nordic.
summit

How I learned to stop worrying and ❤️ Dynamics 365 projects

Andrew Bibby

- Fun facts about me
  - 👷🏻 Working with Dynamics 365 since 2007
  - 💘 Love the Dynamics 365 community
  - 🎖️ Microsoft MVP
  - 🚀 Have been inside a space shuttle

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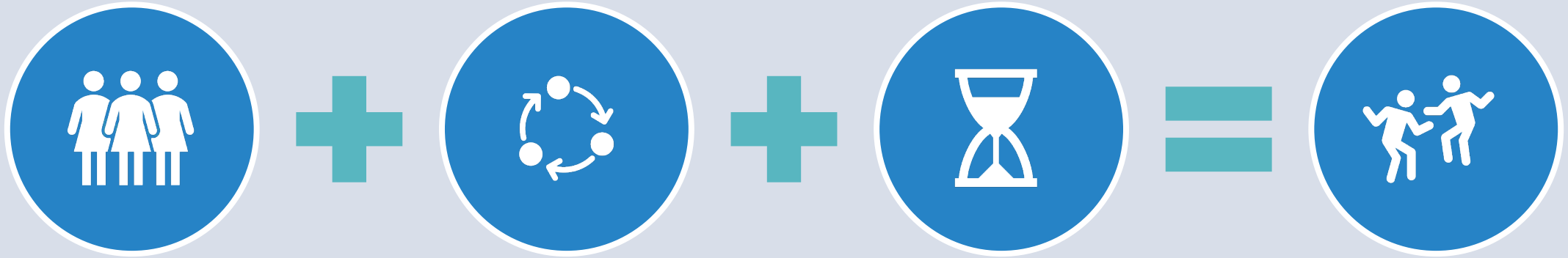
What is this session is about?

- CRM projects are hard 😞
  - 70% of CRM projects fail
- Things I've learned from 15 years of experience of working on Dynamics 365 and Power Platform projects
- Learn from my experience and keep your project on track and on budget
- Death by a thousand cuts - every single delay risks your go-live date
- We'll look at common issues that projects often overlook

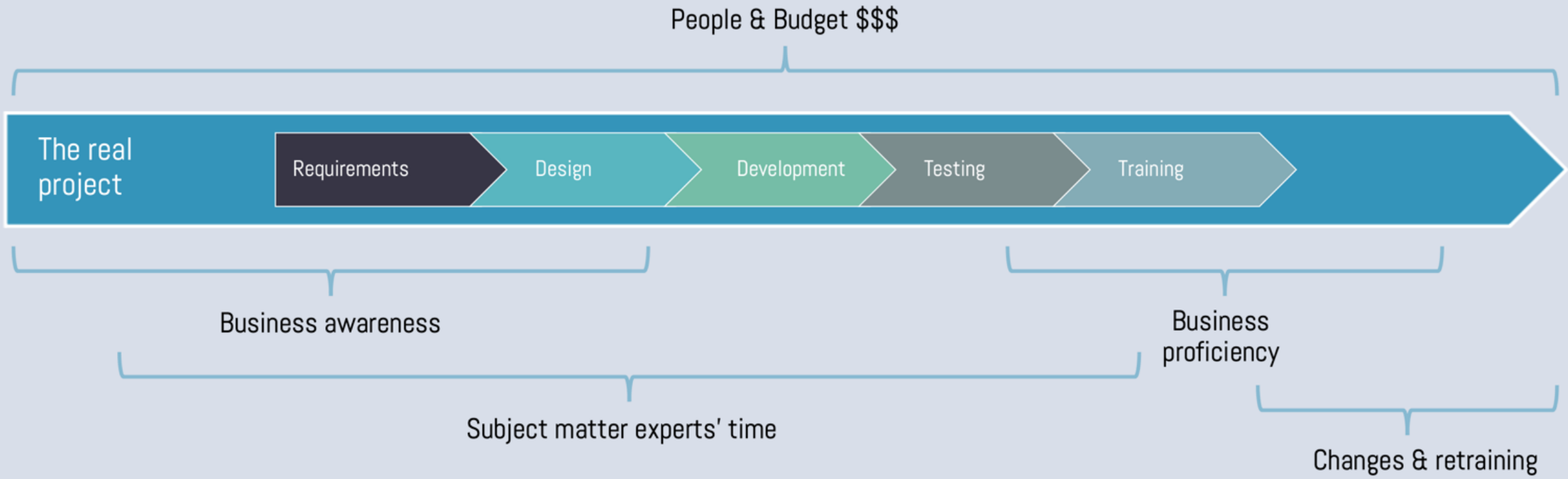
Look on the bright side

- It's not just CRM projects, most business transformation projects fail! 🙌
- There are things you can do to significantly increase the chances your project will be successful
- Recipe for success



