Case study

Timely environment planning is a critical factor to success

A multinational retailer with stores in Southeast Asia, Australia, and New Zealand implemented the Dynamics 365 Finance, Supply Chain Management, and Commerce apps in a series of phased rollouts spread over eight months.

The management team was not clear that the environments, services, and default capacities included in the SaaS subscription license—mainly the production and sandbox environments and hosted build automation services—were the minimum needed to run the solution on an ongoing basis, but were insufficient on their own to complete all the implementation activities required for the moderately complex rollout.

When the FastTrack team was engaged early in the implementation process, this issue was addressed as part of the Solution Blueprint Review (SBR). In discussions with the solution architect, the retailer and partner members of the implementation team gained a better understanding of the deployment plans and risks posed by their current environment strategy (or lack thereof). After the review, the team agreed to conduct a deep-dive workshop on environment strategy with FastTrack, which was one of the recommendations based on the findings from the SBR.

In the workshop, the solution architect explained that environment planning is not a one-time, set-it-and-forget-it event. Rather, it's a continuing activity that requires close collaboration between key stakeholders. Careful planning aligned with the project schedule ensures that the team can be productive, conduct important activities concurrently without environment contention, and achieve milestones on time, within budget, and with the desired level of quality.

Next, the project team charted out an environment plan to document the different environments, their purpose, the exact project phase for which they were needed, and how long they would be needed. For example, they acquired a high-grade testing environment for three months just to conduct their performance testing. They also identified key activities that might affect the environment plan and incorporated recurring reviews of the environment plan into the project plan. This simple but important exercise helped the team feel confident that they understood and accounted for all important implementation requirements, and that they were prepared to procure the needed environments on time to reach all milestones.

The development team also worked on configuring DevOps for multiple release branches, with a separate pipeline of sandboxes to facilitate go-live phases and ongoing support for each one.

Ultimately, this retailer successfully performed the implementation and rolled out the solution across multiple countries—and realized that timely environment planning was a critical factor in that success.