

# FastTrack for Dynamics 365

Accelerate Customer Success

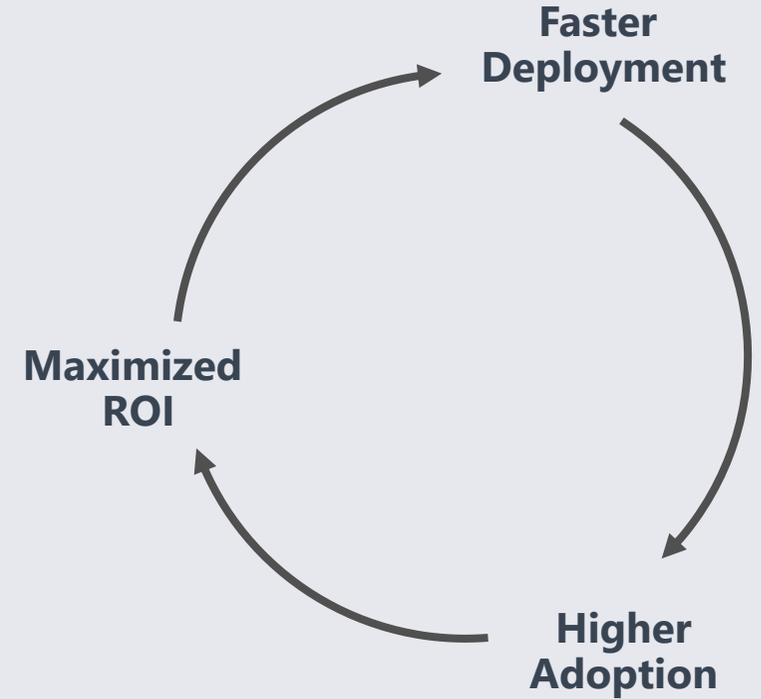
Includes new services for FY18 Q4



# Microsoft FastTrack

Our customer success service for the Microsoft Cloud

- Ongoing and repeatable benefit included in your purchase
- Online resources and tools available to all customers
- Assistance and guidance by Microsoft engineers and partners
- Onboarding, migration, user adoption, and devices management
- Available for Microsoft cloud services
- New service “previews” will be available as they are introduced to the program



[FastTrack.microsoft.com](https://FastTrack.microsoft.com)

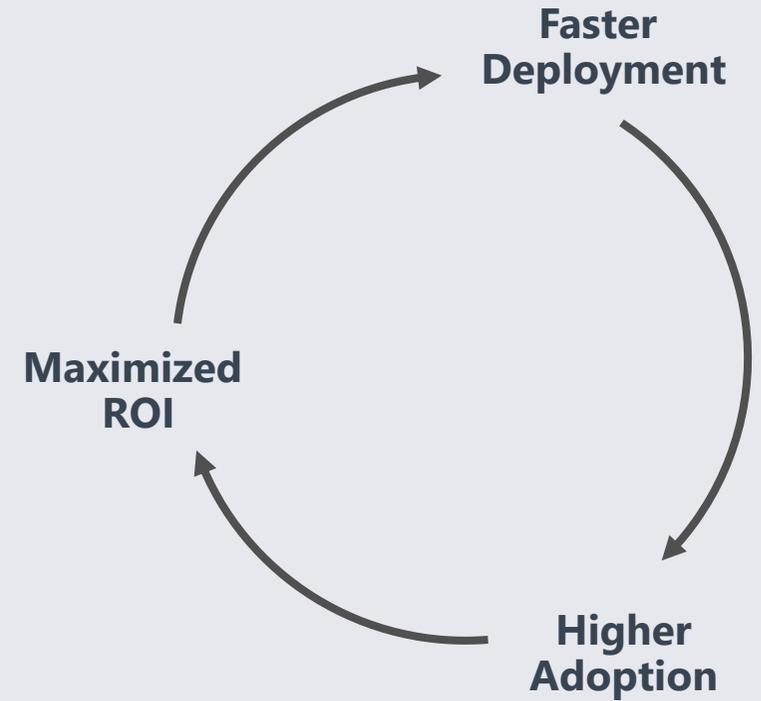
# Microsoft FastTrack for Dynamics 365

Onboarding and adoption assistance

Dynamics 365 for Sales, Customer Service, Field Service, Project Service Automation Service, Finance and Operations, and Talent

- For all eligible customers
- Technical talks, workshops, and regular touchpoints
- Direct Microsoft engineering engagement
- Delivered remotely by time zone-based engineers in the Americas, EMEA, and APAC

See the “What’s new?” section for new FastTrack for Dynamics 365 services in FY18 Q4



