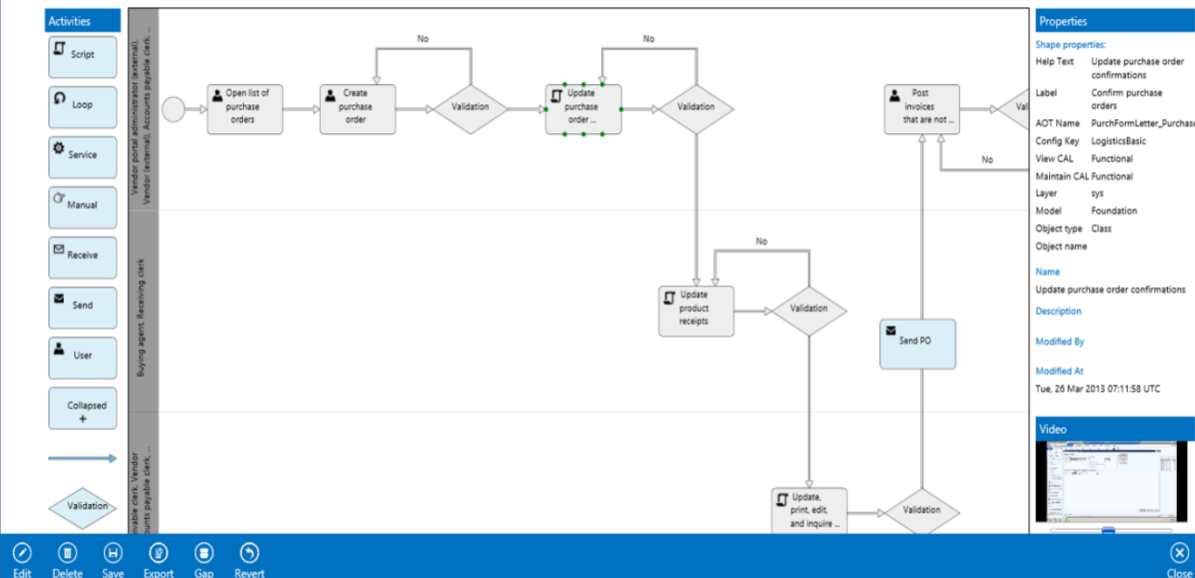


Business measure

Key Performance Indicators:

- Number of FTEs that perform the process Select suppliers and develop/maintain contracts per \$1 billion purchases
- Total cost to perform the process Select suppliers and develop/maintain contracts per \$1,000 purchases

4.2.3.4 Create/Distribute purchase orders (10295)

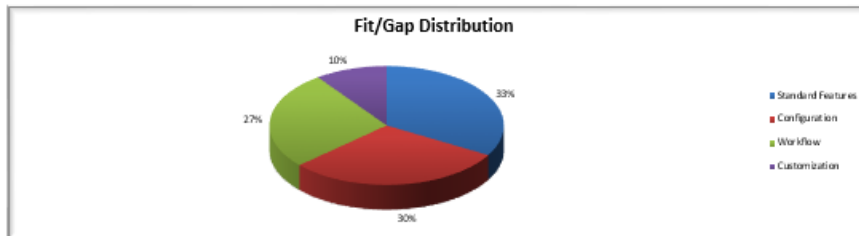


Degree of Fit Analysis		Sample Customer		[SELECT PRODUCT]									
Business Area	Total # of Individual Requirements	Phase 1										Phase 2	Comments
		Standard Features		Configuration			Workflow			Customization			
		#	%	#	%	S	#	%	S	#	%		
Accounts	6	2	33%	2	33%	0	2	33%	0	0	0%	0	0
Contacts	6	2	33%	2	33%	0	2	33%	0	0	0%	0	0
Activities	6	2	33%	2	33%	0	2	33%	0	0	0%	0	0
Leads	6	2	33%	2	33%	0	2	33%	0	0	0%	0	0
Opportunities	6	2	33%	2	33%	0	2	33%	0	0	0%	0	0
Campaigns	6	2	33%	2	33%	0	2	33%	0	0	0%	0	0
Goals	6	2	33%	1	17%	0	2	33%	0	1	17%	0	0
Service	6	2	33%	2	33%	0	1	17%	0	1	17%	0	0
Unified Desktop	6	2	33%	2	33%	0	0	0%	0	2	33%	0	0
Other	6	2	33%	1	17%	0	1	17%	0	2	33%	0	0
Total	60	20	33%	18	30%	0	16	27%	0	6	10%	0	0

Degree of Fit*: 90%

N.B. This analysis considers only those requirements selected to be in Phase 1, which also includes those requirements to be demonstrated in the POC. Requirements selected to be in Phase 2 were not included in this analysis.

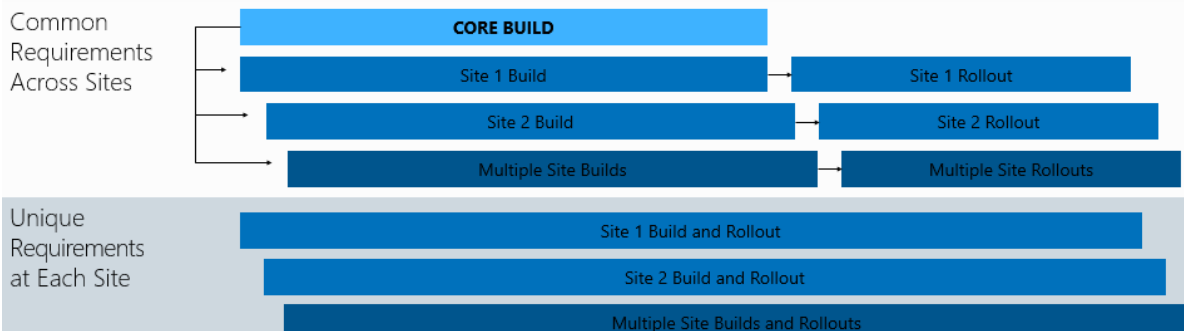
Total Customization and Development Man Days (Phase 1) = 0



Solution Deployment – Staging Options



MULTIPLE OPTIONS FOR DEPLOYING RELEASES





NUCLEUS
RESEARCH

MAIN
PAGE

QUICK
START

1
ENTER
COST DATA

2
ENTER
BENEFIT
DATA

3
VIEW
FINANCIAL
RESULTS

4
GENERATE
REPORT

ROI
HELP
TUTORIAL

CONTACT
NUCLEUS

Current Calculation

ROI:
Payback: 3+ years
NPV: 0

Quick Start

In this section we'll ask you a few questions to help you get started with the financial analysis of Microsoft Dynamics AX. It's likely you'll be able to complete your analysis using just this page, however if you need to enter additional cost and benefit data go to sections 1 and 2 using the buttons above. From this page you can print a snapshot financial analysis or go directly to section 3 for a full financial analysis and section 4 for a detailed project report.

Company Name
Microsoft Dynamics AX



Report A10 - Maximizing the potential return on investment

If you select your industry the tool can highlight likely benefits:

Manufacturing

Microsoft Dynamics AX helps mid-sized and larger organizations improve business operations and financial management, driving greater productivity, better decision making, and reduced costs. Deployed properly, Microsoft Dynamics AX can deliver payback in fewer than 18 months.

Costs

In this section we'll ask a few questions to assess the cost of the Microsoft Dynamics AX project.

If you are purchasing the software using internal funds put the total cost of the software in the initial year. If you are financing the software or purchasing through a Microsoft special program that spreads payments over time, put the net payments in the appropriate year. Any payments made before the application is deployed belong in the initial year.

Net cost of software per period:

Initial	Year 1	Year 2	Year 3
0	0	0	0

Check here if the initial year software is a capital expense that should be depreciated.

What is the annual maintenance cost for the software?

0

What is the cost of hardware purchased for the AX project?

0

Check here if this is a capital expense that should be depreciated.

What is the annual maintenance cost for the hardware?

0

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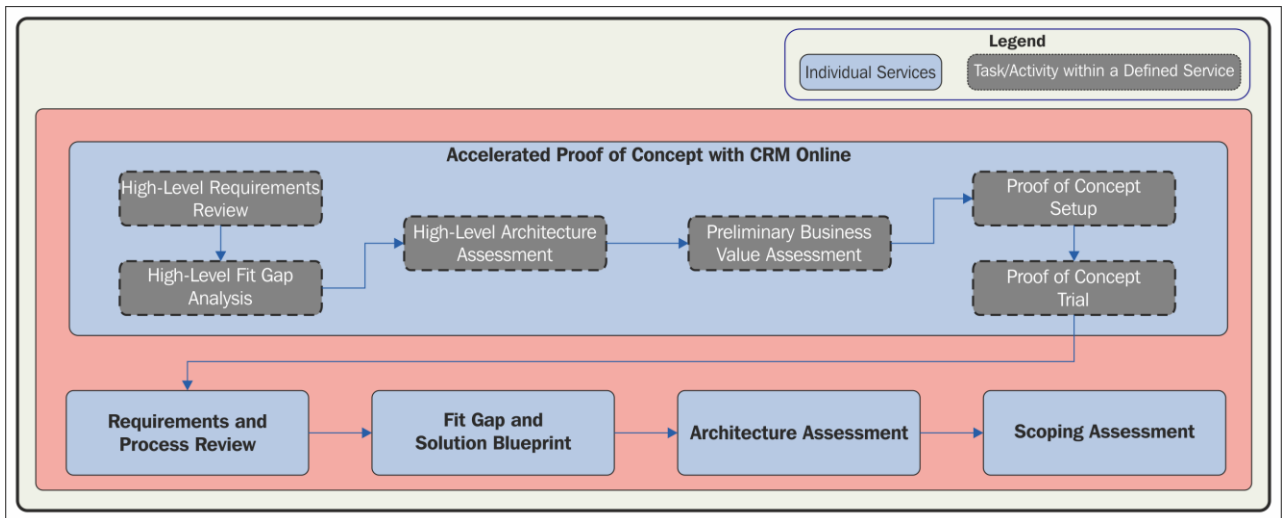
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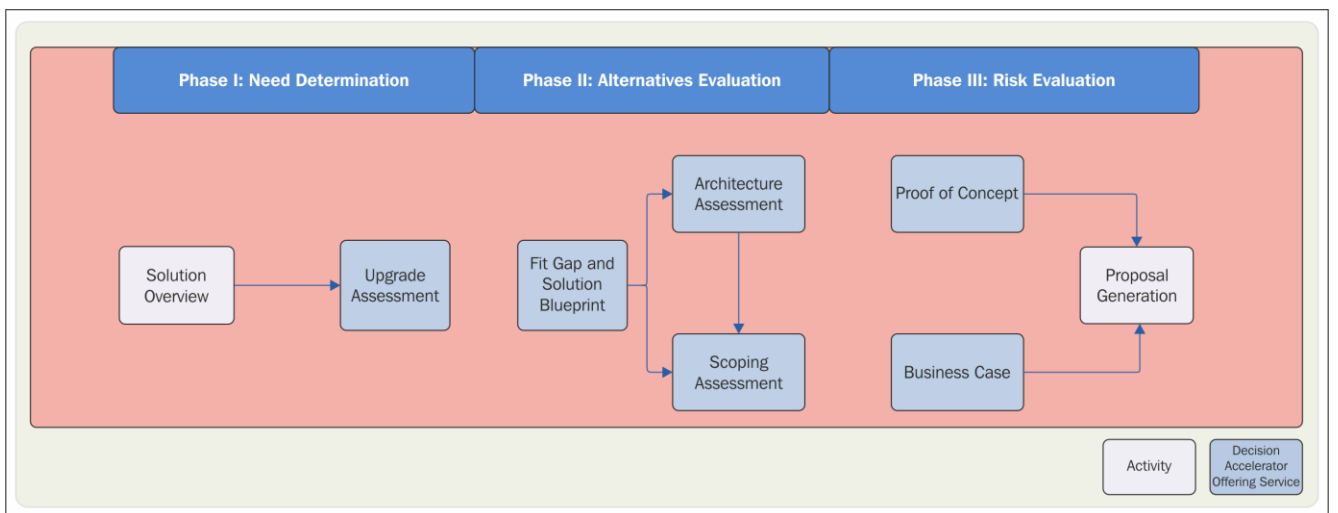
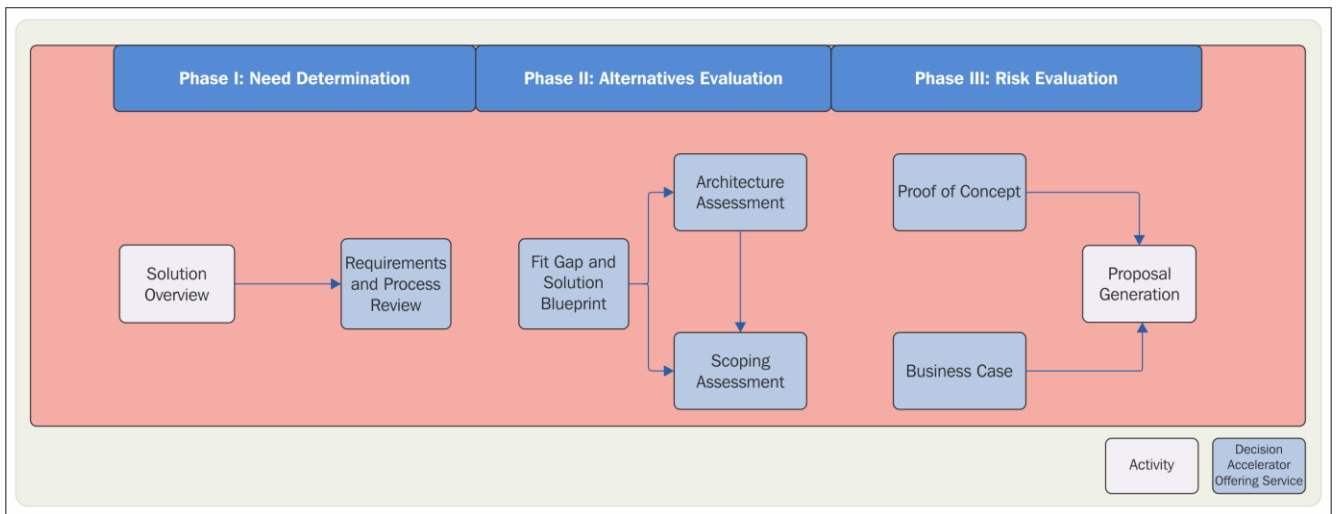
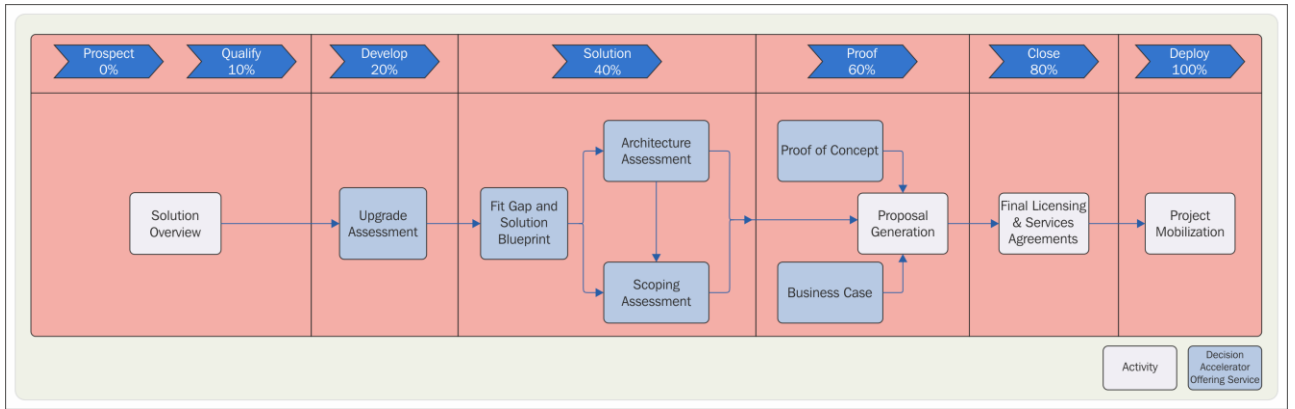
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Microsoft Dynamics Sure Step

Sure Step Methodology | Projects | Resources | Preferences | Search | Solution: General | Product: All | Project Type: Standard

Sure Step Methodology > Final Licensing & Services Agreements

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 - Health and Personal Care
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 - Professional Services
 - Architecture and Engineering, Construct
 - Media and Entertainment
 - Cross Industry/Horizontal Solutions
 - Extended CRM Solutions
 - Customer Care

Tools, Templates and Links

- Statement of Work for Standard Projects
- Proposal Management
- Price Lists
- Microsoft Services Premier Support
- Business Ready Service Plans

Sure Step Methodology

Final Licensing & Services Agreements

On this page:

- Purpose
- Description
- Pre-conditions
- Diagram

Purpose

To finalize the commercial engagement proposal, present it to the customer, and thereby obtain signoff on the Licensing and Service Contract agreements.

