# 95.01 Service to Deliver Scenario Board Discovery Workshop

The Service to Deliver scenario board discovery workshop is designed to help establish a comprehensive understanding of the end-to-end service lifecycle using Dynamics 365 Field Service. This workshop covers strategic planning, service work planning, order processing, operations execution, and performance analysis. It also includes questions to determine whether Customer Service, Finance, or Supply Chain Management modules are required to meet business needs.

## Assumptions

* The Service to Deliver process is in scope for the Dynamics 365 implementation.
* The scenario board includes both field service and supporting business functions.
* The following stakeholders are available and actively contribute to the workshop:
  + Service strategy managers – responsible for defining service offerings and objectives.
  + Field service managers – responsible for planning and dispatching service work.
  + Customer service managers – responsible for case management and customer engagement.
  + Finance representatives – responsible for service billing, cost tracking, and revenue recognition.
  + Supply chain managers – responsible for parts availability, inventory, and logistics.
  + IT and Dynamics 365 administrators – responsible for system configuration and integration.
  + Executive sponsors – responsible for strategic alignment and decision-making.

## Objectives

* Understand the customer’s service delivery model and process scope.
* Identify key scenarios and requirements across the service lifecycle.
* Document agreed business scope and supporting system needs.

## High-Level Agenda

* Introduction and objectives
* Overview of Service to Deliver process
* Discussion of each L2 process area
* Interactive Q&A session
* Wrap-up and next steps

## Key Questions

* What types of services are offered (e.g., break/fix, preventive maintenance, installations)?
* How are service strategies defined and aligned with customer expectations?
* How is service work planned and scheduled?
* What tools are used for dispatching and resource management?
* How are service orders created and managed?
* What is the process for capturing time, materials, and expenses?
* How are service operations executed and monitored in the field?
* How is customer communication and documentation handled?
* How is service performance measured (e.g., SLA compliance, first-time fix rate)?
* Are there requirements for case management or customer support beyond field service?
* Are service items or parts tracked through inventory or supply chain systems?
* How is service billing handled (e.g., flat rate, time and materials)?
* Are there integration needs with Finance or Supply Chain Management?
* What historical service data needs to be migrated?
* What systems need to integrate with Dynamics 365 Field Service?

## Scenario Board

Following is a sample scenario board template for the Service to Deliver process.



The image is a flowchart titled Service to Deliver Scenario Board that outlines a business process from lead identification to quotation of sales. The top row depicts a basic flowchart of the business process areas for the Service to Deliver process. Below each process step there are one or more blue boxes that depict scenarios and key attributes of the business process area for discussion in the workshop. The bottom of the graphic includes horizontal or supporting processes that support the entire Service to Deliver process.