[FastTrack.microsoft.com/Dynamics](https://fasttrack.microsoft.com/Dynamics)

# What you can expect from FastTrack for Dynamics 365

## FastTrack benefits include...

- Implementation guidance, including tools and processes
- Onboarding, adoption, and migration guidance and assistance
- Architectural and technical guidance
- Customized workshops to review project milestones
- Technical talks on best practices for technical subjects
- Product roadmap and related feedback loop

## Customers and partners own...

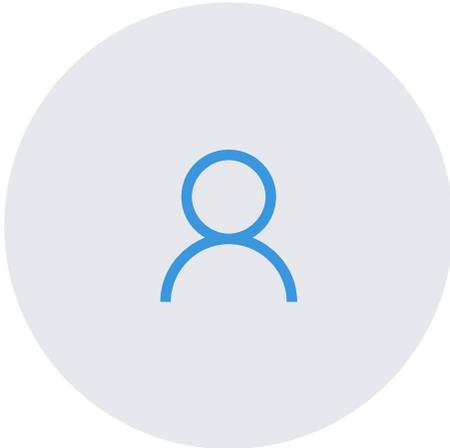
- Overall program and project management
- Implementation activities, including design, development, etc.
- Data migration, security roles setup, and user trainings
- Application setup, configuration, and customization
- Product assistance and user support
- Communications and trainings to drive service adoption

What does FastTrack  
for Dynamics 365 offer?



# Envision

Define your vision, identify and prioritize business scenarios, and collaborate with key stakeholders to plan for successful rollouts at your own pace.



Identify key stakeholders



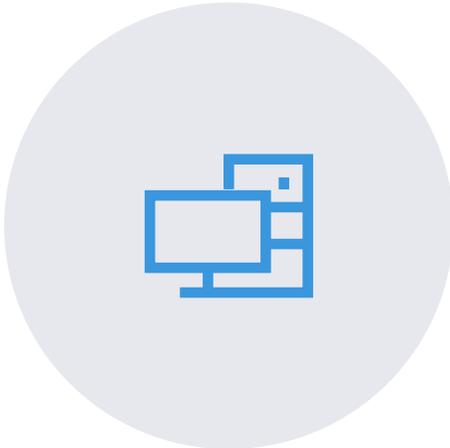
Define your vision and business scenarios



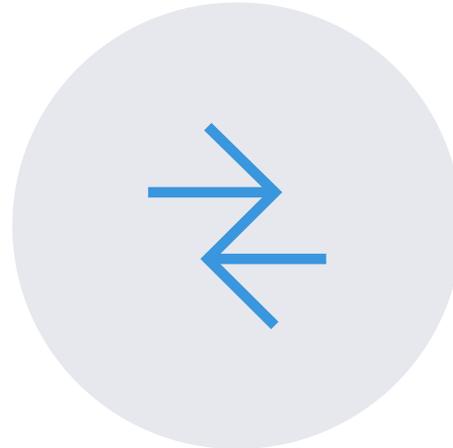
Plan for a successful rollout

# Onboard

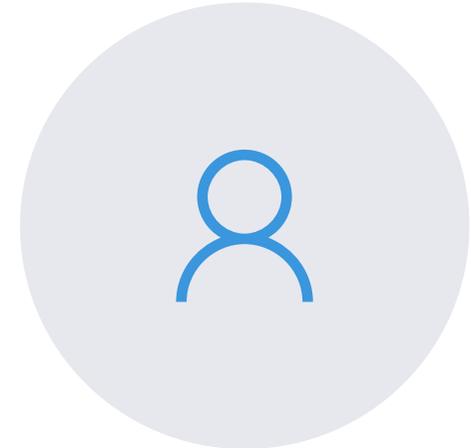
Confidently onboard new users and capabilities with remote assistance from Microsoft engineers committed to guide your IT team and partner.



Prepare your technical infrastructure



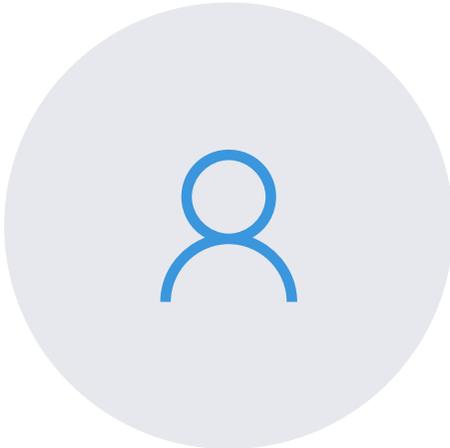
Ensure a smooth migration experience



Enable new users and capabilities

# Drive value

Generate more value with resources available to help your teams and partner drive user adoption across your organization; and prepare for and manage change.



