

# FastTrack User Guide- Microsoft & Partners

This guide contains step by step instructions to help Microsoft and Microsoft partner users understand the new FastTrack site. This guide covers site registration, navigation, using the Field dashboard, finding customers, redeeming offers, and creating success plans and plan snapshots.

## Contents

- Things You Should Know ..... 2
- Data Migration Overview ..... 2
- FastTrack Audiences ..... 4
- Logging In ..... 4
- Navigation – Microsoft and Partner Accounts ..... 6
- Navigation –From within a Customer Record ..... 7
- Quick Start Activities ..... 8
  - Explore Your Dashboard ..... 8
  - Customers at a Glance ..... 8
  - Using Your Customer List ..... 9
  - Customer Search ..... 9
  - Customer Preview Screen ..... 10
  - Invite a Customer and Verify their FastTrack Account ..... 11
  - Open a Customer Record ..... 12
  - Request Access to a Customer ..... 13
  - Add Yourself to a Customer ..... 13
  - Customer Timeline ..... 14
  - Team Members ..... 14
  - Offers ..... 15
  - Getting Started ..... 16
  - View Your Success Plans ..... 16
  - FastTrack Support ..... 17
- Activity Scenario: Set Up a New Success Plan ..... 18
- Activity Scenario: Complete a Success Plan and Output Document ..... 22
- Activity Scenario: Complete an Offer Form ..... 29

## Things You Should Know

1. FastTrack can now only be accessed using a working **Organizational ID**. This means that all partners and customers will need company tenant to access the site. Any partners or customers without an Org ID can sign-up for a trial tenant using the normal process.
2. **Test success plans should only be created in test customer and partner accounts**. Any test success plan created in a real customer account will be viewable by that customer upon login.
3. Certain **offers** will require customer log-in and validation for redemption in the new site.
4. **Updates to company logos and masthead images are publicly viewable** to all users of your company account. This feature has been locked down for Microsoft users.
5. **Getting Started** no longer loads content into a live customer tenant, but now uses a temporary test tenant.

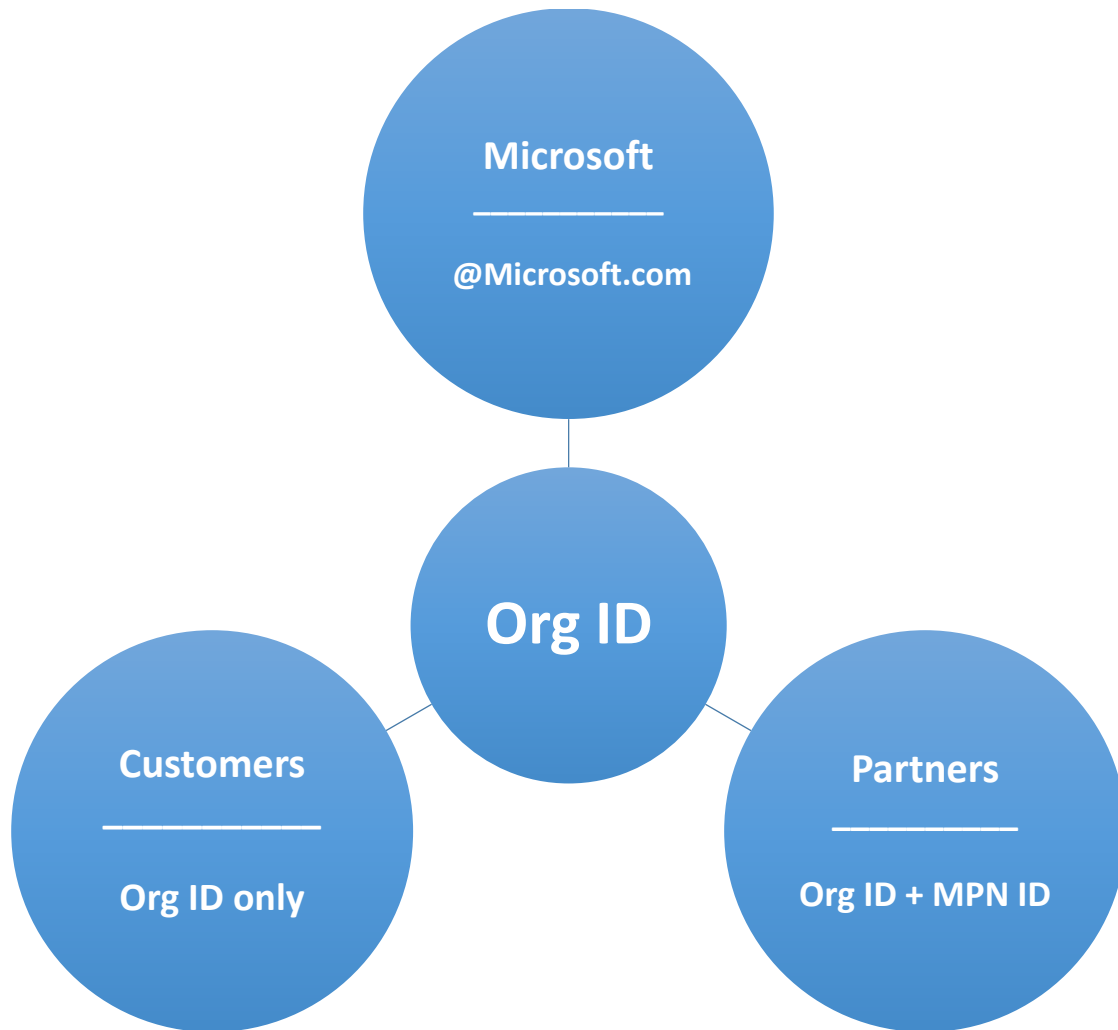
## Data Migration Overview

All previous FastTrack customers with active usage in the last 12 months will be migrated to the preview site. They will appear as an unverified customer record until someone from the company completes first-time login using an Org ID. After first-time login, the customer record is verified. The following criteria was used to determine which FastTrack accounts were migrated from the previous environment:

- Customers with “Test” in their name were not migrated.
- Customers were migrated if they showed active usage, those without active usage were not.
- Active usage was determined by the following criteria:
  - Customer showed at least one question was modified after August 31, 2014 in one of the following plan types; Deployment Plan, Adoption Plan, EMS Deployment Plan, CRM Plan or the Azure Consumption Plan. –and/or–
  - Customer showed some offer status for any of the following plans; FY15 Office Adoption Offer, Skype for Business Kit, Excitement Kit, Office 365 DPS Offer, Office 365 “Buy E4 Now” Offer, FY16 Office 365 Adoption Offer, FY16 EMS Adoption Offer.

