# Acquire to dispose scenario board discovery workshop

The Acquire to dispose scenario board discovery workshop is designed to help establish a comprehensive understanding of the end-to-end asset management process from acquisition to disposal for all key stakeholders in the implementation of Dynamics 365 to support these processes. This workshop will guide participants through the key scenarios and business process areas involved in the acquire to dispose process. By leveraging visual representations and interactive discussions, the workshop aims to align all stakeholders on the vision for the project and ensure that the new technology solution meets the needs of its users. Participants will engage in identifying key scenarios, goals, and key inputs and outputs for the processes. The workshop serves as a valuable tool for communication and collaboration, helping to refine the proposed scope and allows the partner to create an initial design proposal.

## Assumptions

* The acquire to dispose end-to-end business process is in scope for the Dynamics 365 project.
* The acquire to dispose scenario board is available and leveraged to conduct the workshop.
* The key stakeholders are available and actively contribute to the workshop. The following stakeholders are recommended:
  + Asset managers - responsible for managing the lifecycle of assets from acquisition to disposal
  + IT department - responsible for implementing and maintaining technology solutions to support the acquire to dispose process
  + Finance department - responsible for tracking asset costs and depreciation
  + Operations department - responsible for using assets to support business operations
  + Maintenance department - responsible for ensuring assets are operational and performing maintenance on the assets
  + Procurement department - responsible for purchasing assets and managing vendor relationships
  + Legal and compliance department - responsible for ensuring regulatory compliance related to asset management and disposal
  + Executive leadership - responsible for overseeing the acquisition and disposal of high-value assets and ensuring alignment with strategic goals.
  + Human resources department – responsible for hiring and training users who will be operating the assets

## Objectives

* **Understand the customer's process**: Gain a clear understanding of the customer's intended acquire to dispose process and process scope, including key steps, pain points, and challenges.
* **Identify key scenarios and requirements**: Identify the most critical scenarios and requirements for the customer's acquire to dispose process.
* **Document agreed business scope**: The partner understands the customer’s scenarios and requirements well enough to propose a design to support the customer’s scenario.

## High-Level Agenda

1. Introduction and objectives (15 minutes)
2. Overview of acquire to dispose process (20 minutes)
3. Detailed discussion on key scenarios (45 minutes)
4. Interactive Q&A session (30 minutes)
5. Wrap-Up and next steps (10 minutes)

## Scenario board

Following is a sample scenario board template for the acquire to dispose process.



The image is a flowchart titled Acquire to Dispose Scenario Board that outlines a business process from acquisition to disposal. The top row depicts a basic flowchart of the business process areas for the acquire to dispose 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 acquire to dispose process.

1. 10.05 Define asset strategy and policies
   1. Scenarios
      1. Build
      2. Buy
      3. Lease
      4. Develop
   2. Compliance
      1. ASC 842
      2. IFRS 16
   3. Policies
      1. Capitalization threshold
      2. Depreciation methods
      3. Maintenance guidelines
      4. Disposal
      5. Lease classification
      6. Renewal and termination
      7. Internal controls
2. 10.20 Acquire assets
   1. Sourcing scenarios
      1. Request for quotation (RFQ)
      2. Purchase requisition
      3. Purchase order
      4. P-Card
      5. Projects
      6. Construction in Progress (CIP)
   2. Asset type scenarios
      1. Tangible, high-value
      2. Tangible, low-value
      3. Intellectual Property
      4. Trademarks
      5. Land
   3. Scenarios
      1. Planned/Budgeted
      2. Unplanned/Not budgeted
   4. Budget approach
      1. Top-down
      2. Bottom-up
      3. Zero-based
   5. Budget detail
      1. Lump sum
      2. Summarize by type
      3. Detailed by asset
3. 10.30 Manage active assets
   1. Fixed asset scenarios
      1. Depreciate assets
      2. Revalue assets
      3. Write-up/down assets
      4. Correct asset values
   2. Asset lease scenarios
      1. Accrue lease payments
      2. Make lease payments
      3. Amortize lease liability
      4. Record lease expenses
   3. Capital asset project scenarios
      1. CIP
      2. Internal/Time
      3. Eliminate/Capitalize projects
   4. Operations
      1. Maintain asset details
      2. Insure
      3. Transfer
      4. Asset tagging
      5. Asset inventory
4. 10.50 Maintain and repair assets
   1. Why
      1. Scheduled maintenance
      2. Unplanned maintenance
   2. Who
      1. Handled internally with local resources
      2. Handled internally with remote resources
      3. Handled internally with travelling resources
      4. Managed through third-party vendor
   3. Where
      1. Integrated
      2. In Dynamics 365
5. 10.60 Retire and dispose of assets
   1. Scenarios
      1. Sell
      2. Replace
      3. Repair
      4. Dispose
      5. Decommission
6. 10.70 Analyze assets
   1. Inventory value
   2. Depreciation
   3. Condition
   4. Lease liabilities
   5. Maintenance cost
7. Case Management
8. Data and Integration