1. **95.05 Develop service strategy**
   1. Scenarios  
      i) Preventive maintenance  
      ii) Reactive/break-fix service  
      iii) Predictive service (IoT-based)  
      iv) Warranty-based service  
      v) Contract-based service  
      vi) Depot repair  
      vii) Field service
   2. Compliance  
      i) Safety and regulatory standards  
      ii) Warranty and service level agreements (SLAs)  
      iii) Environmental regulations
   3. Policies  
      i) Service level definitions  
      ii) Warranty coverage rules  
      iii) Contract entitlements  
      iv) Resource utilization targets  
      v) Outsourcing and subcontractor policies
2. **95.15 Plan service work**
   1. Scheduling scenarios  
      i) Manual scheduling  
      ii) Assisted scheduling  
      iii) Resource scheduling optimization (RSO)  
      iv) Territory-based scheduling  
      v) Skill-based scheduling  
      vi) Crew or team scheduling
   2. Resource types  
      i) Internal field technicians  
      ii) Third-party contractors  
      iii) Mixed workforce
   3. Planning inputs  
      i) IoT alerts  
      ii) Customer requests  
      iii) Preventive maintenance plans  
      iv) Case escalations (→ Customer Service)
   4. Tools and methods
      1. Schedule board
      2. Mobile access
      3. Integrated calendars
      4. Time zone considerations
      5. Shift considerations
3. **95.25 Manage service work**
   1. Creation scenarios  
      i) From customer case (→ Customer Service)  
      ii) From IoT alert  
      iii) From maintenance schedule  
      iv) Manual entry  
      v) From sales or project delivery
   2. Work order components  
      i) Service tasks  
      ii) Products/parts  
      iii) Services/labor  
      iv) Expenses
   3. Entitlement and contract validation  
      i) Warranty validation  
      ii) Contract coverage  
      iii) SLA enforcement
   4. Inventory and parts  
      i) Warehouse issue  
      ii) Van stock  
      iii) Just-in-time delivery  
      iv) Return and restock (→ Supply Chain Management)
   5. Financial integration  
      i) Time and materials billing  
      ii) Fixed fee billing  
      iii) Internal cost tracking (→ Finance)
4. **95.35 Deliver services**
   1. Execution scenarios  
      i) On-site service  
      ii) Remote service  
      iii) Depot repair  
      iv) Follow-up visits
   2. Technician enablement  
      i) Mobile work order management  
      ii) Access to customer history  
      iii) Access to manuals and schematics  
      iv) Offline capabilities
   3. Time tracking
      1. Manual entry
      2. Clock-in/clock-out
      3. Mobile time capture
      4. Payroll integration
      5. Project accounting integration (→ Finance)
   4. Materials and expenses  
      i) Parts usage  
      ii) Travel and mileage  
      iii) Lodging and meals  
      iv) Equipment rental  
      v) Expense capture via mobile
   5. Completion and feedback  
      i) Customer signature  
      ii) Photo documentation  
      iii) Post-service survey  
      iv) Follow-up case creation (→ Customer Service)
5. **95.45 Analyze service performance**
   1. Metrics  
      i) First-time fix rate  
      ii) SLA compliance  
      iii) Technician utilization  
      iv) Mean time to repair (MTTR)  
      v) Service margin (→ Finance)  
      vi) Parts usage trends (→ Supply Chain Management)
   2. Reports  
      i) Work order backlog  
      ii) Contract profitability  
      iii) Customer satisfaction  
      iv) Resource performance  
      v) Inventory consumption

# 95.02 Service to Deliver Storyline Design Review Workshop

The Service to Deliver storyline design review workshop is a critical step in validating the proposed solution design for managing service operations in Dynamics 365 Field Service. This session focuses on reviewing the “happy path” scenarios across the service lifecycle, conducting a fit-to-standard review, and identifying any gaps or design decisions.

## Assumptions

* The agreed business scope from the scenario board workshop is finalized.
* Dynamics 365 is configured for the selected storyline scenarios.
* The following stakeholders are available and actively contribute to the workshop:
  + Field service managers – responsible for validating service planning and execution workflows.
  + Customer service managers – responsible for reviewing case and communication scenarios.
  + Finance and billing analysts – responsible for validating service invoicing and cost tracking.
  + Supply chain managers – responsible for reviewing inventory and parts logistics.
  + IT and solution architects – responsible for reviewing system configuration and integrations.
  + Executive sponsors – responsible for strategic alignment and sign-off.

## Objectives

* Demonstrate Dynamics 365 Field Service capabilities for service delivery.
* Validate the solution design for each L2 process area.
* Identify gaps, risks, and decisions.
* Define next steps for configuration and testing.

## High-Level Agenda

* Introduction and objectives
* Demonstration of storyline scenarios (Service to Deliver lifecycle)
* Fit-to-standard discussion
* Q&A and feedback
* Wrap-up and next steps

## Key Questions

* Does the solution support your service delivery model effectively?
* Are there any gaps in functionality or integration?
* How are service orders, scheduling, and execution handled in the system?
* How are customer communications and documentation managed?
* How are service costs and billing captured and reported?
* Are there any concerns with usability, scalability, or compliance?
* What changes are needed to align with your service strategy?

# 95.05 Develop Service Strategy - Deep-Dive Discovery Workshop

This workshop is designed to define and refine the service strategy for organizations using Dynamics 365 Field Service. It focuses on establishing service pricing models, service policies, catalogs, terms, risk management strategies, and the overall service delivery approach. The session will help identify strategic goals, align service offerings with customer expectations, and ensure operational readiness.