## FastTrack Audiences

The FastTrack preview site allows Microsoft, partner and customer teams to drive adoption in a shared environment, while protecting user privacy with audience-level permissions. There are three distinct site profiles that FastTrack assigns at the org-level based on user Org ID– customer, partner or Microsoft. FastTrack breaks out audiences using the following Org ID logic:



**New** FastTrack preview audience specific updates:

- Microsoft users can view all customer records, but need customer consent to be visibly added to a team
- Partners need customer consent to view anything more than offer availability within a customer
- Customers must sign-in and approve a success plan for it to be marked final
- All cross-customer search features are unique to Microsoft and partner user dashboards

## Logging In

Navigate to <http://fasttrack.microsoft.com>

Click **Sign In**



The screenshot shows the Microsoft FastTrack website. At the top, there is a navigation bar with the Microsoft logo and links for Office 365, EMS, Success Plan, and Sign In. The main content area features a large image of a woman presenting to a group of people. Overlaid on this image is the text "Microsoft FastTrack" and a sub-headline: "Microsoft FastTrack is our customer success service designed to help you realize business value faster with the Microsoft Cloud." Below this, there are two icons: the Office 365 logo and the Enterprise Mobility Suite logo. The text "Office 365" and "Enterprise Mobility Suite" is positioned below their respective icons. Below the image, the heading "What is Microsoft FastTrack?" is followed by a paragraph: "Microsoft FastTrack is our customer success service designed to help you realize business value faster with the Microsoft Cloud. Discover what's possible, plan for successful rollouts, and onboard new users and capabilities at your own pace. Access best practices, tools, resources, and experts committed to make your experience with the Microsoft Cloud a success." At the bottom of this section, it says "Get Started Today with [Office 365](#) and [Enterprise Mobility Suite!](#)"

Enter your work account credentials.




Click **Sign In**



The screenshot shows the sign-in page. On the left, there is a blue banner with a lightbulb icon and two white cloud icons. On the right, the text "Sign in" is displayed. Below it, the text "Sign in with your work or school account" is shown. There are two input fields: "Email or phone" and "Password". Below these fields is a checkbox labeled "Keep me signed in". At the bottom right, there is a blue "Sign in" button.

Note: FastTrack can now only be accessed using a working **Organizational ID**. This means that all partners and customers will need company tenant to access the site. Any partners or customers without an Org ID can sign-up for a trial tenant using the normal process.

Check **Yes** and enter your MPN ID if you are a Microsoft Partner.

Languages ▾

## Edit your profile All fields are required

First Name Jeff	Last Name Hay	Company Name Test Company 1 <small>Company name may be overwritten later to match the actual company name associated with this tenant</small>
Email jeffh@70COM979242.onmicrosoft.com		
Are you a Partner? <input type="checkbox"/> Yes		

## Terms & Use for FastTrack

Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur. Excepteur sint occaecat cupidatat non proident, sunt in culpa qui officia deserunt mollit anim id est laborum.

By clicking "Save", I agree to the terms and conditions and privacy statement.

**Save** Cancel

**Note:** Once users are matched to an Organizational record, the temporary company name will be overwritten with the actual name used on the company tenant.

Click **Save** to continue to the site

## Navigation

### Microsoft and Partner Accounts

The following features are shared by both Microsoft and partner users



### Office 365 | EMS | Success Plan

| Dashboard | Support | Resources

#### Success Plan (Welcome Screen):

Introduces FastTrack to new users, showcases important announcements and features recommended actions.

#### Office 365:

Provides tools and resources to help you drive usage of Office 365.

#### EMS:

Overview of the EMS FastTrack and onboarding program.

#### Dashboard:

Search for customers, view organizational stats, access your success plans and begin stand-alone success plans.

#### Support:

Launch FastTrack customer support tickets and reference Knowledge Base materials for learning and troubleshooting.

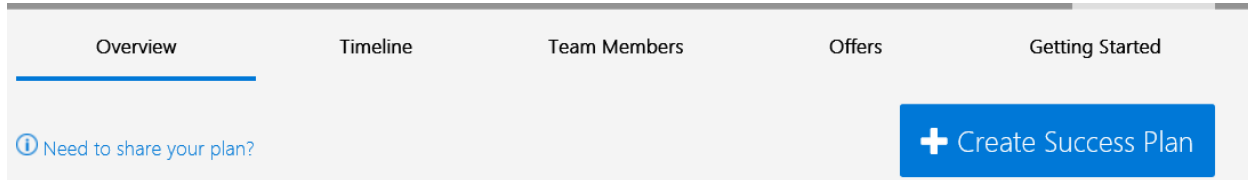
#### Resources:

Documents & videos to help you get the most out of your Microsoft FastTrack experience.

## Navigating within a Customer Record

### Overview | Timeline | Team Members | Offers | Getting Started

Opening a customer record, presents the user with a secondary navigation at the customer level.



Note: Top-level navigation (the black bar at the top of the screen) relates to the user's organization, not the companies you work with. If you press one of the top tabs within a customer record, you will exit the customer and go back to your site.

#### **Overview:**

The company Overview screen lists all of the success plans started at the company level. Partners can only see success plans they have been invited to or success plans they initiated. Field and customers can see all success plans for that customer.

#### **Timeline:**

The customer timeline shows FastTrack milestones and events visually over time. Timelines can be focused on specific success plans or look across an entire customer.

#### **Team Members:**

View customer, partner and Microsoft FastTrack users that have been invited to participate in the customer team. Microsoft users must request access to be visible in this section.

#### **Offers:**

Check available offer status and redeem offers for your customers.

#### **Getting started:**

Customers and partners can spin up an Office 365 test tenant loaded with resources end users can touch and feel to help drive adoption activities.

## Quick Start Activities

### Explore your Dashboard

After Login, you will land on the **Success Plan (Home)** screen. Click **Dashboard** to view information on your customers.




### Customers at a Glance


Customers – The total number of customers associated with your organization.



Customers Engaged – Number of customers your company has been invited to that show recent success plan or offer activity.

My Success Plans – Represents the total number of success plans you have created or have been invited to and links to those plans for easy access.

### Customers At A Glance

 Customers <b>1227</b>	 Customers Engaged <b>19</b>	 My Success Plans <b>0</b>
---	---	---









 



## Using Your Customer List

From your **Dashboard**, scroll down to see a full list of customers your organization has worked with since Sept 1, 2014. Customers without activity after that date were not migrated to the new system. (See Data Migration Overview above for details).

Note: You may experience up to a 15 second delay loading your customer list during the preview dependent on the number of customers associated to your organization.

	<b>Test Company for FastTrack</b>	1 Projects	1 Submitted Offers	0 Available Seats	Unverified
	<b>Test company215</b>	2 Projects	1 Submitted Offers	0 Available Seats	Unverified
	<b>test deployment plan progress</b>	3 Projects	2 Submitted Offers	0 Available Seats	Unverified
	<b>test disappearing tenant</b>	1 Projects	1 Submitted Offers	4120 Available Seats	Unverified
	<b>test domain reservation</b>	1 Projects	0 Submitted Offers	0 Available Seats	Unverified
	<b>test e4 submission date</b>	1 Projects	1 Submitted Offers	0 Available Seats	Unverified

## Customer Search

From your dashboard, click in the Search new customers by name, TPID, or tenant box and conduct a customer search using one of those criteria. All previous FastTrack customers that met the migration criteria are available via search. Refer to the Migration Criteria section above to understand the logic used in that process.