Description

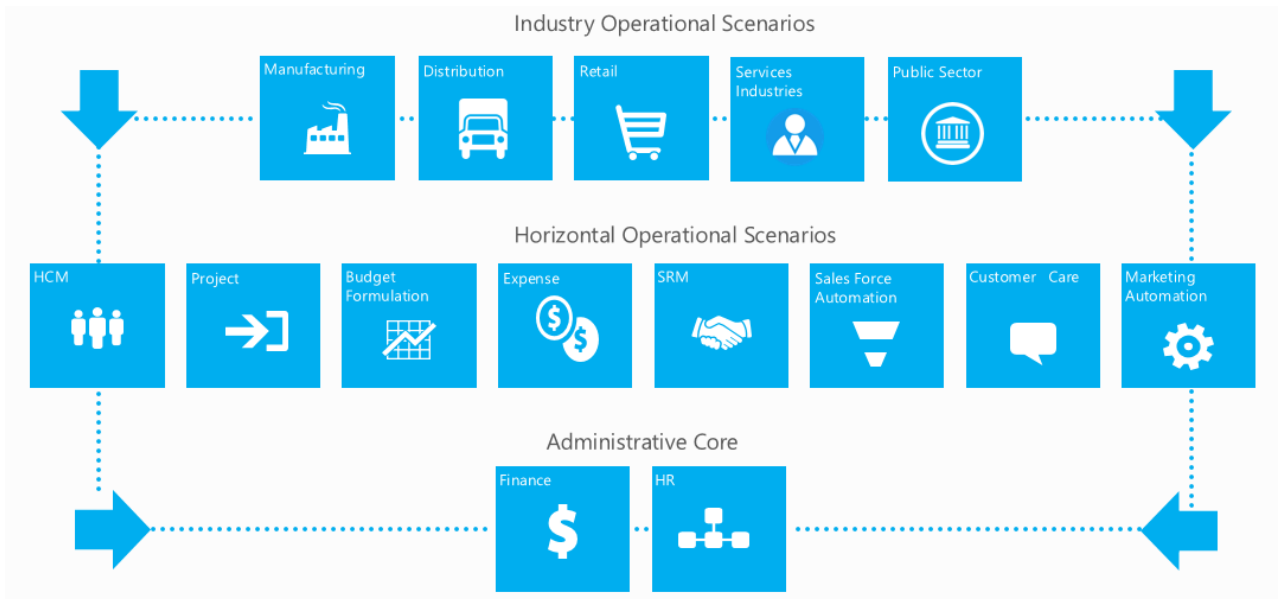
Proposal management activities are executed within all cross phases of the project implementation life cycle with the purpose of monitoring the agreed project scope and actively ensuring that the project stays on track. Typically, contractual agreements for business solutions will include three components:

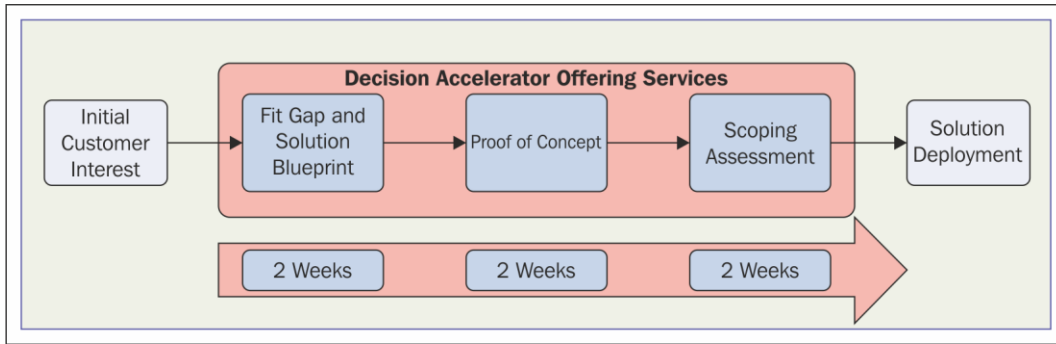
- License agreement(s) with the software provider(s) for the components that make up the overall solution
- Solution Delivery agreement(s) with the services team(s) that will be responsible for the solution implementation, upgrade or optimization
- Solution Support agreement(s) with the organization(s) that will support the solution when it is in production

From a services perspective, although the primary proposal generation activities typically occur in the Proof stage of the Microsoft Solution Selling Sales Process (MSSP), it is in

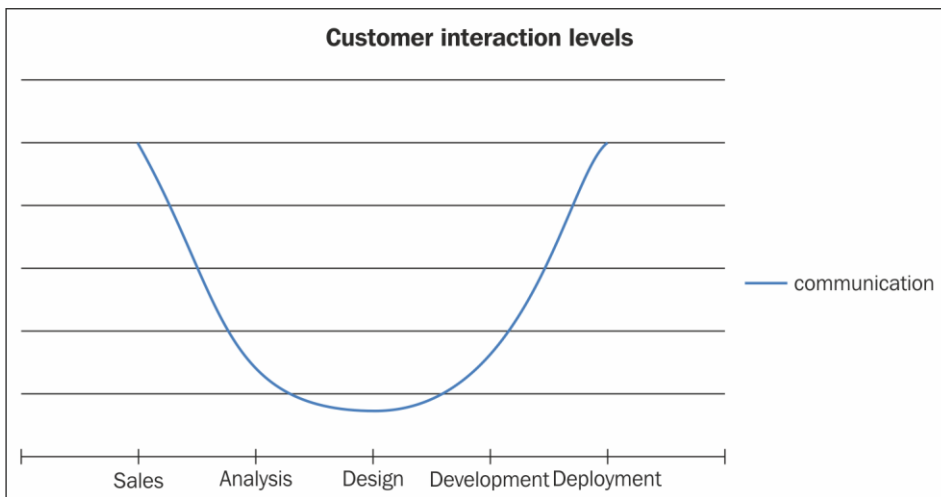
Roles

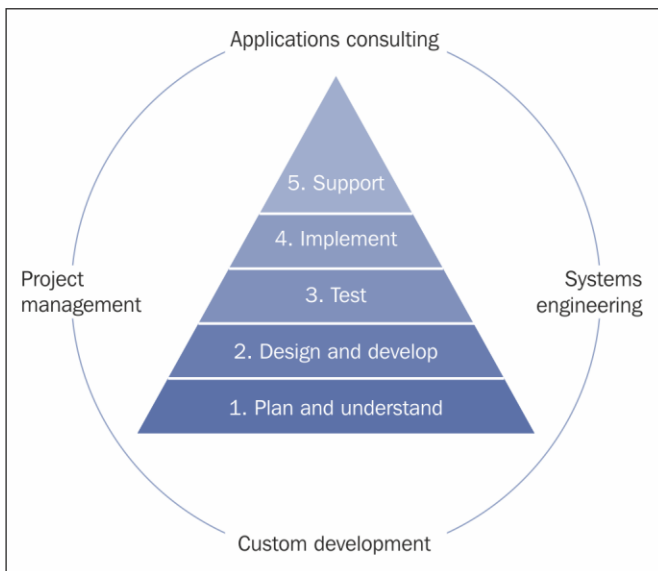
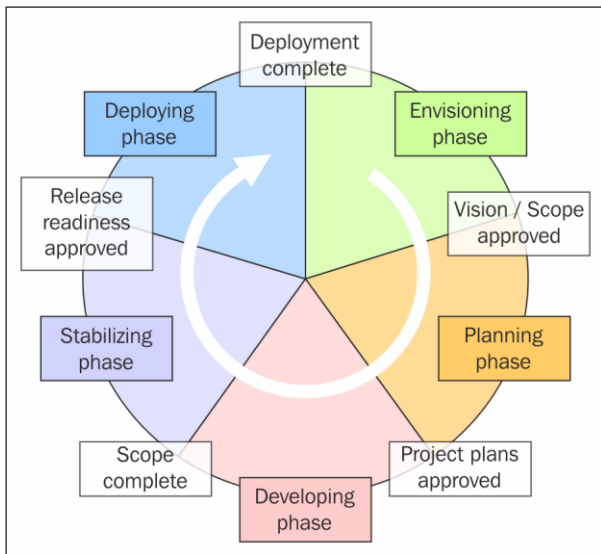
Consulting Roles	Customer Roles	Owner
Project Manager	Business Decision Maker	
Engagement Manager	Project Manager	
Account Manager	Executive Sponsor	
Sales Representative	Purchase Manager	

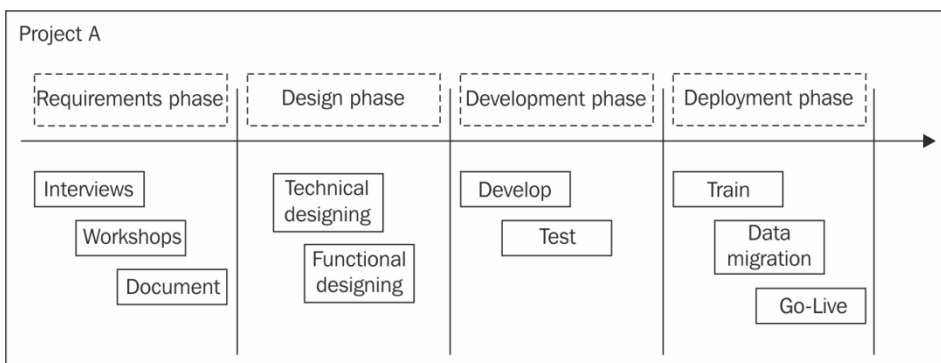
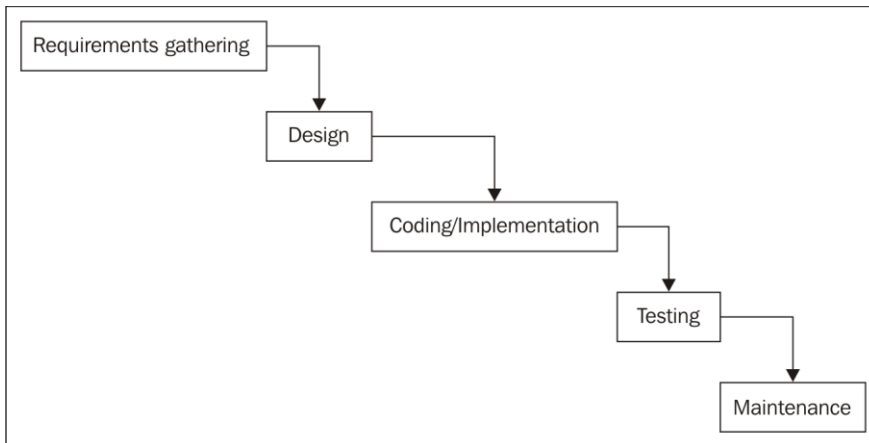
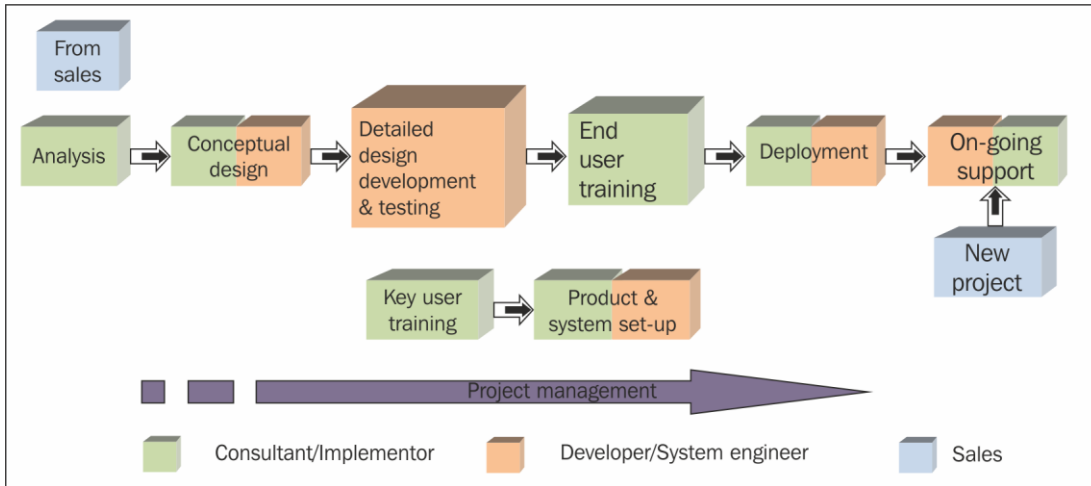


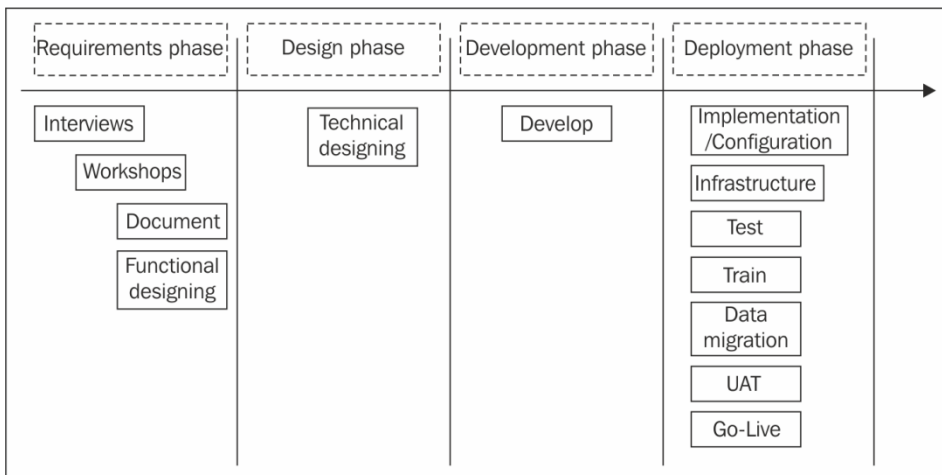
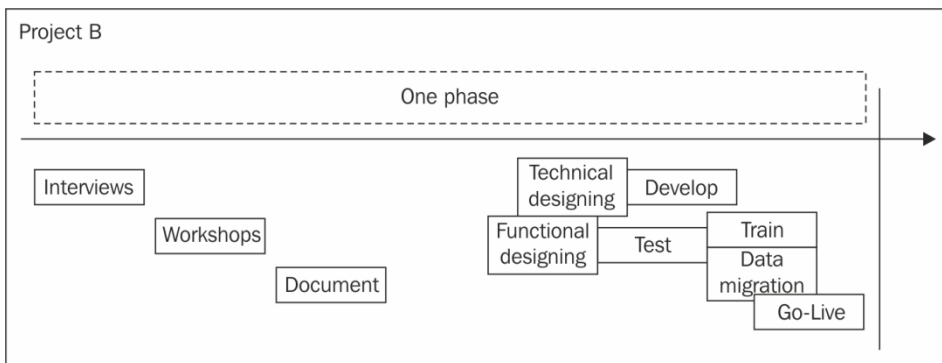
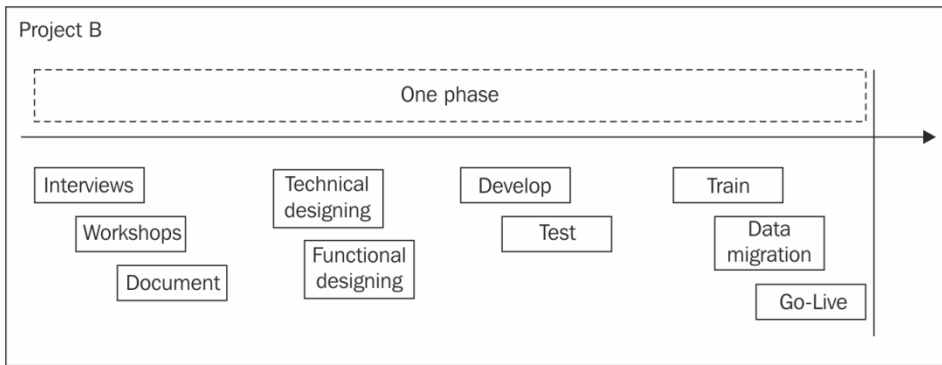


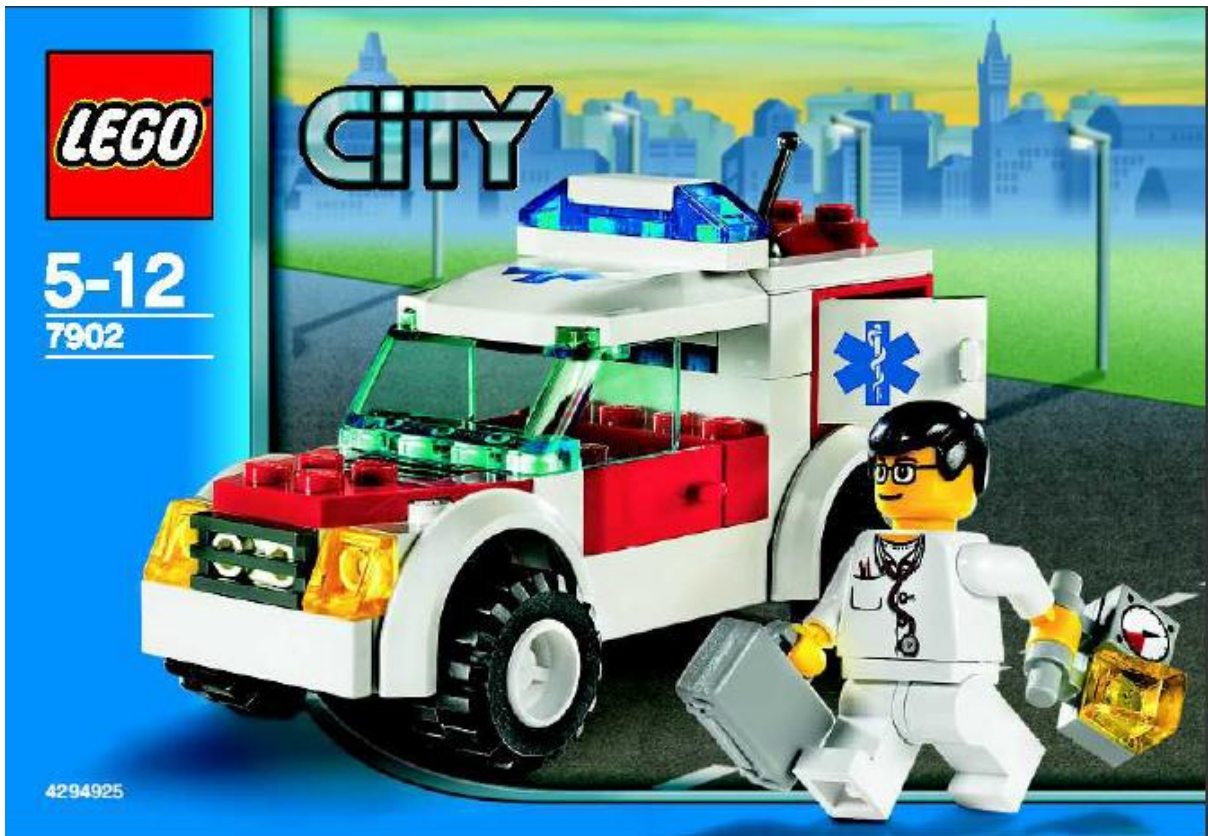
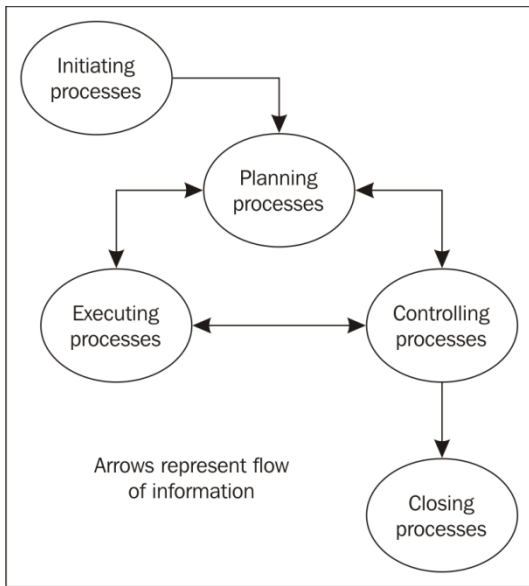
Chapter 4