A typical Dynamics 365 project

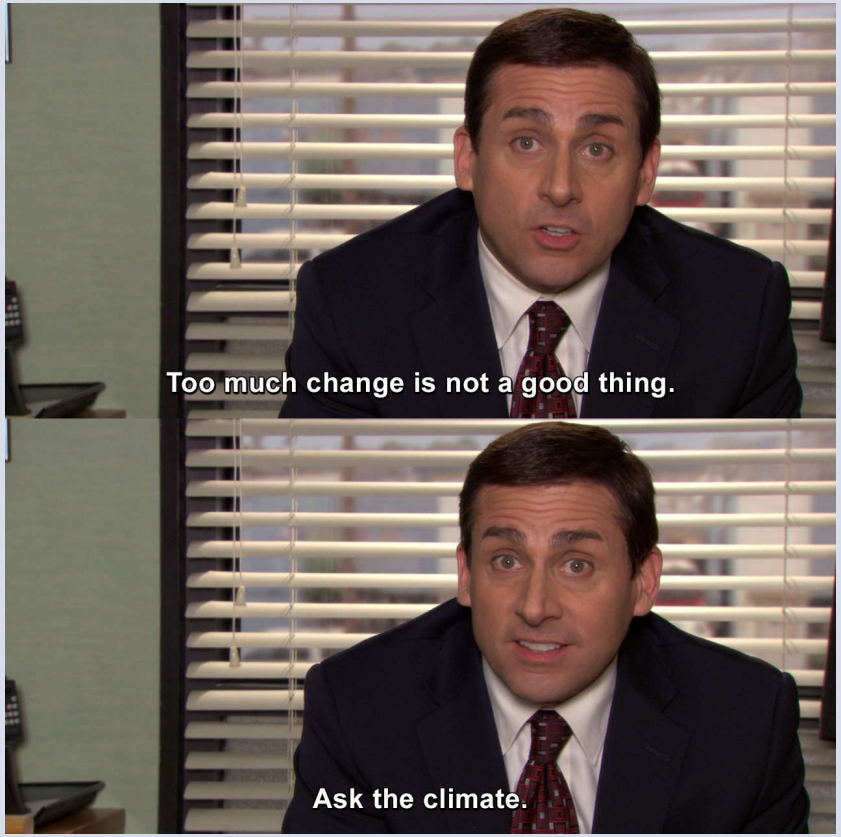
The real Dynamics 365 project



PEOPLE

Get people ready

- What does CRM stand for?
  - Change
  - Requires
  - Management
- Empathise, support, train the impacted user groups
- Everyone is resistant to changes



Change management

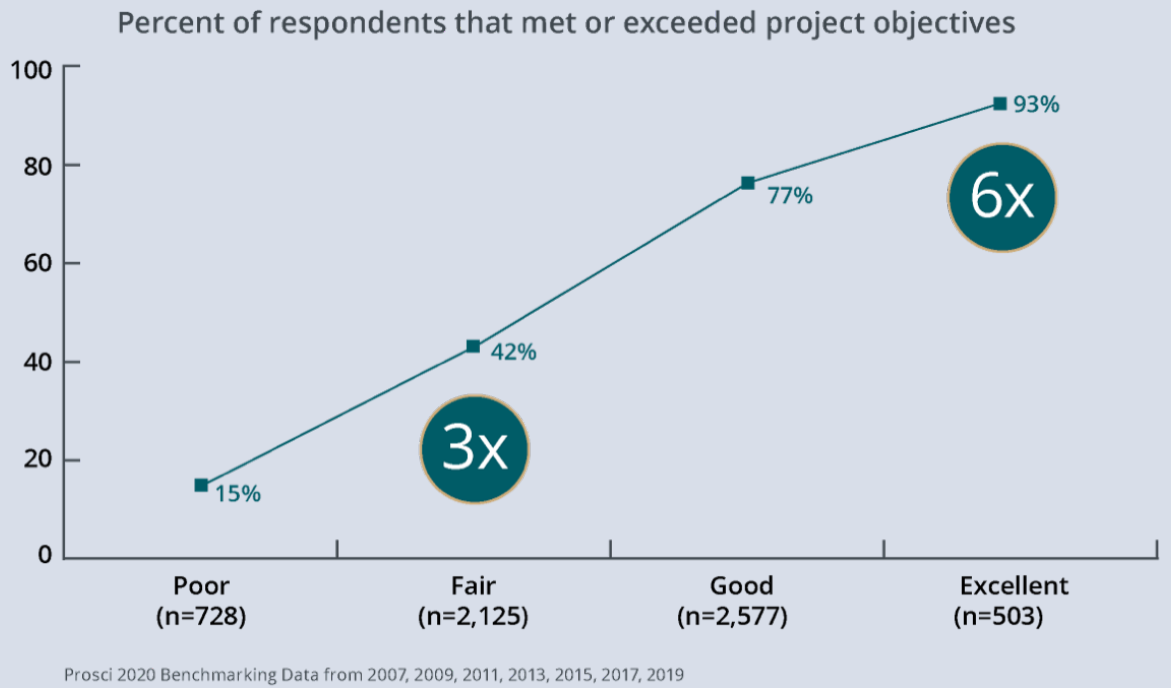
- You need to manage change on every project
- What is meant by change management?