## Assumptions

* The 95.05 Develop Service Strategy process is in scope for the Dynamics 365 implementation.
* The following stakeholders are available and actively contribute to the workshop:
  + Service strategy managers – define service offerings and long-term objectives.
  + Field service directors – oversee service delivery models and performance standards.
  + Pricing analysts – define and maintain service pricing structures and discounting policies.
  + Legal and compliance officers – ensure service terms and policies meet regulatory requirements.
  + Risk managers – assess and mitigate service-related risks.
  + IT and Dynamics 365 administrators – configure service catalogs and pricing models.
  + Finance representatives – validate cost models and revenue strategies.

## Objectives

* Define service strategy requirements and goals.
* Identify gaps in current service offerings and policies.
* Plan for service pricing, catalogs, terms, and risk mitigation.

## Agenda

* Introduction and objectives
* Review of current service strategy and offerings
* Discussion of pricing, policies, catalogs, and terms
* Risk management and compliance considerations
* Wrap-up and next steps

## Key Questions

* Service Pricing
  + What pricing models are used (e.g., flat rate, time and materials, tiered)?
  + How are service prices determined and maintained?
  + Are there regional or customer-specific pricing variations?
  + How are discounts and promotions managed?
* Service Policies
  + What policies govern service delivery (e.g., response time, warranty, cancellation)?
  + How are service level agreements (SLAs) defined and enforced?
  + Are there escalation procedures for service issues?
* Service Catalogs
  + What services are offered and how are they categorized?
  + How is the service catalog maintained and updated?
  + Are there bundled or configurable service packages?
* Service Terms
  + What are the standard terms and conditions for service contracts?
  + How are service agreements documented and approved?
  + Are there variations in terms based on customer type or geography?
* Risk Management Strategy
  + What are the key risks associated with service delivery?
  + How are risks assessed and mitigated?
  + Are there contingency plans for service disruptions?
* Overall Service Approach
  + What is the long-term vision for service delivery?
  + How is customer feedback incorporated into service strategy?
  + How is the service strategy aligned with business goals?

# 95.15 Plan Service Work - Deep-Dive Discovery Workshop

This deep-dive discovery workshop is designed to define and evaluate the planning processes for service work in Dynamics 365 Field Service. It focuses on capacity planning, service demand forecasting, service parts forecasting, scheduling of service technicians, and contractor planning. The goal is to understand current practices, identify gaps, and define requirements for a scalable and efficient service planning model.

## Assumptions

* The Plan Service Work process is in scope for the Dynamics 365 Field Service implementation.
* The following stakeholders are available and actively contribute to the workshop:
  + Field service planners – responsible for forecasting and scheduling service work.
  + Dispatchers – responsible for assigning and managing technician schedules.
  + Inventory managers – responsible for managing service parts and forecasting demand.
  + Contractor coordinators – responsible for managing third-party service providers.
  + IT and Dynamics 365 administrators – responsible for system configuration and integration.
  + Finance and operations analysts – responsible for tracking service costs and performance.

## Objectives

* Define service planning requirements and constraints.
* Identify gaps in current scheduling and forecasting processes.
* Plan for data migration and system integrations.

## Agenda

* Introduction and objectives
* Review of current service planning processes
* Capacity planning and forecasting
* Technician scheduling and contractor planning
* Wrap-up and next steps

## Key Questions

* Capacity Planning
  + How is service capacity currently calculated and tracked?
  + Are there seasonal or regional variations in service demand?
  + How are technician skills and availability factored into capacity planning?
* Service Demand Forecasting
  + How is future service demand forecasted (e.g., preventive maintenance, historical trends)?
  + What tools or reports are used to support service forecasting?
  + How is forecasted demand used to inform staffing and inventory decisions?
* Service Parts Forecasting
  + How are service parts demand forecasted and replenished?
  + Are parts usage tracked by service type or technician?
  + How are parts shortages or delays managed?
* Technician Scheduling
  + How are technicians scheduled and dispatched?
  + What constraints are considered (e.g., skills, location, availability)?
  + Are technicians assigned to specific territories or customer segments?
* Contractor Planning
  + How are third-party contractors scheduled and managed?
  + Are contractor SLAs tracked and enforced?
  + How is contractor availability and performance monitored?

