

Accelerate Dynamics 365 Adoption Checklist



Checklist for Accelerating Dynamics 365 Adoption

Dynamics 365 enables real Digital Transformation. A big part of that transformation includes how organizational processes and people work. This checklist can help your team accelerate your transformation by focusing people and process side of your solution.

- ❑ **Get the most out of basic and premium support plan benefits**
Beyond technical support, many plans also include access to experts and training
- ❑ **Join the User Group for Dynamics 365**
Connect with other Dynamics 365 users who can answer questions, share best practices, and more
- ❑ **Build an adoption plan to drive your people and processes transformation**
Identify and include the key stakeholders, usage scenarios, communications, and training plans
- ❑ **Accelerate adoption with partner adoption, change and training services**
Many partners are certified in change management and have tools to accelerate transformation
- ❑ **Empower end users with resources for learning and answers to help you scale**
A variety of resources are available to get answers, training, and to learn about more capabilities

Get the most out of Support Plans

Support plans are more than just technical support. Understand how to get answers to technical issues and how to leverage other benefits. [Compare the Support Plans below and online.](#)

Get the most out of Basic Subscription Support Plan Benefits

- **Unlimited support** with less than 1 hour technical support response times for your most critical cases.
- **Product-focused Blogs** provide latest updates from engineering
- **The Microsoft Dynamics Community** to post questions and review answers from other customers, MVPs, and Microsoft engineers
- **Visit [Dynamics 365 Complete Docs](#) to access the latest** documentation resources 24 hours a day.

Get more benefits from the Professional Direct Support Offering

- **Priority routing:** Connect 1:1 with support Concierge's engineer every time, with quicker access to support escalation engineers.
- **Ask the Expert Webinars.** Microsoft experts share their knowledge and expertise on specific Dynamics 365 topics.
- **Service Delivery Management:** includes advisory, upgrade and release readiness, crisis management, and escalation assistance. Delivery Managers can help with customized delivery plans and monthly 1:1 service reviews to track progress toward business goals.

Unified Support

- Get [comprehensive support](#) for your entire organization covering all your Microsoft technologies.
- Increase internal subject matter expertise with on-demand learning and take control of your IT health with as-needed assessment tools.

Join the User Group for Dynamics 365

Thousands of other Dynamics 365 users can help you accelerate adoption and deployment

[D365UG](#) is the official user group to connect Dynamics 365 users globally to help them achieve more from Dynamics 365 through education, training, and events. With 6,000+ companies and 50,000+ individuals, you will always have someone to lean on who has “been there” and “done that.” D365UG offers invaluable networking, knowledge sharing, case studies, and training on all things Dynamics 365.

Training

- 24/7 access to educational training (both live and recorded). Topics include: Faster Adoption, Tips & Tricks
- 20% discounts on Academy training and registration prices to events

Answers to Questions

- Discussion Forums to ask questions and receive answers from other Dynamics 365 product users
- Industry- and Role-specific discussions and product training webinars from live instructors

Networking

- Free attendance to in-person regional user group meetings near you
- Learn from others like you in-person and virtually
- Discounted registration for annual User Group Summit events (Europe, North America, and Australia)

Personalized onboarding & orientation

- Meet with your Engagement Manager to walk through all the User Group benefits with you, and your team
- Company membership can be used by all roles within your entire organization

Build an Adoption and Change Plan

The Dynamics 365 Adoption Guide provides an easy-to-follow framework to guide you through the adoption process. Each phase is broken into simple steps that guide you to the best practices, resources, and tools you need to build and deploy a customized adoption approach.

The Adoption Planning Workbook includes templates you can use to build your plan. Team Member Guidance helps you assemble the right team. The Champion Guide walks through the steps of building a champions program.

Envision

Identify and prioritize scenarios while learning about available resources as you plan for rollout. This stage is critical to your journey as you're setting business goals to measure success.

- Assemble Your Team
- Define Business Strategy
- Determine Readiness

Onboard

Work with your key stakeholders to build and launch your adoption plan. Prepare your environment and test your adoption approach with Early Adopters. Use feedback to make adjustments before scaling to the business.

- Build Your Adoption Plan
- Launch to Early Adopters
- Adjust Your Plan

Drive Value

Full-scale deployment and business success depend on usage and satisfaction. This requires planning through the Envision and Onboard phases plus ongoing operational excellence.

- Monitor End User Adoption
- Measure and Report Usage
- Encourage Ongoing Engagement

Accelerate Adoption, Change and Learning with Partners

Partners have a range of services that can support the people and process side of your digital transformation.

Formal Change Management, such as Prosci®, have proven approaches to overcoming people's natural resistance to change. Many partners are certified in change management. Microsoft also provides partners with adoption and change frameworks, tools, and best practices through the Partner Customer Program.

Ask your Microsoft point person or partner about these services.

Formal Change Management

Many partners can deliver change management services:

- Goal & Stakeholder alignment
- Scenarios & Business Process
- KPIs & metrics
- Awareness & Communication plans
- Management process and reporting

Assessment Workshops

Microsoft and partners have tools to help teams understand:

- Clarity of Business Goals
- Project complexity
- Scenario & stakeholder alignment
- Organizational readiness

Learning and Training

Variety of options from Dynamics 365 partners with training services and [Microsoft Learning Partners](#).

- Training on standard and customized functionality
- In-person and virtual training
- Reinforcement and on-going training for new employees

Dynamics 365 Learning & Answer Resources

Microsoft.com/Learn

Primary destination for Dynamics 365 learning with free videos, tutorials, and hands-on learning.

- Step-by-step training to fit your schedule
- Role-based, from beginner to advanced
- Earn achievements and recognition for your Microsoft skills

[Dynamics 365 Downloadable e-Learning Courses](#)

Download and take e-Learning courses on a range of topics. These courses (previously accessed through CustomerSource) are now available for free on the community site.

[Dynamics 365 Webinars](#)

Product-based training to help ready people to use the services and apps effectively.

[Microsoft Dynamics 365 YouTube Channel](#)

How-to videos, product announcements, success stories, Tech Talks

Get Answers from the Web and Communities

[Use your favorite search engine](#)

If your product question is: "How do I...in Dynamics," try typing it into a search engine

[Dynamics 365 communities](#)

Post questions in forums, search forums, blogs, and videos to help answer your questions

Access e-learning

[D365UG User Group for Dynamics 365](#)

Independent member-driven education, networking, and events. Post questions, find answers, get education, connect with peers. Ask your project leader about membership

Look up answers in [CustomerSource Knowledge Base](#)

- Search the Knowledge Base
- Access available to all on-line Dynamics 365 subscribers
- To get access, go to [Need Access to Customer Course](#)

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.

Some examples depicted herein are provided for illustration only and are fictitious. No real association or connection is intended or should be inferred.

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.

© 2020 Microsoft. All rights reserved.

Microsoft and Dynamics are trademarks of the Microsoft group of companies. All other trademarks are property of their respective owners.