> "Change management is a framework for managing the people side of change"

- I used to wonder why my projects weren't successfully adopted
- It is all about the people impacted by your project
- Usually means: training and some emails

Why change management?

- Projects that incorporate excellent change management are 6 times more likely to be successful
  - 5 times more likely to stay on or ahead of schedule
  - 2 times more likely to stay on or under budget
- Who doesn't want a successful project??



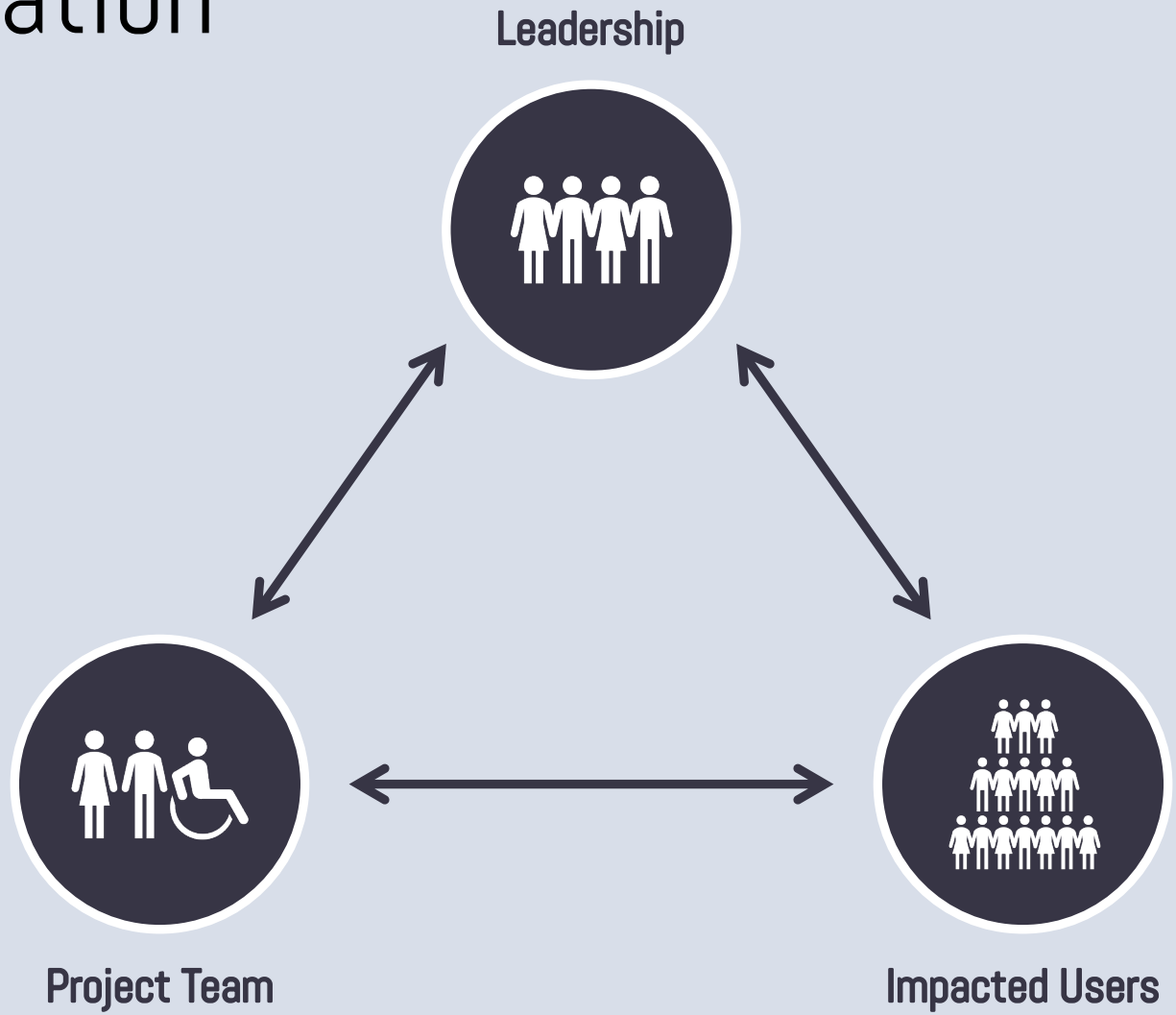
Prosci 2020 Benchmarking Data from 2007, 2009, 2011, 2013, 2015, 2017, 2019