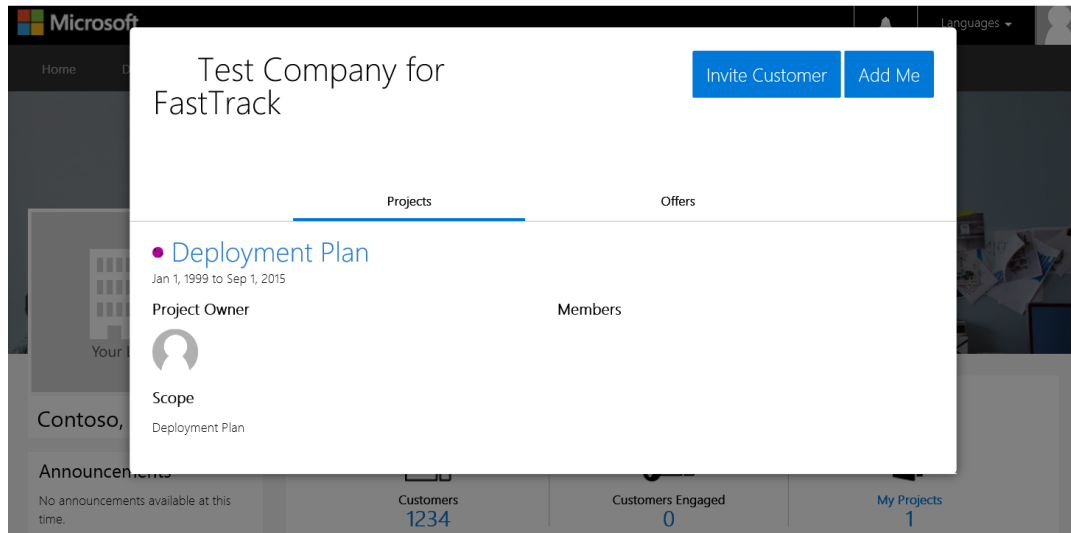
Please note: Microsoft users can see all customer data, however, partners are limited to viewing available offers and must request access from the customer to see additional customer data.

Type a customer name into the search box, if the customer is not in the system you are prompted to invite them to FastTrack.

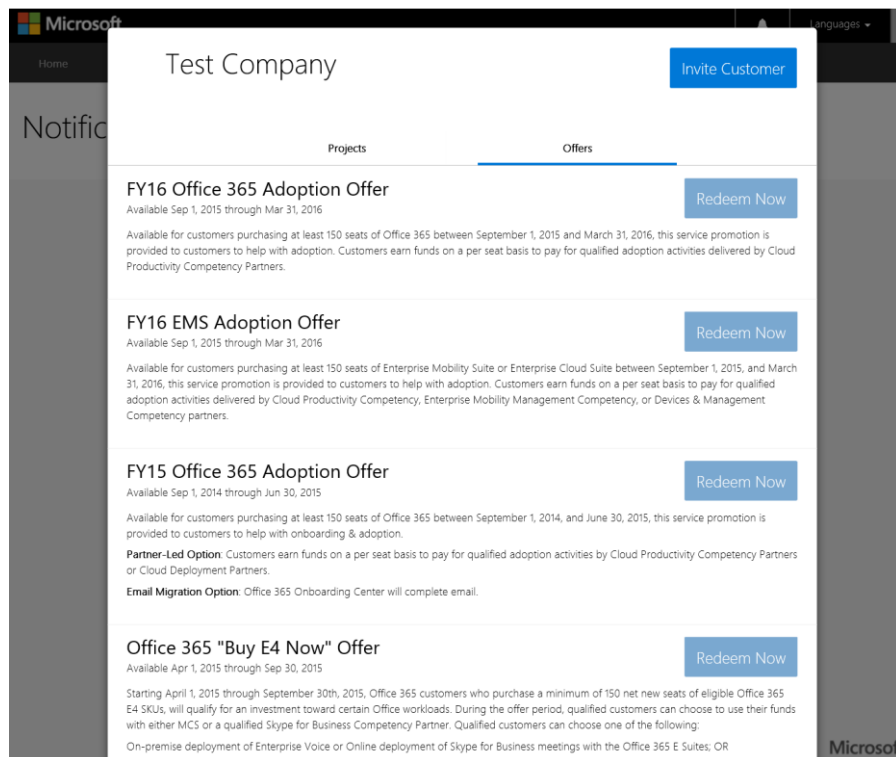
If search returns the customer you are looking for, click on the customer you choose.

You will land on a **Customer Preview Screen** where you can preview company details including a direct view into all success plans to which the customer has granted you access. (Microsoft user permissions allow them to see all success plans for the company by default.)

The company preview screen also allows you to open the customer record by clicking on the company name, invite customers to work on new success plans or ask to be added to their company team.



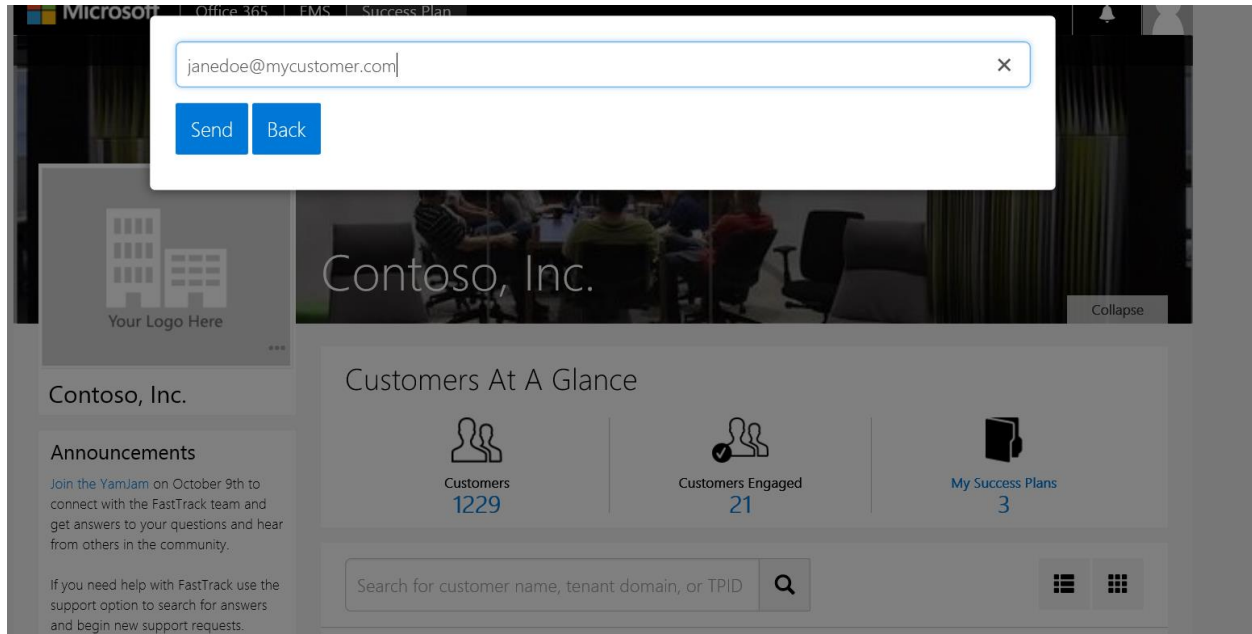
Click the **Offers** tab on the preview screen to view the available offers for that company and see offer status information and begin the redemption process.



## Invite a Customer and Verify Their FastTrack Account

From the customer **Overview** screen, choose **Invite Customer** to invite customers who have never participated in FastTrack. Inviting a customer sends a mail to the email address you choose, instructing them how to login to the site.

**Note:** Because all past FastTrack customers will need to login to the site to verify their customer record, this is an easy way to help with that process.



## Open a Customer Record

Choose one of the companies already associated with your organization and click on the company name to view the customer **Overview** screen.

This Overview screen shows a list of customer success plans and key highlights from the Insight and Guidance data (Microsoft users only). This screen also presents tabs to drill into for more customer details, including; Timelines, Team Members and Offers.

