

MOC 80235 A Project Managing Microsoft Dynamics CRM Implementations with Microsoft Dynamics Sure Step 2010

Course Summary

Description

The two day course, Project Managing Microsoft Dynamics CRM Implementations with Microsoft Dynamics Sure Step is an advanced training workshop that focuses on the Project Management area of Microsoft Dynamics Sure Step 2010. Students assume the role of a Project Manager as they complete a case study involving the implementation of Microsoft Dynamics CRM at Tailspin Toys, a fictitious customer account.

Guidance is provided in using Microsoft Dynamics Sure Step from a Project Manager's perspective as students complete each phase of the implementation. Lab activities focus on project management tasks involving project initiation, planning, execution, monitoring, and closure. Students are tasked with completing a variety of Sure Step documents and making strategic implementation decisions during each implementation phase.

Students do not install or use Microsoft Dynamics CRM during the case study. However, sufficient knowledge of Microsoft Dynamics CRM is necessary for the student to tailor the implementation and complete the Sure Step project documents to satisfy the customer's business requirements. Class discussions following each lab exercise add the dimension of peer learning and play a key role in enforcing the knowledge learned during the training.

The student kit includes a comprehensive workbook and other necessary materials for this class. The following software is provided in the student kit:

- Student CD contains an .sspzip file that is required for creating the Sure Step project used throughout the case study.

Objectives

At the end of this course, students will be able to:

- Examine how to prepare and plan for a Diagnostic phase.
- Select, plan, and deliver Sure Step's decision accelerators.
- Define the scope of the project based on decision accelerator results.
- Guide the customer toward the most efficient implementation process and project type.
- Produce time and cost estimates for the project.
- Plan the resources for the project and plan for risks.
- Prepare for and conduct the Kickoff meeting with the Customer.
- Determine if a Solutions Overview is necessary.
- Understand the process of Sure Step's Detailed Business Analysis workshops.
- Identify and document functional requirement Fits and Gaps.
- Control scope creep by implementing proposal management.
- Plan early for the Deployment phase by creating a deployment plan.
- Learn how to use Sure Step's Solution Design Documents.
- Examine Performance Reporting and Status Reporting.
- Plan and perform testing activities across different phases.
- Conduct a tollgate review.
- Prepare and conduct the cutover from the non-production to production environment.
- Understand the importance of quality management during the Operation phase.
- Identify how to work toward project closure.

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Course Summary (cont'd)

Topics

- Introduction to the Microsoft Dynamics Sure Step Case Study
- Project Initiation and Planning in the Diagnostic Phase
- Project Planning and Execution during the Analysis Phase
- Project Execution and Monitoring during the Design, Development, and Deployment Phases.
- Project Closure during the Operation Phase

Audience

This training is intended for Project Managers and Implementation Consultants responsible for managing Microsoft Dynamics CRM implementations.

Prerequisites

Before attending this course, students must have:

- A working knowledge of Microsoft Dynamics Sure Step. It is recommended, but not required, that students complete the following courses prior to attending this workshop:
- Introduction to Microsoft Dynamics Sure Step: This course can also be accessed from the Sure Step landing page on PartnerSource using a link to the Partner Learning Center.
- Using Microsoft Dynamics Sure Step 2010 Course # 80166: This course can also be accessed from the Sure Step landing page on PartnerSource using a link to the E-Learning site.

Because a consultant-friendly layer has been built into the labs, sufficient knowledge of Microsoft Dynamics CRM is also a definite advantage in successfully completing the case study.

Duration

Two days

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Course Outline

I. Introduction to the Microsoft Dynamics Sure Step Case Study

This module provides a brief introduction about this two day course, which begins by reviewing and summarizing some of the essential concepts of Microsoft Dynamics Sure Step. This module also introduces the basic premise of the case study. Background information about the fictitious implementation project is provided, as well as the structure and types of exercises in the upcoming modules.

- A. Overview of Microsoft Dynamics Sure Step
- B. Introduction to the Case Study

Lab: Create a Test Project

- Create a test project in Microsoft Dynamics Sure Step that is unrelated to the case study used in this course.
- Provide experience in creating a new Sure Step project and review the standard tools and templates which Sure Step copies to the project.

Lab: Import the Sure Step Project File for the Case Study

- Create a second project by importing a zipped Microsoft Dynamics Sure Step project file that was created for Tailspin Toys, a fictitious customer account.
- Review the custom tools and templates that were imported into the project and that will be used throughout the case study.
- Provide experience importing a Microsoft Dynamics Sure Step project file.

