



Checklist

✓ Support scope

- ☐ Establish a practical reference architecture and detailed procedures with repeatable steps for the support team that can be operated day to day.
- ☐ Identify the impact of the business and IT policies on the scope and the impact on the policies after the Dynamics 365 application is in operation.
- ☐ Identify the Dynamics 365 application-specific functions and procedures as well as business processes that need to be supported.

✓ Support model and the related support organization

- ☐ Define the type of support operating model to adopt and the nature of the role of the internal and external support teams.
- ☐ Create a support organization charter with a detailed definition of the tasks, roles, responsibilities, and standards expected to keep the system operating.
- ☐ Consider the implications of supporting a cloud and SaaS application, and potentially including a Dynamics 365 CoE in the support model.

✓ Support operational considerations

- ☐ Establish a transition strategy that drives the support team to participate in the emerging solution and improve their support readiness over the project lifecycle, rather than a limited handover close to go live.
- ☐ Confirm the readiness of the support team's operating model, resources, knowledge, and procedures during UAT.
- ☐ Have a defined strategy to manage the critical period just after going live (hyper care) with explicit entry and exit criteria.
- ☐ Define how to keep the solution up to date and evolving with additional and improved features and capabilities.
- ☐ Determine a support and servicing calendar for regular and periodic maintenance activities.
- ☐ Identify the normal hours of operation across different locations, as well as out-of-hours service windows, multi-language and time zone requirements, seasonal peaks, period-end, or one-off events.
- ☐ Establish formal escalation procedures with defined criteria, SLAs, and different tiers of support, including internal and external support.
- ☐ Determine the tooling that the support organization requires.
- ☐ Identify the policies to access data and environments, either by internal support teams or by external support teams.