# 50.01 Forecast to plan scenario board discovery workshop

The Forecast to plan scenario board discovery workshop is designed to help establish a comprehensive understanding of the end-to-end planning process from forecasting to planning 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 Forecast to plan 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 Forecast to plan end-to-end business process is in scope for the Dynamics 365 project.
* The Forecast to plan 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:
  + Business strategists - responsible for developing business strategies
  + Financial planners - responsible for conducting financial planning
  + Sales and operations planners - responsible for conducting sales and operations planning
  + IT department - responsible for implementing and maintaining technology solutions to support the Forecast to plan process
  + Finance department - responsible for tracking financial performance and budgeting
  + Operations department - responsible for aligning operations with business strategies
  + Marketing department - responsible for market analysis and demand forecasting
  + Sales department - responsible for sales forecasting and planning
  + Legal and compliance department - responsible for ensuring regulatory compliance related to planning processes
  + Executive leadership - responsible for overseeing the planning processes and ensuring alignment with strategic goals

## Objectives

* Understand the customer's process: Gain a clear understanding of the customer's intended Forecast to plan 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 Forecast to plan 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

* Introduction and objectives
* Overview of Forecast to plan process
* Detailed discussion on key scenarios
* Interactive Q&A session
* Wrap-up and next steps

## Key questions

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

## Scenario board

Following is a sample scenario board template for the Design to retire process.



The image is a flowchart titled Forecast to Plan Scenario Board that outlines a business process from designing and maintaining new products to the retirement and analysis of product performance. The top row depicts a basic flowchart of the business process areas for the Forecast to plan 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 Forecast to plan process.

1. **50.15 Develop business strategy**
   * Scenarios
     + Market analysis
     + Competitive analysis
     + SWOT analysis
     + Strategic goals
     + Long-term planning
     + Short-term planning
     + Risk management
     + Resource allocation
   * Policies
     + Strategic alignment
     + Performance metrics
     + Governance
     + Compliance
     + Budgeting guidelines
   * ESG
     + Environmental impact assessment
     + Social responsibility initiatives
     + Governance and ethical standards
     + Sustainability goals
     + ESG reporting
2. **50.55 Conduct financial planning**
   * Forecasting
     + Budget forecasting
     + Revenue forecasting
     + Expense forecasting
     + Cash flow forecasting
   * Scenarios
     + Financial risk assessment
     + Investment planning
     + Cost management
   * Policies
     + Financial reporting standards
     + Budget approval processes
     + Financial controls
     + Compliance with financial regulations
3. **50.35 Conduct sales and operations planning**
   * Scenarios
     + Make to stock
     + Make to order
     + Project-centric
     + Product-centric
     + Asset-centric
     + Service-centric
   * Forecasting
     + Demand forecasting
     + Supply chain planning
   * Planning
     + Purchases
     + Production
     + Transfers
     + Capacity
     + Logistics
   * Inventory management
     + Safety stock
     + Replenishment
   * Workforce planning
     + Workforce demand forecasting
     + Workforce supply analysis
     + Talent acquisition planning
     + Succession planning
     + Skill gap analysis
     + Workforce optimization
4. **50.45 Execute sales and operations**
   * Scenarios
     + Order management
     + Production execution
     + Inventory control
     + Distribution planning
     + Sales execution
     + Customer service management
   * Policies
     + Order fulfillment guidelines
     + Production standards
     + Inventory accuracy
     + Distribution policies
     + Sales performance metrics
   * Workforce planning
     + Workforce planning guidelines
     + Recruitment policies
     + Training and development standards
     + Compliance with labor regulations
     + Diversity and inclusion initiatives
5. **50.65 Analyze business performance**
   * Scenarios
     + Financial performance analysis
     + Operational performance analysis
     + Sales performance analysis
     + Market performance analysis
     + KPI tracking
     + Benchmarking
     + Performance improvement planning
   * Policies
     + Performance reporting standards
     + Data accuracy guidelines
     + Compliance with performance metrics
     + Continuous improvement policies

# 50.02 Forecast to plan storyline design review workshop

The Forecast to plan storyline design review workshop is a crucial step in refining the design of the planning process. This workshop focuses on reviewing the storyline or happy path defined in the Forecast to plan scenario board discovery workshop, conducting a fit-to-standard review, reviewing the configured solution, and reviewing high-level designs and slides for parts that cannot be demonstrated. This workshop takes place after the initial Forecast to plan 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.