## Key questions

1. **Introduction and Objectives**
   1. What are your main objectives for implementing Dynamics 365 for asset management?
   2. What are the key challenges you are currently facing in your acquire to dispose process?
   3. Is the acquire to dispose process the same across your organization? Are there key differences between legal entities, business units, or departments that need to be considered?
2. **Overview of Acquire to Dispose Process**
   1. What are the key scenarios in your acquire to dispose process? (Mark or highlight the primary scenario that will be focused on for the next phase.)
   2. Are there any scenarios that should not be included on this diagram? (Mark or strikethrough scenarios that are out of scope.)
   3. Are there any additional scenarios that are not included in this diagram that should be includes? (Add the rows and document as potential gaps.)
   4. What key differences do you see in your current acquire to dispose process and this standard process? (Use the acquire to dispose scenario board as a starting point. Document any key differences for change management.)
   5. What are the key pain points or bottlenecks in your current process?
3. **Detailed Discussion on Key Scenarios**
   1. Are there any policies that need to be reviewed or adjusted as part of this project? (If so, document and flag for change management.)
   2. What are the most critical scenarios you encounter in your acquire to dispose process?
   3. How many total assets do you have today?
   4. How often do you dispose or retire assets?
   5. What systems or tools are you currently using for asset management?
   6. How do you ensure compliance with regulatory requirements in your acquire to dispose process?
   7. What improvements or changes would you like to see in your current process?
4. **Data Migration:**
   1. What data needs to be migrated to the new asset management system?
   2. How do you currently manage and store asset data?
   3. Are there any data quality issues that need to be addressed before migration?
   4. What are the key challenges you anticipate during the data migration process?
   5. How do you plan to validate and verify the accuracy of migrated data?
5. **Integrations:**
   1. What systems need to be integrated with the new asset management system?
   2. How do you currently handle data exchange between different systems?
   3. Are there any specific integration requirements or protocols that need to be followed?
   4. What are the key challenges you anticipate during the integration process?
   5. How do you plan to test and validate the integrations to ensure seamless data flow?

# Acquire to dispose storyline design review workshop

The Acquire to dispose storyline design review workshop is a crucial step in refining the design of the asset management process. This workshop focuses on reviewing the storyline or “happy path” defined in the acquire to dispose scenario board discovery workshop, conducting a fit-to-standard review, reviewing the configured the solution, and reviewing high-level designs and slides for parts that cannot be demonstrated.

This workshop takes place after the initial acquire to dispose scenario board workshop and is based on the initial discovery phase. During this session, we will delve deeper into the chosen storyline or “happy path”, ensuring that it aligns with business requirements and standards. We will also identify any gaps or areas that need further refinement.

By the end of this workshop, the aim is to achieve 80-90% accuracy and acceptance for the selected storyline, ensuring that we are well-prepared for the next phases of the project.