II. Project Initiation and Planning in the Diagnostic Phase

The case study begins with the Diagnostic phase, which typically includes sales related activities. This module examines the Diagnostic activities that support and reinforce the sales activities and prepare for the upcoming project. This involves gathering sufficient information to define the high level project scope and make a confident proposal for the remaining phases of the implementation.

- A. Prepare for the Diagnostic Phase
- B. Deliver Decision Accelerators
- C. Plan the Project
- D. Manage the Project Proposal

Lab: Internal Briefing Meeting

- Perform role-play based on real life scenario.

Lab: Review Preliminary Project Information

- Learn how to find relevant project documents for this moment in the project lifecycle.
- Discover the outlines of the project specific context for this case.

Lab: Select Decision Accelerators

- Identify if there is a need in this project for decision accelerators.
- Identify which decision accelerators are applicable to this implementation.

Lab: Initiate Project Meeting

- Listen to the other students' views on how to approach this project.
- Discuss the next steps that need to be taken.

Lab: Requirements and Process Review

- Review the customer's current processes to determine its future requirements.
- Understand the Requirements and Process Review process.
- Complete specific sections of the Requirements and Process Review final presentation.
- Understand the relationship of the Requirements and Process Review to the Functional Requirements Document.

Lab: Fit Gap Solution Blueprint

- Determine the Degree of Fit and the Degree of Gap for your project.
- Validate the degree of Fit and create a solution blueprint for the implementation.

Lab: Scoping Assessment

- Identify the scope and risks of this decision accelerator.
- Analyze the customer requirements for insight on the scope of the project.
- Analyze the outputs from any other diagnostic service offerings.
- Determine the implementation scope.
- Understand and use the Microsoft Dynamics Costing Worksheet.

Lab: Define the Project Type for the Case

- Interpret the information gathered in the decision accelerators.
- Match this information to the recommended project type criteria.
- Determine which project type best fits the Tailspin Toys implementation.

Lab: Create the High-Level Project Plan

- Review the project plan templates Sure Step includes based on the work breakdown structure for each project type.
- Develop a project schedule for the Tailspin Toys implementation.

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Course Outline (cont'd)

Lab: Class Discussion – Project Planning

- Discuss the creation of the Project Plan in class.
- Identify the benefits of the Project Plan templates provided by Sure Step.

Lab: Create the Statement of Work (SOW)

- Create the SOW for the Tailspin Toys project using the Sure Step SOW template and the high level information gathered thus far.

Lab: Present the Statement of Work

- Discuss content of the SOW.
- Contribute to the class discussion by highlighting the key points you included in your own SOW.

III. Project Planning and Execution during the Analysis Phase

This module examines the activities required to initiate and effectively plan the entire project. In the case study, you will finalize and approve the project charter, execute the project team Kick Off meeting, document the functional requirements, update the Fit Gap analysis, and manage issues and changes.

- A. Project Planning and Communications Management During the Analysis Phase
- B. Conduct the Solutions Overview
- C. Detailed Business Process Analysis
- D. Fit Gap Analysis
- E. Issue Management
- F. Proposal Management

Lab: Prepare for the Kick Off Meeting

- Learn how to prepare for and conduct a Kick Off meeting.
- Create the necessary documents and presentations for the Tailspin Toys Kick Off meeting.

Lab: Conduct the Kick Off Meeting

- Present Kick Off meeting presentation to the rest of the class.
- Discuss peer learning.

Lab: Necessity of the Solutions Overview

- Discuss the necessity and benefits of the Solutions Overview for key users prior to conducting a detailed system analysis.

Lab: Plan for the Solutions Overview

- Create a training plan for conducting the Solutions Overview training at Tailspin Toys.

- Identify the business areas and the Microsoft Dynamics CRM modules that will be the subject of the Solutions Overview training.
- Identify which users should participate in the training.
- Identify the benefits of conducting Solutions Overview training.

Lab: Review Detail Business Process Analysis

- Review the Business Process Analysis Workshop reports that are provided for the students.
- Become familiar with the Sure Step Business Process Analysis templates and acquire more information on the scope of the Tailspin Toys project.

Lab: Complete the Functional Requirements Document (FRD)

- Determine Tailspin Toys' business requirements and document them in the FRD based on the information defined in the Workshop Reports.

