

Adoption Team Member Role Details

Dynamics 365 Adoption Guide | Supplemental Resources

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Executive Sponsor

Focus	Ownership and guidance
Department	Executive Leadership
Summary	<ul style="list-style-type: none">• Plays an essential role in championing transformation throughout the organization• Influential leader who understands and actively communicates the value of working in a more collaborative way
Qualifications	<ul style="list-style-type: none">• Trusted and influential leader who can enable cultural change• Innovative visionary who encourages new ideas and cutting-edge technology• Collaborates across boundaries to build strategic relationships• Dynamics 365 advocate that is tech/social media savvy
Responsibilities	<ul style="list-style-type: none">• Articulate value proposition across executive team• Serve as a role model in the community• Ensure appropriate funding and staffing to successfully execute change, not limited to collaboration programs
Next steps with Dynamics 365	<ul style="list-style-type: none">• Deliver the introduction to the transformation effort as part of the program kick off• Use Dynamics 365 capabilities to issue future company-wide announcements and updates, such as QBR's, earnings summaries, etc.• Use modern employee engagement methods – create content, engage in discussion, use video

Success Owner

Focus	Ownership and guidance
Department	Usually within the key business unit
Summary	<ul style="list-style-type: none"> Plays an essential role in championing collaboration service strategy & Dynamics 365 throughout the organization Influential leader who understands and actively communicates the value of working in a more collaborative way
Qualifications	<ul style="list-style-type: none"> Relevant levels of business and cultural acumen Trusted advisor in the organization Innovative visionary who encourages new ideas Collaborates across boundaries to build strategic relationships Dynamics 365 advocate who is tech/social media savvy
Responsibilities	<ul style="list-style-type: none"> Articulate value proposition across business stakeholders and user communities Serve as a role model in the community Participate in a network engagement event to help launch effort Encourage Dynamics 365 usage and emphasize that it is supported for the organization Ensure appropriate funding and staffing to successfully execute programs
Next steps with Dynamics 365	<ul style="list-style-type: none"> Deliver the introduction to the transformation effort as part of the program kick off Use Dynamics 365 capabilities to issue future company-wide announcements and updates, such as QBR's, earnings summaries, etc. Take advantage of the Yammer feed to keep a finger on the pulse of the organization Periodically "like" posts that are appealing to encourage continued good conversations/collaboration in the network

Champions

Focus	Awareness and engagement
Department	Staff-level individuals in any business unit or department
Summary	<ul style="list-style-type: none">• Build Dynamics 365 awareness, understanding and engagement across the organization• Enthusiastic and knowledgeable about Dynamics 365 and eager to grow participation
Time commitment	<ul style="list-style-type: none">• Pre-launch: 2 hours per week• Post-launch: 3 hours per week
Qualifications	<ul style="list-style-type: none">• Tech/social savvy• Enthusiastic and forward thinking• Thought leaders who are eager to participate in making the Dynamics 365 solution a success
Responsibilities	<ul style="list-style-type: none">• Evangelize the Dynamics 365 solution and the business value across teams• Build awareness through informal communication channels• Support project manager in launch activities, awareness campaigns, and engagement events• Assist in welcoming new users, providing guidance and best practices

Program Manager

Focus	Planning and execution of the Dynamics 365 solution rollout
Department	IT
Summary	<ul style="list-style-type: none">• Oversees entire rollout, from pre-launch project planning and assignments to execution and success assessments• Experienced in successfully managing an enterprise-wide initiative or program• Requires both technical and business acumen
Qualifications	<ul style="list-style-type: none">• Strong interpersonal, leadership and motivational abilities• Results-driven, problem solver• Detail-oriented, excellent time management• Social savvy, enterprise social advocate
Responsibilities	<ul style="list-style-type: none">• Define project scope, goals, timeline and milestones and review with other stakeholders• Assign responsibilities to rollout team and clearly communicate expectations• Ensure coordination of launch, communications, training and end user engagement activities• Coach, mentor, motivate and supervise project team members and resolve rollout issues/conflicts
Next steps	<ul style="list-style-type: none">• Create a SharePoint team site with an embedded Yammer group to keep tabs on the rollout project plan and timelines, share status updates and delegate responsibilities

Training Lead

Focus	Training
Department	Learning and Development, Human Resources
Summary	<ul style="list-style-type: none">• Establishes a thorough understanding of the Dynamics 365 solution and its intended use among end users• Manages and delivers all training content creation/customization
Time commitment	<ul style="list-style-type: none">• Pre-launch: 4 hours per week• Post-launch: 2 hours per week
Qualifications	<ul style="list-style-type: none">• Experienced in multi-channel training development and delivery• Ability to plan and coordinate with a diverse group of people• Highly organized, detail oriented, excellent verbal and communication skills• Tech/social savvy
Responsibilities	<ul style="list-style-type: none">• Review resources available on the Microsoft Dynamics 365 website and customize to meet internal standards• Coordinate logistics for all training activities, regularly conduct and supervise the Dynamics 365 solution training sessions• Integrate Dynamics 365 training into the new hire onboarding process

Departmental Leads

Focus	Engagement and adoption within business unit
Department	All departments/business units, management level
Summary	<ul style="list-style-type: none">• Identify how specific departments and teams will use the Dynamics 365 solution• Evangelize the Dynamics 365 solution across teams and encourage active participation and engagement
Time commitment	<ul style="list-style-type: none">• Pre-launch: 3 hours per week• Post-launch: 1 hour per week
Qualifications	<ul style="list-style-type: none">• Superior interpersonal skills; well-connected, influential and respected among peers• Understanding of and ability to navigate departmental operations, information environment, organization and culture• Strong listening and mentoring skills• Management support and bandwidth to actively participate and fulfill leadership responsibilities
Responsibilities	<ul style="list-style-type: none">• Serve as a liaison between end user community and rollout team• Articulate the Dynamics 365 solution benefits and value across business units• Deliver department-specific communications and guidance on solution usage• Identify opportunities to streamline business processes with the Dynamics 365 solution

IT Specialists

Focus	Technical setup and support
Department	IT
Summary	<ul style="list-style-type: none">• Oversees all technical aspects of integrating the Dynamics 365 solution with existing business applications• Has the authority to make high-level IT decisions
Qualifications	<ul style="list-style-type: none">• Deep understanding of internal technical architecture and integration opportunities• Experience with managing IT support team and authority to make IT decisions affecting large audiences• Dynamics 365 solution advocate
Responsibilities	<ul style="list-style-type: none">• Work with the FastTrack center to technically onboard the organization to Dynamics 365• Identify and involve all required IT personnel• Work with project manager on integration timing/logistics• Communicate any technical issues or queries

Communications Lead

Focus	Awareness and understanding
Department	Corporate Communications
Summary	<ul style="list-style-type: none">• Oversees the development, approval and delivery of company-wide communications related to the Dynamics 365 solution rollout• Strong working knowledge of internal communications best practices
Time commitment	<ul style="list-style-type: none">• Pre-launch: 5 hours per week• Post-launch: 2 hours per week
Qualifications	<ul style="list-style-type: none">• Demonstrated success in developing and implementing corporate communications to a variety of audiences• Experience using social media tools and approaches as part of communication strategy• Outstanding writing and proofreading skills and excellent verbal communication skills• Authority to approve and deliver corporate communications, strong working knowledge of communications best practices
Responsibilities	<ul style="list-style-type: none">• Work closely with other members of the steering committee on rollout communication strategy• Customize communication materials to meet internal guidelines• Ensure timely delivery of all pre-launch and launch communications

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