**Key Activities:**

* **Review the storyline:** Revisit the storyline or “happy path” selected during the initial discovery phase, ensuring it meets business needs and aligns with the strategic goals.
* **Fit-to-Standard Review:** Conduct a thorough review to ensure that the proposed solution fits within the standard processes and guidelines.
* **Demonstrate the Solution:** Demonstrate the out of the box solution addressing any issues or challenges that arise. Making sure that the focus is on the primary storyline selected in the initial workshop.
* **Review other components and design proposals:** For parts of the process that cannot be demonstrated live, we will review slides or other resources to help illustrate the workflow and key points of the proposed design.

## Assumptions

* The agreed business scope from the first workshop is completed
* Dynamics 365 has been configured for the key storyline selected
* The key stakeholders are available and actively contribute to the workshop. The following stakeholders are recommended:
  + Asset managers - responsible for managing the lifecycle of assets from acquisition to disposal
  + IT department - responsible for implementing and maintaining technology solutions to support the acquire to dispose process
  + Finance department - responsible for tracking asset costs and depreciation
  + Operations department - responsible for using assets to support business operations
  + Maintenance department - responsible for ensuring assets are operational and performing maintenance on the assets
  + Procurement department - responsible for purchasing assets and managing vendor relationships
  + Legal and compliance department - responsible for ensuring regulatory compliance related to asset management and disposal
  + Executive leadership - responsible for overseeing the acquisition and disposal of high-value assets and ensuring alignment with strategic goals.
  + Human resources department – responsible for hiring and training users who will be operating the assets

## Objectives

* **Demonstrate Dynamics 365 Capabilities:** Showcase how Dynamics 365 can address the identified pain points and improve the acquire to dispose process.
* **Gather Feedback and Insights:** Collect feedback from stakeholders to tailor the Dynamics 365 implementation to their specific needs.
* **Define Next Steps:** Outline the next steps and action items for the Dynamics 365 implementation.
* **Document Gaps, Risks, Issues, and Decisions:** Ensure all critical points are documented for future reference and action.

## High-Level Agenda

* Introduction and Objectives (5 minutes)
* Demonstration of Dynamics 365 solution for the storyline scenario (30 minutes)
* Detailed Discussion on Key Scenarios (45 minutes)
* Interactive Q&A Session (30 minutes)
* Wrap-Up and Next Steps (10 minutes)

## Key questions

1. Fit-to-Standard Review:
   1. Does the proposed solution fit within the standard processes and guidelines of your organization?
   2. Are there any gaps or areas that need further refinement to align with the standard solution?
   3. How does the solution address the identified pain points and bottlenecks in your current process?

# Acquire to dispose detailed design workshops

## Define Asset Strategy and Policies Detailed Design Workshop

The define asset strategy and policies discovery workshop is designed to help your organization establish a clear strategy for asset acquisition and management. This session will focus on understanding your overall strategy for buying versus leasing assets, key reporting requirements, budget definitions, and other critical policies.

### Agenda

* Overall Strategy: 1 hour
* Stakeholders: 30 minutes
* Reporting Requirements: 1 hour
* Budget Definitions: 1 hour
* Policies and Guidelines: 30 minutes
* Non-functional Requirements: 1 hour 30 minutes
* Data migrations: 1 hour
* Integrations: 1 hour
* Identifying Gaps: 30 minutes

### Assumptions:

* Key stakeholders involved in asset strategy and policy decisions are available and willing to participate.
* Current asset acquisition strategies, reporting requirements, and budget processes are documented and accessible.
* Participants have a basic understanding of asset management principles and compliance standards.
* Relevant data on asset acquisition strategies, reporting requirements, and budget definitions is available.

