

Dynamics 365 Migration Program

Standard Migration Assessment

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

Objectives

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

Risk Level Key			
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 integrations that require more complex update scenarios.	There is a high amount of integrations and complexity that 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 tables, data and user/team complexity.	There is a high amount of custom tables, data and user/team complexity.
Processes	There is a low amount of processes and complexity.	There is a moderate amount of processes and complexity that may need to be updated for online.	There is a high amount of processes and 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 code in the application. The code may require updates for online. Plugin assembly is sandboxed.	There is a high amount of custom code in the application. The code may require updates for online. Plugin assembly is not sandboxed.
Reports	There are little to no custom SSRS reports.	There is a moderate amount of custom reports that need to be assessed/refactored.	There is a high 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 complexity in moving security structure to online.	There is a high amount of complexity in moving security structure to online.
Solutions (ISV, 3rd Party, Managed)	There is a low amount of solutions that will need updated for online.	There is a moderate amount of solutions that will need updated/evaluated for online.	There is a high amount of solutions that will need updated/evaluated for online.
Etc.			

Area: Environment

Risk Level

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	<ul style="list-style-type: none"> • 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	<ul style="list-style-type: none"> • 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

Migration assessment process