# 95.25 Manage Service Work - Deep-Dive Discovery Workshop

This workshop is designed to define and refine the business requirements and solution design for processing service orders using Dynamics 365 Field Service. It focuses on the creation and maintenance of work orders, parts management, deployment of service resources, management of service assets and contracts, and dispatching and routing of technicians.

## Assumptions

* The 95.25 Process Service Orders process is in scope for the Dynamics 365 implementation.
* The following stakeholders are available and actively contribute to the workshop:
  + Field service managers – oversee work order lifecycle and technician performance.
  + Dispatchers – manage technician scheduling and routing.
  + Inventory and parts managers – ensure availability and tracking of service parts.
  + Contract managers – manage service agreements and entitlements.
  + Asset managers – track and maintain customer-owned or company-managed service assets.
  + IT and Dynamics 365 administrators – configure and integrate Field Service and related modules.
  + Finance representatives – manage service billing and cost tracking.
  + Executive sponsors – provide strategic alignment and decision-making support.

## Objectives

* Define business requirements for managing service orders.
* Identify gaps in current processes and systems.
* Plan for data migration and system integrations.
* Align stakeholders on the future-state solution design.

## Agenda

* Introduction and objectives
* Review of current service order process
* Discussion of work order lifecycle
* Parts and inventory management
* Resource deployment and scheduling
* Asset and contract management
* Wrap-up and next steps

## Key Questions

* **Work Order Creation and Maintenance**
  + How are service orders initiated (manual, automated, customer portal)?
  + What information is required to create a work order?
  + How are work order types and templates managed?
  + How are work orders updated throughout the service lifecycle?
  + What are the approval or validation steps for work orders?
* **Parts Management**
  + How are parts and materials assigned to work orders?
  + How is inventory availability checked and reserved?
  + How are parts usage and returns tracked?
  + Are there integration requirements with inventory or supply chain systems?
* **Deploying Service Resources**
  + How are technicians assigned to work orders?
  + Are there rules or preferences for technician assignment?
  + How is technician availability and skillset managed?
  + Are subcontractors or third-party resources used?
* **Managing and Monitoring Service Assets and Contracts**
  + How are customer assets tracked and linked to work orders?
  + How are warranties and service agreements managed?
  + How are entitlements validated during service order creation?
  + How is asset history and service history maintained?
* **Dispatching and Routing Technicians**
  + What tools are used for dispatching and routing?
  + How is travel time and route optimization handled?
  + How are schedule changes communicated to technicians?
  + Are there mobile tools used by technicians in the field?

# 95.35 Deliver Services - Deep-Dive Discovery Workshop

The Run Service Operations deep-dive discovery workshop is designed to help organizations define and refine their field and back-office service execution processes using Dynamics 365 Field Service. This session focuses on the execution of service work, collaboration, inventory usage, asset updates, customer interaction, and service reporting. It includes considerations for both mobile field technicians and back-office coordination teams.

## Assumptions

* The 95.35 Run Service Operations process is in scope for the Dynamics 365 implementation.
* The following stakeholders are available and actively contribute to the workshop:
  + Field service technicians – perform service work and update work orders using mobile devices.
  + Service coordinators – manage technician schedules and monitor service progress.
  + Inventory managers – track and replenish service parts and consumables.
  + Asset managers – maintain and update asset registers and service history.
  + Customer service representatives – coordinate service appointments and follow-ups.
  + Finance representatives – review service time entries and validate billable activities.
  + IT and Dynamics 365 administrators – configure mobile and back-office service applications.
  + Executive sponsors – ensure alignment with service delivery strategy and KPIs.

## Objectives

* Define service execution requirements for mobile and back-office users.
* Identify gaps in current service operations and collaboration workflows.
* Plan for data capture, reporting, and integration with related systems.

