



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



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ASSESSMENT MAIN COMPONENTS:



2. 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.



3. 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.



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ASSESSMENT MAIN COMPONENTS:



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.

Area	GREEN	AMBER	RED
Environment	There is a low level of complexity.	There is a moderate level of complexity that may require additional effort for online.	There is a high level of complexity that will require additional effort for online.
Workstations	The workstation setup is ready for online.	The workstation setup needs a moderate amount of updates for online.	The workstation setup needs a high number of updates for online.
Configurations	There is a low amount of configurations and complexity.	There is a moderate amount of configurations and complexity, the configurations may need to be updated for online.	There is a high amount of configurations and complexity that need to be updated for online.
Infrastructure	There is a low level of complexity with infrastructure to move online.	There is a moderate level of complexity with infrastructure to move online.	There is a high level of complexity with infrastructure to move online.
Integrations	There is a low amount of integrations and complexity.	There is a moderate number of and require more complex update scenarios.	
Database	There is a low amount of custom tables, data and user/team complexity.	There is a moderate number of custom data that require more complex scenarios.	
Processes	There is a low amount of processes and complexity.	There is a moderate amount of process complexity that may need to be updated for online.	
Custom Code	There is little to no custom code in the application. Plugins are sandboxed.	There is a moderate amount of custom JavaScript. The code may require optimization for online. Plugin-asset sandboxed.	
Reports	There are little to no custom SSRS reports.	There is a moderate amount of custom reports that need to be assessed/refactored.	
Security	There is a low amount of complexity in moving security structure to online.	There is a moderate amount of complex security structure to online.	
Solutions (SV, 3rd Party Managed) Etc.	There is a low amount of solutions that will need updated for online.	There is a moderate amount of solutions to be updated/evaluated for online.	

Total	Risk Level	Observation
1	RED	• You should plan to complete any in-progress work well before the actual migration efforts begin. Please consider that any in-progress work may be able to be accomplished differently/more easily after the upgrade to the cloud.
3	AMBER	• CRM 2013 will undergo three upgrades to get to version 9.0 • Many of the new features of D365 replace the need for external batch processes, further discussion and analysis is needed to determine how to accomplish. • On December 1, 2020, the legacy web client will no longer be available to online organizations. Organizations should make the transition to the Unified Interface as soon as possible to take advantage of Microsoft's ongoing investments in reliability, performance, and functionality.
4	GREEN	• Performance tuning recommendations frequently configured by on-premise customers is handled by Microsoft engineers with the move to the cloud. • Migrations to the cloud typically occur over the weekend to minimize system downtime during normal business operating hours. Additional planning for system downtime is recommended to ensure minimal impact to your business. • Client has a development environment • Client's Testing Environment is closest to their Production Environment

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



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Migration Assessment Overview





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

Standard Migration Assessment