Boost user engagement  
and drive adoption



Manage and prepare  
for change



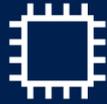
Measure success,  
learn, and iterate

# What FastTrack for Dynamics 365 offers



During FastTrack engagements, the FastTrack Center will offer customers opportunities to participate in learning sessions, attend workshops to contribute to a successful onboarding, and engage in regular touchpoints.

## The key to your success



### Technical talks

Technical talks are focused on providing technical depth and best practices to empower their team with more knowledge specific to the subject areas. These talks often provide overviews of available tooling and/or content.



### Workshops

Workshops are interactive, outcome-based, and may involve automation and tooling. Customers and partners have the opportunity to provide input prior to the workshop and this is customized for their project.



### Regular touchpoints

These touchpoints are a core part of the FastTrack service offerings. These are typically quick 30-minute calls that continue throughout the duration of the project. Small technical proof points are sometimes provided to help remove customer roadblocks.

# FastTrack migration services overview

On-Premises

Cloud

CRM 2011  
CRM 2013  
CRM 2015

Migration Service

Dynamics 365  
Customer  
Engagement  
apps

AX 2009

Data Migration Service

AX 2012 R3  
AX 2012 R2

Upgrade Service

Dynamics 365  
for Finance and  
Operations app



Tools &  
Resources



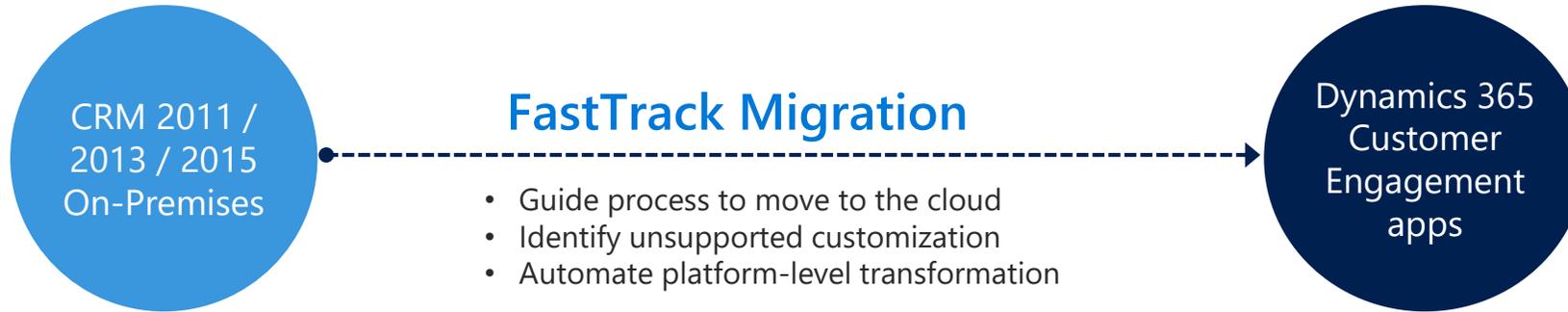
Methodology  
& Processes



Guidance &  
Best Practices

# FastTrack migration service

CRM 2011/2013/2015 to Dynamics 365 Customer Engagement apps



## Migration Tool

### Will cover

- Database migration (does not support SQL 2014 and above)
- Managed solution migration
- Audit log migration
- User and personal setting migration
- Validate the CRM database for unsupported changes

### Will not cover

- CRM upgrade issues; upgrade is a multi-step process
- Selective data migration
- Fixing any flagged security or upgrade issues
- 3rd-party integration (reconfiguration)

## FastTrack Migration Service

### Will cover

- Provide assistance for end-to-end migration
- Guide project team to remove roadblocks
- Enable migration and post completion steps
- Assist in go-live activities
- Support driving user adoption post go-live

### Will not cover

- Perform prerequisite activities
- Resolve the issues found throughout the process
- Perform all migration, go-live and post go-live activities
- Acquire Azure subscription and Dynamics 365 licenses for migration purpose