Prosci
PEOPLE. CHANGE. RESULTS.™

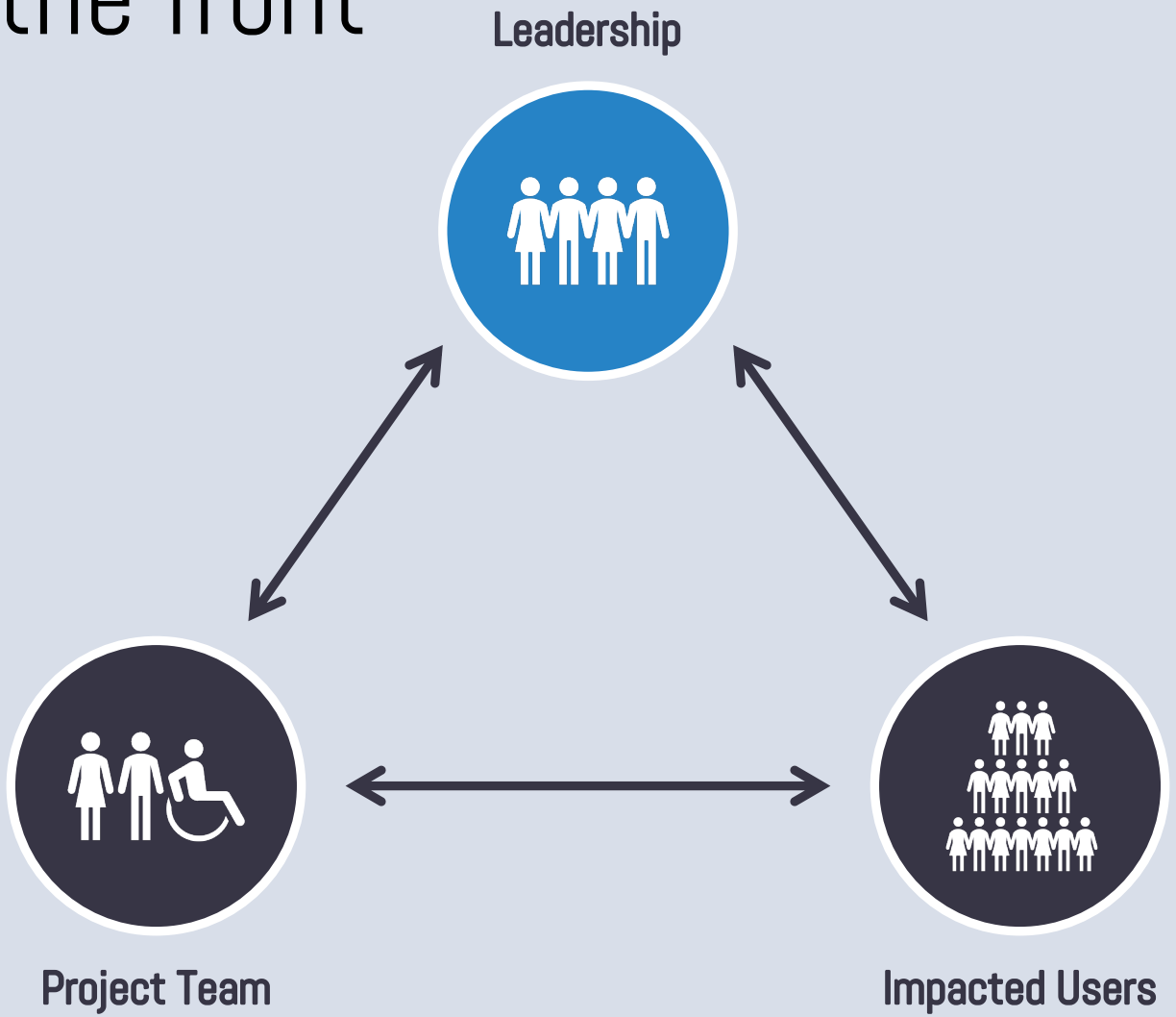
Change management

- Most Microsoft partners do not incorporate change management into projects
- Highly recommend Prosci change management methodology (prosci.com)
- Get interested in change management!
  - Get training for people in your organisation
  - Microsoft Customer Success Managers
  - Books, community events

Communication



Lead from the front



The project team

- Project management
  - Weak project management leads to uncoordinated dependencies and delay
  - Good Scrum Masters and Product Owners are worth their weight in gold
- Make sure you have the right skills in the team
  - Sufficient depth and breadth
  - Replace people who don't perform
- A team that plays together, stays together
  - Team members should get to know each other
  - A strong team gets through the hard times together
  - Replace people who don't 'gel'

PROCESS

Business requirements

- Your business requirements can make or break your project
- Quality counts – this takes time and effort
  - Use trained business analysts
- Requirements impact on:
  - Development productivity
  - Testing
  - User adoption

Impact of requirements

- Poor requirements can impact the entire project

Non-functional Requirements

- What are non-functional requirements (NFRs)? Examples:
  - Performance
  - Scalability
  - Availability
  - Infrastructure security
  - User experience
- Can cause significant rework and impact your go-live
- Document them – treat them the same as functional requirements
- Bake them in from the start!

Security requirements

- Define personas for all impacted user groups 👩 👨 👨 🦸 🧑‍🚀
- Tag requirements with personas so you can test
- Don't forget non-core users:
  - IT Support
  - Data administrators
  - Internal development team
  - Integration/application users
- Incorporate security requirements from the start

Don't forget the project team

- What access do project team members need?
  - Existing environments/data
  - New environments – which should they have access to, and when?
  - Integration and data migration teams
- What software licenses do they need?
  - Dynamics 365 – when?
  - Infrastructure build
  - Others

Your project's data

- Data quality
  - Agree quality standards – different data sources/formatting/required fields
  - Cleanse data before migration
    - Doesn't get done after go-live
    - Major user adoption impact
- Data ownership
  - Who owns the data you are incorporating into your project?
    - Could be several [conflicting] business areas – leads to delay
  - The organisation must define clear ownership and responsibility for quality
  - Data retention rules - document as requirements