### Key Questions to Explore:

1. **Overall Strategy:**
   1. What is your organization’s strategy for acquiring assets? Do you prefer buying or leasing, and why?
   2. How do you decide between buying and leasing assets?
   3. What are the key factors influencing your asset acquisition strategy?
2. **Stakeholders:**
   1. Who are the key stakeholders involved in asset strategy and policy decisions?
   2. How do these stakeholders influence the asset acquisition process?
3. **Reporting Requirements:**
   1. What are the key reporting requirements for your organization regarding asset management? How do you need to group, filter, search, or report on your assets?
   2. Are there specific compliance or regulatory standards you need to adhere to (e.g., ASC, IFRS)?
   3. How do you currently handle reporting for fixed assets, leases, and capital projects?
4. **Budget Definitions:**
   1. How do you define and allocate budgets for asset acquisition and management?
   2. What processes are in place for budget approval and monitoring?
   3. How do you track and report on budget performance for assets?
5. **Policies and Guidelines:**
   1. What policies and guidelines are currently in place for asset management?
   2. How do you ensure compliance with these policies?
   3. Are there any specific approval workflows for asset acquisition and management?
6. **Identifying Gaps:**
   1. Are there any gaps in your current strategy or policies that need to be addressed?
   2. What improvements or changes would you like to see in your asset management strategy?
7. **Security:**
   1. What are the security requirements for managing assets?
   2. How do you currently ensure data security and privacy for asset information?
   3. Are there specific access controls or permissions needed for different user roles?
   4. How do you handle data encryption and secure data transmission?
8. **Performance:**
   1. What are the performance expectations for the asset management system?
   2. Are there any specific response time requirements for asset-related transactions?
   3. How do you handle high transaction volumes and peak loads?
   4. What are the performance monitoring and optimization strategies in place?
9. **Scalability:**
   1. How do you plan to scale the asset management system as your organization grows?
   2. Are there any anticipated changes in transaction volumes or asset types that need to be considered?
   3. What are the scalability requirements for the system infrastructure?
10. **Reliability:**
    1. What are the reliability and uptime requirements for the asset management system?
    2. How do you handle system failures and ensure business continuity?
    3. Are there any specific disaster recovery plans in place?
11. **Usability:**
    1. What are the usability requirements for the asset management system?
    2. How do you ensure that the system is user-friendly and easy to navigate?
    3. Are there any specific training or support needs for users?
12. **Compliance:**
    1. What compliance and regulatory requirements must the asset management system meet?
    2. How do you ensure ongoing compliance with relevant standards and regulations?

## Planning and Budgeting Assets Design Workshop

The plan and budgeting assets workshop is designed to help your organization effectively plan and budget for regular fixed assets, asset leases, and capital assets through projects using Dynamics 365 Finance. This workshop will provide a comprehensive overview of the planning and budgeting processes, identify key requirements, and address any gaps in the out-of-the-box functionality.

### Agenda

* Introduction and Objectives (30 minutes)
* Current Planning and Budgeting Processes (1 hour)
* Volume of Transactions and Budgeting Needs (30 minutes)
* Approval Processes and Policies (1 hour)
* Compliance and Regulatory Concerns (30 minutes)

### Assumptions:

* Key stakeholders are available and willing to participate.
* Current planning and budgeting processes are documented and accessible.
* Participants have a basic understanding of asset management principles.
* Relevant data on transaction volumes, budgeting needs, and compliance requirements is available.

### Key Questions to Explore:

1. **Stakeholders, Systems, and Processes:**
   1. Who are the key stakeholders involved in planning and budgeting for fixed assets, asset leases, and capital projects?
   2. What systems are currently used for planning and budgeting?
   3. Can you describe the current processes for planning and budgeting for each asset type?
   4. What are the main pain points in your current planning and budgeting processes?
2. **Volume of Transactions:**
   1. How many transactions do you process monthly/annually for fixed assets, asset leases, and capital projects?
   2. What is the average value of these transactions?
3. **Approval Processes and Policies:**
   1. What approval processes are in place for planning and budgeting for fixed assets, asset leases, and capital projects?
   2. Are there specific policies that govern these processes?
4. **Compliance and Regulatory Concerns:**
   1. Are there any compliance or regulatory requirements related to planning and budgeting for assets (e.g., ASC, IFRS)?
   2. How do you currently ensure compliance with these requirements?