Lab: Identify Gap Information

- Collect all the relevant information regarding the Gaps based on the input information from the FRD and the Workshop Review Reports.
- Revise the Fit/Gap spreadsheet used during the Diagnostic phase with this new information.
- Revise your conclusions regarding the Fit/Gap analysis and discuss with the class.

Lab: Identify Integration and Interface Requirements

- Review the Workshop Reports for each Tailspin Toys business department.
- Complete the existing Integration Requirements Spreadsheet with the new required information.

Lab: Identify Issues

- Identify the possible issues identified within the Diagnostic and Analysis documents.
- Document these issues in the Issue Entry Form and the Issues List.

Lab: Class Discussion – Identify Changes

- Participate in a class discussion about what makes a particular gap or issue a change and investigate the different sources that make up a change request.

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Course Outline (cont'd)

Lab: Document Changes and Update the Project Plan

- Review the Issues and Gap information related to possible changes that were identified in the Detailed Business Process Analysis workshop reports.
- Analyze the changes and document them in Change Request forms.
- Update the Project Plan based on the accepted and rejected change requests that were submitted to the customer.

IV. Project Execution and Monitoring during the Design, Development, and Deployment Phases.

This module examines the activities that a Project Manager must execute and monitor when implementing Microsoft Dynamics CRM. By collaborating with the project team (the class), the student will determine what activities and processes are appropriate and to what extent each activity needs to be conducted. During the execution phase of the project, the student will review the following project management activities as they apply to the case study: plan and perform quality assurance and quality control, monitor and close any necessary purchases and acquisitions, ongoing risk and issue management, ongoing time and cost management, project scope management, project communication, and develop the project team.

- Overview of the Design, Development, and Deployment phases
- Project Planning
- Solution Design
- Project Performance and Status Reporting
- Testing
- Tollgate Review
- Go-Live

Lab: Create the Deployment Plan

- Envision the necessary activities for the Deployment phase and formalize this in the Deployment Plan.

Lab: Update the Project Plan

- Update the project plan with any changes to the timeline, resources, and milestones based on any changes that have occurred to the project.

Lab: Create a Fit Design in the Functional Design Document (FDD)

- Examine the FDD document provided by Sure Step for recording configuration Fit requirements.
- Document in the FDD the configuration and parameter settings that are required for both the

standard functionality and ISV solution(s) to fully meet the customer's business requirements.

Lab: Create a Gap Design in the Functional Design Document (FDD)

- Examine the FDD document provided by Sure Step for recording business requirement gaps.
- Document in the FDD the customizations that must be made to Microsoft Dynamics CRM to fully meet the customer's business requirements.

Lab: Create a Solution Design Document (SDD)

- Review the SDD that has been provided and discuss its contents.

Lab: Class Discussion – Using Design Documents

- Discuss the pros and cons about using separate design documents for each Gap and each Fit.
- Discuss the benefits of using an SDD in implementations.

Lab: Review the Consultant Status Report

- Review the content of the Development Estimate Report and the Consultant Status Report provided with the case study.

Lab: Create the Project Status Report

- Based on a number of issues included in the case study, create a Project Status report that provides a summary of the project accomplishments, decisions, planned work, risks, and issues.

Lab: Unit and Function Testing

- Review the Unit and Function Testing scenarios (custom code testing).
- Review the testing activities identified in the case study and determine the affect of the test results.

Lab: User Acceptance Testing

- Monitor the results of the test provided with the case study and determine the next steps in the project.

Lab: Prepare the Tollgate Review

- Create a Tollgate Review report to close the Development Phase.

Lab: Create a Go-Live Cut-over Plan

- Examine what items need to be prepared and which tasks need to be completed before transitioning from the non-production to production environment.
- Create a Go-Live Cutover Plan.

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Course Outline (cont'd)

V. Project Closure during the Operation Phase

This module examines the final activities required to close out the project and transition the solution and knowledge to the customer.

- A. Quality Management
- B. Additional Operation Activities
- C. Project Closure
- D. Celebrate

Lab: Clear Pending Items

- Identify the pending items that need to be resolved to complete the project.

Lab: Class Discussion – Conduct Lessons Learned Meeting

- Discuss what has been learned from the case study and how perceptions of Sure Step have shifted over the course of the class.

Lab: Class Discussion – Conduct Close-Out Meeting

- Prepare for the Close-Out meeting with the customer by reviewing the Engagement Closure Checklist and creating a Project Close-Out Meeting Agenda.
- Use the students as members of the customer organization, conduct a Close-Out Meeting.
- Document your conclusions and notes in the Project Close-Out Report.