Case study
The journey to a process-focused solution

A large, multinational organization that provides contract-based servicing with some manufacturing and distribution services was planning to replace parts of its 15-year-old tier-one ERP and CRM systems and other related legacy systems.

The wrong road

The project started with the implementation process that they had traditionally applied to other IT projects. The traditional approach was strictly Waterfall with a heavy documentation bias. The initial phase of requirements gathering was conducted by using the old systems as the reference point. A very long list of requirements was gathered, with the assistance of an implementation partner, across the various functions. The requirements gathering phase was extended a few times as the requirements review took significantly longer than expected.

The reviews needed multiple parties to read, understand, and validate the requirements and there was a concern among the business approvers that if they missed any requirement, or even a nuance, their system would not function well.

So, there were multiple document-based reviews where comments

from the approvers were formally submitted and the project team wrote responses to them, which in turn generated even more comments from the approvers. The spiral of these reviews finally concluded, but the business was not entirely convinced that they fully understood what they had approved and hoped that the design phase would provide more clarity.

The design phase was similarly based on writing and reviewing complex design documents and was running late. The focus tended to be on the "gaps" identified, and as these were not always placed in context, the discussion with business users was not always productive and was often at cross purposes. As further delays accrued and the business users were becoming even less confident about the proposed solution, the stakeholders decided to review the project direction and the reasons for the continuous delays and general dissatisfaction.

The change of direction

As part of the review, which included third parties, several recommendations were made. The primary recommendation was to adopt a more process-focused approach and apply the processes as the framework for a more Agile way of working. The first step in the process was to define the end-to-end process at the highest level in order to establish the boundaries of the project scope in business process terms. The subsequent steps then generated two further levels of visualization of the process detail for the business process streams. The project took deliberate steps to try to define the processes in terms of the business flow and desired business outcomes, rather than replicating the existing systems. This process mapping exercise was done at an accelerated pace, working as combined business, project, and implementation partner workstreams.

The right road

Once there was a reasonable map of the processes, the requirements were mapped to the processes so that they could be understood in the context of a process. As a result, many of the requirements were restated to be better anchored in the context of a business transaction and thus less likely to be misinterpreted or removed for being redundant.

The processes at level two were put into a storyboard by using the expertise and leadership of the partner solution architect and the customer's lead functional expert. The customer's lead functional expert used the process flows to create logical end-to-end process flows across workstreams so the delivery of software would be meaningful. The partner solution architect provided the Dynamics 365 application view of the embedded standard processes, dependencies, and constraints to ensure that the sequence of process delivery would be efficient within the Dynamics 365 applications. This storyboard would drive the sequence of work from realizing foundational processes to more peripheral ones. Furthermore, the level two end-to-end processes (such as "Prospect to Cash") were prioritized by considering the core/most frequent/ baseline path through the process as a higher priority. The more specialized and less frequent variations were sequenced to be designed and delivered after the core processes.

This set of processes in the storyboard were then mapped to an overall design within Dynamics 365 applications, generating a process-focused solution blueprint. It was reviewed against the existing technical, system, and data solution blueprint to create a rounded solution blueprint.

The delivery of the processes was distributed into sprints of four weeks each, so each sprint delivered a meaningful part of the storyboard for each of the workstreams, with an emphasis on delivery of end-to-end processes as rapidly as possible. A high-level plan was constructed based on the sequence, dependencies, and estimated effort related to process delivery.

The sprint level planning was performed on the processes in scope for that sprint, defining a more detailed process flow when required. Documentation was kept to a minimum and the processes were designed in the Dynamics 365 system in collaborative workshop environments. All related activities such as data migration, integrations, testing, training, change management, etc. were performed based on the processes in scope. Each sprint culminated in a "conference room pilot" (sometimes called "working demo" or "playback"), where the business SMEs presented the new logical business process and how the processes

were designed and implemented in the system via a demo to an invited business audience.

At each sprint end, the business attendees reviewed and approved the incrementally complete and functioning processes in the Dynamics 365 system instead of reviewing and approving complex and technical design documents. Individual gap designs that had previously been circulating on paper for weeks and months were getting translated into end-to-end working software. Business engagement significantly increased as the project was talking their language and they were working directly with the emerging Dynamics 365 system rather than with abstract design documents and lists of requirements.

Arriving at the destination

The project further reinforced the process-centric project approach, beyond design and build, by using the processes to script and drive end-to-end testing, reporting status and progress as "ability to execute a process within the system." The senior business stakeholders on the steering group also connected with the project more meaningfully as they were finally able to understand the project readiness and business operations implications.

The project successfully went live, and the customer continued to adopt a process-centric view throughout the remainder of their go-lives in other countries. The implementation partner decided to adopt this process-centric approach as their new standard implementation approach for their other projects because they could clearly see the benefits.