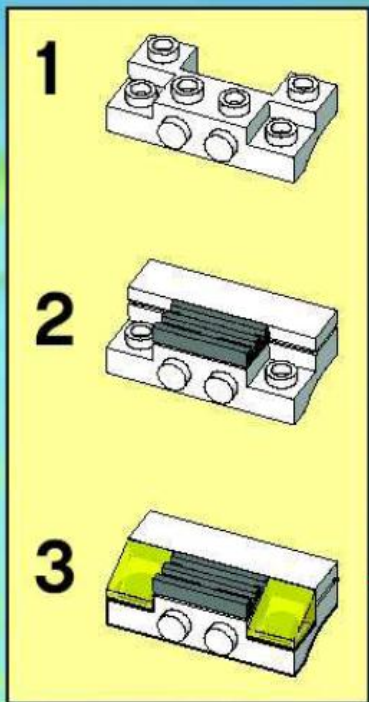




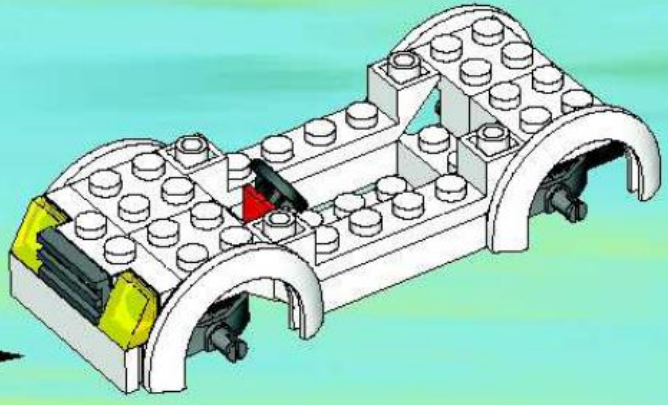


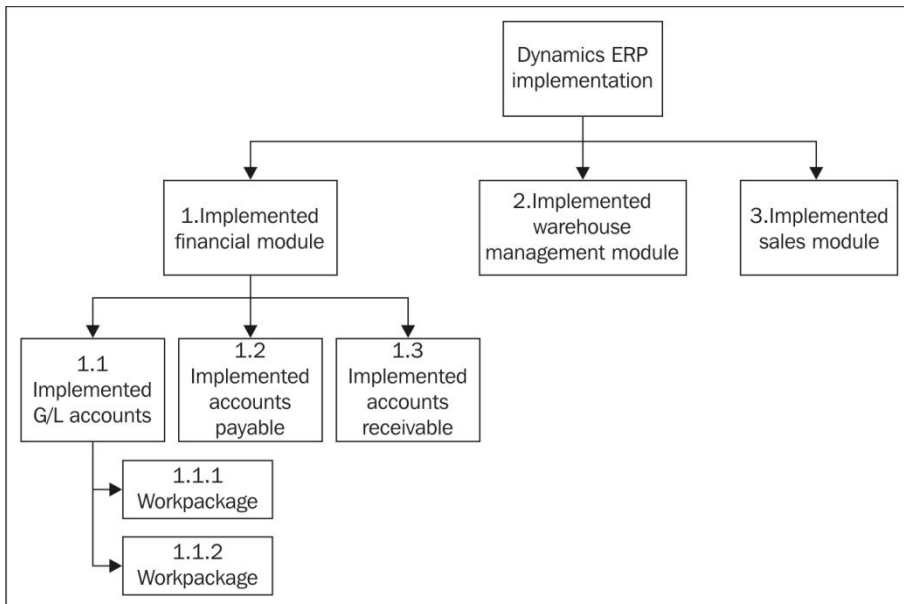
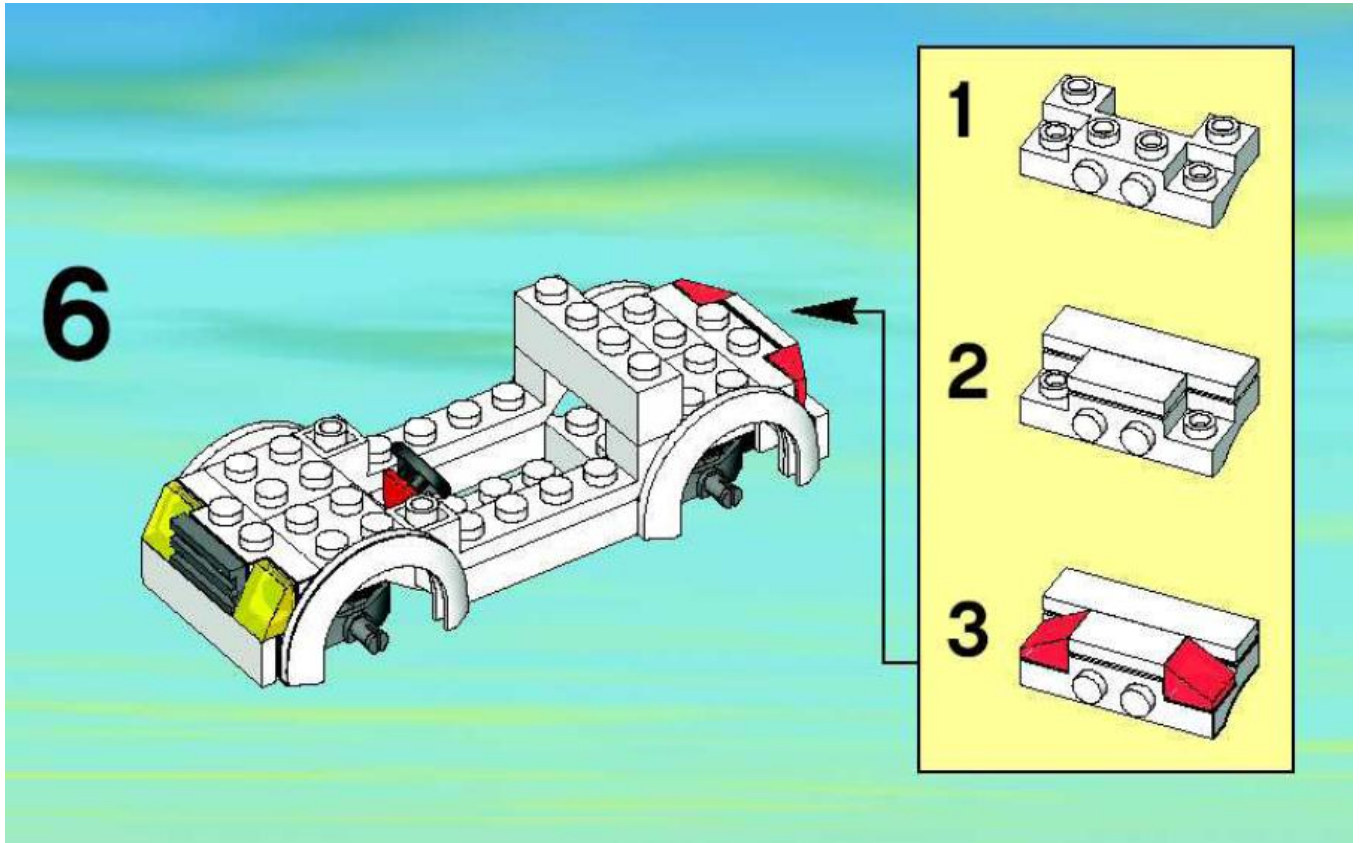


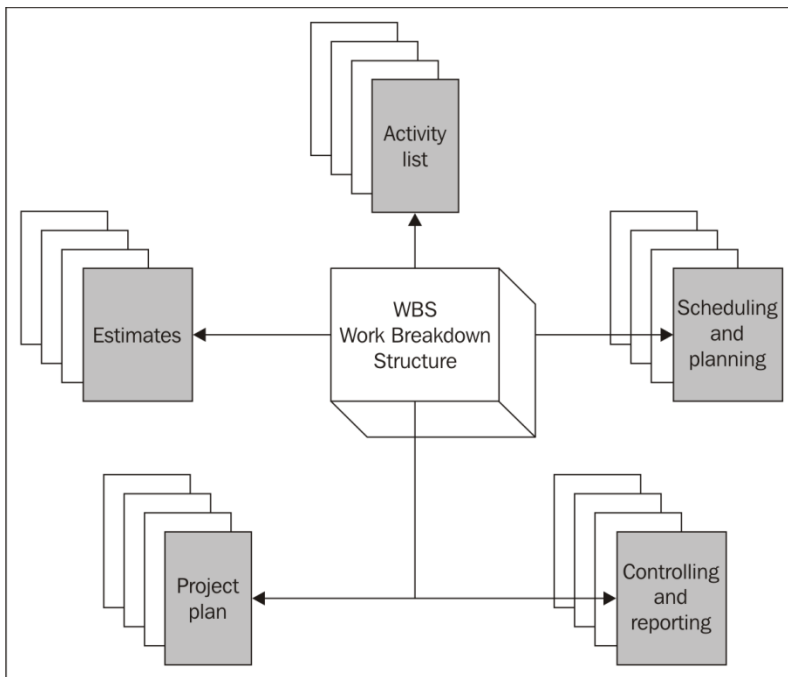
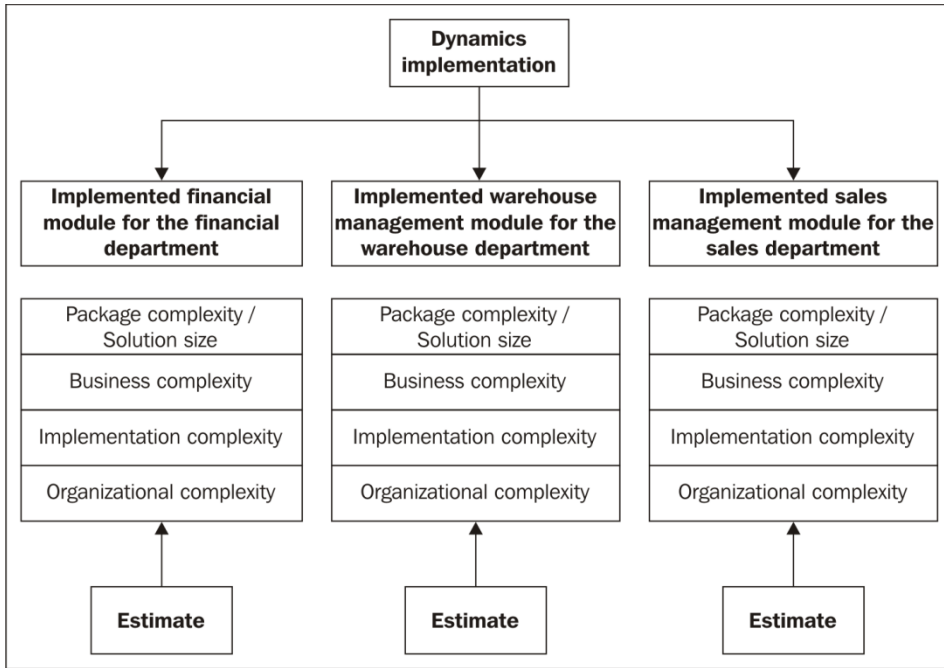




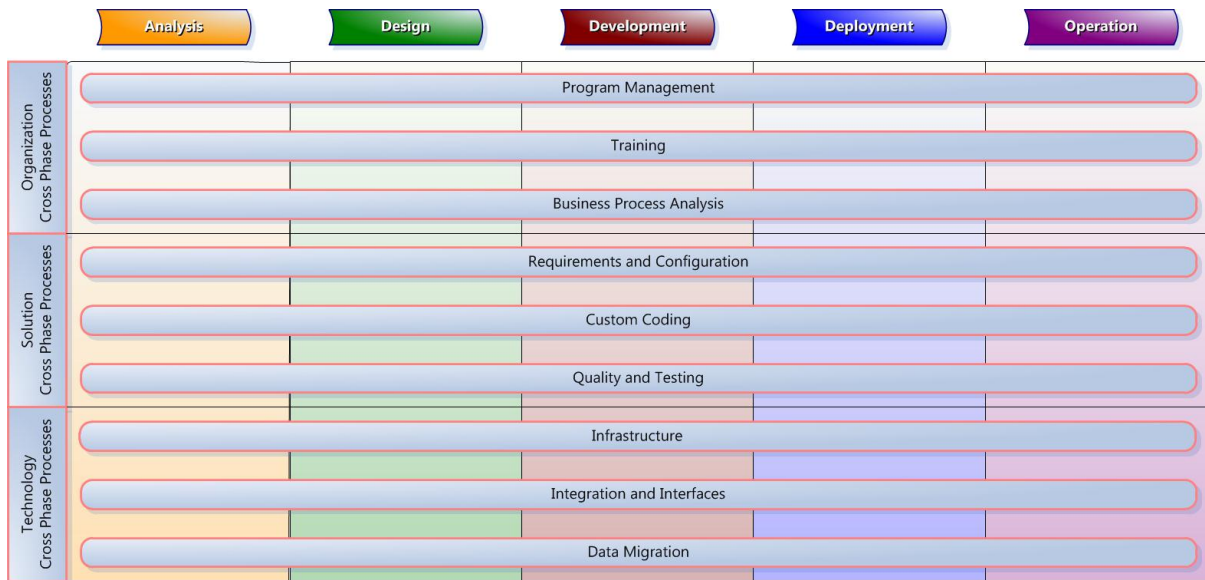
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Chapter 5



Microsoft Dynamics Sure Step

Sure Step Methodology | Projects | Resources | Preferences | Search | Solution: General | Product: All | Project Type: Rapid

Reference | Documents

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 - 3 4 6 - Finalize Configuration and Setup
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 - 4 2 2 - Conduct User Training
 - 4 4 2 - Go Live
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 - 4 9 3 - Final Data Migration to PROD
 - Operation
 - 5 1 5 - Project Closure
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 - Data Migration
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Tools, Templates and Links

Sure Step Methodology

Roles

Microsoft Dynamics Sure Step

Sure Step Methodology | Projects | Resources | Preferences | Search | Solution: General | Product: All | Project Type: Standard

Sure Step Methodology > Standard Project Type

Reference | Documents

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 - Solution Implementation and Upgrade
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 - 1.2.2 - Gather User Training Requirements
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 - Design
 - Design Activity Flow
 - 2.1.1 - Project Planning
 - 2.2.1 - Conduct Core Team Training
 - 2.2.4 - Conduct Job Impact Analysis and Create Training Requirements
 - 2.3.1 - Review and Update Business Process Analysis
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 - 2.4.3 - Create Fit Design in Functional Design
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 - 2.5.2 - Create Technical Design Document
 - 2.6.1 - Conduct Feature Testing of Standard and Custom Code
 - 2.6.2 - Create Unit and Function Test Scripts
 - 2.8.1 - Design Integration and Interface Components
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 - 2.9.3 - Create a Subset of Data for Testing
 - Development
 - Development Activity Flow
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 - 3.2.1 - Create Training and Additional Documentation
 - 3.2.1 - Create Training and Additional Documentation
 - 3.3.1 - Review and Update Business Process Analysis

Tools, Templates and Links

Sure Step Methodology

Roles

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Microsoft Dynamics Sure Step

Sure Step Methodology | Projects | Resources | Preferences | Search | Solution: General | Product: All | Project Type: Enterprise

Sure Step Methodology > Analysis Activity Flow

Reference | Documents

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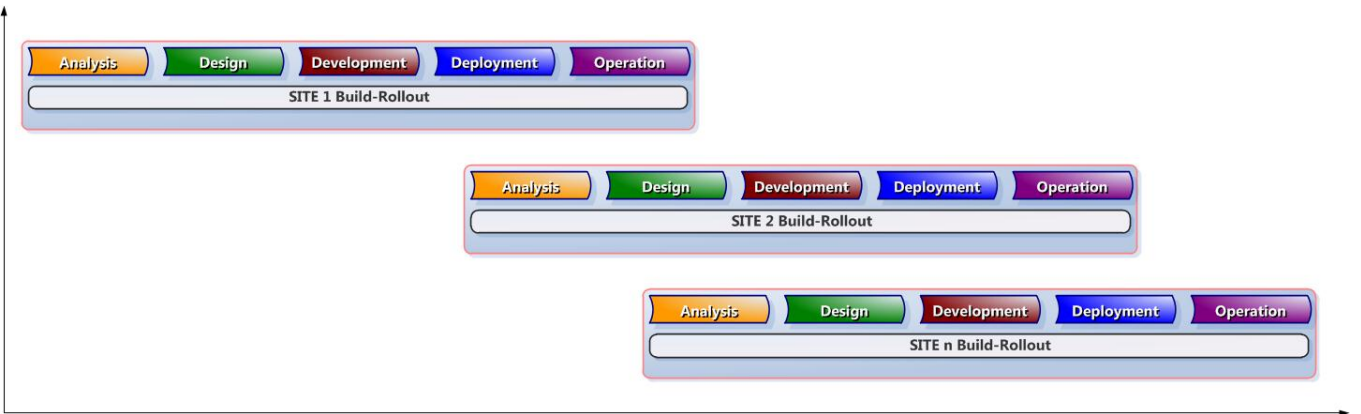
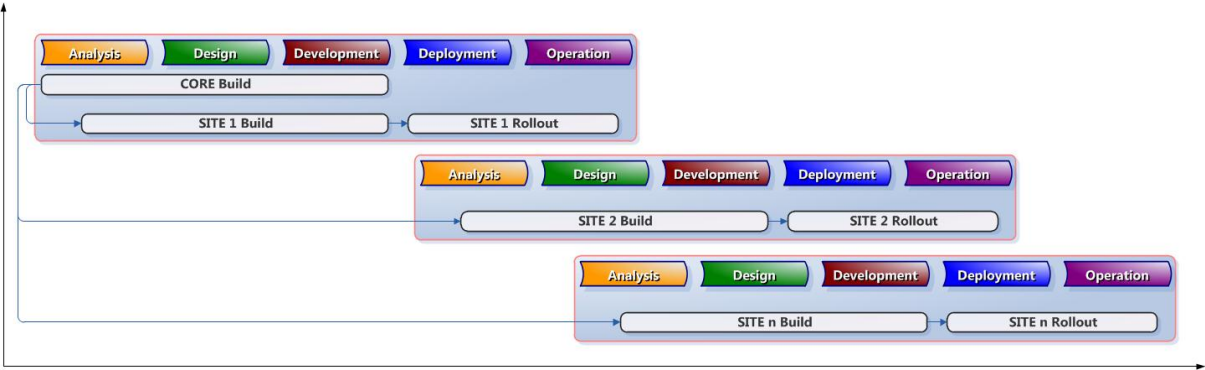
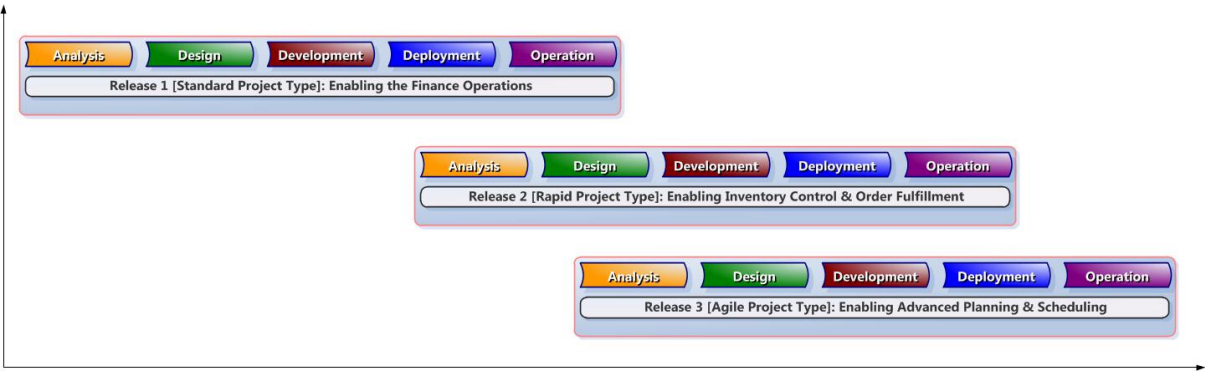
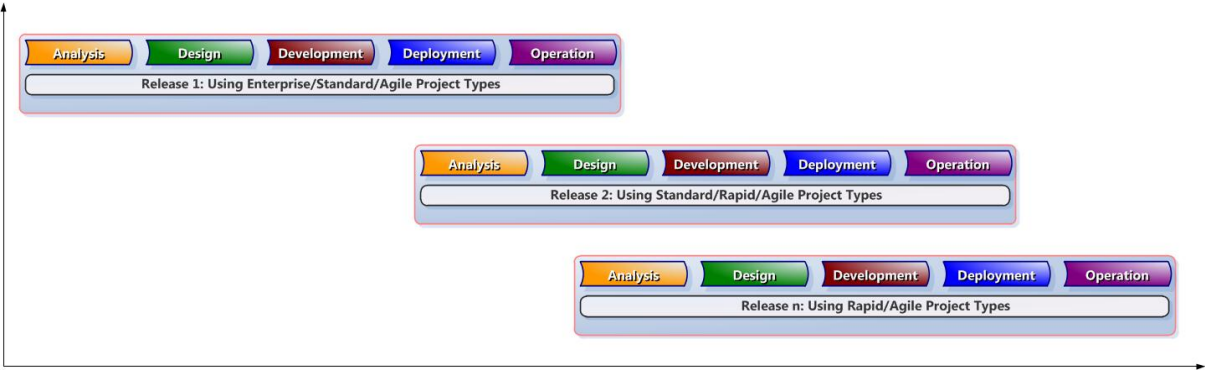
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 - Solution Implementation and Upgrade
 - Enterprise Project Type
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 - 1.1.1.1 - Conduct Executive Kick Off
 - 1.1.1.2 - Develop Organization Change Management Plan
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 - Design