The screenshot displays the 'Overview' tab of a customer record. At the top, there are navigation tabs: Overview (selected), Timeline, Team Members, Offers, and Getting Started. A blue button labeled '+ Create Success Plan' is in the top right. Below the tabs, a blue banner indicates '3 Success Plans'. The first plan is 'Azure Usage Project' (Oct 5, 2015 to Nov 28, 2015). It features a 'Members' section with two icons labeled 'CA' and 'MR', and a 'Scope' section with 'Workloads' including 'Microsoft Enterprise Mobility' (AAD, MI, RMS). Below this plan are buttons for 'Success Plan Settings' and 'Success Plan Library'. The second plan is 'Office 365' (Oct 2, 2015 to Nov 2, 2015). It features a 'Members' section with two icons labeled 'MH' and '?', and a 'Scope' section with 'Workloads' including 'Office 365' (represented by icons for Office, Exchange, SharePoint, Skype, and Yammer). Below this plan is a 'Success Plan Library' button.

## Request Access to a Customer

From the customer **Overview** screen, choose **Request Access** to an existing FastTrack customer record to which you do not have access. An email invite request will be auto-generated to the customer site manager. Upon acceptance you will appear in the Team Members tab for that customer and you will be able to assist them with success plans.

The screenshot shows the customer overview for Contoso Group Limited. At the top left is the company logo, a purple square with a white circular icon. To its right is the company name "Contoso Group Limited" in blue. In the top right corner, there is a dropdown menu showing "Brian Shiers" and a blue "Request Access" button. Below the header, there are two tabs: "Success Plans" and "Offers", with "Offers" being the active tab. Under the "Offers" tab, there is a card for "FY16 Office 365 Adoption Offer" with a "Redeem Now" button. The offer details state it is available from Sep 1, 2015 to Mar 31, 2016, and is for eligible customers purchasing at least 150 seats of Office 365.

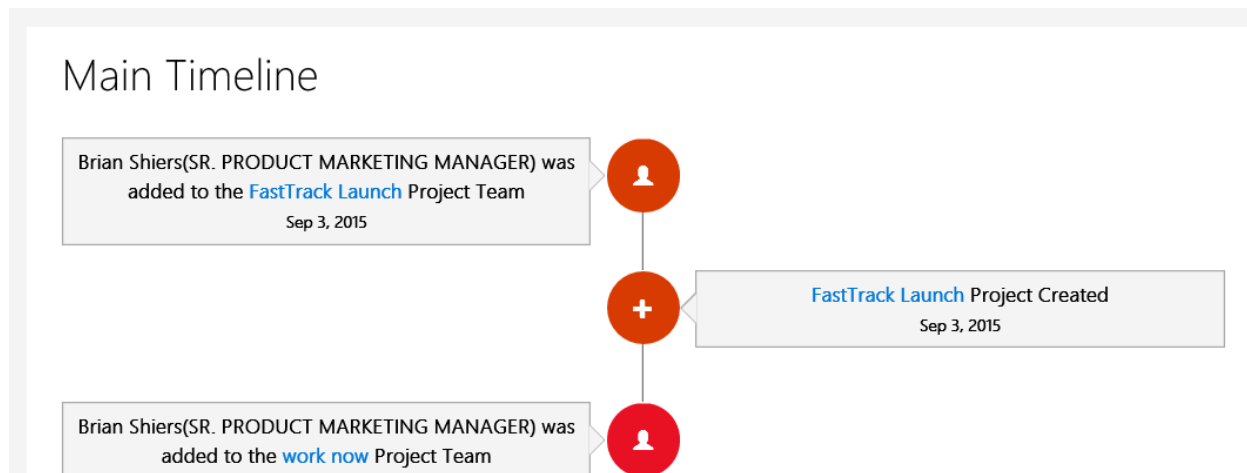
## AddMe to a Customer

From the customer **Overview** screen, choose **Request Access** to an existing customer in cases where someone in your partner organization has worked with the customer, but you personally haven't accessed their customer record. When you add yourself, you will appear in the Team Members tab for that customer and you will be able to assist them with success plans.

The screenshot shows the customer overview for Brown Chicken Brown Cow. At the top left is the company logo, featuring a cartoon chicken and a cartoon cow. To its right is the company name "Brown Chicken Brown Cow" in blue. In the top right corner, there is a blue "Add Me" button. Below the header, there are two tabs: "Success Plans" and "Offers", with "Success Plans" being the active tab. Under the "Success Plans" tab, there is a card for "All workloads" with a date range of "Sep 29, 2015 to Oct 29, 2015". At the bottom of the screen, there are three sections: "Members", "Scope", and "Workloads".

## Customer Timeline

From the Customer Overview screen, click the **Timeline** tab. This will display the Main Timeline which rolls up all milestone events for all success plans you have access to for that company. Use the left Timeline navigation bar to filter milestone events to specific success plans.



## Team Members

Click the **Team Members** tab from the Customer Overview Screen to view a list of all customer team members and any Microsoft or partner team members who have been added to the site by a company user.

Click **+Add Team Members** to invite new members to join the company team. Click the “star” and favorite team members to make them appear under **Favorite Contacts** on the left hand nav bar to make it easier to contact them.

The screenshot shows the 'Team Members' tab selected in the navigation bar. The interface displays the following information:

- Navigation:** Overview, Timeline, **Team Members**, Offers, Getting Started.
- Company:** Contoso Group Limited. FastTrack Center Status: Engaged.
- Engagement Status:**
  - FastTrack Manager: Mr. Manager
  - FastTrack Engineer: Engineer Dude
- Favorite Contacts:** Brian Shiers, Marcus Ruyle.
- Team Members List:**
  - Contoso Group Limited Team:** Brian Shiers (brian@contosogroupltd.onmicrosoft.com) with a star icon.
  - Partners:** Marcus Ruyle (Valorem Consulting / mruyle@valoremconsulting.com) with a star icon.
  - Microsoft:** Brian Shiers (partially visible).
- Buttons:** '+ Add Team Members' button.

## Offers

Click **Offers** from the Customer Overview Screen. Here you can see all available offers for this customer and also see the redemption status of each offer. You may also initiate the redemption process for a specific offer from this screen.

Note: More detail around this process will be provided in the “Fill Out an Offer Form” validation scenario below.

The screenshot displays the 'Offers' page for a customer named 'Contoso Group Limited'. The page features a navigation bar with tabs for 'Overview', 'Timeline', 'Team Members', 'Offers' (selected), and 'Getting Started'. On the left, there is a sidebar with the customer's logo and engagement status: 'FastTrack Center Status: Engaged'. Below this, two engagement status blocks are shown, each listing 'FastTrack Manager: Mr. Manager' and 'FastTrack Engineer: Engineer Dude'. The main content area is titled 'Offers' and has two sub-tabs: 'Current Offers' (selected) and 'History'. Three offers are listed:

- FY16 Office 365 Adoption Offer**: Available Sep 1, 2015 through Mar 31, 2016. Current Status: **Available**. Description: Available for eligible customers purchasing at least 150 seats of Office 365 between September 1, 2015 and March 31, 2016, this service promotion is provided to eligible customers to help with adoption. Eligible customers earn funds on a per seat basis to pay for qualified adoption activities delivered by Cloud Productivity Competency Partners.
- FY16 EMS Adoption Offer**: Available Sep 1, 2015 through Mar 31, 2016. Current Status: **Available**. Description: Available for eligible customers purchasing at least 150 seats of Enterprise Mobility Suite or Enterprise Cloud Suite between September 1, 2015, and March 31, 2016, this service promotion is provided to eligible customers to help with adoption. Eligible customers earn funds on a per seat basis to pay for qualified adoption activities delivered by Cloud Productivity Competency, Enterprise Mobility Management Competency, or Devices & Management Competency partners.
- FY15 Office 365 Adoption Offer**: Available Sep 1, 2014 through Jun 30, 2015. Current Status: **Available**.