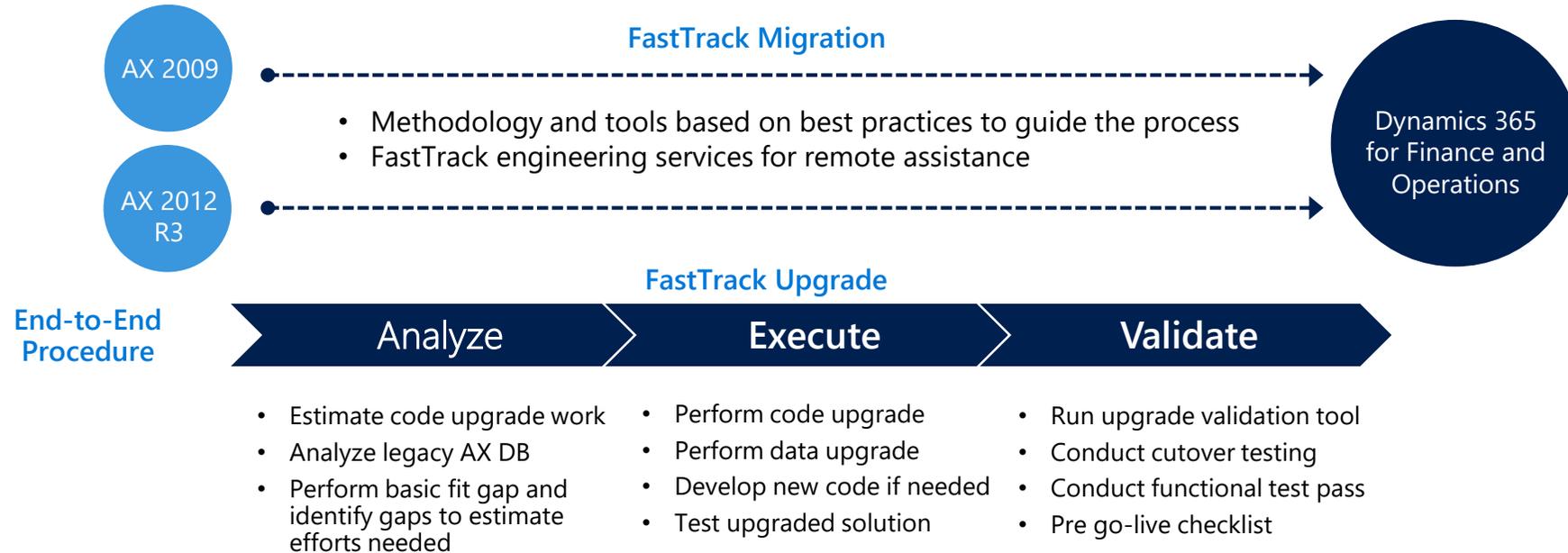
Migration Services

Migrate your on-premises CRM to Dynamics 365 customer engagement apps using the latest migration tool and with the guidance and best practices offered by FastTrack engineering team through Migration Services

For customers with 250+ seats

# FastTrack migration service

AX 2012 R3 to Dynamics 365 for Finance and Operations app



Migration / Upgrade Services

## What we can assist with...

- Migration/upgrade planning workshop
- Bi-weekly touchpoints
- Guidance on how to analyze legacy AX code and data to estimate migration/upgrade effort
- Guidance on how to plan migration/upgrade project
- Provide tech talks and documentation on migration/upgrade topics
- Guidance on best practices for optimizing final cutover time

## What we are not...

- Performing any migration/upgrade tasks
- A solution for a partner's lack of bandwidth
- Pre-sales demo for upgrade (use TechTalk)
- Staff augmentation to fill resource capacity
- Experts to analyze functional validity of ISV or customization
- Help with data quality issues

Move on-premises AX to Dynamics 365 for Finance and Operations using the latest methodology and tooling, and with the guidance and best practices offered by FastTrack engineering team through upgrade services

# What's new?



# FastTrack for Dynamics 365: What's new

Where we are now



Horizontal and Vertical Service Expansion

\* In preview and available to selected customers

# FY18 Q4: FastTrack new services for Finance & Operations and Talent

Dynamics 365 for Finance and Operations and Talent

## FastTrack for On-Premises

FastTrack for Dynamics 365 On-Premises for Finance & Operations is a new service designed to help customers with architectural guidance, tools and processes for implementing Dynamics 365 Finance and Operations On-Premises.

This includes:

- Providing guidance on choosing between On-Premises vs Cloud deployment options
- Providing guidance on sizing
- Providing guidance on deployment
- Providing best practices on performance tuning
- Product roadmap and related feedback loop into Dynamics engineering teams

