

Dynamics 365 Migration Program Standard Migration Assessment

Start your cloud journey by analysing your on-premises solution and cloud migration options



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

- Understand the benefits of moving from on-premises to the cloud
- Identify business objectives and tie these into the functionality of Dynamics 365
- Optimize the migration process by reducing effort and costs
- Determine your next steps toward cloud transformation

Assessment main components



1. Initiate

Customer time commitment: 1 - 3 hours

For a successfully Standard Migration Assessment launch, the customer should prepare in advance by following instructions in the welcome email:

- Fill out the SMA client questionnaire prior to the functional demo
- **Review SMA client tool instructions** and ask questions during the kick-off meeting
- **Review SMA client roles and responsibilities** to assist your organization through this process

Kick-off meeting will cover 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



Workload

Microsoft Dynamics CRM



Virtual assessment

Microsoft-managed assessment, typically requiring 4.5 to 8 hours of a customer's time over the course of 5 days



Geography

Globally available



Deliverables

Final presentation deck

- Overall assessment analysis of areas based on risk level
- What's new in Dynamics 365 Customer Experience

Results and observations

 Technical analysis from tool output and SMA client questionnaire





2. Discover

Customer time commitment: 2 - 3 hours

This component examines your current business processes and use of Dynamics CRM system components throughout your organization to understand the complexity of existing configurations, customizations and integrations. From here, we can assess the expected effort and identify the business dependencies involved when migrating to Dynamics 365. This component includes:

Functional demo: Customer will demo a "day in the life" use of your Dynamics CRM system so we can learn how you are using the system

Questionnaire follow up: We will review the SMA client questionnaire responses to understand of the functional and technical customizations within your environment.



3. Analysis

Customer participation 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

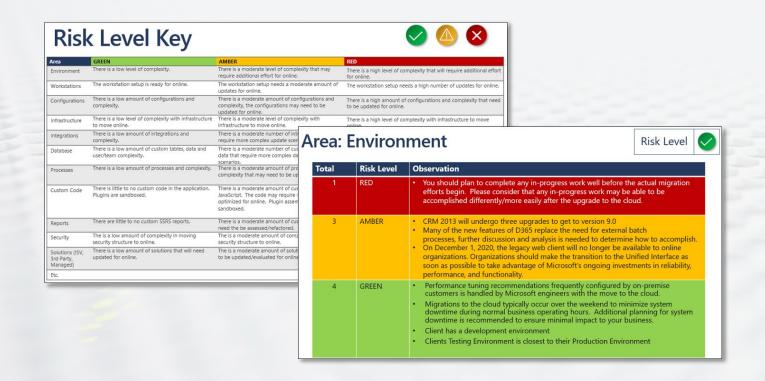
4. Final presentation



Customer time commitment: 1.5 - 2 hours

Present results and observations to provide an in-depth analysis and recommendations on addressing each identified area. Areas are ranked on a risk level of Green, Amber or Red. The final presentation will include reviews of:

- ✓ Questionnaire follow up
- ✓ Functional demo
- ✓ Information collected using the platform assessment tool
- ✓ Overall migration recommendation
- ✓ What's new in Dynamics 365 Customer Experience online on a high-level



Migration assessment process