## Getting Started

Quickly learn how to get Office 365 up and running for you or your customers so that users experience the value that Office 365 can bring to them. Begin your customer's Office 365 journey with helpful scenarios and how-to documentation for end-users and IT professionals – that users can experience all from within a realistic Office 365 environment.

Overview Timeline Team Members Offers Getting Started

### Getting Started

Quickly learn how to get Office 365 up and running for you or your customers so that users experience the value that Office 365 can bring to them. Begin your customer's Office 365 journey with helpful scenarios and how-to documentation for end-users and IT professionals – that users can experience all from within a realistic Office 365 environment.

[Get Tenant](#)

Tenant Name	Username	Password	Days Remaining
FT8278	admin@FT8278.onmicrosoft.c	pass@word1	75

Open an InPrivate browsing session and visit <https://portal.office.com> to log in with your QuickTenant username and password. To open the QuickTenant, click on the FastTrack tile in the Office 365 Sites menu.

Contoso Group Limi...  
FastTrack Center Status: Engaged  
Engagement Status:  
FastTrack Manager: Mr. Manager  
FastTrack Engineer: Engineer Dude

## View Your Success Plans

From your Dashboard, click the My Success Plans link to see a list of your success plans. If you don't have any success plans, complete the Create a Success Plan Exercise below and you will see it show up in this view.

Click on the row to open the success plan.

Your Logo Here  
Contoso, Inc.

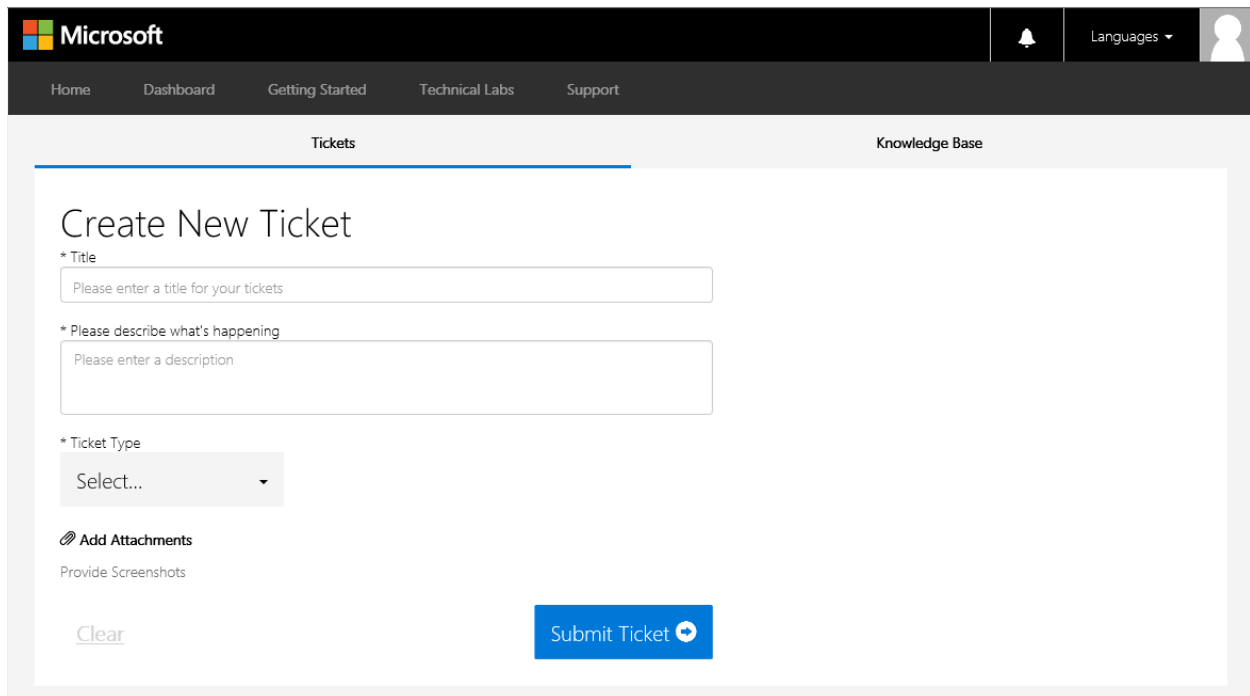
Name	Customer Name	# Members	Customer Stakeholder	Start Date	End Date
Test3	Stand Alone	1	N/A	09/10/2015	10/30/2015

Announcements  
No announcements available at this



## FastTrack Support

Click **Support** in the top navigation bar, fill out details about your issue, attach screenshots and Submit Ticket. A customer support representative will get back to you soon.



The screenshot shows the Microsoft FastTrack Support interface. At the top, there is a dark navigation bar with the Microsoft logo on the left, a notification bell icon, a 'Languages' dropdown menu, and a user profile icon. Below this is a secondary navigation bar with links for 'Home', 'Dashboard', 'Getting Started', 'Technical Labs', and 'Support'. The main content area is titled 'Tickets' and 'Knowledge Base'. The primary heading is 'Create New Ticket'. The form includes three required fields: a text input for the title with the placeholder 'Please enter a title for your tickets', a larger text area for the description with the placeholder 'Please enter a description', and a dropdown menu for 'Ticket Type' currently set to 'Select...'. Below these fields is an 'Add Attachments' section with a camera icon and the text 'Provide Screenshots'. At the bottom left is a 'Clear' link, and at the bottom right is a blue 'Submit Ticket' button with a right-pointing arrow.

## Activity Scenario: Set Up a New Success Plan

Setting up a success plan is the foundation for completing your success plan. To create a new success plan, open a customer from your Dashboard customer list and choose an existing success plan.

This will land you on the **Success Plan Overview** page. Select + Create New Success Plan which opens the New Success Plan Wizard.

The screenshot displays the 'Success Plan Overview' page for 'Contoso Group Limited'. The page features a navigation bar with tabs for 'Overview', 'Timeline', 'Team Members', 'Offers', and 'Getting Started'. A blue banner at the top indicates '9 Success Plans' and includes a '+ Create Success Plan' button. Below this, two success plans are listed: 'Azure Consumption Plan' and 'CRM Online Consumption Plan', both marked as 'Migrated Plan'. The 'Azure Consumption Plan' section shows a 'Members' list with a user 'BS' and a 'Scope' section containing 'Azure Consumption Plan'. A 'Success Plan Library' button is also visible.

Contoso Group Limi...

FastTrack Center Status: Engaged

Engagement Status:  
FastTrack Manager: Mr. Manager  
FastTrack Engineer: Engineer Dude

Engagement Status:  
FastTrack Manager: Mr. Manager  
FastTrack Engineer: Engineer Dude

Overview Timeline Team Members Offers Getting Started

Need to share your plan?

+ Create Success Plan

9 Success Plans

- Azure Consumption Plan [↗](#)  
*Migrated Plan*

Members

BS

Scope

Azure Consumption Plan

Success Plan Library

- CRM Online Consumption Plan [↗](#)  
*Migrated Plan*

Scope

From the Create New Success Plan Wizard, enter a success plan name, scope and select a color (colors help you organize multiple success plans), click **Next** to complete section 1.

# Create A Success Plan

- 1 Name your plan
- 2 Dates & Workloads
- 3 Build your team
- 4 Finish


Plan Name \*

Scope \*

975/1000 characters available

Color

Select a color to distinguish your plan in the Timeline view

 Orange ▼

\* indicates a required field

Cancel

On section 2 you will set milestone dates, success plan type and check any workloads your Success Plan will cover, click **Next** to proceed.