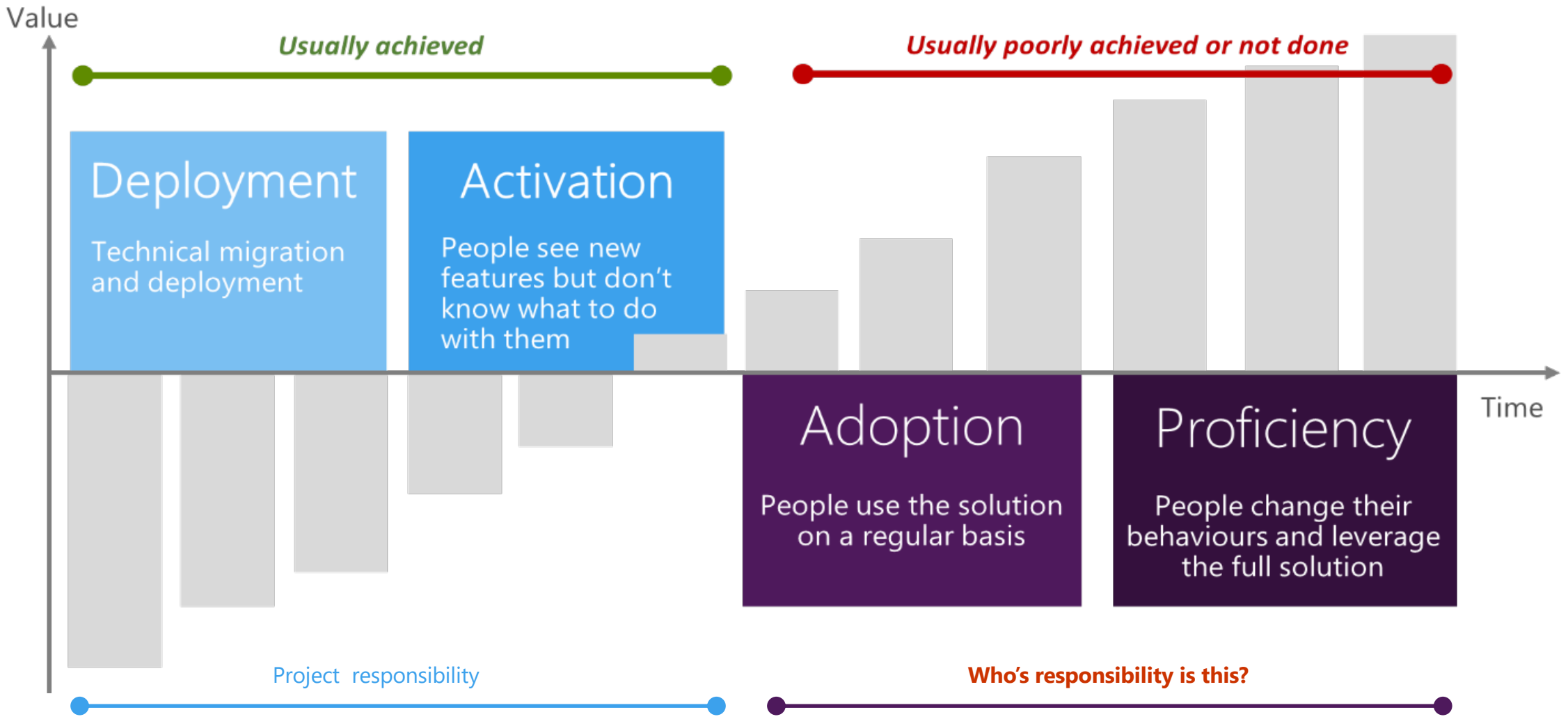
Data migration

- Always harder than you think
  - Often takes 2-3 times longer than planned
- Is dependent upon earlier work – can't start without a data model!
- A key project dependency and very common reason for delaying go-live – you can't go-live without data
  - Migration becomes a bottleneck

TIME

There is never enough time

- When things get tough, give the project the opportunity to succeed
- A difficult conversation ⏰ = 💰 💰 💰
- Consider the cost of failure


Value
Usually achieved
Usually poorly achieved or not done
Deployment
Technical migration and deployment
Activation
People see new features but don't know what to do with them
Adoption
People use the solution on a regular basis
Proficiency