## Agenda

* Introduction and objectives
* Review of current service execution processes
* Discussion of mobile and back-office service scenarios
* Inventory and asset management integration
* Customer interaction and feedback collection
* Wrap-up and next steps

## Key Questions

* **Performing Service Work**
  + How do technicians receive and start service work orders?
  + What tools or checklists are used to guide service execution?
  + How are service tasks documented and updated in real time?
* **Collaboration on Work**
  + How do technicians communicate with dispatchers or other team members?
  + Are there scenarios where multiple technicians collaborate on a single job?
  + How is escalation or support handled during service execution?
* **Consuming Inventory**
  + How are parts and consumables issued to technicians?
  + How is inventory usage recorded and replenished?
  + Are there mobile capabilities for scanning or logging parts used?
* **Updating Asset Registers**
  + How are asset records updated after service is completed?
  + What data is captured (e.g., meter readings, condition, photos)?
  + How is asset history maintained and accessed?
* **Coordinating with the Customer**
  + How are customers notified of technician arrival and job status?
  + What tools are used to capture customer preferences or constraints?
  + How is customer communication documented?
* **Collecting Customer Feedback**
  + How is customer satisfaction captured after service?
  + Are surveys or ratings used?
  + How is feedback linked to technician performance or service quality?
* **Recording Customer Signoff**
  + How is customer approval or signoff captured (e.g., signature, digital form)?
  + Is signoff required for all service types?
  + How is signoff data stored and accessed?
* **Recording Service Timesheets**
  + How do technicians log time spent on service activities?
  + Are time entries reviewed or approved by supervisors?
  + How is time data used for billing or payroll?
* **Mobile and Back-Office Operations**
  + What mobile devices or apps are used by field technicians?
  + What offline capabilities are required?
  + How do back-office teams monitor service progress and update records?
  + What dashboards or reports are used to track service KPIs?

# 95.45 Analyze Service Performance Deep-Dive Discovery Workshop

The Analyze Service Performance deep-dive discovery workshop is designed to help organizations evaluate and improve their service operations using Dynamics 365. This session focuses on identifying key performance indicators, analyzing service gaps, understanding profitability, assessing customer risk, and monitoring service quality. The workshop supports both field and back-office service models and aims to align stakeholders on performance measurement strategies and reporting requirements.

## Assumptions

* The 95.45 Analyze Service Performance process is in scope for the Dynamics 365 implementation.
* The key stakeholders are available and actively contribute to the workshop. The following stakeholders are recommended:
  + Service performance analysts – responsible for defining and tracking service KPIs and metrics.
  + Field service managers – responsible for operational performance and technician effectiveness.
  + Customer success managers – responsible for customer satisfaction and feedback analysis.
  + Finance analysts – responsible for service profitability and cost tracking.
  + Quality assurance leads – responsible for monitoring service quality and compliance.
  + IT and reporting specialists – responsible for configuring dashboards and integrating data sources.
  + Executive sponsors – responsible for strategic oversight and performance improvement initiatives.

## Objectives

* Define service performance measurement requirements.
* Identify gaps in current service reporting and analytics.
* Align on KPIs, data sources, and reporting tools.
* Plan for data integration and dashboard configuration.

## Agenda

* Introduction and objectives
* Review of current service performance metrics
* Discussion of performance gaps and improvement areas
* Review of profitability and customer risk indicators
* Service quality and compliance monitoring
* Wrap-up and next steps

## Key Questions

* Measuring Service Performance
  + What KPIs are currently used to measure service performance?
  + How is technician performance tracked (e.g., first-time fix rate, response time)?
  + What tools or dashboards are used to visualize service metrics?
* Analyzing Service Gaps
  + What are the most common service delivery issues or delays?
  + How are service gaps identified and prioritized?
  + Are there recurring issues by region, product, or customer segment?
* Service Profitability
  + How is service profitability calculated (e.g., by contract, customer, or technician)?
  + What costs are tracked (labor, parts, travel, overhead)?
  + Are profitability metrics used to adjust service offerings or pricing?
* Customer Risk Related to Services
  + How is customer satisfaction measured (e.g., surveys, NPS)?
  + Are there indicators of customer churn or dissatisfaction tied to service performance?
  + How is customer feedback collected and analyzed?
* Service Delivery Effectiveness
  + How is on-time service delivery tracked?
  + Are SLAs defined and monitored?
  + How are escalations and exceptions handled?
* Monitoring Service Quality
  + What quality standards are in place for service delivery?
  + How are service audits or inspections conducted?
  + Are there compliance requirements for service documentation or technician certification?