

1 Workshop 1 > Kickoff and inspiration

The Kickoff and Inspiration is a 6-hour workshop where we will show and demonstrate the Dynamics 365 system. The agenda is as follows:

09:00 - Welcome and presentation

09:15 - High level Dynamics 365 Demonstration/Presentation

- Operations App
- Customer engagement
- Power BI
- PowerApps, Flow and Common Data Services

12:00 – Lunch and break

12:30 – Access to the Dynamics 365 system and additional sites

- Fast Track program, Help sites and training sites.
- Life Cycle Services
- Visual Studio Team Services
- Office 365/ Home.dynamics.com

14:30 - Discussions on focus areas and scope of this project

15:00 – Establishing local teams and responsibilities.

15:45 – Questions and Answers

16:00 – Workshop end

2 Workshop 2 > Import and setup generic parameters

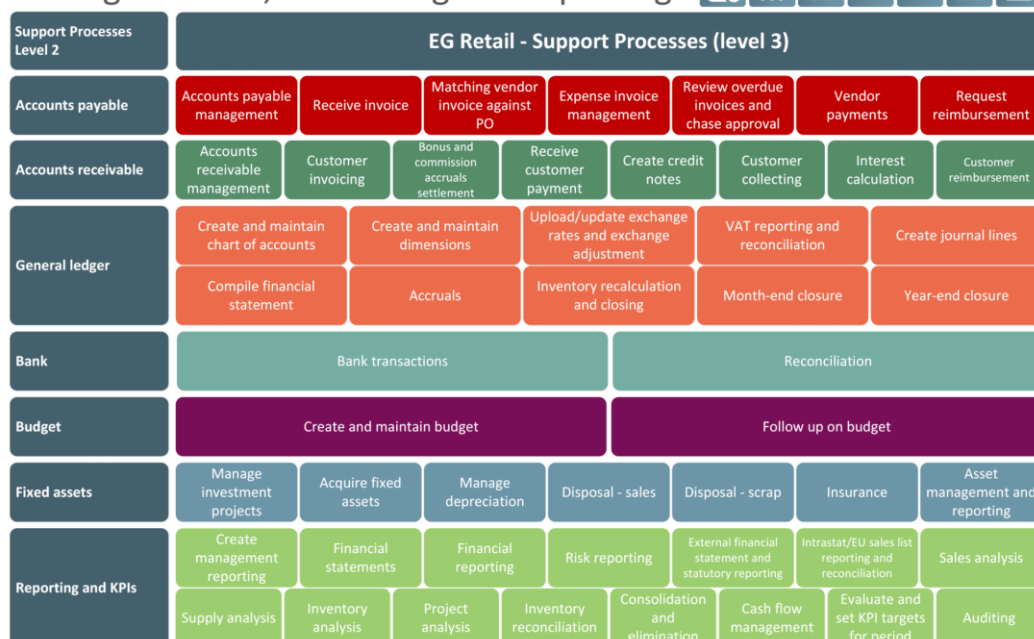
The purpose of this 6-hour workshop is to take a completely empty system, and populate with the common parameters and setup. The workshop does not have an agenda, but will be guided by a solution architect. The following setup is the objective, where parameters and generic setup data have been defined:



3 Workshop 3 > Finance processes

The purpose of this 6-hour workshop is to continue the previous workshop, but more focus on Chart of Account(COA), and importing a standard COA. The workshop does not have an agenda, but will be guided by a financial solution architect. In addition, some financial dimensions are defined. The processes discussed in this workshop is covering these main processes.

Manage finance, controlling and reporting



Some basic default management reports will also be defined. Based on the processes, a Work breakdown structure(WBS) will be defined in VSTS

Work Item Type	Title
Epic	Manage Finance, controlling and reporting
Feature	Account payable
Feature	Account receivable
Feature	General ledger
Feature	Create legal entities and organizational hierarchies
Feature	Create and maintain chart of accounts
Feature	Create and maintain dimensions
Feature	Upload/update exchange rates
Feature	VAT reporting and reconciliation
Feature	Create Journal lines
Feature	Compile financial statement
Feature	Accruals
Feature	Inventory recalculation and closing
Feature	Month end closure

4 Workshop 4 > Build high-level learn/try backlog

The purpose of this 6-hour workshop is to define a learn/try backlog in the Visual Studio Team Services (VSTS). This means that we will import the onboarding models, scaled down vertical value chain models, and also create a site for recording requirements that needs to be covered in throughout the project. The following processes are discussed in this workshop

Operating Processes Level 1	EG Retail - Operating Processes (level 2)					
Category management	Category management	Assortment management	Commercial terms, sales	Campaign management	Space management	
Planning and procurement	Sourcing	Vendor management	Planning and optimisation	Procure items	Store order management (HQ)	
Warehouse and distribution	Manage warehouse	Receipt of goods	Pick and pack	Load and ship	Transport optimisation	
Store and headquarters	Store inventory management	POS front-end	Store back office	Support (stores)	Set up new store	Franchise management
OMNI channels	Build customer awareness	Impact customer consideration	Impact customer evaluation	Sales and customer service	After sales	Loyalty and market intelligence

Based on the processes, a Work breakdown structure(WBS) will be defined in VSTS.