## 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:
  + Business strategists - responsible for developing business strategies
  + Financial planners - responsible for conducting financial planning
  + Sales and operations planners - responsible for conducting sales and operations planning
  + IT department - responsible for implementing and maintaining technology solutions to support the Forecast to plan process
  + Finance department - responsible for tracking financial performance and budgeting
  + Operations department - responsible for aligning operations with business strategies
  + Marketing department - responsible for market analysis and demand forecasting
  + Sales department - responsible for sales forecasting and planning
  + Legal and compliance department - responsible for ensuring regulatory compliance related to planning processes
  + Executive leadership - responsible for overseeing the planning processes and ensuring alignment with strategic goals

## Objectives

* Demonstrate Dynamics 365 capabilities: Showcase how Dynamics 365 can address the identified pain points and improve the Forecast to plan 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
* Demonstration of Dynamics 365 solution for the storyline scenario
* Detailed discussion on key scenarios
* Interactive Q&A session
* Wrap-up and next steps

## Key questions

* Fit-to-standard review
  + Does the proposed solution fit within the standard processes and guidelines of your organization?
  + Are there any gaps or areas that need further refinement to align with the standard solution?
  + How does the solution address the identified pain points and bottlenecks in your current process?

# 50.15.001 Develop business strategy deep-dive discovery workshop

The Develop business strategy deep dive discovery workshop is designed to help your organization establish a clear strategy for business development and management. This session will focus on understanding your overall strategy for developing business strategies, key reporting requirements, budget definitions, and other critical policies.

## Assumptions

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

## Objectives

* Define detailed requirements and design.
* Identify gaps and areas for improvement.
* Plan data migration and integrations.

## High-level agenda

* Introduction and objectives
* Current processes and systems
* Volume of transactions and needs
* Approval processes and policies
* Compliance and regulatory concerns

## Key questions

* Stakeholders, systems, and processes
  + Who are the key stakeholders involved in developing business strategy?
  + What systems are currently used for developing business strategy?
  + Can you describe the current processes for developing business strategy?
  + What are the main pain points in your current business strategy development process?
* Volume of transactions
  + How many transactions do you process monthly/annually for business strategy development?
  + What is the average value of these transactions?
* Approval processes and policies
  + What approval processes are in place for developing business strategy?
  + Are there specific policies that govern business strategy development?
* Compliance and regulatory concerns
  + Are there any compliance or regulatory requirements related to developing business strategy?
  + How do you currently ensure compliance with these requirements?

# 50.55.001 Conduct financial planning deep-dive discovery workshop

The Conduct financial planning deep dive discovery workshop is designed to help your organization effectively conduct financial planning using Dynamics 365. This session will delve into your current systems, processes, and pain points, and identify any gaps in the out-of-the-box functionality. The workshop will focus on understanding the overall strategy for financial planning, key reporting requirements, budget definitions, and other critical policies.

## Assumptions

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

## Objectives

* Define detailed requirements and design.
* Identify gaps and areas for improvement.
* Plan data migration and integrations.

## High-level agenda

* Introduction and objectives
* Current processes and systems
* Volume of transactions and needs
* Approval processes and policies
* Compliance and regulatory concerns

## Key questions

* Stakeholders, systems, and processes
  + Who are the key stakeholders involved in financial planning?
  + What systems are currently used for financial planning?
  + Can you describe the current processes for financial planning?
  + What are the main pain points in your current financial planning process?
* Volume of transactions
  + How many transactions do you process monthly/annually for financial planning?
  + What is the average value of these transactions?
* Approval processes and policies
  + What approval processes are in place for financial planning?
  + Are there specific policies that govern financial planning?
* Compliance and regulatory concerns
  + Are there any compliance or regulatory requirements related to financial planning?
  + How do you currently ensure compliance with these requirements?