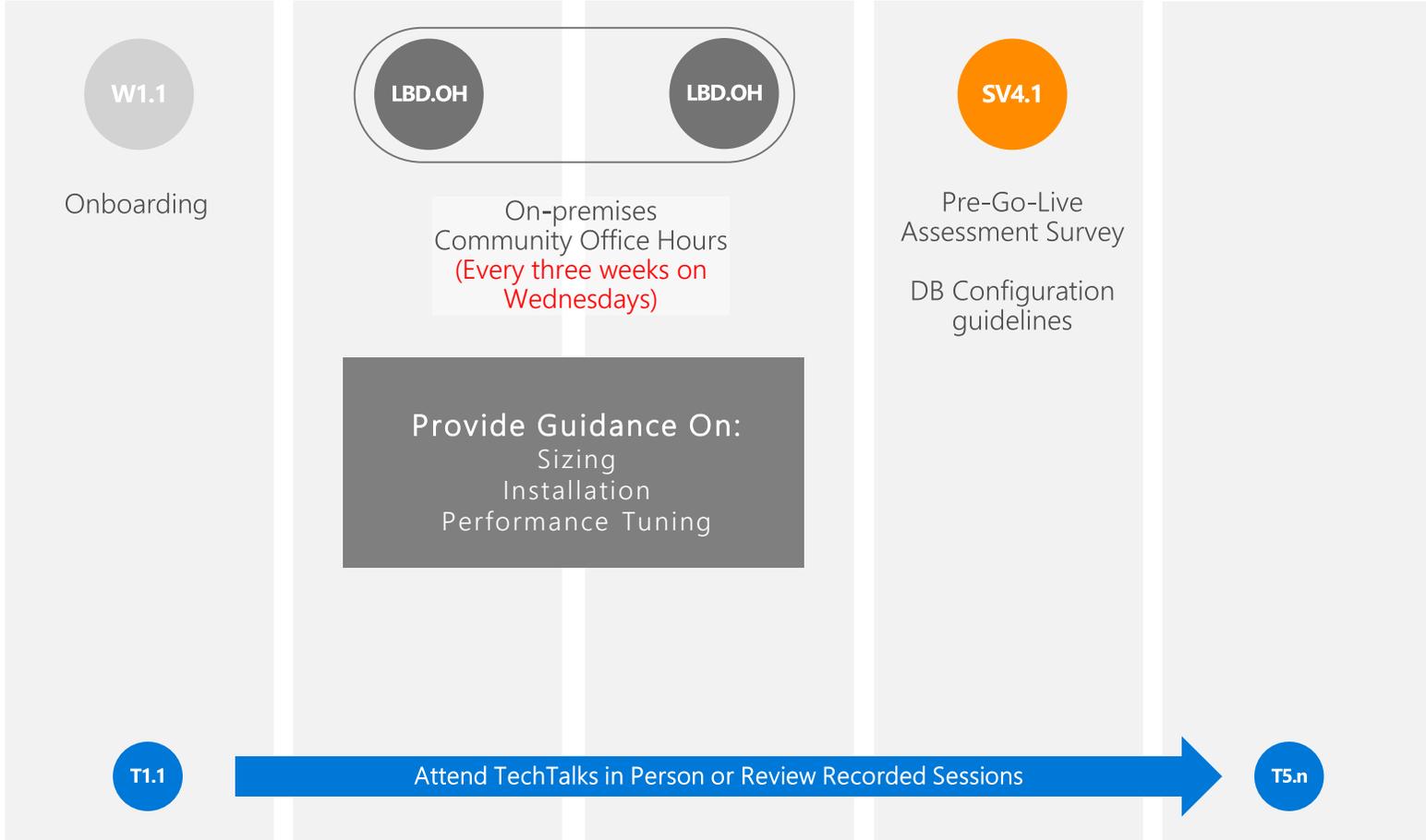
## FastTrack for Dynamics 365 for Talent

FastTrack for Dynamics 365 for Talent is a new service designed to help customers with architectural guidance, tools and processes for implementing Dynamics 365 for Talent.

This includes:

- Architectural and technical guidance through regular touch points
- Workshops to review Solution areas and provide guidance per project needs
- Technical Talks for deeper technical guidance on specific topics
- Product roadmap and related feedback loop into Dynamics engineering teams

# FastTrack service: On-Premises for Finance & Operations



### LEGEND

- T** Tech Talk
- W** Workshop
- SV** Service
- LBD** Office hour

### TECHTALKS

- 1.1 Onboarding
- 4.1 Pre Go-live
- 5.n Post Go-live
- OH Office Hours

For a detailed service description, please [visit our site](#).

# FastTrack for Dynamics 365 offering

## FastTrack for Dynamics 365 for Talent

As part of core FastTrack engagements, FastTrack center will provide you with guidance based on project need.

These topics are subject to change.