Order	Work Item Type	ID	Title
5	Epic	1548	EG WBS Retail/POS processes
	Epic	1550	Category processes
	Feature	1551	Category Management
	Feature	1553	Define categories
	Feature	2921	Segment categories
	Requirement	1884	Retail product hierarchy
	Task	1941	Create Product Hierarchy
	Task	1942	Approve Product Hierarchy
	Requirement	1903	Retail navigation hierarchy
	Requirement	1904	Retail supplemental hierarchy
	Feature	1555	Category policies
	Feature	1557	Assortment Management
	Feature	1564	Commercial terms and sales
	Feature	2926	Campaign Management
	Epic	1585	Planning and Procurement processes
	Epic	1627	Logistics and back-office processes
	Epic	2987	Store and front-end processes
	Epic	1653	OMNI channels processes

The workshop does not have an agenda, but will be guided by a solution architect.

5 Workshop 5 > Define learning plan and start learning

The purpose of this 6-hour workshop is to define a learning plan per project participant. There will be a list of training materials and videos that each participant need to follow, and to learn the system and processes associated. The workshop does not have an agenda, but will be guided by a solution architect. For each role and participant a learning plan will be defined, that is connected to the more than 200 Microsoft e-learning sessions.

Course	Course Name	Type
80956	Retail Basic Architecture and Navigation in Microsoft Dynamics 365 for Operations	Retail
80958	Retail Channels in Microsoft Dynamics 365 for Operations	Retail
80959	Retail Core Prerequisite Configuration and Parameters in Microsoft Dynamics 365 for Operations	Retail
80961	Retail Payment Management in Microsoft Dynamics 365 for Operations	Retail
80963	Retail POS Design in Microsoft Dynamics 365 for Operations	Retail
80964	Retail Workers and Security in Microsoft Dynamics 365 for Operations	Retail
80965	Loyalty Management for Retail in Microsoft Dynamics 365 for Operations	Retail
80962	Retail POS Setup in Microsoft Dynamics 365 for Operations	Retail
80966	Retail Gift Cards in Microsoft Dynamics 365 for Operations	Retail
80967	Retail IT Functions and Configuration in Microsoft Dynamics 365 for Operations	Retail
80968	Retail Reporting in Microsoft Dynamics 365 for Operations and Inquiries	Retail
80970	Workflow Configuration for Retail in Microsoft Dynamics 365 for Operations	Retail
80969	End of Day Operations for Retail in Microsoft Dynamics 365 for Operations	Retail
80973	Retail Barcodes and Labels in Microsoft Dynamics 365 for Operations	Retail
80988	Call Center Configuration in Microsoft Dynamics 365 for Operations	Retail
80989	Basics of Catalogs for Call Centers in Microsoft Dynamics 365 for Operations	Retail
80971	Retail Units of Measure in Microsoft Dynamics 365 for Operations	Retail
80972	Using Product Variants for Retail in Microsoft Dynamics 365 for Operations	Retail
80974	Retail Category Hierarchies in Microsoft Dynamics 365 for Operations	Retail
80975	Released Products and Catalogs in Microsoft Dynamics 365 for Operations	Retail
80976	Retail Assortments in Microsoft Dynamics 365 for Operations	Retail
80977	Modes of Delivery for Retail in Microsoft Dynamics 365 for Operations	Retail
80979	Retail Vendor Catalogs in Microsoft Dynamics 365 for Operations	Retail
80980	Replenishment Setup for Retail in Microsoft Dynamics 365 for Operations	Retail
80978	Retail Pricing and Discounts in Microsoft Dynamics 365 for Operations	Retail
80981	Replenishment Processing for Retail in Microsoft Dynamics 365 for Operations	Retail
80982	Retail Product Kits in Microsoft Dynamics 365 for Operations	Retail

6 Workshop 6 > Summary Report

The purpose of this 6-hour workshop is to create a summary report of this project, and where each project team member is presenting their findings to the entire team. Based on the feedback, a Work breakdown structure(WBS) will be defined in VSTS. The summary report workshop represents the ending of this project, and hopefully also the start of a main implementation project.