## Acquire fixed assets design workshop

The acquire fixed assets design workshop aims to understand your organization’s requirements for managing fixed assets using Dynamics 365 Finance. This session will delve into your current systems, processes, and pain points, and identify any gaps in the out-of-the-box functionality.

### Agenda

* Stakeholders, Systems, and Processes: 1 hour
* Volume of Transactions: 30 minutes
* Approval Processes and Policies: 30 minutes
* Compliance and Regulatory Concerns: 30 minutes
* Identifying Gaps: 30 minutes

### Assumptions:

* Key stakeholders are available and willing to participate.
* Current systems and processes for managing fixed assets are documented and accessible.
* Participants have a basic understanding of fixed asset management principles.
* Relevant data on transaction volumes and compliance requirements is available.

### Key Questions to Explore:

1. **Stakeholders, Systems, and Processes:**
   1. Can you describe the current processes for acquiring, tracking, and disposing of fixed assets?
   2. What are the main pain points in your current fixed asset management process?
2. **Volume of Transactions:**
   1. How many fixed asset transactions do you process monthly/annually?
   2. What is the average value of these transactions?
   3. What is the expected growth trajectory of fixed assets over the next year/5 years?
3. **Approval Processes and Policies:**
   1. What approval processes are in place for acquiring and disposing of fixed assets?
   2. Are there specific policies that govern fixed asset management?
4. **Compliance and Regulatory Concerns:**
   1. Are there any compliance or regulatory requirements related to fixed assets (e.g., ASC 360, IFRS)?
   2. How do you currently ensure compliance with these requirements?

## Acquire asset leases design workshop

The Acquire asset leases discovery workshop focuses on understanding your organization’s needs for managing asset leases with Dynamics 365 Finance. This session will cover current systems, processes, pain points, and compliance requirements.

### Assumptions:

* Key stakeholders are available and willing to participate.
* Current systems and processes for managing asset leases are documented and accessible.
* Participants have a basic understanding of lease management principles.
* Relevant data on lease agreements, payments, and compliance requirements is available.

### Agenda

* Stakeholders, Systems, and Processes: 1 hour
* Volume of Transactions: 30 minutes
* Approval Processes and Policies: 30 minutes
* Compliance and Regulatory Concerns: 30 minutes
* Identifying Gaps: 30 minutes

### Key Questions to Explore:

1. **Stakeholders, Systems, and Processes:**
   1. Can you describe the current processes for managing asset leases?
   2. What are the main pain points in your current lease management process?
2. **Volume of Transactions:**
   1. How many lease agreements do you manage?
   2. What is the frequency of lease payments and renewals?
   3. What is the expected growth trajectory of fixed assets over the next year/5 years?
3. **Approval Processes and Policies:**
   1. What approval processes are in place for entering into and renewing lease agreements?
   2. Are there specific policies that govern lease management?
4. **Compliance and Regulatory Concerns:**
   1. Are there any compliance or regulatory requirements related to asset leases (e.g., IFRS 16, ASC 842)?
   2. How do you currently ensure compliance with these requirements?

## Acquire assets through capital projects design workshop

The Acquire assets through capital projects discovery workshop is designed to understand your organization’s requirements for managing capital projects using Dynamics 365 Finance. This session will explore current systems, processes, pain points, and compliance needs.

### Agenda

* Stakeholders, Systems, and Processes: 1 hour
* Volume of Transactions: 30 minutes
* Approval Processes and Policies: 30 minutes
* Compliance and Regulatory Concerns: 30 minutes
* Identifying Gaps: 30 minutes

### Assumptions**:**

* Key stakeholders are available and willing to participate.
* Current systems and processes for managing capital projects are documented and accessible.
* Participants have a basic understanding of capital project management principles.
* Relevant data on project budgets, expenditures, and compliance requirements is available.