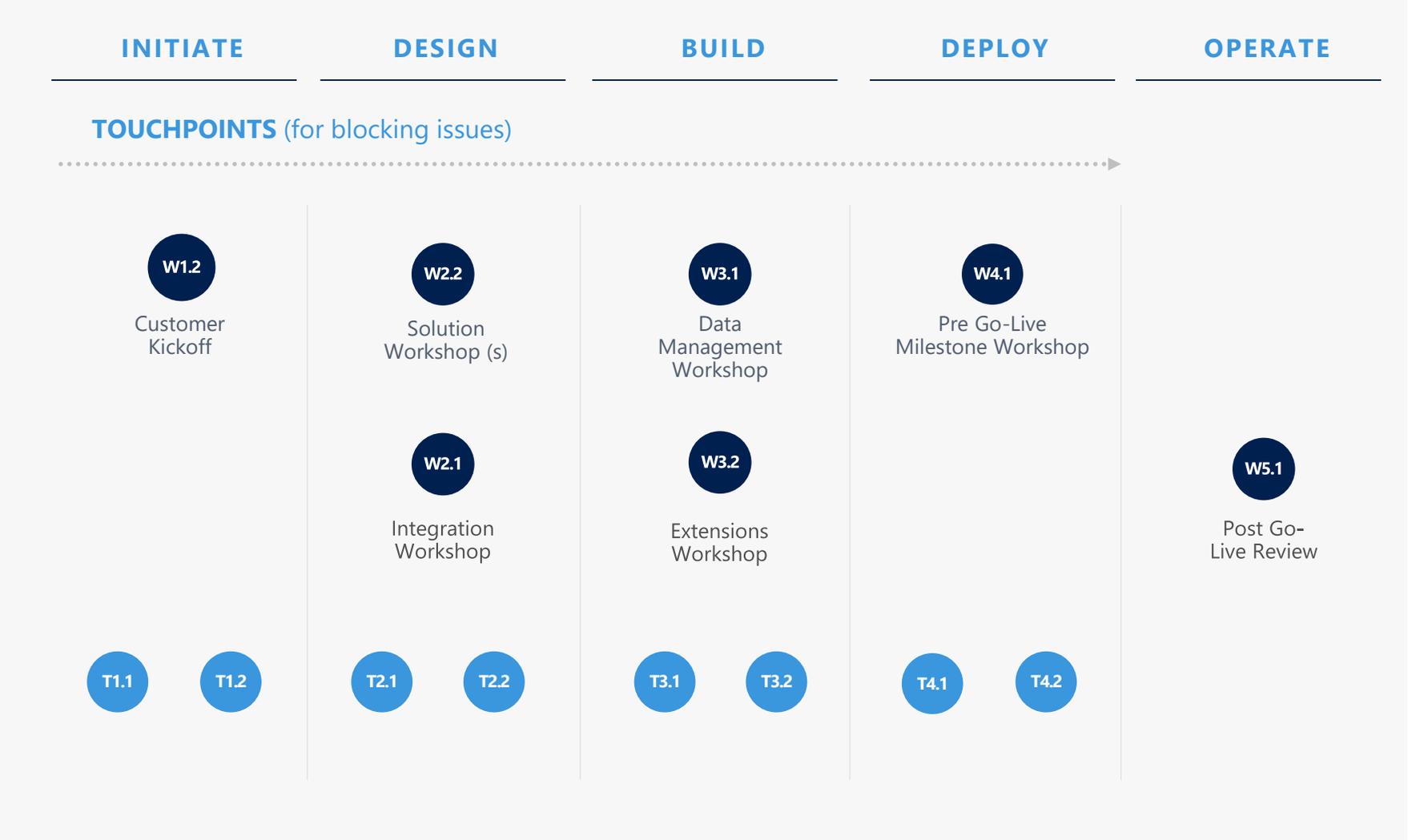
### LEGEND

**T** Tech Talk      **W** Workshop

### TECHTALKS

- |                                   |  |
|-----------------------------------|--|
| <b>1.1</b> Talent Architecture    | <b>2.1</b> Integration with Finance & Operations       |
| <b>1.2</b> Environment Management | <b>2.2</b> Integration with 3 <sup>rd</sup> Party Apps |
| <b>3.1</b> Data Migration         | <b>4.1</b> Go-Live Readiness                           |
| <b>3.2</b> Dev ALM/Extensions     | <b>4.2</b> Servicing                                   |

*# Tech Talks topics will be added on a regular basis based on customer/partner feedback*



# FY18 Q4: FastTrack services updates for Customer Engagement

CRM 2011/2013/2015 to Dynamics 365 Customer Engagement apps

## Portal Workshop

Dynamics 365 for Customer Engagement Portals Tech Talk and Workshop is designed to help customers with an overview on the Dynamics 365 portals offering and platform. Providing a deeper guidance and best practices on:

- What are the different types of Portal templates that can be deployed for easier configuration and customization.
- How the deployment for portals is done and managed.
- Discussion on basic customization.
- An overview of the identity and access of Dynamics 365 records through Dynamics 365 portals technology.