# Create A Success Plan

- 1 Name your plan
- 2 Dates & Workloads
- 3 Build your team
- 4 Finish

Set the timeline for your success plan and select the plan type & technical workloads this plan will deliver.

## Set Your Date \*

Please list when you expect to start and complete this plan.

Start Date

End Date

## What type of success plan is this? \*

**Deployment and Implementation**

This success plan type will guide you to drive use of the service with your users, including helping manage the change communications for users.

**Usage and Adoption**

This success plan type will guide you to setup use of a new service.

## Choose Your Workloads \*

**Office 365**

Select the technical workloads of Office 365 your success plan will use. Ensure you select all of the workloads required to meet your success plan solution goals. Selection of the workloads will scope the success plan to relevant workloads.

**Office Client**


To invite a “Test” customer owner enter a test email address to review the invite process. If you are not ready to invite a Customer Owner at this time, leave the box blank and click **Next** to continue.

## Create A Success Plan


1 Name your plan 2 Dates & Workloads 3 **Build your team** 4 Finish

Invite customer plan owner


Available Members



**BS**  
Brian Shiers  
Microsoft  
[Add](#)



**MR**  
Marcus Ruyle  
Contoso, Inc.  
[Add](#)



**JH**  
Jeff Hay  
Unknown  
[Add](#)

Review all of the success plan details you have just entered. Click **Previous** to make changes or if everything looks good hit **Save and Finish**. Your success plan will now be visible in your **My Success Plans** list from the dashboard.

## Create A Success Plan

1 Name your plan 2 Dates & Workloads 3 Build your team 4 **Finish**

### Final Review

Review your plan setup. Once confirmed click Save & Finish to create your success plan

Plan Name  
Azure Consumption Plan

Start Date: Oct 6, 2015      End Date: Nov 6, 2015


Scope  
Drive more usage

Color  
● Orange

Selected Workloads

- Type of Plan**
  - Usage and Adoption
  - Deployment and Implementation
- Microsoft Enterprise Mobility**
  - Azure Active Directory Premium
  - Microsoft Intune
  - Azure Rights Management
- Microsoft Azure**

Team



**MR**  
Marcus Ruyle

[Previous](#)      [Cancel](#)      [Save & Finish](#)

## Activity Scenario: Complete a Success Plan & Output Document

Open a customer from your Dashboard customer list and choose an existing success plan. This will land you on the **Success Plan Overview** page.

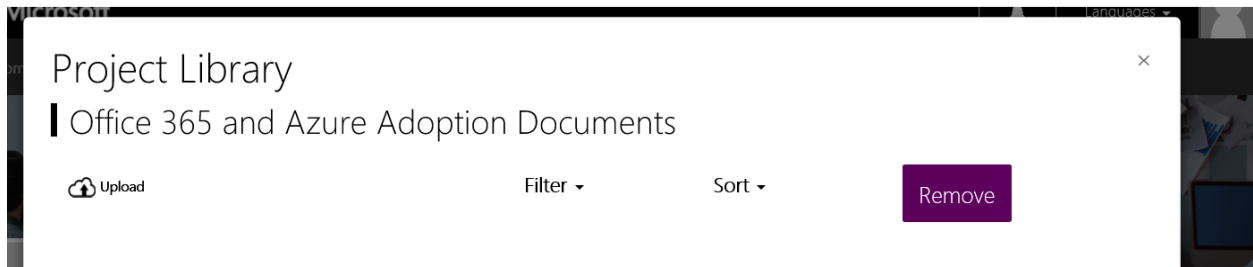
The top of the Success Plan Overview page shows details about the success plan; Name, Milestones, Success Plan Owner, Success Plan Members and scope.

Success Plan Overview is also where you can take actions at the success plan level like; edit success plan, add members, view Project Library and publish the success plan.

Note: A Customer Success Plan Owner must be assigned in order to publish a success plan. Go into Edit Project to assign customer owner before attempting to publish.

The screenshot shows the 'Overview' tab of a success plan page. At the top, there are navigation tabs: Overview (selected), Timeline, Team Members, Offers, and Getting Started. The main content area features a title 'EMS Adoption Project' with a red dot icon, and a date range 'Oct 6, 2015 to Nov 6, 2015'. Below the title, there are two sections: 'Members' and 'Workloads'. The 'Members' section shows two circular icons labeled 'MR' and 'BS'. The 'Workloads' section is currently selected and shows a list of services: 'Microsoft Enterprise Mobility' with sub-items 'AAD', 'MI', and 'RMS', and 'Microsoft Azure'. At the bottom of the main content area, there are three blue buttons: 'Success Plan Settings', 'Success Plan Library', and 'Publish'. Below the main content area, there is a section titled 'Build Success Plan' with two dropdown menus: 'Plan Summary' (with a Word icon) and 'Summary' (with a PowerPoint icon).

When outside documentation is needed to assist with success plan creation, you can upload and download documents from the Success Plan Library. Access this feature from the Success Plan Overview screen by clicking on the **Success Plan Library** and opening or uploading a document.



From the Success Plan Overview screen, scroll down to see all of the success plan sections. The product sections only show up if you selected a workload from that product family. All other sections are required for every success plan. The section descriptions are as follows:

#### Overview

In this section you will name your success plan to make it discoverable for the team, define realistic timelines and milestones, choose between adoption activities and workloads, establish the stakeholder team and layout your success plan vision. This section is worth some extra thought because these questions lay down the foundation for the rest of the success plan.

#### Current Environment

Define your current environment by entering by defining existing workloads, user groups, domains, Active Directory forests, security, firewall and VPN access information. These details are required for a successful implementation so please make sure you track down all the correct information.

#### Adoption Activities

In this section you will define adoption activities across pre-launch, launch and post launch as well as establish the team members who will own them. Even if you are focused on implementation at this stage, it is critical to begin planning user adoption now to ensure your users hit the ground running and to maximize return on your investment.

#### Office 365

Office 365 success plan sections are driven by the workloads selected upon success plan creation. Remember, to adjust success plan workloads you must go back and edit the success plan.

#### Dynamics CRM

The Dynamics CRM section consists of a technical overview, change management planning questions and usage planning questions.

#### Azure

In this section you will determine size and scope of your implementation and then go into details around Security and Compliance, Identity, Cloud Experience and Network/Applications.

#### EMS

The Enterprise Mobility Suite section walks you through domains in scope, implementation questions around Microsoft Intune and Configuration Manager and lays out Microsoft Azure AD Premium configuration details.

### Support


The Support section covers basic questions around any Microsoft Premier Support contracts and how this implementation will be supported.

Note: If you are missing workloads you can edit the success plan to add/remove workloads.



## Success Plan

## Download Planning Documents

 Plan Summary ▾

## Overview

Assigned No one has been assigned yet

Last modified: 09/02/2015

In this section you will name your project to make it discoverable for the team, define realistic timelines and milestones, choose between adoption activities and workloads, establish the stakeholder team and layout your Success Plan vision. This section is worth some extra thought because these questions lay down the foundation for the rest of the project.

Continue

## Current Environment

Assigned No one has been assigned yet

Created on: 09/02/2015

Define your current environment by entering by defining existing workloads, user groups, domains, Active Directory forests, security, firewall and VPN access information. These details are required for a successful implementation so please make sure you track down all the correct information.