Sure Step Methodology

Analysis

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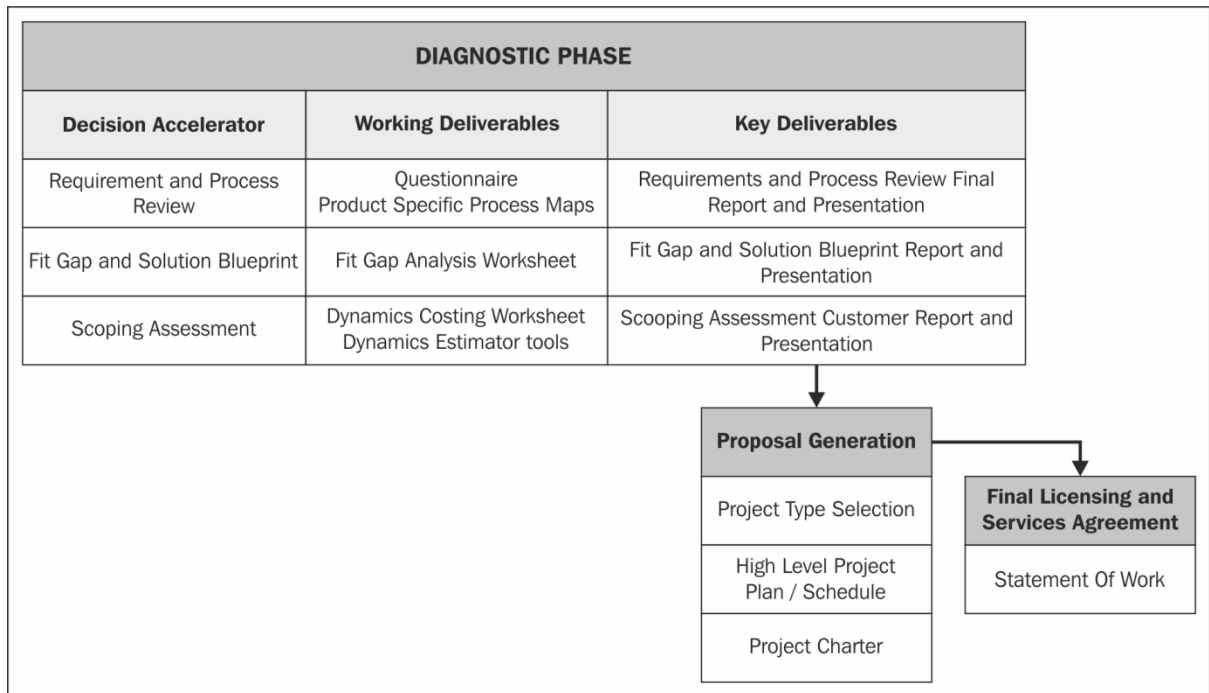
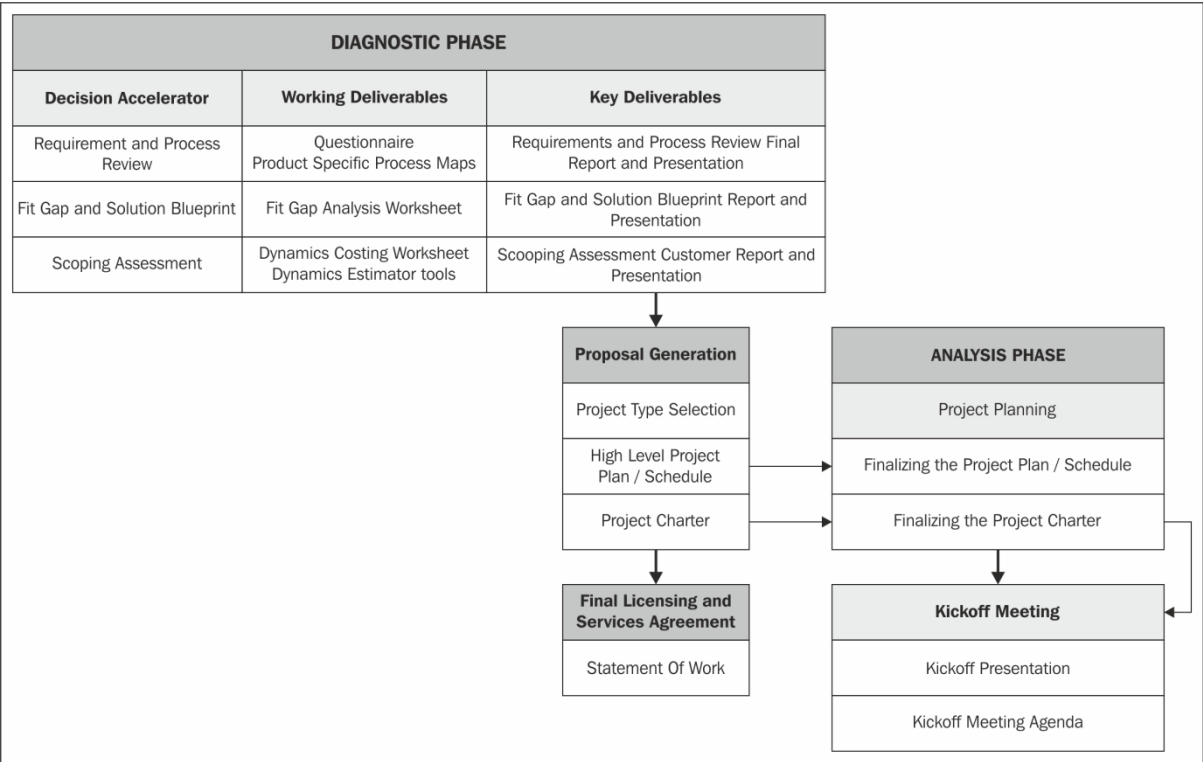
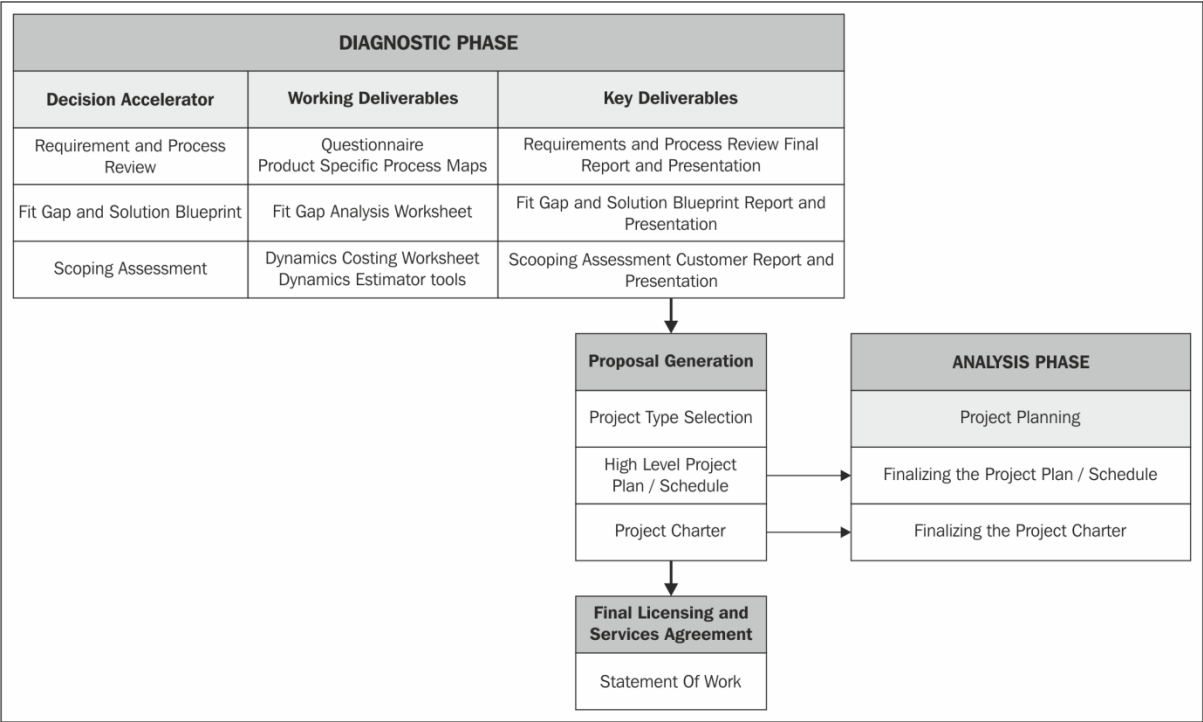
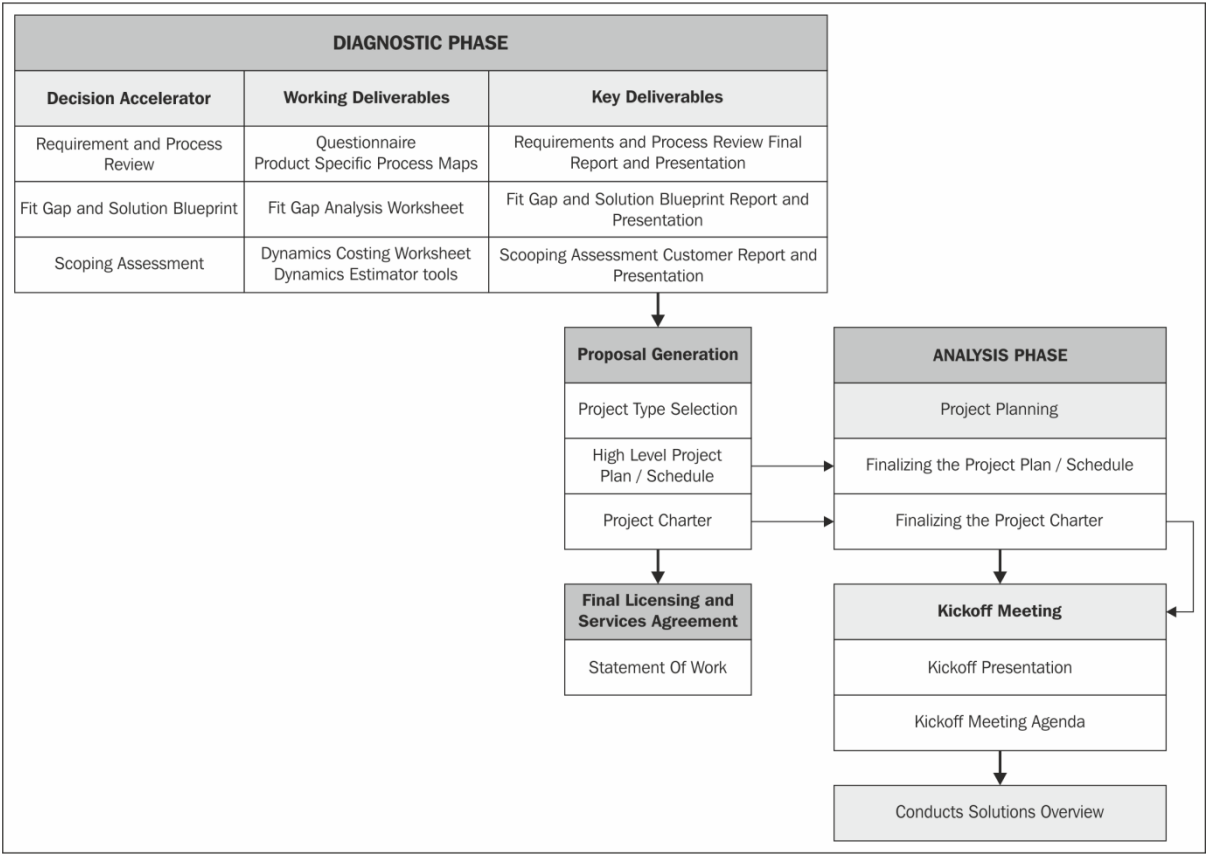
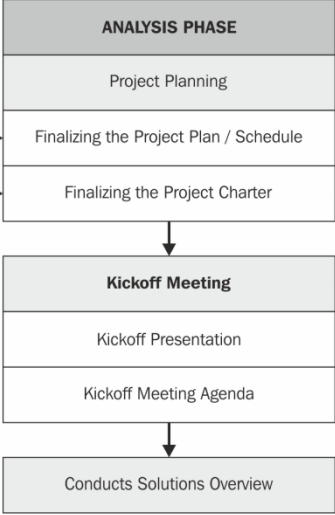
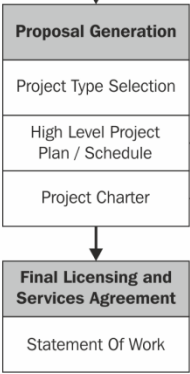


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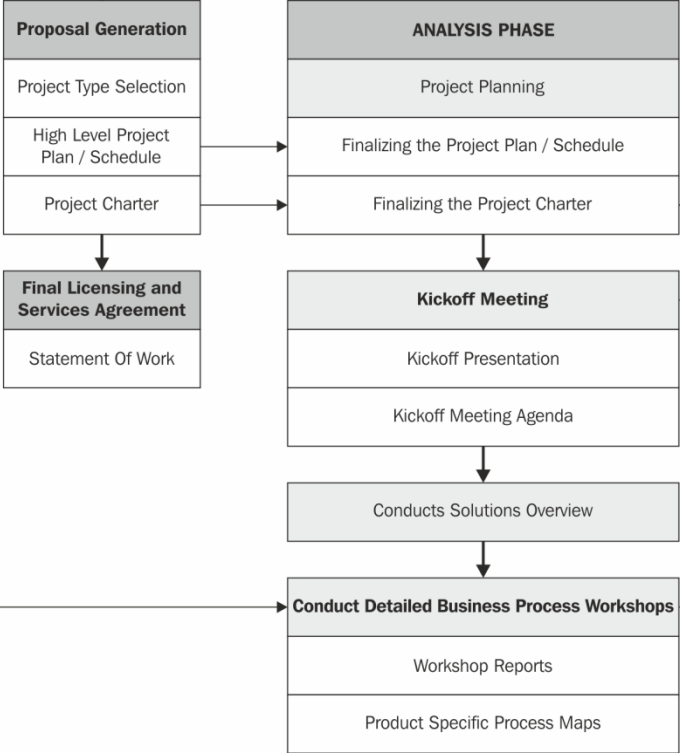


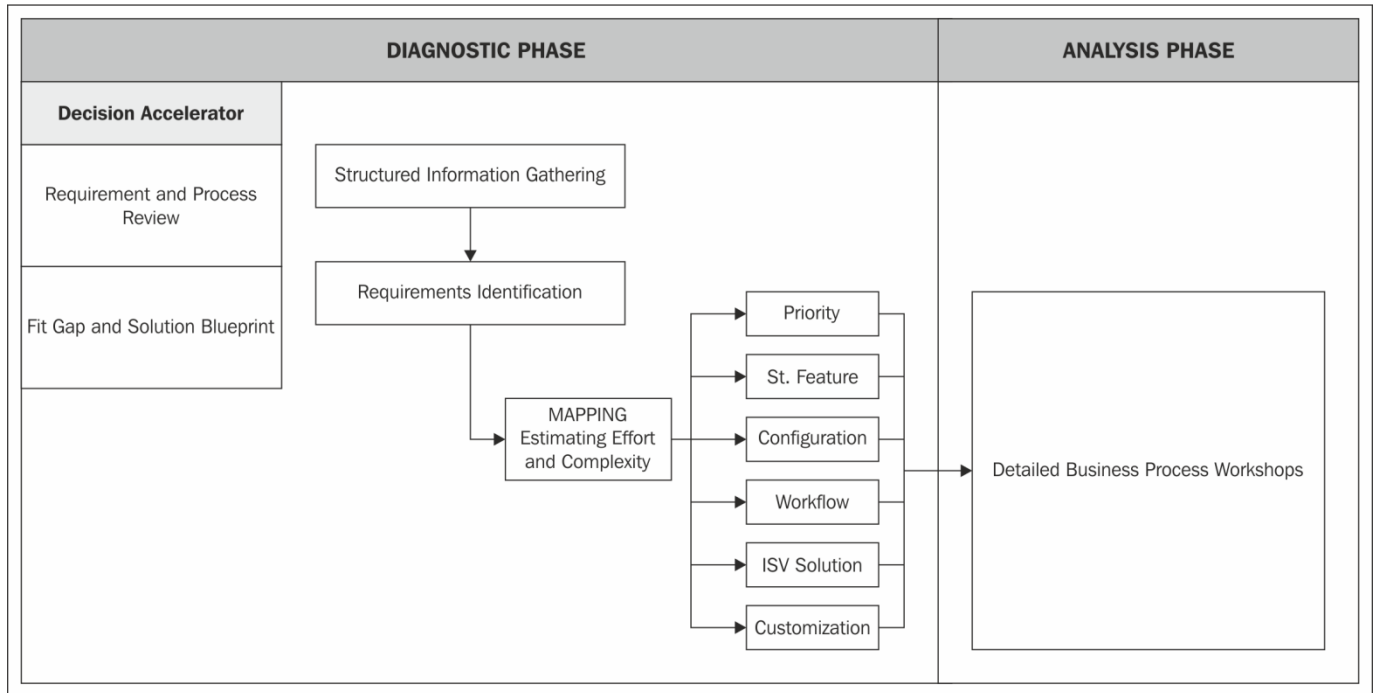
DIAGNOSTIC PHASE		
Decision Accelerator	Working Deliverables	Key Deliverables
Requirement and Process Review	Questionnaire Product Specific Process Maps	Requirements and Process Review Final Report and Presentation
Fit Gap and Solution Blueprint	Fit Gap Analysis Worksheet	Fit Gap and Solution Blueprint Report and Presentation
Scoping Assessment	Dynamics Costing Worksheet Dynamics Estimator tools	Scoping Assessment Customer Report and Presentation



DIAGNOSTIC PHASE		
Decision Accelerator	Working Deliverables	Key Deliverables
Requirement and Process Review	Questionnaire Product Specific Process Maps	Requirements and Process Review Final Report and Presentation
Fit Gap and Solution Blueprint	Fit Gap Analysis Worksheet	Fit Gap and Solution Blueprint Report and Presentation
Scoping Assessment	Dynamics Costing Worksheet Dynamics Estimator tools	Scoping Assessment Customer Report and Presentation

Reuse Diagnostic information to set priorities for Analysis Workshops





6 DELIVERABLES

The following future 'To Be' business processes were agreed:

Business Process	Attachment
1.	
2.	

