



Case study

The gift: go live in a cloud solution

A toy company recently embarked on an implementation project and migrated all their processes from on-premises to Dynamics 365. They had integrations with Dynamics 365 Customer Engagement, Microsoft Power Apps, and Power BI. The company plans to implement Dynamics 365 Commerce and Warehouse Management mobile app in Microsoft Dynamics 365 Supply Chain Management in future rollouts, but they needed to move all financial data and their CRM system to the cloud in time for the end of the year, their busiest time.

At the end of October, the team was excited and a little nervous about the approaching go live. The impact of changing from a system in place for many years would be huge. The team was used to their manual and inefficient processes but were ready to move to a system that would automate and improve processes and increase revenue growth and profitability along with scalability. Change management was critical for success.

The implementation team needed to make sure that everything was ready for going live. With go live four weeks away, it was time to start reviewing their readiness for the implementation. SIT was completed, and UAT and performance testing were almost completed. The system seemed performant—although not optimal, it was considered ready for production.

The team was ready to start the go-live review, to switch to the Prepare phase. They prepared the go-live checklist and asked themselves the following: Everything was thoroughly tested, but was the system really ready? Were the users ready? Was all the infrastructure ready? Were all the systems up to date? Was the mock cutover planned? Were the ISVs working well?

Concerns came up over risks and issues identified during the assessment. For instance, they realized that the mail service and other services were in another tenant, so they needed to perform a tenant move to enable single sign-on for their users. In addition, Microsoft was planning an automated version release by their go-live date, so they needed to update their environments to the latest version. This would necessitate conducting another smoke test and verifying that the ISVs worked correctly with the version. They missed dates because they were focused on UAT and making fixes and addressing new requirements identified during the testing phase.

The team realized that open transactions weren't ready to be closed in the old system and therefore they created them in the new one. The data migration plan wasn't solid. In addition, performance was weak, so the team needed to troubleshoot the code.

Business stakeholders made a go/no-go decision after this assessment. It wasn't an easy decision, but they decided not to go live. Despite all the heavy lifting they had done, they didn't have a mock cutover plan, which they realized was necessary to complete the readiness process.

Would they need to change the go-live date that was so close to the holiday season?

What could they have done better? They couldn't have changed the date because they needed to be ready for the holidays, but they could have planned the go-live date earlier so that they had more time for the ramp-up and to address any delays or issues. They could also have had an earlier assessment review, with UAT almost complete. The timelines were tight, and they had the choice to go live with what they had, which was risky because that might mean stopping operations in the

middle of the busiest season, or move the go-live date to January—December wasn't an option. A third option was to hire more resources and work more hours to try to deliver on time, which was risky because the ramp-up would be during November. A big-bang go live wasn't optimal for this situation.

The team learned that it's important to start the readiness review on time and to schedule sufficient time and resources. Additionally, it's crucial to have a solid support plan for production. The importance of the Prepare phase also shouldn't be underestimated—plan with enough time to mitigate any issues and risks.