Start

## Adoption Activities

Assigned No one has been assigned yet

Created on: 09/02/2015

In this section you will define adoption activities across pre-launch, launch and post launch as well as establish the team members who will own them. Even if you are focused on implementation at this stage, it is critical to begin planning user adoption now to ensure your users hit the ground running and to maximize return on your investment.

Start

## Office 365

Assigned No one has been assigned yet

Created on: 09/02/2015

Office 365 Success Plan sections are driven by the workloads were selected upon project creation. Remember, to adjust project workloads you must go back and edit the project.

Start

## Azure

Assigned No one has been assigned yet

Created on: 09/02/2015

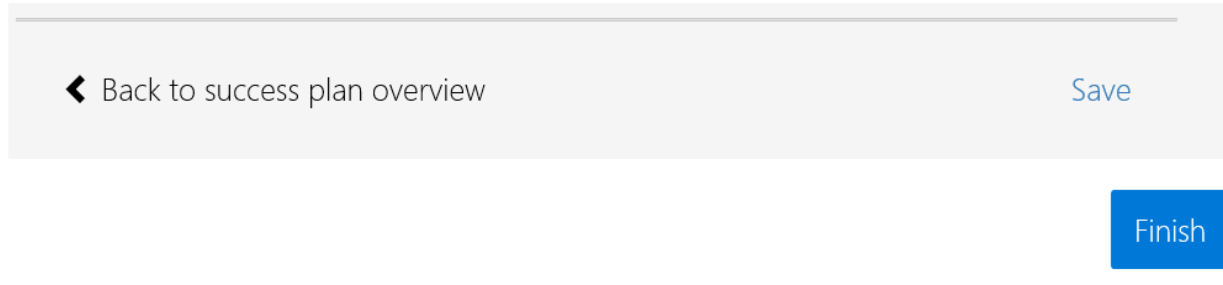
In this section you will determine size and scope of your implementation and then go into details around Security and Compliance, Identity, Cloud Experience and Network/Applications.

Start

## Support

Once you are ready to move on from a plan section, click **Finish** to save your work and go back to the Success Plan Overview screen and start on the next one. Click **Save** to save your work without leaving the section and click **Back to success plan overview** to leave the section without saving your work.

You can always come back and edit/complete a section later.



Click on a Success Plan section to get started answering questions.

◀ Back to success plan overview

Define your current environment by entering by defining existing workloads, user groups, domains, Active Directory forests, security, firewall and VPN access information. These details are required for a successful implementation so please make sure you track down all the correct information.

**Current Environment** ⋮ ↑

Assigned No one has been assigned yet Last modified: 10/06/2015 Brian Shiers

Select all current Microsoft cloud solution you are using today:

- Office 365
- Dynamics CRM Online
- Microsoft Intune
- Azure AD Premium
- Azure RMS
- Azure IaaS/PaaS

---

Enter the Tenant Domain in form of <domain>.onmicrosoft.com



---

List the Active Directory Forests in the following table:

The expected inputs for this table are detailed for reference:

**AD Forest:** Fully qualified domain name of the Active Directory forest root domain

**Logon:** Do users have an active user account they use to log on to their workstations?

**Resource Forest:** What AD forest does this resource forest provide service to, i.e.Exchange, Skype for Business, etc.

Use fully qualified domain names.

AD Forest	Object Count	Logon	Resource Forest
+ Add new group			

---

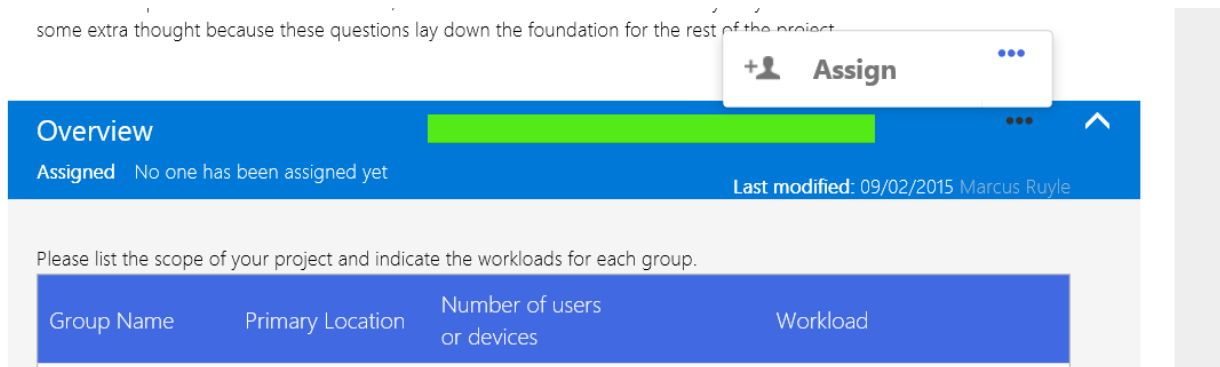
Do the locations for this plan have redundant Internet access?

Yes

No

You can also assign sections to other success plan team members, but you will have to make sure they are added via the Success Plan Overview screen first.

**Note:** Only a Success Plan Owner can add/delete team members.

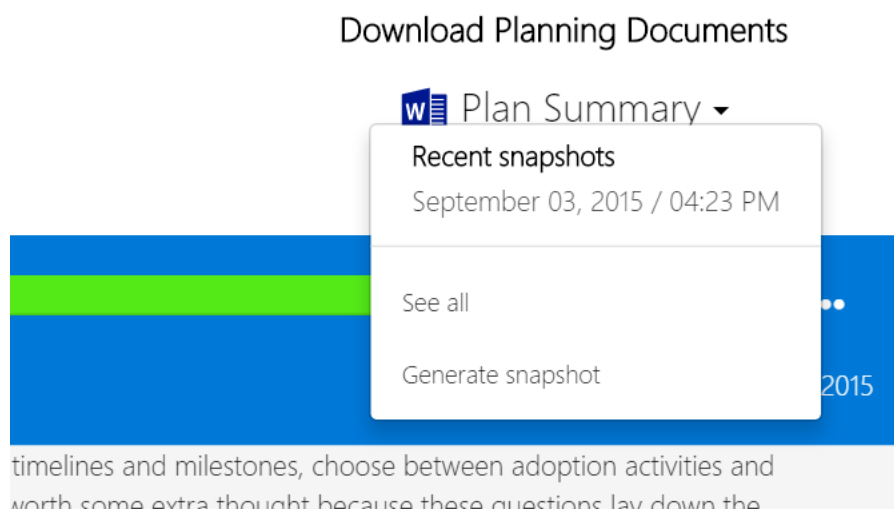


At any time in the process you may choose to view an existing plan snapshot or generate a new one. Snapshots allow you to document where you are in the plan as of that moment. Plan snapshots can be downloaded at your convenience or used in the redemption of Offers as required.

To output success plan documents at any time in the process go to the Success Plan Overview screen and click the **Plan Summary** drop down.

You will see options to open **Recent Snapshots**, **See All** or **Generate Snapshot**.

**Note:** Allow up to 1 minute for a new plan snapshot to generate.



Download and open a snapshot to see or share your entire success plan via a single Microsoft Word document.



© 2015 Microsoft Corporation. All rights reserved.

This document is for informational purposes only. MICROSOFT MAKES NO WARRANTIES, EXPRESS OR IMPLIED, IN THIS SUMMARY.

This document is provided "as-is." Information and views expressed in this document, including URL and other Internet Web site references, may change without notice. You bear the risk of using it.

This document does not provide you with any legal rights to any intellectual property in any Microsoft product. You may copy and use this document for your internal, reference purposes. You may modify this document for your internal, reference purposes.