The following business process changes have been identified between 'As Is' and 'To Be':

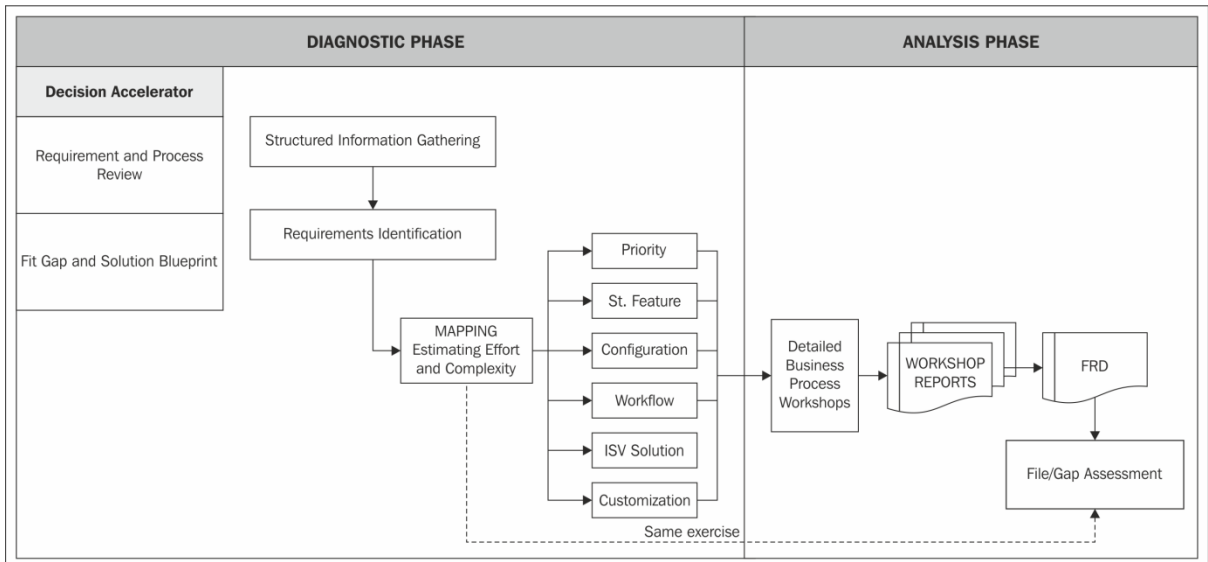
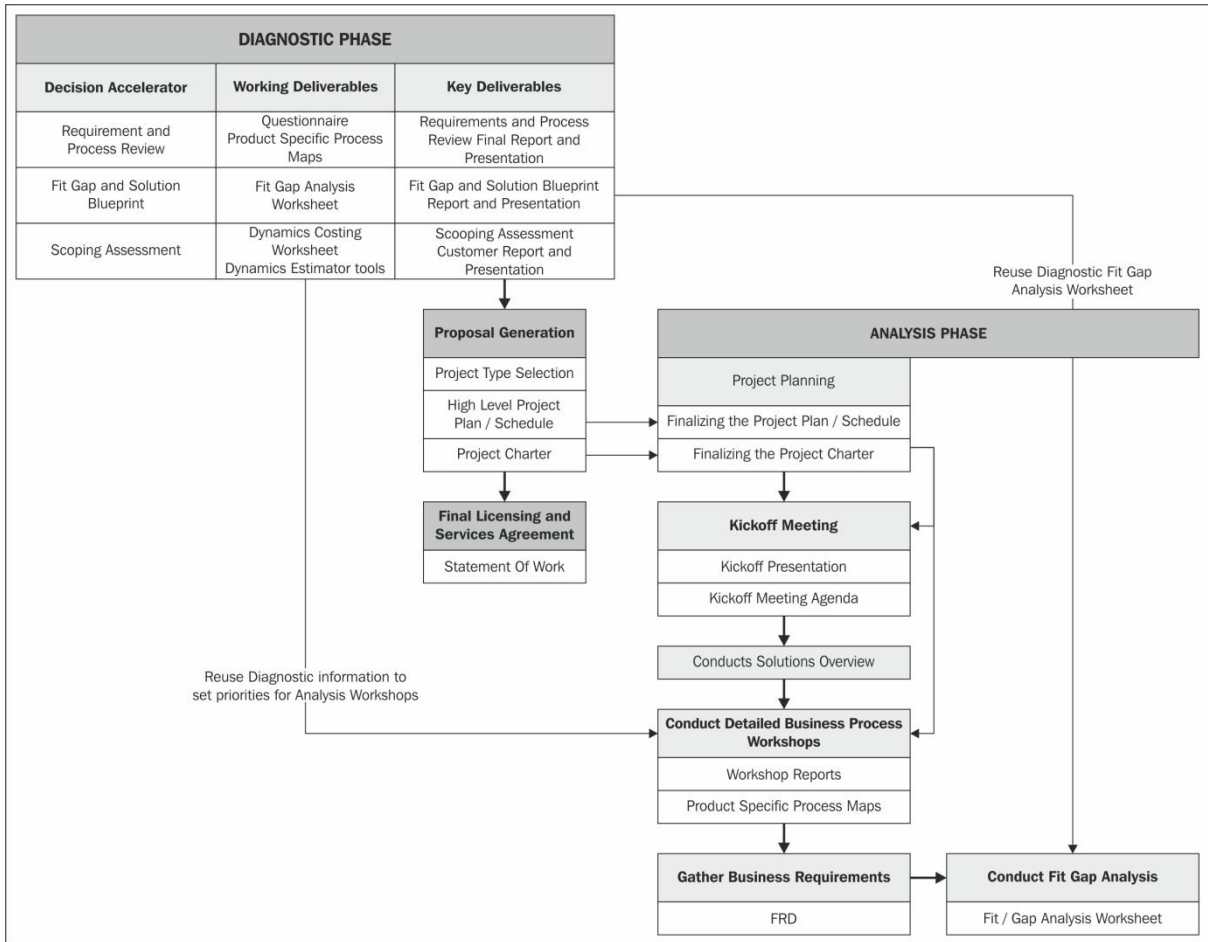
Business Process Change	Priority
1.	
2.	
3.	
4.	
5.	

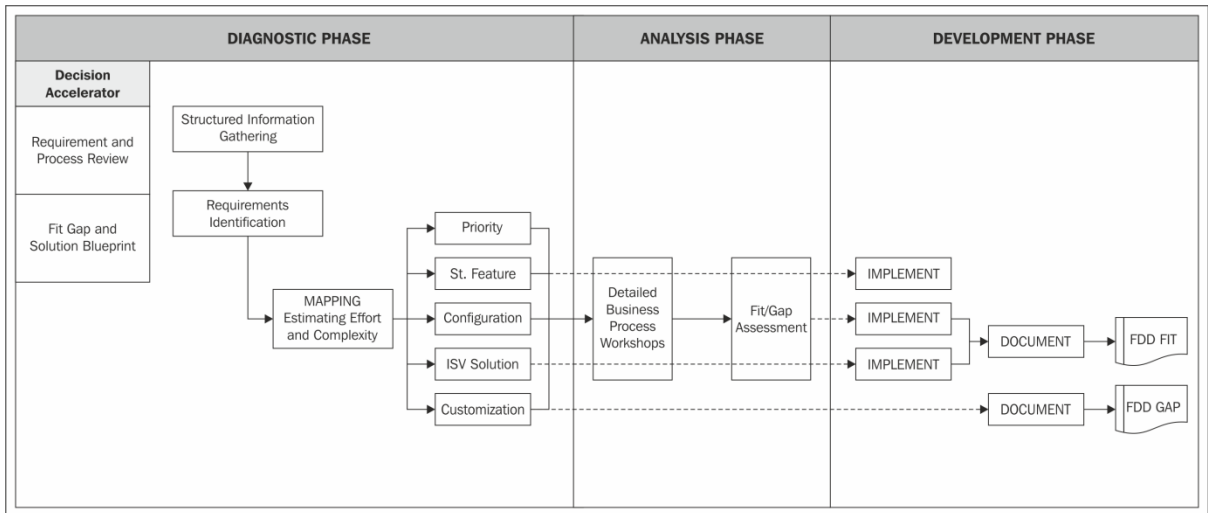
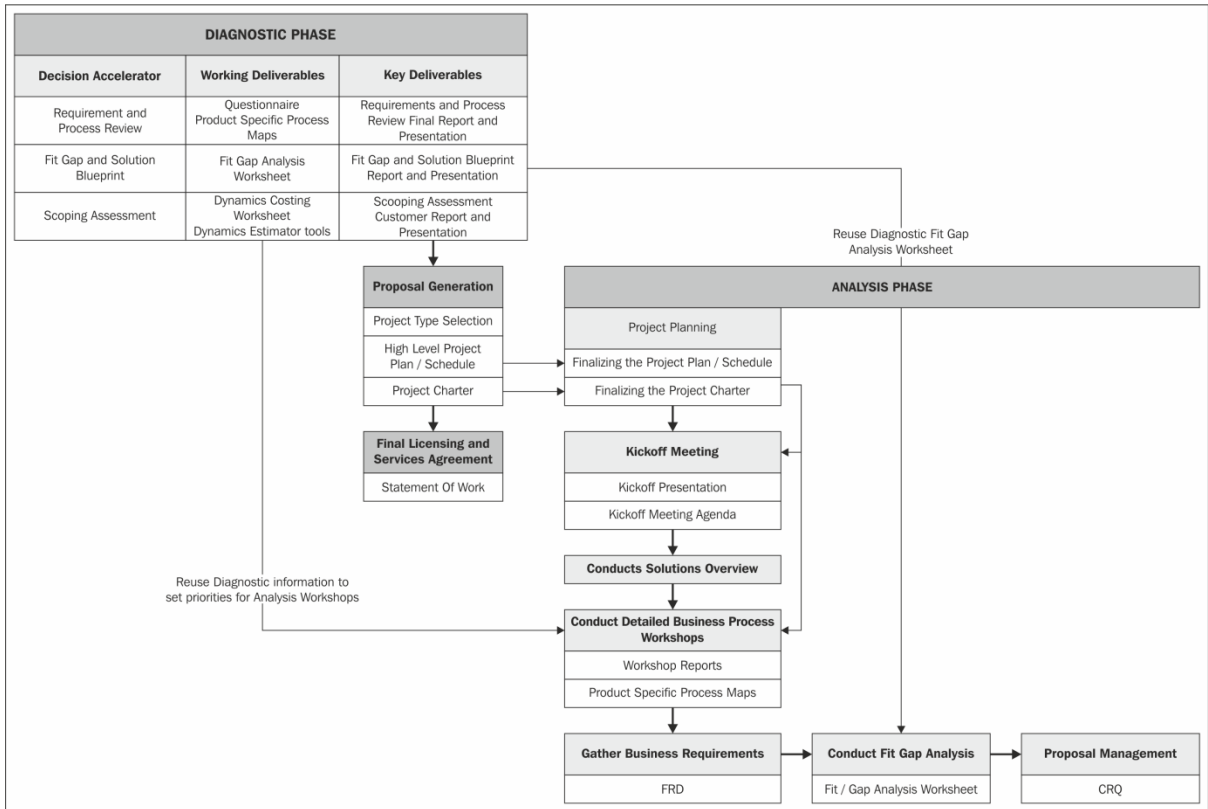
The following functional gaps were identified:

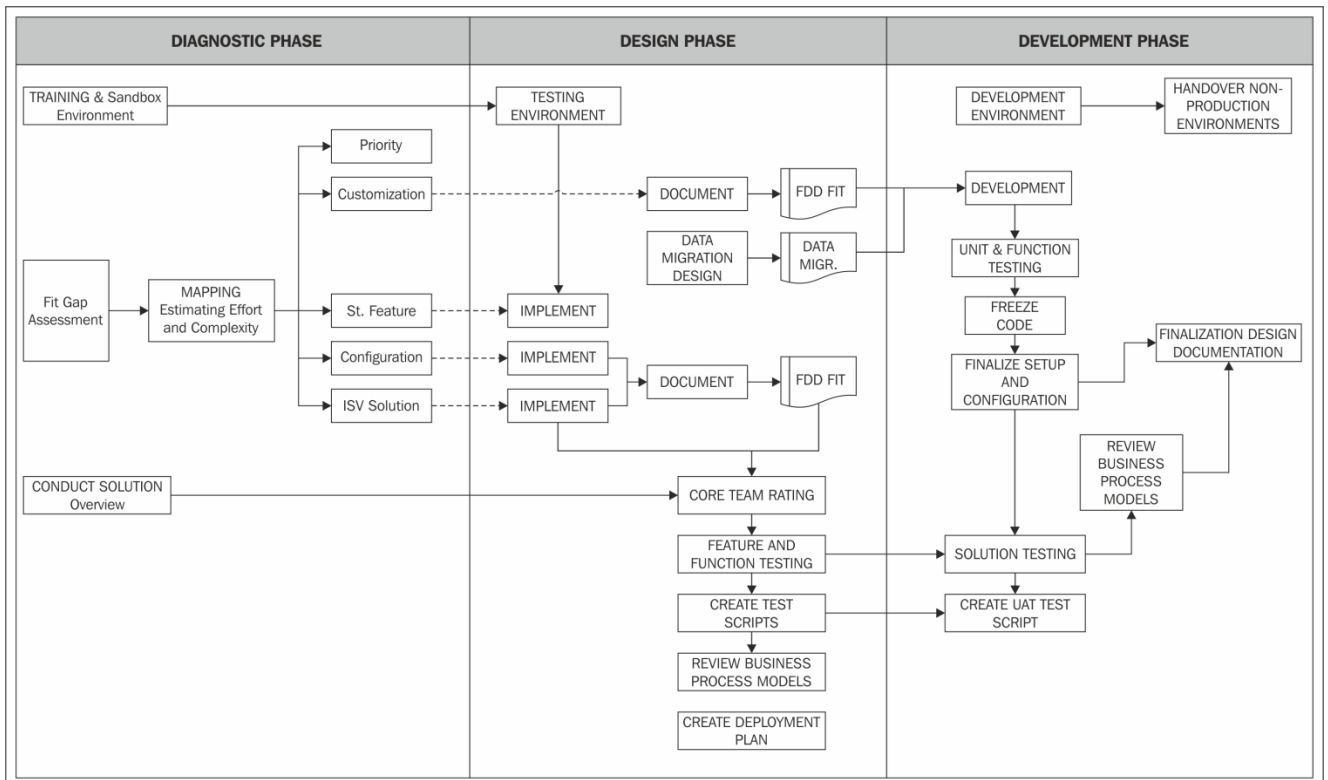
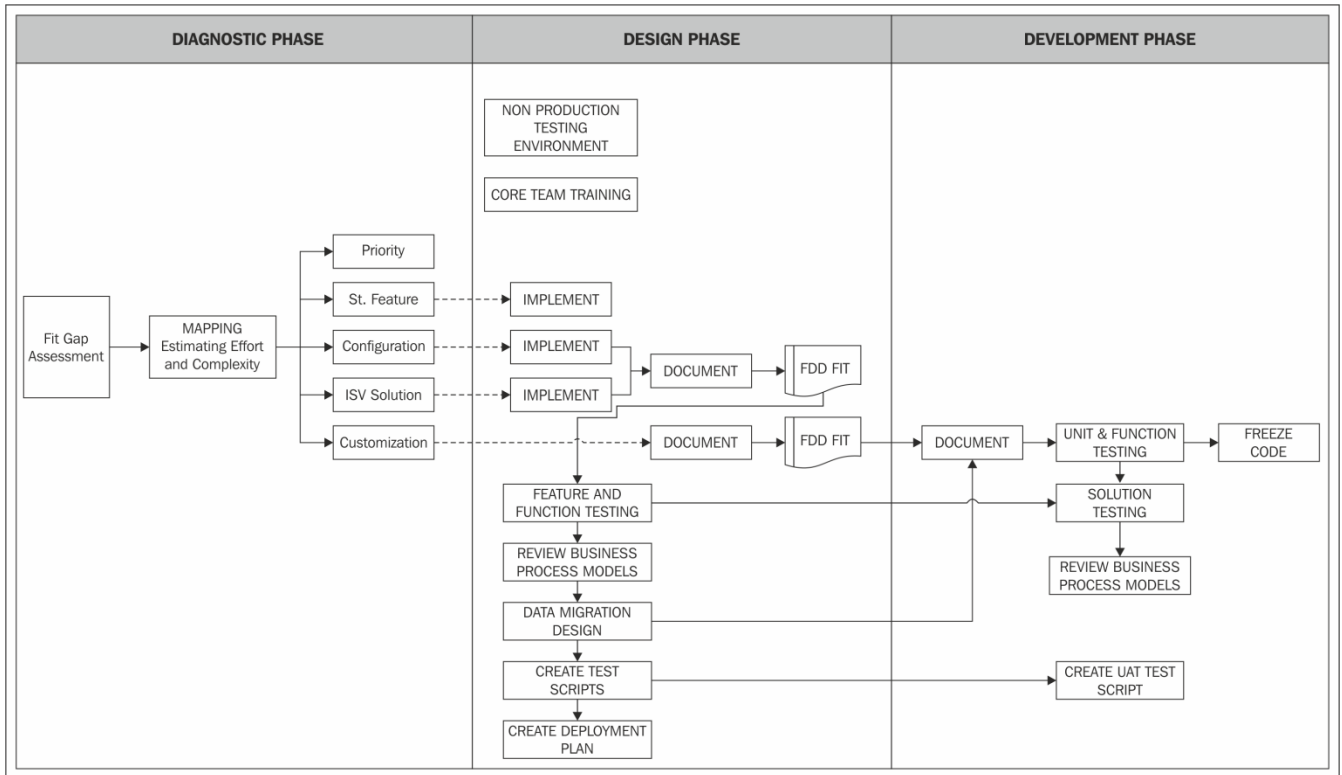
Gap	Possible Solution	Priority
1.		
2.		
3.		
4.		
5.		

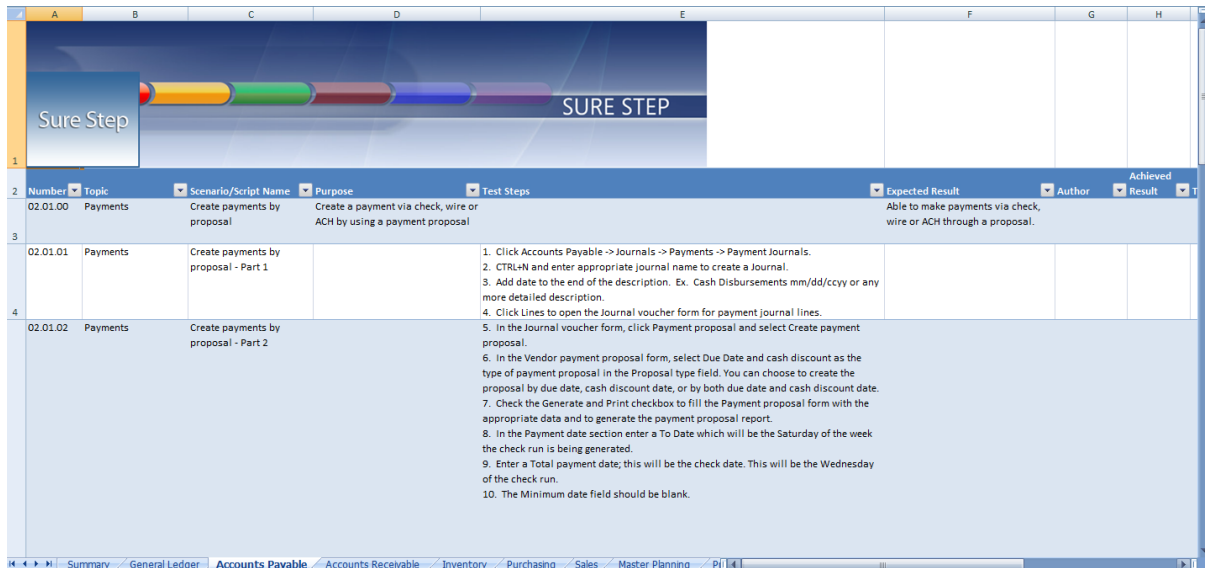
The following issues were identified:

Issue	Priority
1.	
2.	
3.	
4.	
5.	