## Mobile Tech Talk

Dynamics 365 for Customer Engagement Mobile Tech Talk and Workshop was developed to provide customers with a detailed overview of features and usage for the Dynamics 365 Mobile App. Guidance and best practices will be provided for the following areas:

- An overview of the Mobile App.
- Mobile strategy - what should be considered before deciding to go mobile.
- Setup and configuration of the Mobile App.
- Discussing the Mobile Security options and differences between them.
- Summary of the key takeaways and what should be considered for each stage of the deployment.

Getting  
started



# Eligibility

	App and Plan	Seats	FastTrack Service and Content			
			Technical Talks	Workshops	Regular Touchpoints	Dedicated FastTrack Engineering Resources
<b>Customer Engagement</b>	<ul style="list-style-type: none"> <li>Dynamics 365 for Sales</li> <li>Dynamics 365 for Field Service</li> <li>Dynamics 365 for Customer Service</li> <li>Dynamics 365 for Project Service Automation</li> <li>Dynamics 365 Customer Engagement Plan</li> <li>Dynamics 365 Plan with a commitment to implement Sales, Field Service, Customer Service or Project Service Automation apps</li> </ul>	250 or more combined eligible app and/or plan user SLs	All included	All included	All included	Included
<b>Unified Operations</b>	<ul style="list-style-type: none"> <li>Dynamics 365 for Finance and Operations</li> <li>Dynamics 365 Unified Operations Plan with the commitment to implement Finance and Operations app</li> </ul>	150 or more combined eligible app and/or plan user SLs, and/or equivalent	All included	All included	All included	Included
		20-149 combined eligible app and/or plan user SLs, and/or equivalent	All included	Pre go-live milestone workshop	Not included	Not included
<b>Talent</b>	<ul style="list-style-type: none"> <li>Dynamics 365 for Talent</li> <li>Dynamics 365 Unified Operations Plan with the commitment to implement Talent</li> </ul>	150 or more combined eligible app and/or plan user SLs, and/or equivalent	All included	All included	All included	Included

# What you can do

Get on the road to success



Learn more about FastTrack for Dynamics 365 at <http://fasttrack.microsoft.com/dynamics> and <https://aka.ms/ftdynamicsvideo>



Contact your Microsoft team or partner

- For any questions
- To get nominated

Questions

[ftdynamics@microsoft.com](mailto:ftdynamics@microsoft.com)