People change their behaviours and leverage the full solution
Time
Project responsibility
Who's responsibility is this?

Measure three times, cut once

- Your project is running late - what are the first things to get cut?

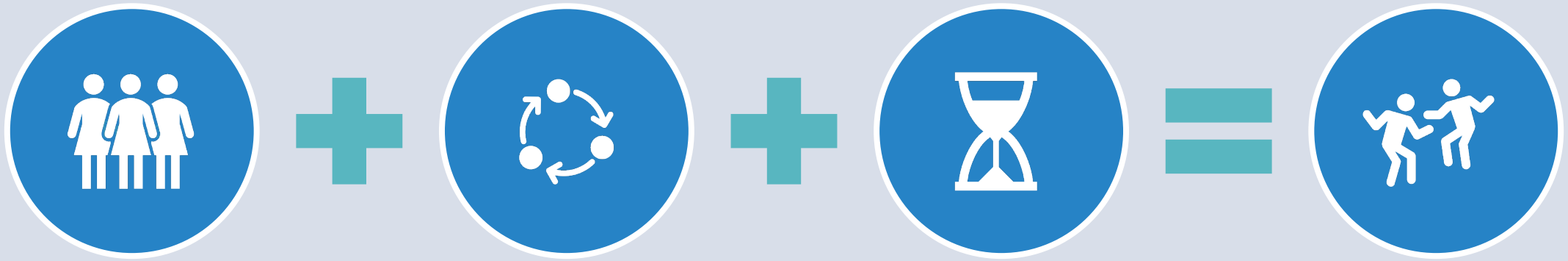
Go-live

- Time to party..?
- No, get back to work!
- Plan for
  - Bug fixes
  - Data fixes
  - Transition into support
  - Your project team is out the door 🏃‍♀️💨
  - ❗ Continue to train people ❗
  - This is a journey not a destination – what next?
- This all costs money – make sure it's budgeted for early on

SUMMARY

Summary

- Successful projects are possible
  - On time and on budget – everybody looks good
- It's not about the technology, remember the recipe for success



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