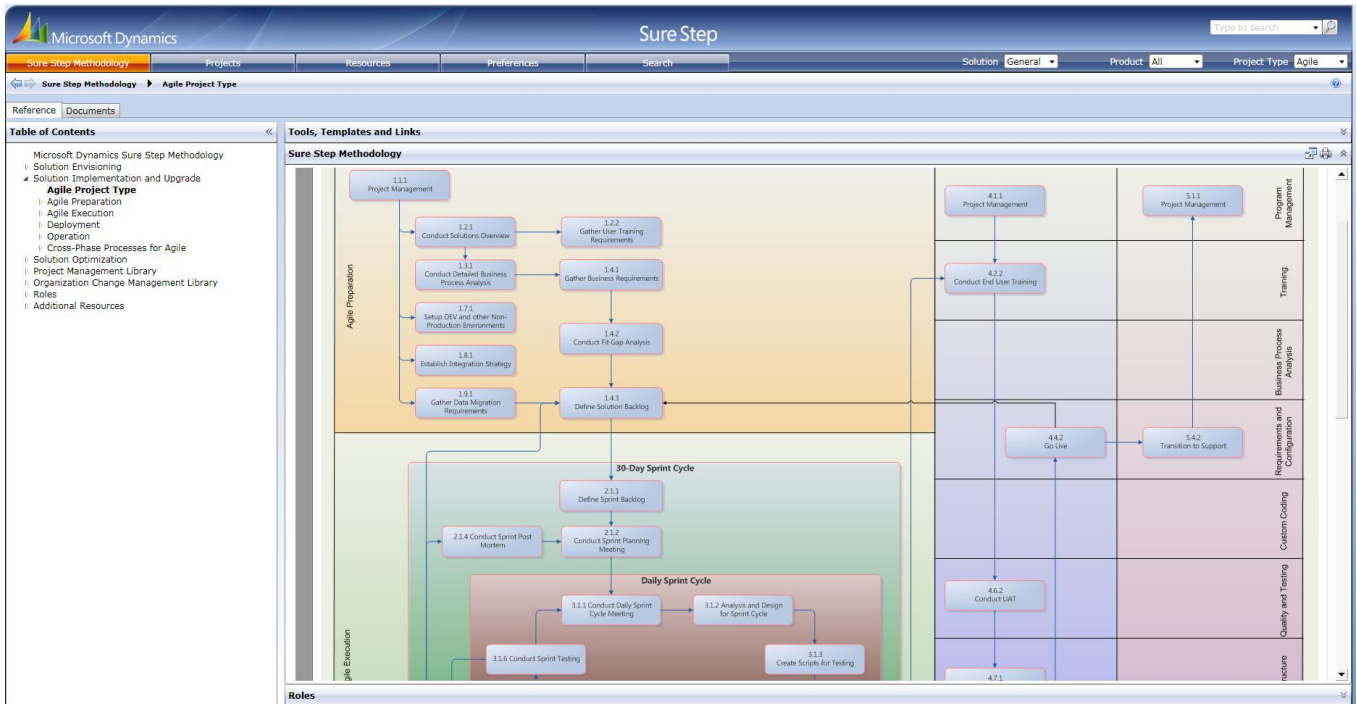








Environment	Initialized	Description
Sandbox	Analysis Phase	An environment that allows the project team members and users to test functionality, try what-if scenarios, and demo standard out of the box features to the customer
Training	Analysis Phase	An environment setup with functionality being deployed, customer data and customer business scenario exercises for conducting Solutions Overview, Core Team, Train-the-Trainer (TTT) and End User Training
Testing	Design Phase	For the execution of Test Scripts during Integration testing, Data Acceptance Testing, Performance Testing and User Acceptance Testing. Depending on the complexity of the engagement, separate environments may be necessary for Performance and User Acceptance Testing (UAT).
Development	Development Phase	For the setup, configuration and customization of the Microsoft Dynamics solution. Depending on the number of development teams involved, more than one Dev environment may be needed
Staging		To transition setup, configurations and custom code from Development of Testing environments to Production. Other usages of this environment may include the following: for executing UAT, for running a Conference Room Pilot, or for Parallel Testing - to compare results from the existing system with the Microsoft Dynamics solution.
Production	Development Phase	The Final LIVE environment that runs the customer's Microsoft Dynamics solution in production mode



Microsoft Dynamics Sure Step

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- Microsoft Dynamics Sure Step Methodology
- Diagnostic Phase
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 - Decision Accelerator Offerings
 - Proposal Generation
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 - Additional Resources

Tools, Templates and Links

- Fixed Scope Proposal for GL-PM-RM-BR-FRx-SOP-POP-IV-FA for Microsoft Dynamics GP
- Fixed Scope SOW for GL-PM-RM for Microsoft Dynamics GP**
- Fixed Scope SOW for GL-PM-RM-BR-FRx for Microsoft Dynamics GP
- Fixed Scope SOW for GL-PM-RM-BR-FRx-SOP-POP-IV-FA for Microsoft Dynamics GP
- Microsoft Dynamics GP Links
- Proposal Management
- Price Lists

Sure Step Methodology

Final Licensing & Services Agreements

On this page:

- Purpose
- Description
- Pre-conditions

Purpose

To finalize the commercial engagement proposal, present it to the customer, and thereby conclude the Licensing and Service Contract agreements.

Description

Proposal management activities are executed within all cross phases of the project implementation life cycle with the purpose of monitoring the agreed project scope and actively ensuring that the project stays on track. Although the primary proposal generation activities typically occur in the Proof stage of the Microsoft Solution Selling Sales Process (MSSP), it is in the Close stage's "Final Licensing and Services Agreements" activity where the overall formally documented scope of the implementation is agreed upon with the customer. The details of this will be described in the following documents:

- Statement of Work (SOW)** This item captures the scope of the implementation

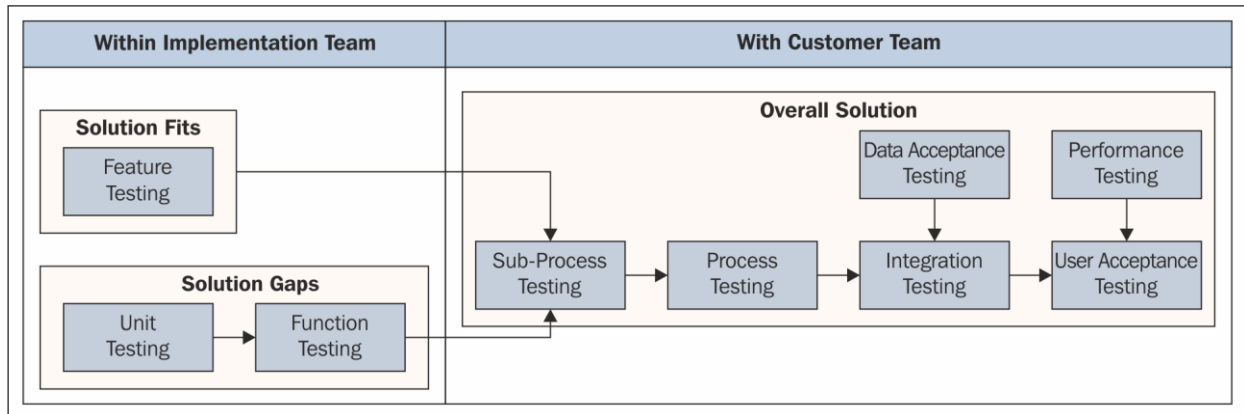
Roles

Consulting Roles	Customer Roles	Owner
Project Manager	Business Decision Maker	
Engagement Manager	Project Manager	
Account Manager	Executive Sponsor	
Sales Representative	Purchase Manager	

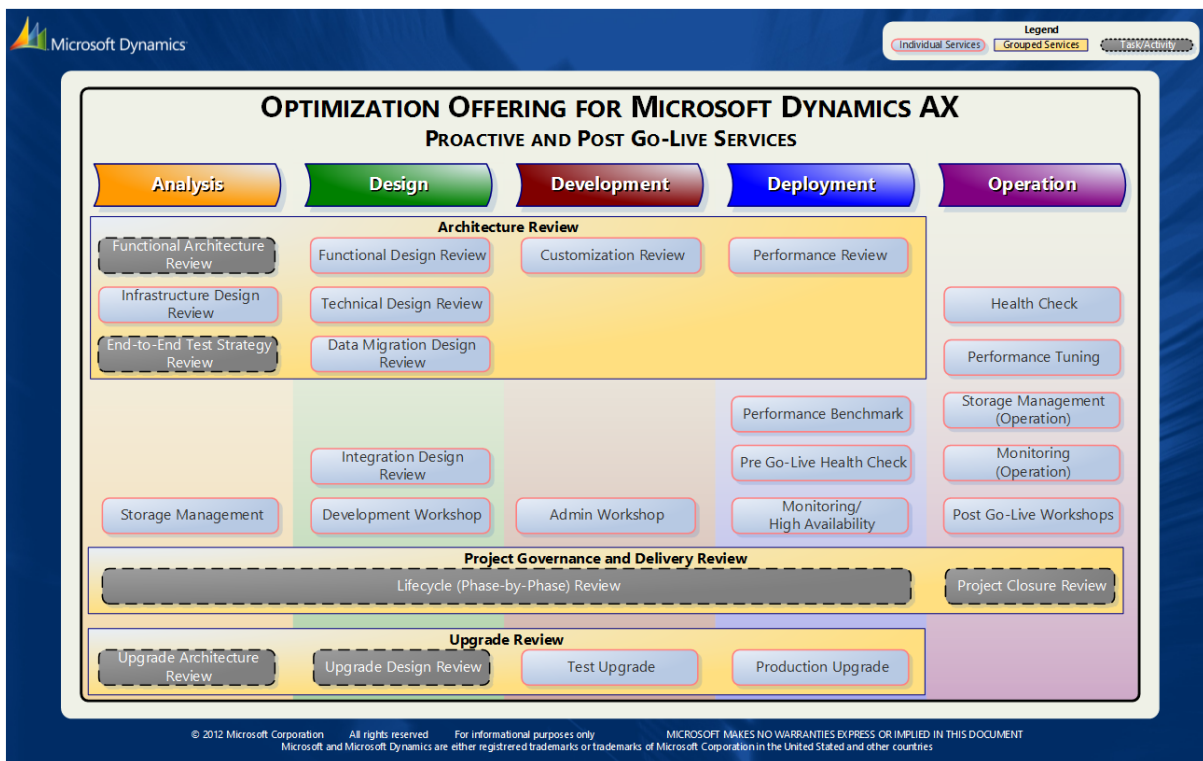
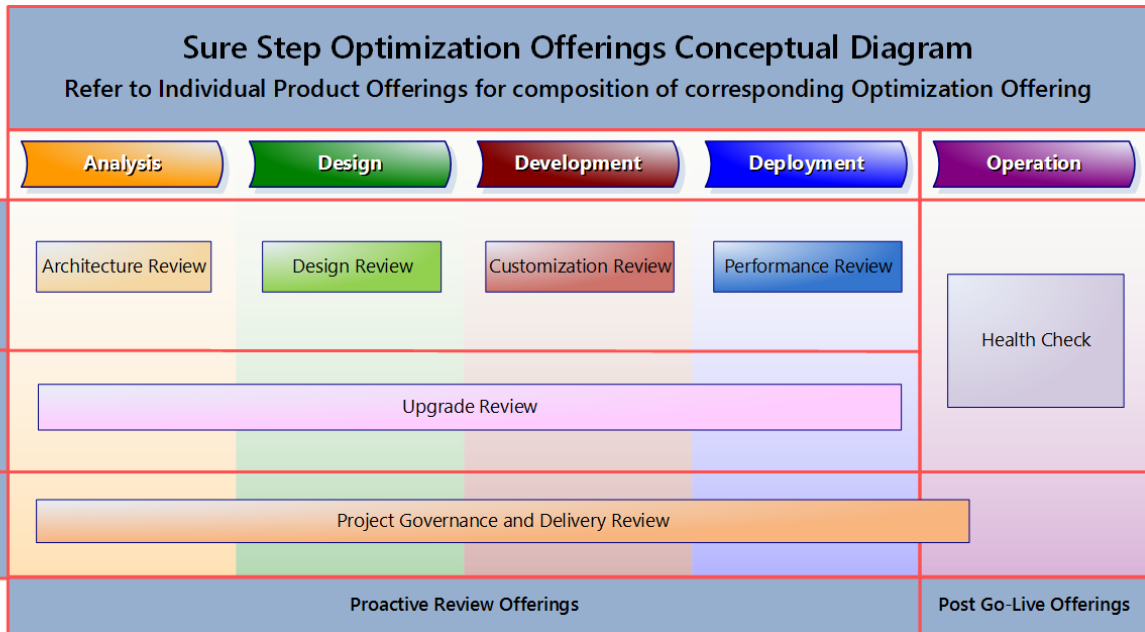
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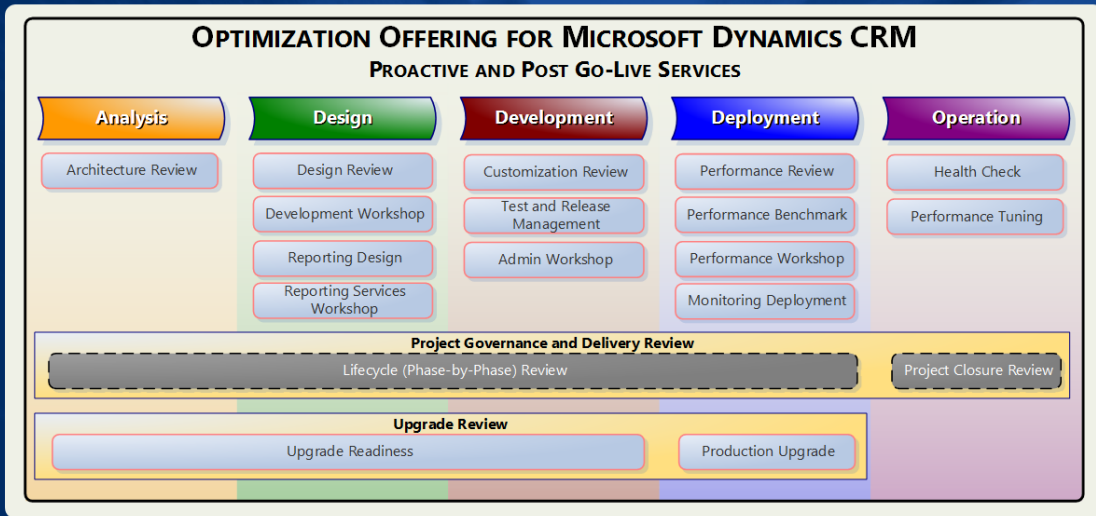
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Chapter 6



Number	Topic	Scenario/Script Name	Purpose	Test Steps	Expected Result	Author	Achieved Result	Tested by	P
01.01.00	Chart of Accounts	Create a GL Account, Chart of Account and attaching to Legal Entity	To create GL accounts in order to establish the chart of accounts	1. Go to General Ledger 2. Go to Common>Main Accounts and select Main Account create option to create new account 3. To create new Chart of Account, Go to GL -> Setup -> Chart of Accounts -> Chart of Account 4. Press CTRL+N to create new chart of account 5. Go to Setup -> Ledger 6. Select CTRL+N to create new record and select Chart of Account	GL Account and Chart of Account should get created. Also COA should get attached to legal entity				P
01.02.00	Budget	Create budgets	Creation of new budget	1. To start the budget process, a budget model will need to be created. This done by going to Budgeting->Setup->Budget Models and creating a new record. 2. The budget can be entered manually at Budgeting- Budget register entries	Able to create budgets				
01.03.00	Budget	Modify budgets	Able to modify existing budgets	1. Go to Budgeting -> Budget Register entries 2. Ensure Budget Models selected is same as the original one for which modification/revision is required. Select Budget Model 3. In Budget Code, select option which has Budget type as	Able to modify budgets				





OPTIMIZATION OFFERING FOR MICROSOFT DYNAMICS SL PROACTIVE AND POST GO-LIVE SERVICES

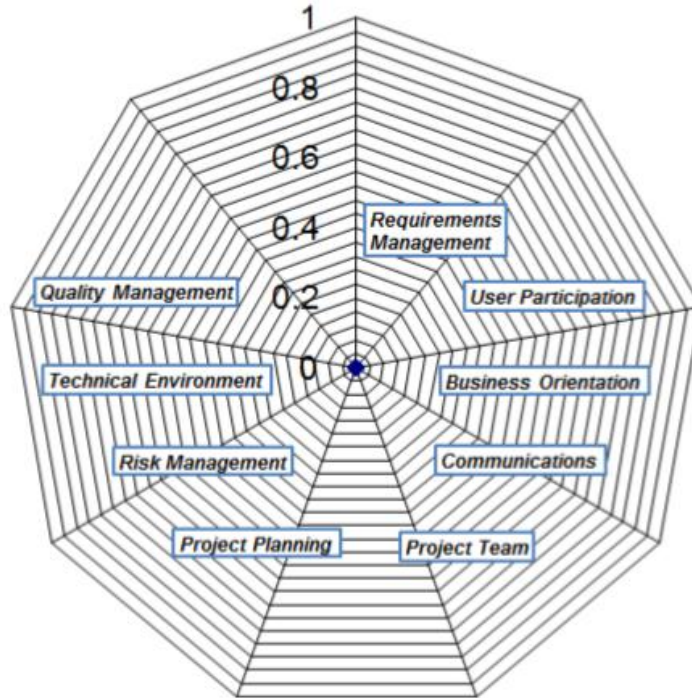


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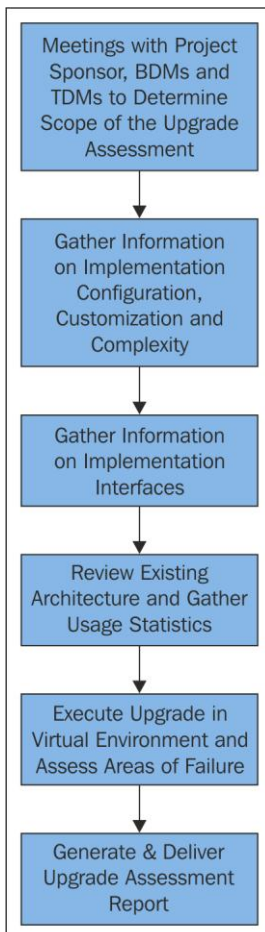
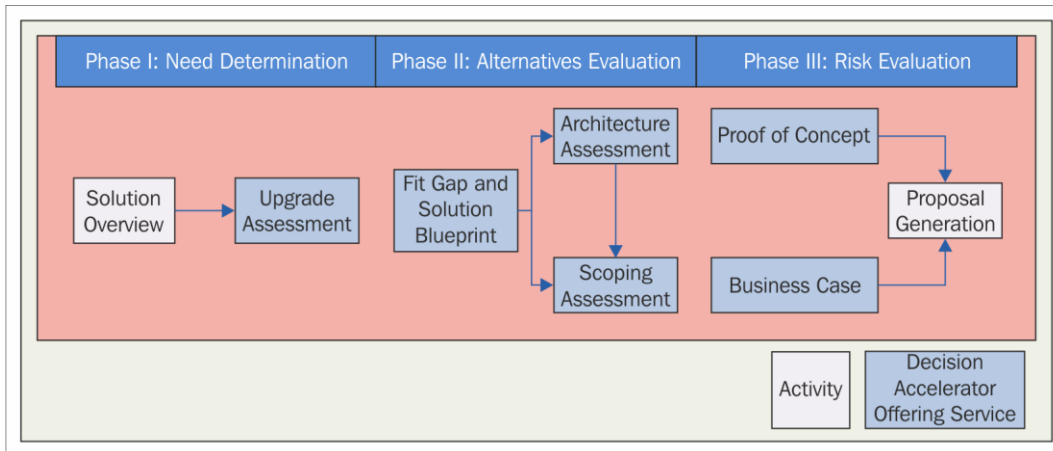
	Good (Green) – Customer’s deployment criterion match “Best Practices” in 100% of criterion
	Fair (Yellow) – Customer’s deployment criterion match “Best Practices” in <100% but >= 70% of criterion
	Poor (Red) – Customer’s deployment criterion match “Best Practices” in < 70% of criterion