**Project Verification**

Project Verified by: <name of approver> <approval date>

**REVIEWER NOTES:**  
 Recommend use of the navigation pane for review and finding sections.  
 Remember that the output document will not typically include all content so it will be scoped to match the project.  
 If you want to call out conditional displays add this as a comment and explain logic in reference to the question number.

**Contents**

Success Plan Summary	4
Scope	4
Team	4
Project Timeline	5
Foundation	5
Vision	5
Scenarios & Solutions	5
Scenario Resources	6
Project Management	8
Success Metrics	8
Risks	8
Dependent Projects	8
Summary of Current Environment	8
Active Directory	8
Connectivity	9
Devices	9
Recommended Actions: Current Environment	9
Adoption and Use Summary	10
Your Plan	10
Resources	11
Azure Adoption and Usage Plan	11
Dynamics CRM Adoption and Usage Plan	12
Deployment & Implementation Summary	12
Office 365	12
Microsoft Intune	27
Azure Active Directory Premium	30
Azure	32
Dynamics CRM	37
Support Plan	38
Support Team	38
Recommended Activities	39
Signatures	39

**Success Plan Summary**

The Success Plan provides your path the Microsoft Cloud. The plan is tailored for the project Office 365 and Azure Adoption. The following is the project and Success Plan overview:

**Office 365 and Azure Adoption**  
 Project Summary  
 Drive adoption

**Scope**

This project provides detailed planning for the Usage and Adoption Deployment and Implementation and will enable the following technical workloads as defined in the FastTrack project:

Technical Workloads Selected	
Office 365	SharePoint Yammer
Microsoft Azure	

**Team**

**Primary Customer Contact**

NAME	EMAIL	PHONE	TITLE

**Draft Team**

The following staff have been identified to take key roles in the project:

ROLE	NAME	RESPONSIBILITIES	EMAIL

**Partner Team**

Partner team resources are also available to support the project. The following team resources have been identified:

ROLE	NAME	RESPONSIBILITIES	EMAIL

**Partner Team**

Microsoft team resources are also available to support the project. The following team resources have been identified:

ROLE	NAME	RESPONSIBILITIES	EMAIL

## Activity Scenario: Complete an Offer Form

From your dashboard, open a customer record and click the **Offers** tab on the Customer Overview screen. This will show a list of all the **Current Offers** available to that customer.

The screenshot displays the 'Offers' section for a customer named 'Contoso Group Limited'. The interface includes a navigation bar with tabs for 'Overview', 'Timeline', 'Team Members', 'Offers', and 'Getting Started'. The 'Offers' tab is selected, and the 'Current Offers' sub-tab is active. The main content area lists three offers:

- FY16 Office 365 Adoption Offer**: Available Sep 1, 2015 through Mar 31, 2016. Current Status: **Available**. Description: Available for eligible customers purchasing at least 150 seats of Office 365 between September 1, 2015 and March 31, 2016, this service promotion is provided to eligible customers to help with adoption. Eligible customers earn funds on a per seat basis to pay for qualified adoption activities delivered by Cloud Productivity Competency Partners.
- FY16 EMS Adoption Offer**: Available Sep 1, 2015 through Mar 31, 2016. Current Status: **Available**. Description: Available for eligible customers purchasing at least 150 seats of Enterprise Mobility Suite or Enterprise Cloud Suite between September 1, 2015, and March 31, 2016, this service promotion is provided to eligible customers to help with adoption. Eligible customers earn funds on a per seat basis to pay for qualified adoption activities delivered by Cloud Productivity Competency, Enterprise Mobility Management Competency, or Devices & Management Competency partners.
- FY15 Office 365 Adoption Offer**: Available Sep 1, 2014 through Jun 30, 2015. Current Status: **Available**.

The left sidebar shows the customer's engagement status as 'Engaged' and lists the FastTrack Manager as 'Mr. Manager' and the FastTrack Engineer as 'Engineer Dude'.

From the Offer page, click the **History** tab to view past offer history.

Offer Name	Date Submitted	Status	Status Detail	Submitted By
FY15 Office 365 Adoption Offer	05/07/2015	Funding Approved		Migration Account
Office 365 Deployment Planning Services Offer	05/07/2015	Submitted		Mario Ortiz

Click back to the Current Offers tab to begin the redemption process.

When an offer is available for redemption, the large blue **Redeem Now** button will light up.

Current Status will show “Available” in blue type.

When an offer has been submitted, you will see a small grey **Submitted** button.

Current Status indicates where the pending request is in the redemption process. When Current Status reads “Funding Approved”, this offer has been redeemed and is no longer available.

Find an available offer and click the **Redeem Now** button on the offer of your choice to view the Offer Overview screen. Select **Create Request** to proceed to the Finalize for Payment form.

**FY16 Office 365 Adoption Offer** [Create Request](#)

**Eligible Funding**

The Partner may receive the following funding based on the number of eligible seats the Customer purchases between September 1, 2015 and June 30, 2016 (“Offer Period”)

<b>For 150 to 1000 seats</b>	<b>For 1001 and above seats</b>	<b>Maximum funding is</b>
\$15 per seat	\$5 per seat	\$60,000 per customer

Before a Partner will be eligible to claim investment funds through this offer, the Partner must satisfy each of the following milestones for Customer adoption to be considered complete, including:

On the **Finalize for Payment** form, fill in the required information and click **Submit**.

Overview
Timeline
Team Members
Offers
Insight & Guidance

## FY16 Office 365 Adoption Offer

Finalize For Payment

### Customer Details

Customer Name

Customer Tenant Domain

### Funding Details

Please select the project to associate with this offer request: ▾

Office 365 Adoption Planning Tool ▾

Please select a workload: ▾

SharePoint Online ▾

SKU Purchases VL, Online Syndication, or CSP: ▾

Online ▾

Customer Order Number ▾

4444444444

Product Family

Must select from the product list.

Purchase Date

Quantity

1000

+ Add Seats

To receive the first payment milestone you may choose to complete one of the following activities with your customer: ▾

Achieve 5% Active Use for the targeted workload

Complete a Value Discovery Workshop with the customer

[www.valuediscoveryworkshop.com](http://www.valuediscoveryworkshop.com)

Who is this led by? ▾

MCS Led ▾

### Additional Information

Funding Requestor ▾

Funding Requestor Email ▾

Confirm where payment will be received ▾

Bahrain ▾

Previous

Clear

Submit

**Skype for Business** ✖

Quantity: 4000  
Purchase Date: 09/10/2015

**Office 365 Enterprise Plan E4** ✖

Quantity: 3000  
Purchase Date: 09/03/2015

\$45000


Funding Amount

Once an offer has successfully been submitted you will land on the confirmation screen.

Overview    Timeline    Team Members    **Offers**    Insight & Guidance

## FY16 Office 365 Adoption Offer

[Finalize For Payment](#)



**Your request has been successfully submitted.**  
You will receive notification from the Program Management Office (PMO) regarding your request status within 15 business days (Monday-Friday, Pacific Time).

**Please Note**  
Pursuant to Microsoft's policy, all projects must have a completed purchase order, sent to the supplier, prior to any work being performed.  
It is against Microsoft policy for a supplier to supply any goods or services without receiving an official Microsoft purchase order. This requirement is extremely important. It not only ensures that the project has been approved by an authorized Microsoft signer, but it also prevents any hang ups or confusion later on. Please note that once the purchase order is complete, you will receive an automated email with the purchase order number. Work can start only post receiving PO number.