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# Appendix



# FastTrack for Dynamics 365

## Customer Engagement

- Sales
- Customer Service
- Field Service
- Project Service Automation

## Finance and Operations

## Talent



# FastTrack for Dynamics 365 for Customer Engagement



# FastTrack for Dynamics 365 offering

## FastTrack for Dynamics 365 Customer Engagement

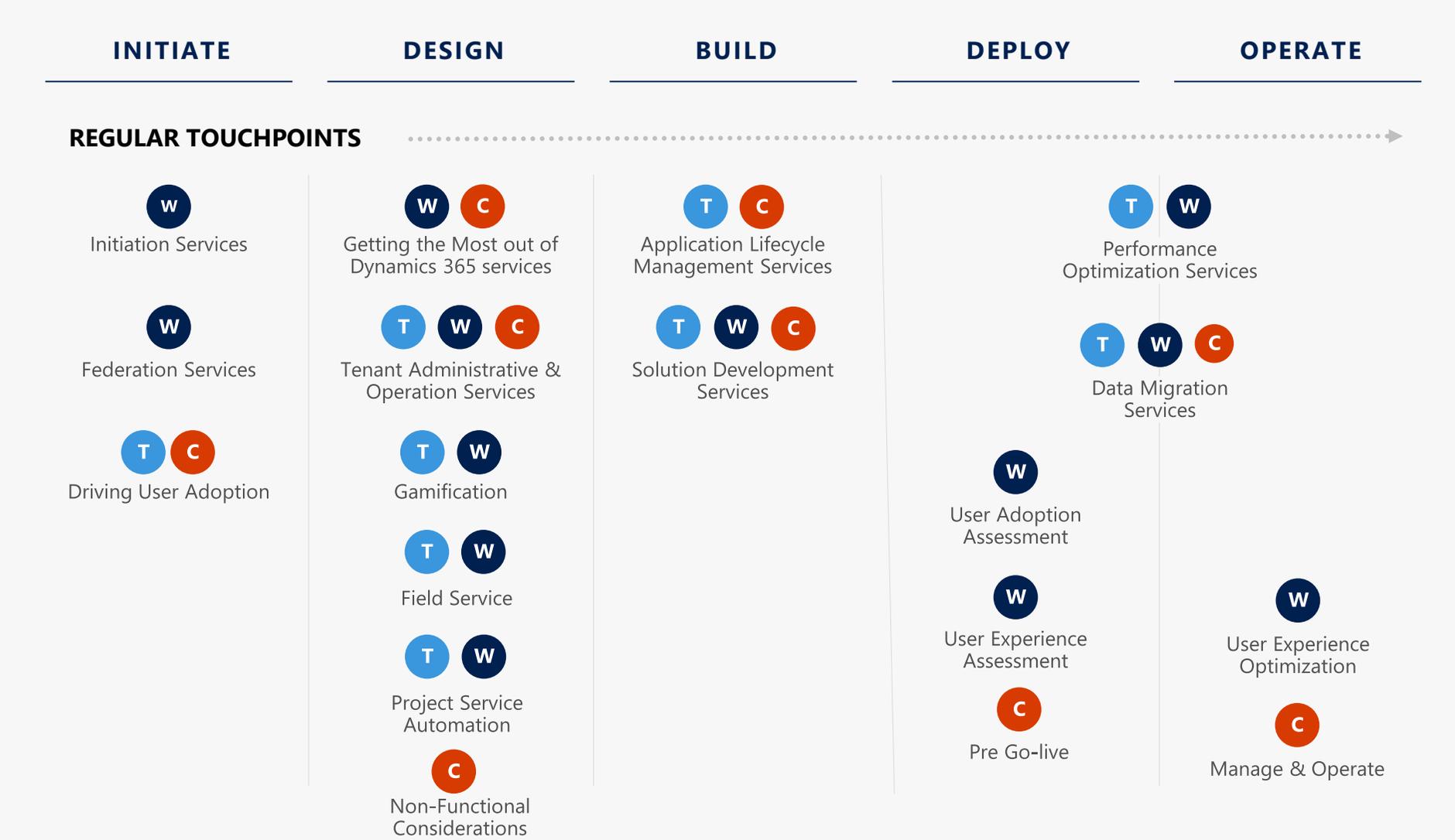
As part of core FastTrack engagements, FastTrack Center will provide customers and partners with guidance based on project need.

These topics are subject to change.

### LEGEND

- **T** Tech Talk
- **W** Workshop
- **C** Checkpoint

For a detailed service description, please [visit our site](#).



# FY18 Q3 FastTrack services updates

CRM 2011/2013/2015 to Dynamics 365 Customer Engagement apps

## Version 9.0 Upgrade Service

For customers needing extra help with their 8.1/8.2 upgrade to 9.0, the FastTrack team has a special service to help. We will provide:

- An extra sandbox instance to test your upgrade
- Assistance resolving issues blocking your upgrade
- Priority scheduling for the upgrade
- An escalation point for anything urgent

## FastTrack Checkpoints

- Checkpoints enable our customers to measure strategy, effectiveness, and preparedness to tackle next steps at every stage of a project.
- Get to know deployment best practices and key knowledge, and have your questions answered at a checkpoint session.
- Checkpoints brings together a set of tools and resources to help your customers make their journey to Dynamics 365 successful and improve their overall experiences.

## Integration Architecture

Dynamics 365 is the core system for managing your customers' business design. Learn how we can help integrate Dynamics 365 with other LoB applications both online and on-premises. Dynamics 365 Integration Architecture TechTalk provides an overview of available patterns and technologies for integrating Dynamics, such as:

- An understanding of available options for integrating Dynamics 365
- Products and services to help simplify and accelerate integration with your LoB applications
- Awareness of various low-code, no-code, Azure-based technologies that can be used for integration
- Common business scenarios and integration factors
- Integration performance and security

## Migration Service Update Available for GA

A comprehensive set of Migration Service components are now available. These include:

- A migration tool that validates and simplifies data and configuration items to migrate.
- FastTrack Migration service provides migration assistance, technical guidance, regular touchpoints, assistance on go-live activities, and support driving user adoption.

# FastTrack for Dynamics 365 for Finance and Operations



# FastTrack for Dynamics 365 offering

Expanded FastTrack for Dynamics 365 for Finance and Operations through tiered service offerings

As part of core FastTrack engagements, FastTrack center will provide you with guidance based on project need.

These topics are subject to change.

### LEGEND

**T** Tech Talk      **W** Workshop

 Included for 20-149 seats

### TECHTALKS

- 1.1 LCS usage
- 1.2 Tenant/VSTS Configuration
- 2.1 Environment plan
- 2.2 Development ALM
- 2.3 Integration guidelines
- 2.4 Data migration
- 2.5 Upgrade
- 3.1 Performance testing
- 3.2 Servicing

For a detailed service description, please [visit our site](#).