Category	Status	Explanation
Operational Excellence Scorecard		
General Operational Excellence		
Business Continuity		
Monitoring and Alerts		
People		
Application Configuration Scorecard		
Application User Information		
Performance Optimization		
Application Server Scorecard		
Administration		
Hardware Utilization		
Settings		
Configuration		
Event Logs		
SQL Server Scorecard		
Administration		
Server Settings		
Database Settings		
CRM Database Settings		
Hardware Utilization		
Security Settings		
Performance		
SQL Query Performance		
SQL Server Blocking		
SQL Server Deadlocks		
Event Logs		
Memory Guidelines		
Microsoft Dynamics Client Scorecard		
Configuration		
Hardware Settings		
Exchange Router Scorecard		
Settings		

Cobb's Paradox



Chapter 7





Microsoft Dynamics Sure Step

Microsoft Dynamics Sure Step

Sure Step Methodology | Projects | Resources | Preferences | Search | Solution: General | Product: All | Project Type: Upgrade

Key Map Methodology > Upgrade Project Type

Reference | Documents

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- Upgrade Project Type
 - Analysis Activity Flow
 - 1.1.1 - Project Planning
 - 1.2.1 - Conduct Solutions Overview
 - 1.4.1 - Gather Requirements
 - 1.4.2 - Conduct Fit Gap Analysis
 - 1.6.3 - Develop Upgrade Test Plan
 - 1.7.5 - Set Up Non-production Environments
 - 1.9.3 - Initiate Data Upgrade Preparation
 - Design Activity Flow
 - 2.4.8 - Review Data Upgrade Checklist
 - 2.5.3 - Review Existing Code
 - 2.8.1 - Review Existing Integration and Incent
 - Development Activity Flow
 - 3.4.7 - Upgrade Application Modules
 - 3.4.8 - Upgrade ISV Solutions as Applicable
 - 3.5.4 - Upgrade Customizations
 - 3.6.10 - Conduct Testing
 - 3.7.4 - Set Up Production Environment
 - 3.8.4 - Upgrade Integrations and Interfaces
 - 3.9.5 - Verify and Benchmark Data
 - Deployment Activity Flow
 - 4.2.2 - Conduct User Training
 - 4.4.2 - Go Live
 - 4.6.2 - Conduct User Acceptance Testing
 - 4.9.4 - Final Data Upgrade to Production
 - Operation Activity Flow
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Tools, Templates and Links

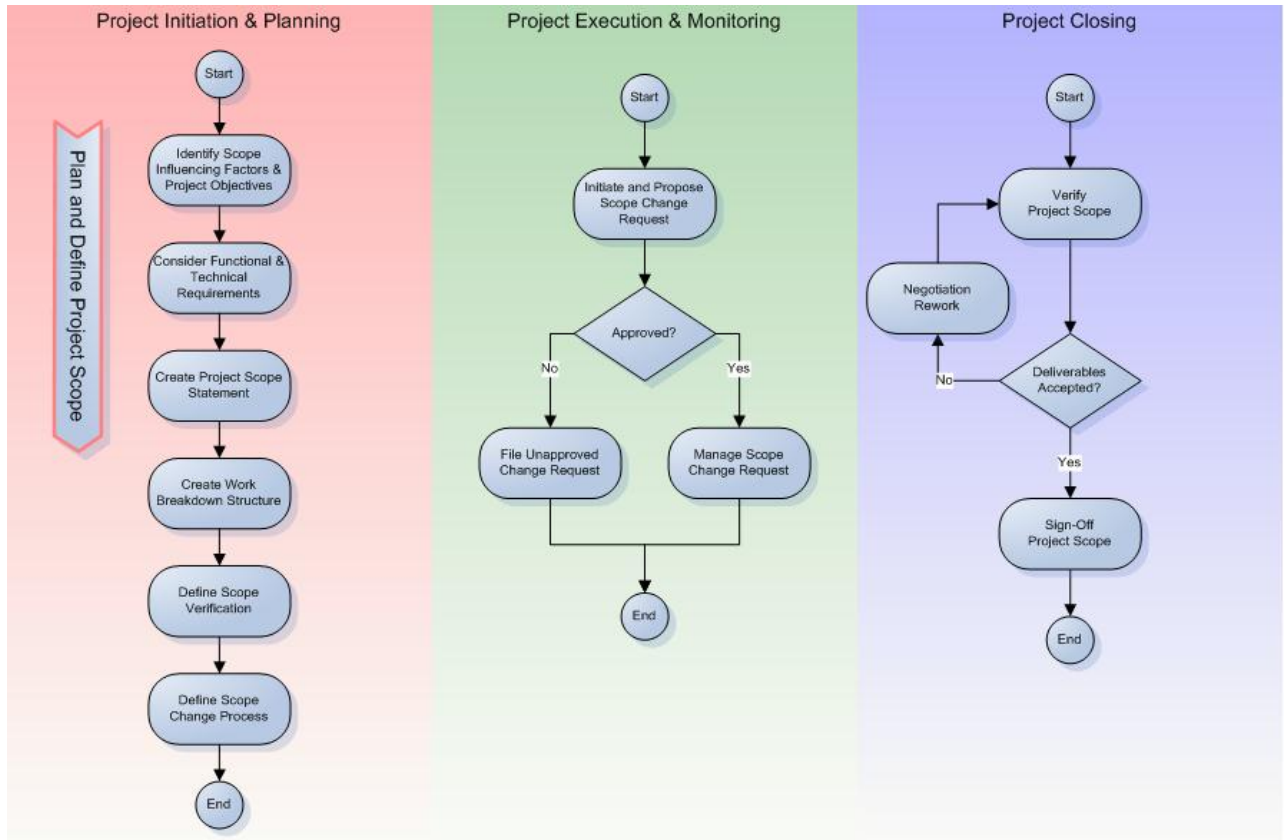
Sure Step Methodology

Diagram illustrating the Sure Step Methodology phases: Analysis, Design, Development, Deployment, and Operation. The diagram shows a grid of tasks and their dependencies across these phases.

Roles

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Chapter 8



Microsoft Dynamics Sure Step

Microsoft Dynamics Sure Step

WBS

Sure Step Methodology | Projects | Resources | Preferences | Search

Advanced Filter

Search: WBS [Reset] [Search]

Filter

Criteria:

- Phase
- Cross Phase Process
- Product
- Project Type
- Owner
- Customer Role
- Consulting Role
- Status

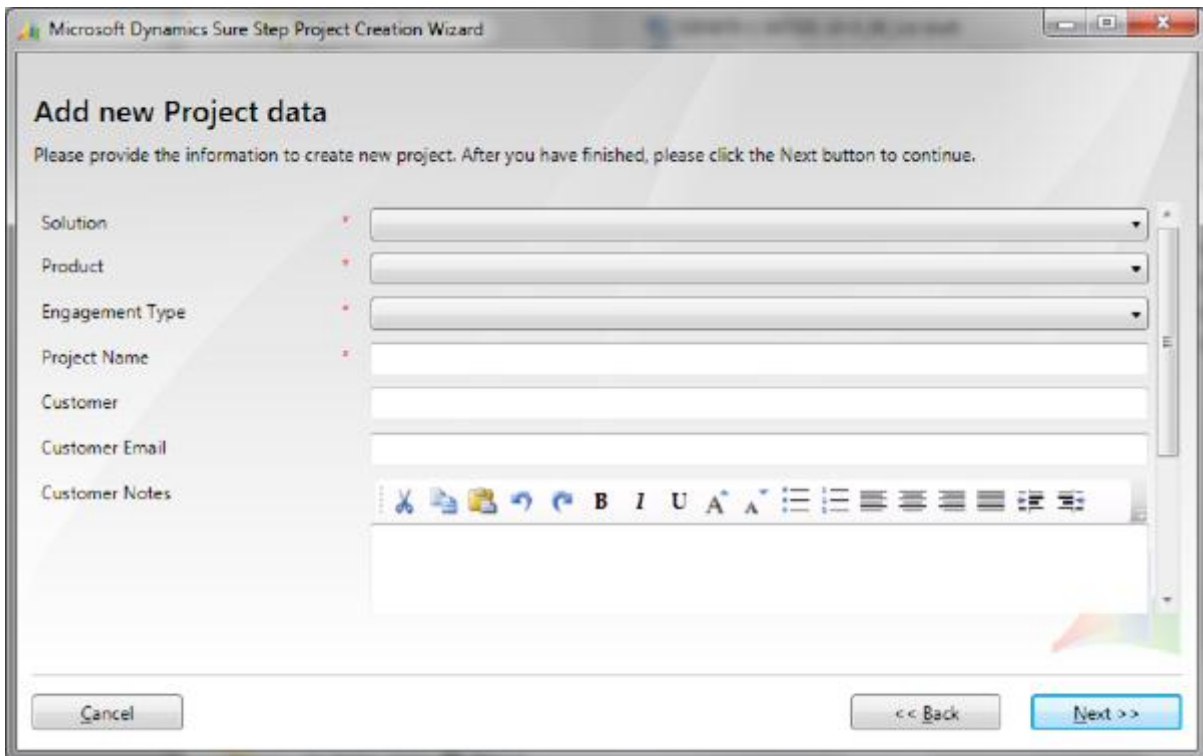
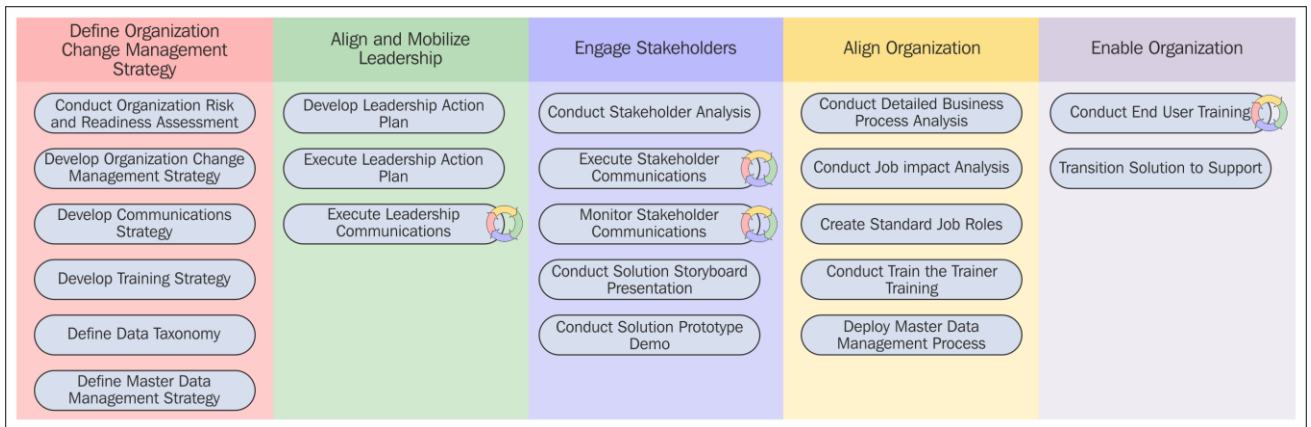
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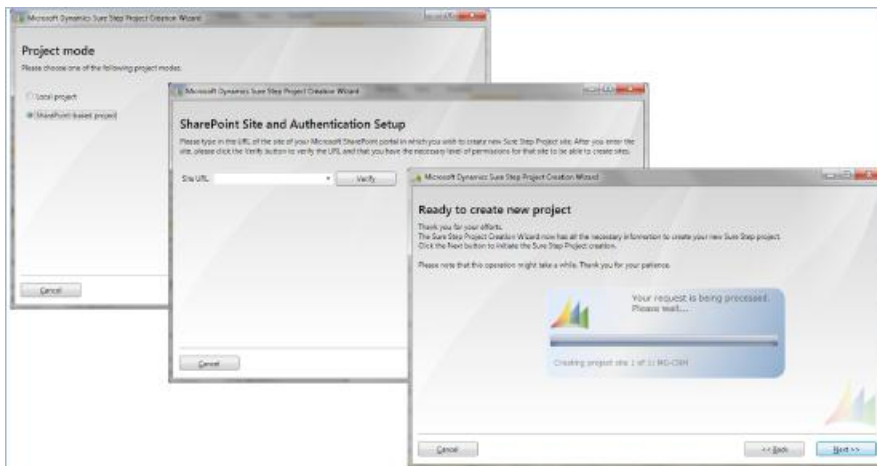
- Microsoft Office Excel
- Microsoft Office PowerPoint
- Microsoft Office Word
- Microsoft Office Visio
- Other (Text, RTF, Html, OneNote, PDF, XPS)

Clear all check boxes to clear the filter.

Search results - found 63 items

Title	Phase	Owner	Product	Project Type
29 Tools and Templates				
Business Case Delivery Guide - CRM	Diagnostic		CRM, CRM Online	Enterprise, Standard, Rapid, Upgrade, CRM
Fit Gap and Solution Blueprint Delivery Guide - CRM	Diagnostic		CRM, CRM Online	Enterprise, Standard, Rapid, Agile
Microsoft Dynamics CRM Performance Review Delivery C	Deployment		CRM, CRM Online	Enterprise, Standard, Rapid, Upgrade,
Scoping Assessment Delivery Guide - AX	Diagnostic	Consulting - Engagement Manager	AX	Enterprise, Standard, Rapid, Upgrade,
WBS	Diagnostic	Consulting - Project Manager	AX, GP, NAV, SL, CRM,	Standard
Microsoft Dynamics® AX Role-Tailored Questionnaire	Diagnostic		AX	Enterprise, Standard, Rapid, Upgrade,
Resources				
Executive Project Kick-Off Meeting Agenda	Analysis	Consulting - Project Manager	AX, GP, NAV, SL, CRM,	





Type	Title	Deliverable	Owner	Handled By	Modified
Client ready	Functional Requirements Document - General		Consulting - Solution Architect	Chandru Shankar	4/22/2010 6:45 AM
Internal only	Risk Assessment Checklist		Consulting - Project Manager	Chandru Shankar	6/22/2010 6:39 AM
Internal only	Risk Management Reporting		Consulting - Project Manager	Chandru Shankar	6/22/2010 6:39 AM
Client ready	Microsoft Dynamics Implementation Project Kick Register		Consulting - Project Manager	Chandru Shankar	6/22/2010 6:39 AM
Client ready	Microsoft Dynamics Implementation		Consulting - Project Manager	Chandru Shankar	6/22/2010 6:39 AM
Change Control Process				Chandru Shankar	6/22/2010 6:43 AM
Implementation Task Entry Form				Chandru Shankar	6/22/2010 6:43 AM
Client ready	Project Charter		Customer - Project Manager	Chandru Shankar	6/22/2010 6:43 AM
Client ready	Executive Project Kick-off Presentation		Consulting - Project Manager	Chandru Shankar	6/22/2010 6:43 AM
Internal only	Project Kick-off Meeting Agenda		Consulting - Project Manager	Chandru Shankar	6/22/2010 6:41 AM
Client ready	Project Kick-off Meeting Agenda		Consulting - Project Manager	Chandru Shankar	6/22/2010 6:41 AM
Client ready	Project Kick-off Meeting Agenda		Consulting - Project Manager	Chandru Shankar	6/22/2010 6:41 AM
Internal only	Issue Log		Consulting - Project Manager	Chandru Shankar	6/22/2010 6:43 AM
Internal only	Project Plan for Interactive Projects		Consulting - Project Manager	Chandru Shankar	6/22/2010 6:39 AM
Internal only	Project Charter - Strategic Data Collection		Consulting - Project Manager	Chandru Shankar	6/22/2010 6:39 AM
Internal only	Change Request Form Sample		Consulting - Project Manager	Chandru Shankar	6/22/2010 6:43 AM
Internal only	Change Control Request Log Sample		Consulting - Project Manager	Chandru Shankar	6/22/2010 6:43 AM
Client ready	Microsoft Dynamics Engagement Indicator Checklist		Consulting - Engagement Manager	Chandru Shankar	6/22/2010 6:17 AM
Client ready	TrialKit System Report		Consulting - Project Manager	Chandru Shankar	6/22/2010 6:17 AM
Client ready	Deliverable Acceptance Form		Consulting - Project Manager	Chandru Shankar	6/22/2010 6:17 AM
Client ready	Training Plan for Microsoft Dynamics CRM - Strategic SaaS		Consulting - Solution Architect	Chandru Shankar	6/22/2010 6:17 AM
Client ready	Training Plan Template		Consulting - Application Consultant	Chandru Shankar	6/22/2010 6:17 AM
Internal only	Marketing Automation Process Flow for Microsoft Dynamics CRM		Consulting - Application Consultant	Chandru Shankar	6/22/2010 6:16 AM
Internal only	Sales Management Process Flow for Microsoft Dynamics CRM		Consulting - Application Consultant	Chandru Shankar	6/22/2010 6:16 AM

Browser address bar: <https://mbs2.microsoft.com/Surestep/default.aspx> | Sure Step

Microsoft Dynamics SURE STEP ONLINE | Preferences | Feedback | Help and Support

Online Project Wizard Overview

Welcome to the Microsoft Dynamics Sure Step Online Project Wizard

The Microsoft Dynamics Sure Step Online Project Wizard will guide customers and partners through the process of creating a SharePoint site for each project. Each site will contain specific project documents related to each engagement and can be used by project teams to manage and collaborate efficiently. Project team members could be both internal and external to your organization.

Projects can be created based upon many criteria. Examples include:

- Dynamics product, e.g. AX, CRM, CRM Online, GP, NAV, or SL
- Project Type, e.g. Enterprise or Agile
- Solution, e.g. Retail or Manufacturing
- Engagement Type, e.g. Diagnostic Phase Offering or Implementation

Download and save the Microsoft Dynamics Sure Step Online Project Wizard to your SharePoint site and run as needed to create projects seamlessly in your SharePoint environment. By deploying to SharePoint, engagements fully benefit from the features available in SharePoint while harnessing the guidance and structure provided by Sure Step.

In order to take advantage of this functionality, review the detailed guidance in the [Microsoft Dynamics Sure Step Online User Guide](#). For support, refer to the Help and Support within Microsoft Dynamics Sure Step Online.

Download the [Microsoft Dynamics Sure Step Online Project Wizard](#).

Methodology
Documents
Search
Projects

Solution: General | Product: All | Project Type: Standard | Content: English (English) | © 2012 Microsoft Corporation | Privacy Statement | Terms of Use

Libraries: Site Pages, Shared Documents

Lists: Calendar, Tasks

Discussions: Team Discussion

Recycle Bin, All Site Content

Welcome to your site!

Add a new image, change this welcome text or add new lists to this page by clicking the edit button above. You can click on Shared Documents to add files or on the calendar to create new team events. Use the links in the getting started section to share your site and customize its look.

Type	Name
There are no items to show in this view of the "Shared Documents" library.	
Add document	

Upload Document

Upload Document

Browse to the document you intend to upload.

Name: [Browse...](#)

[Upload Multiple Files...](#)

Overwrite existing files

OK Cancel



Project Data

Provide the project information to create the new project. After you have finished, click the Next button to continue.

Solution	*	<input type="text"/>
Product	*	<input type="text"/>
Engagement Type	*	<input type="text"/>
Project Name	*	<input type="text"/>
Customer		<input type="text"/>
Customer Email		<input type="text"/>
Customer Notes		<input type="text"/>
Project owners Email		<input type="text"/>
Project notes		<input type="text"/>
Language		<input type="text" value="English (English)"/>





Project Type

Select the project type for the Implementation project.

Enterprise

Standard

Rapid

Upgrade

Agile



Back

Next



SharePoint Site Authentication

Enter the url of your Microsoft SharePoint site to verify the site and that permissions are granted to be able to create the project site as a subsite of this url. On the next page in this wizard you will define the name of the project site to be created. Click the Verify button to verify the url and that permissions are granted to create subsites.