### Key Questions to Explore:

1. **Stakeholders, Systems, and Processes:**
   1. Can you describe the current processes for managing capital projects?
   2. What are the main pain points in your current capital project management process?
2. **Volume of Transactions:**
   1. How many capital projects do you undertake annually?
   2. What is the average budget for these projects?
3. **Approval Processes and Policies:**
   1. What approval processes are in place for initiating and managing capital projects?
   2. Are there specific policies that govern capital project management?
4. **Compliance and Regulatory Concerns:**
   1. Are there any compliance or regulatory requirements related to capital projects?
   2. How do you currently ensure compliance with these requirements?

## Managing internal assets design workshop

The managing internal assets design workshop is designed to help your organization effectively manage assets after they have been acquired. This workshop will cover processes such as putting an asset into service, updating asset details, insuring assets, and transferring or moving assets within the organization.

### Agenda:

* Introduction and Objectives (30 minutes)
* Current Asset Management Processes (1 hour)
* Volume of Transactions and Asset Management Needs (30 minutes)
* Approval Processes and Policies (1 hour)
* Compliance and Regulatory Concerns (1 hour)

### Assumptions:

* Key stakeholders are available and willing to participate.
* Current asset management processes are documented and accessible.
* Participants have a basic understanding of asset management principles.
* Relevant data on transaction volumes, asset management needs, and compliance requirements is available.

### Key Questions to Explore:

1. **Stakeholders, Systems, and Processes:**
   1. Who are the key stakeholders involved in managing internal assets?
   2. What systems are currently used for managing internal assets?
   3. Can you describe the current processes for putting assets into service, updating asset details, insuring assets, and transferring or moving assets?
   4. What are the main pain points in your current asset management processes?
2. **Volume of Transactions:**
   1. How many transactions do you process monthly/annually for putting assets into service, updating details, insuring, and transferring assets?
   2. What is the average value of these transactions?
3. **Approval Processes and Policies:**
   1. What approval processes are in place for managing internal assets?
   2. Are there specific policies that govern these processes?
4. **Compliance and Regulatory Concerns:**
   1. Are there any compliance or regulatory requirements related to managing internal assets?
   2. How do you currently ensure compliance with these requirements?

## Managing and reporting on asset financials design workshop

The managing and reporting on asset financials workshop is designed to help your organization effectively manage and report on the financial aspects of assets using Dynamics 365 Finance. This workshop will cover processes such as amortizing leases, making lease payments, depreciating fixed assets, making adjustments or revaluing assets, capitalizing assets, and making corrections.

### Agenda:

* Introduction and Objectives (30 minutes)
* Current Financial Management Processes (1 hour)
* Volume of Transactions and Financial Reporting Needs (1 hour)
* Approval Processes and Policies (1 hour)
* Compliance and Regulatory Concerns (1 hour)

### Assumptions:

* Key stakeholders are available and willing to participate.
* Current financial management processes are documented and accessible.
* Participants have a basic understanding of asset financial management principles.
* Relevant data on transaction volumes, financial reporting needs, and compliance requirements is available.

### Key Questions to Explore:

1. **Stakeholders, Systems, and Processes:**
   1. Who are the key stakeholders involved in managing and reporting on asset financials?
   2. What systems are currently used for managing asset financials?
   3. Can you describe the current processes for amortizing leases, making lease payments, depreciating fixed assets, making adjustments or revaluing assets, capitalizing assets, and making corrections?
   4. What are the main pain points in your current financial management processes?
2. **Volume of Transactions:**
   1. How many transactions do you process monthly/annually for amortizing leases, making lease payments, depreciating fixed assets, making adjustments or revaluing assets, capitalizing assets, and making corrections?
   2. What is the average value of these transactions?
3. **Approval Processes and Policies:**
   1. What approval processes are in place for managing and reporting on asset financials?
   2. Are there specific policies that govern these processes?
4. **Compliance and Regulatory Concerns:**
   1. Are there any compliance or regulatory requirements related to managing and reporting on asset financials (e.g., ASC, IFRS)?
   2. How do you currently ensure compliance with these requirements?

