Dynamics 365 Migration Program: Standard Migration Assessment
Start your journey to the Cloud

A migration assessment is the first step to help you understand the value and journey to the cloud

OBJECTIVES
A migration assessment is the 1st step on your cloud journey, which helps to:

- Understand the benefits of moving from an older on-premises CRM solution to the cloud
- Identify business objectives and tie these into the functionality of Dynamics 365
- Learn how to optimize the migration process with a focus on reducing effort and costs
- Determine your next steps toward cloud transformation and have a high-level assessment of migration considerations and complexity

ASSESSMENT MAIN COMPONENTS:

1. Initiate

Customer estimated time commitment: 1 - 3 hours

In order to successfully launch the standard migration assessment it is essential the Client prepares themselves by reviewing the documentation they received in the Welcome email:

- **SMA Client Questionnaire:** We request you to fill this out prior to the Functional Demo. In the document we have provided instructions on how and who should fill out this document.

- **SMA Client Tool Instructions:** We request you to review the instructions and bring any questions you may have to the Kick-Off Meeting

- **SMA Client Roles and Responsibilities:** We request you to review the roles and their responsibilities to assist your organization through this process

Kick-Off Meeting: We will be providing an overview of the Standard Migration Assessment program and will be going over the following:

- Introduction
- Project Team, Roles and Responsibilities
- Migration Assessment Overview
- Migration Assessment Timeline
- Rated Areas, Risk Level and Sample Findings
- Actions Items and Next Steps

Assessment
Microsoft-managed assessment virtually, typically requiring 4.5 to 8 hours of a customer’s time

Workload
Microsoft Dynamics CRM

Geography
Globally available

Content/Deliverables
Final Presentation Deck
- Overall analysis of Rated Areas based on Risk Level
- What’s new in Dynamics 365 CE Online
- Overall Assessment Analysis
- Q&A time for your questions around Dynamics 365

Results and Observations
- Technical Analysis from Tool Output and SMA Client Questionnaire
A migration assessment is the first step to help you understand the value and journey to the cloud.

**ASSESSMENT MAIN COMPONENTS:**

1. **Discover**
   
   **Customer estimated time commitment: 2 - 3 hours**
   
   This component examines your current business processes and use of system components throughout your organization. This assessment is designed to understand how CRM is being utilized and the amount and complexity of existing configurations, customizations and integrations. This assessment includes:

   - **Functional Demo:** You will demo a “day in the life” use of your CRM system so we can learn how you are currently using the system.
   - **Questionnaire Follow Up:** We will be reviewing the response from the SMA Client Questionnaire to gain a better understanding of the functional and technical customizations within your environment. The goal of this meeting is to review the following:
     
     ✓ Understand in more detail your current configurations supporting your business processes.
     
     ✓ Review customizations within your environment. The goal is to assess the expected effort and identify the business dependencies involved when migrating to Dynamics 365.

2. **Analysis**
   
   **Customer Participation is Not Required**
   
   During this stage Microsoft will be using the output from the Platform Assessment Tool and response from SMA Client Questionnaire to develop an analysis of your environment and determine how it can be best leveraged in Dynamics 365.

   Microsoft will not access – nor will you provide access – to Personally Identifiable Information (PII) that is housed within your current Dynamics CRM On Premises solution.

---

**Assessment**

Microsoft-managed assessment virtually, typically requiring 4.5 to 8 hours of a customer’s time

**Workload**

Microsoft Dynamics CRM

**Geography**

Globally available

**Content/Deliverables**

Final Presentation Deck

- Overall analysis of Rated Areas based on Risk Level
- What’s new in Dynamics 365 CE Online
- Overall Assessment Analysis
- Q&A time for your questions around Dynamics 365

Results and Observations

- Technical Analysis from Tool Output and SMA Client Questionnaire
Dynamics 365 Migration Program: Standard Migration Assessment
Start your journey to the Cloud

A migration assessment is the first step to help you understand the value and journey to the cloud

ASSESSMENT MAIN COMPONENTS:

4. Review

Customer estimated time commitment: 1.5 - 2 hours

Review Results and Observations: Review results from Questionnaire Follow Up and Platform Assessment Tool on the CRM organization. Each Rated Area will be assessed as a risk of Green, Amber or Red.

Present Final Presentation results: The Final Presentation provides an in-depth analysis of the rated area and recommendations on how to address each of the areas identified.

- Review of Questionnaire Follow Up
- Review of Functional Demo
- Review of information collected using the Platform Assessment Tool
- Overall Migration Recommendation
- What's new in D365 CE Online: This is intended as a high-level overview of what's new to Dynamics 365 for upgrade clients.

Timeline and expected resource engagement

While the Microsoft-managed assessment will be performed over the course of 5 days, your total time commitment should fall between 4.5 and 8 hours. See below for further details of what is expected from start to finish.

For more information about the assessment please contact us at ask-dmp@microsoft.com
# Migration Assessment Overview

## Focus Area
- SMA Client Questionnaire
- Kick Off
- Run migration assessment tool
- Functional Demo
- Questionnaire Follow Up
- Microsoft analyzes data from Migration Assessment Tool
- Microsoft assembles the Results and Observation document and Final Presentation
- Finalize and distribute assessment results and presentation
- Recommend next steps discussion

## Customer Participants
- PM, System Admin, Solution Architect, DB Admin, Developer, CRM Owner, IT Manager
- System Admin, Solution Architect, DB Admin, Developer, CRM Owner, IT Manager
- Customer participation is not needed during this stage
- PM, System Admin, Solution Architect, DB Admin, Developer, CRM Owner, IT Manager

## Level of Customer Engagement
- Fill out SMA Client Questionnaire
- Participate in Kick-Off call
- Upload result zip file to shared location
- Lead Functional Demo
- Assist MS to gather info about business/system
- Customer engagement is not needed during this stage
- Participate in final presentation
- Provide feedback and share expectations on next steps

## Prerequisites
- Identify resources
- Make systems available to run tools
- Preview SMA Client Tool Instructions

© 2020 Microsoft Corporation. All rights reserved.
This document is for informational purposes only. MICROSOFT MAKES NO WARRANTIES, EXPRESS, IMPLIED, OR STATUTORY, AS TO THE INFORMATION IN THIS DOCUMENT. Some examples are for illustration only and are fictitious. No real association is intended or inferred.
Assessment Initiation
• Client receives Welcome Email
• Client populates SMA Client Questionnaire
• Kick-Off meeting

Discovery
• Client runs Platform Assessment Tool
• Client uploads result zip file to shared location
• Functional Demo
• Questionnaire Follow Up

Analysis
• Microsoft analyzes data from Platform Assessment Tool
• Microsoft analyzes responses from SMA Client Questionnaire
• Following documents are being assembled:
  • Results and Observations
  • Final Presentation Deck

Review
• Present the following deliverables:
  • Results and Observations
  • Final Presentation Deck
  • Overall Migration Recommendation
  • What’s New

On Premise to Online

Standard Migration Assessment

© 2020 Microsoft Corporation. All rights reserved. This document is for informational purposes only. MICROSOFT MAKES NO WARRANTIES, EXPRESS, IMPLIED, OR STATUTORY, AS TO THE INFORMATION IN THIS DOCUMENT. Some examples are for illustration only and are fictitious. No real association is intended or inferred.