Example site urls are:

http://<ServerName>

http://<ServerName>/<SubSite>

https://<ServerName>

https://<ServerName>/<SubSite>

Site:

Verify

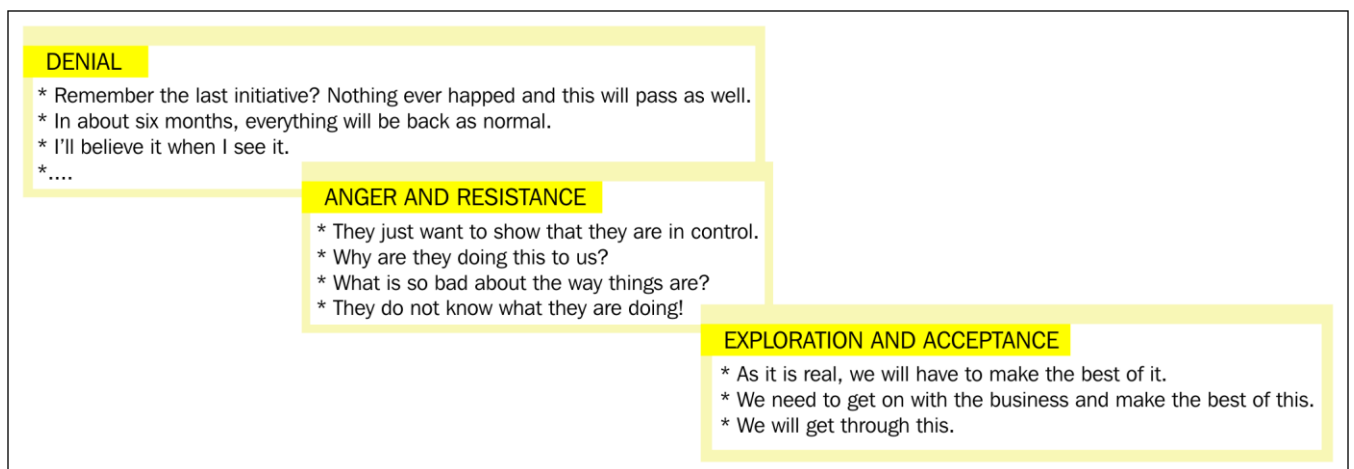
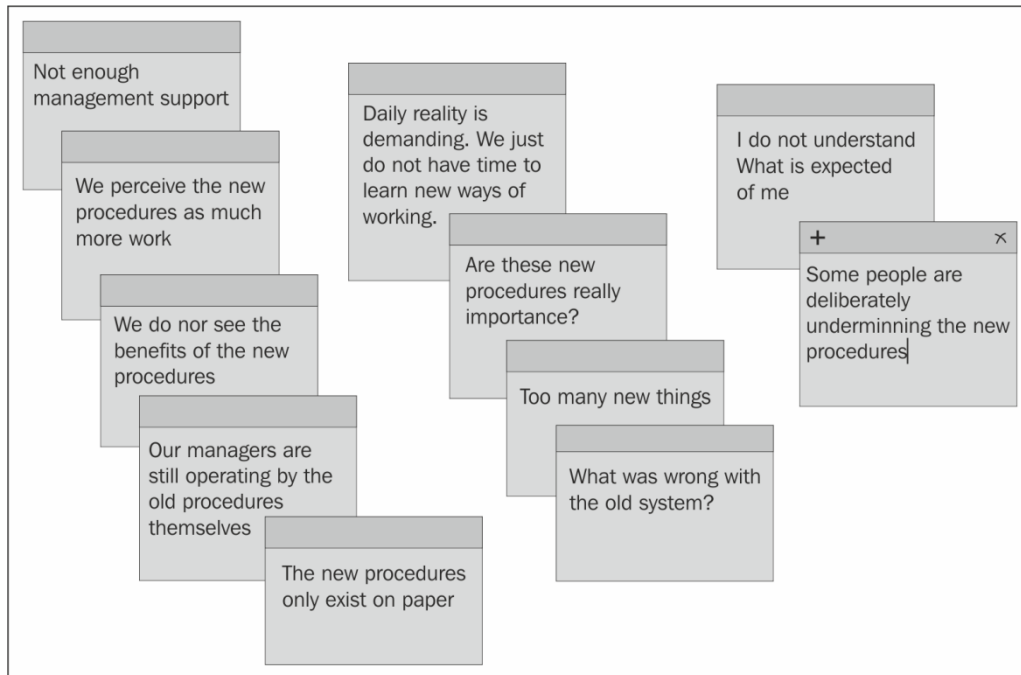


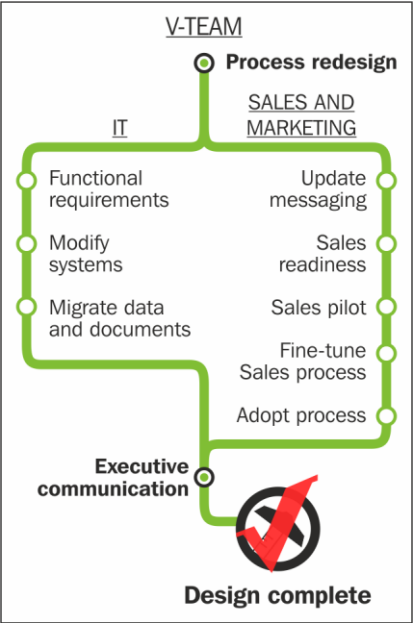
Back

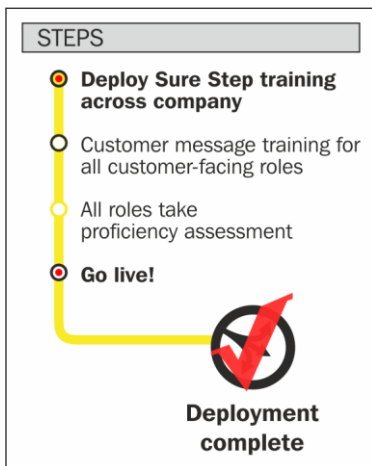
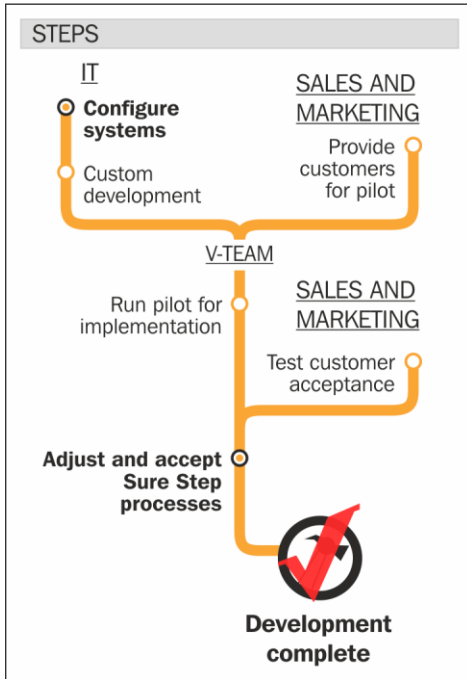
Next

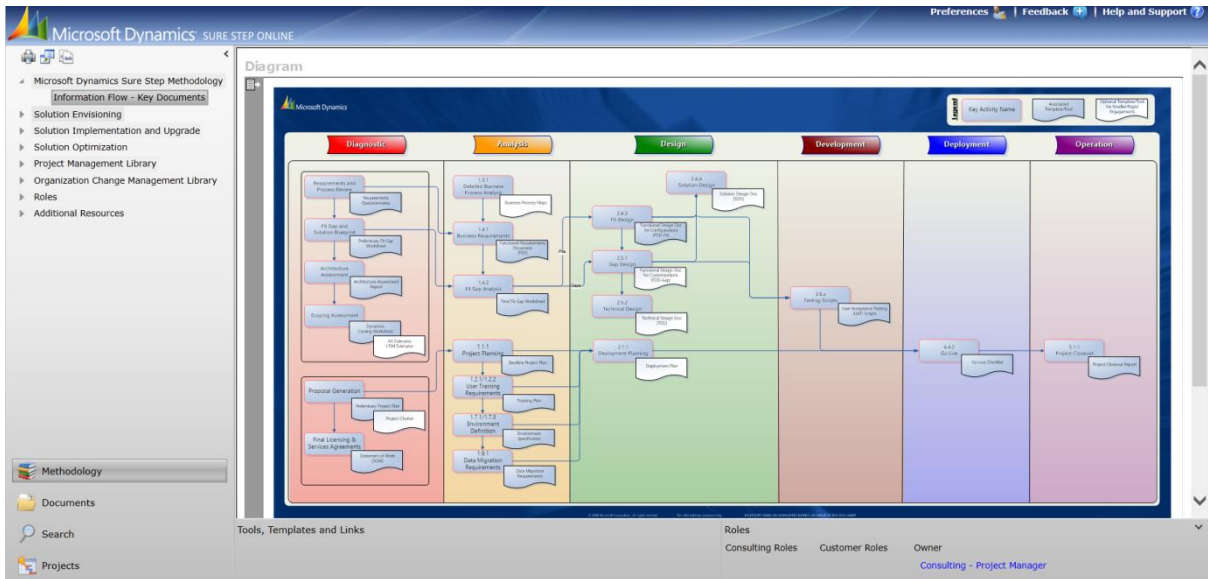
Library Tools					
Site Actions					
Browse		Documents Library			
GP IMPLEMENTATION > Sure Step Documents > All Sure Step Documents >					
Home					
Sure Step Documents	Type	Title	Name	Activity ID	Deliverable
Diagnostic Phase		ISV Requirements Questionnaire	0.02_Requirements Questionnaire_ISV <small>NEW</small>	0.02	Internal only
Analysis Phase		Fit Gap Analysis Worksheet for Microsoft Dynamics GP	0.03_Fit Gap Analysis Worksheet_Sample_GP2013 <small>NEW</small>	0.03	Client ready
Design Phase					
Development Phase					
Deployment Phase		Fit Gap Solution Blueprint Template for Microsoft Dynamics ERP	0.03_Fit Gap Solution Blueprint Template <small>NEW</small>	0.03	Client ready
Operation Phase					
Agile Preparation Phase					
Agile Execution Phase		Description of Services—	0.04.3_High Availability Disaster Recovery <small>NEW</small>	0.04.3	Client ready

Chapter 9









Sure Step

ISV Requirements Questionnaire

Role-based information
In the tables provided in this template, next to **Role**, type the role of the person from whom you are gathering information (for example, Finance Manager). In the **Question** column, enter the questions that you believe will provide the information you require to support the process. The person in the role specified at the top of the table should then provide the answers in the **Answer** column. Please add as many questions as you believe necessary to gain the appropriate level and detail of information. Two tables have been provided; if more roles are required for the information-gathering process, please copy and paste these tables and fill them in as required.

An example of a completed table, based on a CRM Business Analytics solution, follows:

Question	Answer
Are you measuring the Return on Investment (ROI) of your marketing campaigns, and using this insight to reallocate resources?	ROI presently being utilized but not to reallocate resources.
Do you know which campaigns have the highest lead conversion and opportunity close rates?	Information is available but has not been utilized.
Do you know the effectiveness of your campaigns by sales territory, by product, or by source?	Measurement performed by sales territory and product, but not by source.

ISV roles and information

Sure Step

SURE STEP

UAT Test Scenario Summary Report - By Role

UAT Test Scripts
Purpose:
Instructions:

Please use the Role-Specific Worksheet tabs to create and maintain your UAT scripts and progress. The "Summary" worksheet will automatically build a summary of all other tabs when you press the "Build Summary" button. Data in this worksheet is Read-Only.

Sure Step

SURE STEP

Costing Worksheet ISV Template

Overview of the Costing Worksheet ISV Template

Business Need:
When engaging with an ISV, it is important for the VARs and Implementation Partners to be able to accurately scope, resource, and ultimately deliver an on-time, in-budget solution. The Costing Worksheet ISV Template is designed to be used by the ISV community to pre-populate with the required information to enable the VARs and Implementation Partner to achieve this aim. ISVs are encouraged to provide as much information as possible. This Costing Worksheet Spreadsheet is used to estimate and cost the implementation of the ISV solution. The detailed Costing Worksheet should be completed prior to any work commencing with the customer.

Using the Costing Worksheet Spreadsheet

Getting started
The template is designed to be used from the last tab backward; i.e., you should fill out the last worksheet. Assumptions, first, and work backward through the remaining worksheets. Information you enter as you work toward the first worksheet of the template will be filled in automatically as you go. You should enter information only in the cells highlighted in green. All other fields and drop-down menus will populate based on the data input.

Assumptions
In this section, enter dependent variables and their requisite value.

Rates
In this section, enter relevant roles for either or all the ISV, the Partner, and the Customer. Enter the rates, such as hourly bill or daily rates for each role.

Expenses
In this section, enter expenses related to various sites on which you'll be working.

Project plan and resources
This section is designed to provide an overview of high-level project planning and task listing. In the project timeline chart provided, you can click on icons within the chart to change text or to shorten or lengthen the time it will take to complete the tasks. Tasks may also be added or deleted as required. Information should be added into the table below the chart. Information added into the week/calendar section of this table should be in days. For example, if training is going to take 5 working days in week 14, the number 5 should be entered under the heading **wk14**, in line with the training task. The cost and time required for all tasks will be summarized at the end of each row, and again in the following two worksheets. Please note. Adding time to this section of the spreadsheet will not affect the chart above the table.

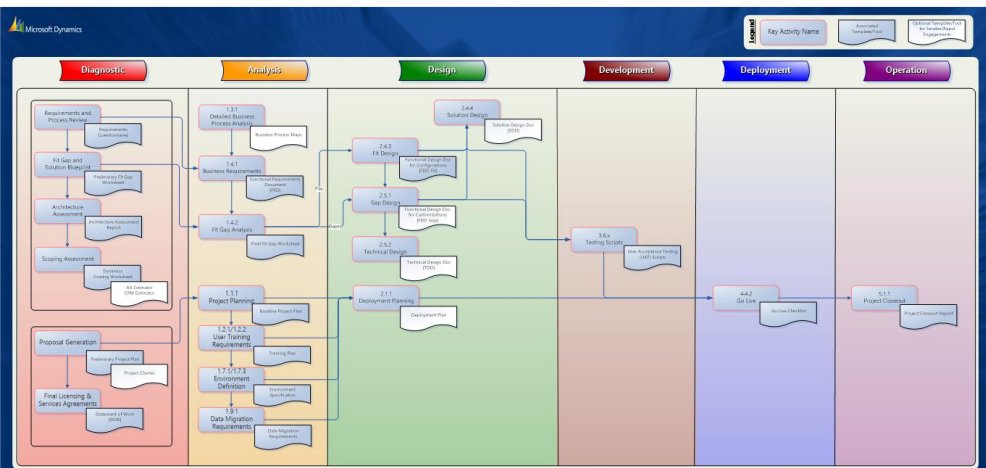
Costs by resource
In this section, select Resource from the drop-down list, and add Role information and Comments as needed. The Labour (Days) and Estimated Price will populate from the information you have added previously to give a complete overview of costs by resource.

Costs by component
In this section, enter Project Component, Description, Resource Source, and Comments. Labour Estimate (Days) and Estimate Costs will have extracted information you have added previously to give an overview of the costs by component.

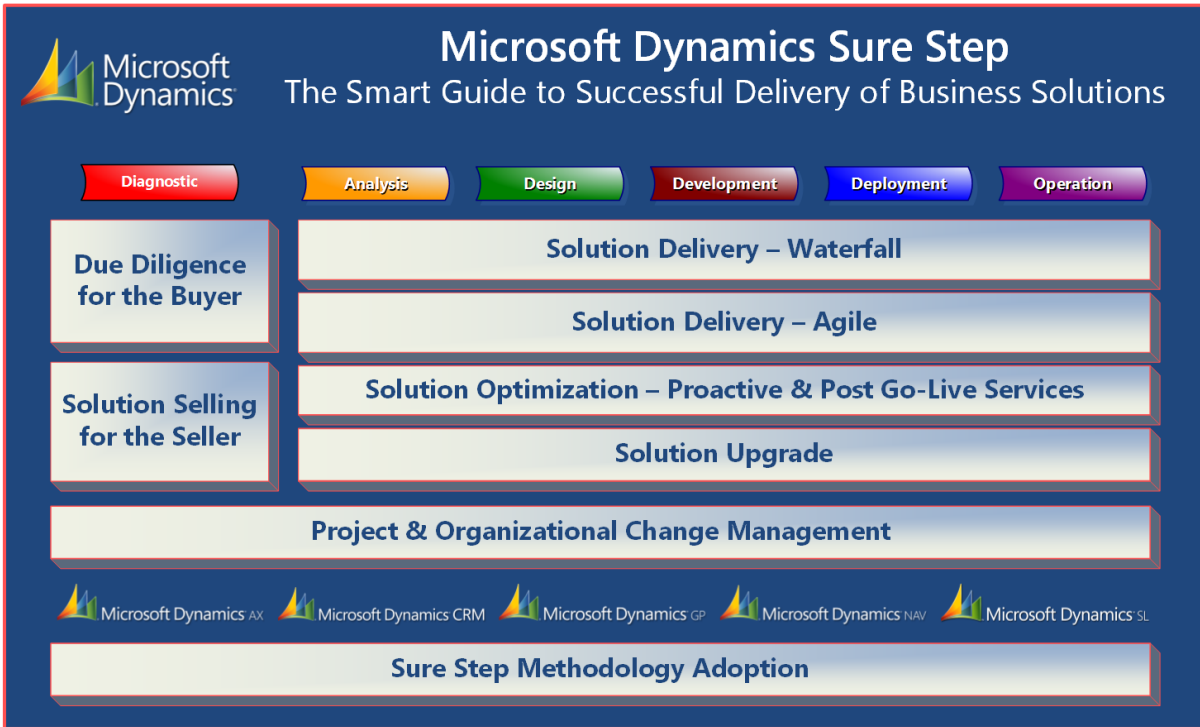
[Costing Worksheet Instructions](#) /
 [Cost Summary](#) /
 [Costs by Component](#) /
 [Costs by Resource](#) /
 [Project Plan and Resources](#) /
 [Expenses](#) /
 [Rates](#)

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 - Guidance on Project Type Selection
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Diagram



Chapter 10



Microsoft Dynamics SURE STEP ONLINE

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Microsoft Dynamics Sure Step Methodology

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- Organization Change Management Library
- Roles
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MICROSOFT DYNAMICS SURE STEP METHODOLOGY

SOLUTION ENVISIONING

Diagnostic

Solution Overview

Decision Accelerators

- Accelerated POC with CRM Online
- Requirements and Process Review
- Fit Gap and Solution Blueprint
- Proof of Concept
- Architecture Assessment
- Scoping Assessment
- Business Case

Upgrade Assessment

Proposal Generation

- Solution & Industry Capabilities
- Business Value Chain & Processes
- Project Charter & Plans
- Business Requirements & Fit Gap Analysis Templates
- Estimation & ROI Assessment Tools

SOLUTION IMPLEMENTATION & UPGRADE

Analysis | Design | Development | Deployment | Operation

Project Types

- Standard
- Rapid
- Enterprise
- Agile
- Upgrade

Case Phase Processes

- Organization > Program Management > Training > Business Process Analysis
- Solution > Requirements and Configuration > Custom Coding > Quality and Testing
- Technology > Infrastructure > Integration and Interfaces > Data Migration

SOLUTION OPTIMIZATION

- Microsoft Dynamics AX
- Microsoft Dynamics CRM
- Microsoft Dynamics GP
- Microsoft Dynamics NAV
- Microsoft Dynamics SL
- Technical Proactive Services
- Technical Post Go-Live Services
- Project Governance Services

Project Management Library

Solution: General | Product: All | Project Type: Standard | Content: English (English)

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