## Maintain and repair internal assets discovery workshop

The maintain and repair internal assets discovery workshop is designed to help your organization effectively plan, schedule, perform, and track maintenance activities for internal assets using Dynamics 365 Finance. This workshop will also cover analyzing maintenance activities to ensure optimal asset performance and cost management.

### Agenda:

* Introduction and Objectives (30 minutes)
* Current Maintenance Management Processes (1 hour)
* Volume of Maintenance Activities and Cost Tracking (1 hour)
* Scheduling and Performing Maintenance (1 hour)
* Analyzing Maintenance Activities (1 hour)

### Assumptions:

* Key stakeholders are available and willing to participate.
* Current maintenance management processes are documented and accessible.
* Participants have a basic understanding of asset maintenance principles.
* Relevant data on maintenance activities, costs, and scheduling is available.

### Key Questions to Explore:

1. **Stakeholders, Systems, and Processes:**
   1. Who are the key stakeholders involved in maintaining and repairing internal assets?
   2. What systems are currently used for planning and scheduling maintenance?
   3. Can you describe the current processes for planning, scheduling, and performing maintenance activities?
   4. What are the main pain points in your current maintenance management processes?
2. **Volume of Maintenance Activities and Cost Tracking:**
   1. How many maintenance activities do you perform monthly/annually?
   2. What is the average cost of these maintenance activities?
   3. How do you currently track maintenance costs?
3. **Scheduling and Performing Maintenance:**
   1. What processes are in place for scheduling maintenance activities?
   2. How do you ensure that maintenance activities are performed on time and effectively?
   3. Are there any specific tools or systems used for scheduling and performing maintenance?
4. **Analyzing Maintenance Activities:**
   1. How do you currently analyze maintenance activities to ensure optimal asset performance?
   2. What metrics or KPIs do you use to evaluate maintenance effectiveness?
   3. Are there any specific reports or dashboards used for analyzing maintenance activities?
5. **Compliance and Regulatory Concerns:**
   1. Are there any compliance or regulatory requirements related to maintaining and repairing internal assets?
   2. How do you currently ensure compliance with these requirements?

## Retire and dispose of assets discovery workshop

The retire and dispose of assets discovery workshop is designed to help your organization effectively manage the retirement and disposal of assets using Dynamics 365 Finance. This workshop will cover processes such as scrapping, selling, or replacing assets.

### Agenda:

* Introduction and Objectives (30 minutes)
* Current Asset Retirement and Disposal Processes (1 hour)
* Volume of Transactions and Disposal Needs (1 hour)
* Approval Processes and Policies (1 hour)
* Compliance and Regulatory Concerns (1 hour)

### Assumptions:

* Key stakeholders are available and willing to participate.
* Current asset retirement and disposal processes are documented and accessible.
* Participants have a basic understanding of asset management principles.
* Relevant data on transaction volumes, disposal needs, and compliance requirements is available.

### Key Questions to Explore:

1. **Stakeholders, Systems, and Processes:**
   1. Who are the key stakeholders involved in retiring and disposing of assets?
   2. What systems are currently used for managing asset retirement and disposal?
   3. Can you describe the current processes for scrapping, selling, or replacing assets?
   4. What are the main pain points in your current asset retirement and disposal processes?
2. **Volume of Transactions:**
   1. How many asset retirement and disposal transactions do you process monthly/annually?
   2. What is the average value of these transactions?
3. **Approval Processes and Policies:**
   1. What approval processes are in place for retiring and disposing of assets?
   2. Are there specific policies that govern these processes?
4. **Compliance and Regulatory Concerns:**
   1. Are there any compliance or regulatory requirements related to retiring and disposing of assets?
   2. How do you currently ensure compliance with these requirements?

## Sample Work Item in Azure DevOps

A screenshot of a computer

Description automatically generated

The workshops are linked at L2 and each L2 has at least one workshop, but some L2’s have multiple workshops.