# 50.35.001 Conduct sales and operations planning deep-dive discovery workshop

The Conduct sales and operations planning deep dive discovery workshop is designed to help your organization effectively conduct sales and operations planning using Dynamics 365. This session will delve into your current systems, processes, and pain points, and identify any gaps in the out-of-the-box functionality. The workshop will focus on understanding the overall strategy for sales and operations planning, key reporting requirements, budget definitions, and other critical policies.

## Assumptions

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

## Objectives

* Define detailed requirements and design.
* Identify gaps and areas for improvement.
* Plan data migration and integrations.

## High-level agenda

* Introduction and objectives
* Current processes and systems
* Volume of transactions and needs
* Approval processes and policies
* Compliance and regulatory concerns

## Key questions

* Stakeholders, systems, and processes
  + Who are the key stakeholders involved in sales and operations planning?
  + What systems are currently used for sales and operations planning?
  + Can you describe the current processes for sales and operations planning?
  + What are the main pain points in your current sales and operations planning process?
* Volume of transactions
  + How many transactions do you process monthly/annually for sales and operations planning?
  + What is the average value of these transactions?
* Approval processes and policies
  + What approval processes are in place for sales and operations planning?
  + Are there specific policies that govern sales and operations planning?
* Compliance and regulatory concerns
  + Are there any compliance or regulatory requirements related to sales and operations planning?
  + How do you currently ensure compliance with these requirements?

# 50.45.001 Execute sales and operations deep-dive discovery workshop

The Execute sales and operations deep dive discovery workshop is designed to help your organization effectively execute sales and operations using Dynamics 365. This session will delve into your current systems, processes, and pain points, and identify any gaps in the out-of-the-box functionality. The workshop will focus on understanding the overall strategy for executing sales and operations, key reporting requirements, budget definitions, and other critical policies.

## Assumptions

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

## Objectives

* Define detailed requirements and design.
* Identify gaps and areas for improvement.
* Plan data migration and integrations.

## High-level agenda

* Introduction and objectives
* Current processes and systems
* Volume of transactions and needs
* Approval processes and policies
* Compliance and regulatory concerns

## Key questions

* Stakeholders, systems, and processes
  + Who are the key stakeholders involved in executing sales and operations?
  + What systems are currently used for executing sales and operations?
  + Can you describe the current processes for executing sales and operations?
  + What are the main pain points in your current execution process?
* Volume of transactions
  + How many transactions do you process monthly/annually for executing sales and operations?
  + What is the average value of these transactions?
* Approval processes and policies
  + What approval processes are in place for executing sales and operations?
  + Are there specific policies that govern execution?
* Compliance and regulatory concerns
  + Are there any compliance or regulatory requirements related to executing sales and operations?
  + How do you currently ensure compliance with these requirements?

# 50.65.001 Analyze business performance deep-dive discovery workshop

The Analyze business performance deep dive discovery workshop is designed to help your organization effectively analyze business performance using Dynamics 365. This session will delve into your current systems, processes, and pain points, and identify any gaps in the out-of-the-box functionality. The workshop will focus on understanding the overall strategy for analyzing business performance, key reporting requirements, budget definitions, and other critical policies.

## Assumptions

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

## Objectives

* Define detailed requirements and design.
* Identify gaps and areas for improvement.
* Plan data migration and integrations.

## High-level agenda

* Introduction and objectives
* Current processes and systems
* Volume of transactions and needs
* Approval processes and policies
* Compliance and regulatory concerns

## Key questions

* Stakeholders, systems, and processes
  + Who are the key stakeholders involved in analyzing business performance?
  + What systems are currently used for analyzing business performance?
  + Can you describe the current processes for analyzing business performance?
  + What are the main pain points in your current performance analysis process?
* Volume of transactions
  + How many transactions do you process monthly/annually for analyzing business performance?
  + What is the average value of these transactions?
* Approval processes and policies
  + What approval processes are in place for analyzing business performance?
  + Are there specific policies that govern performance analysis?
* Compliance and regulatory concerns
  + Are there any compliance or regulatory requirements related to analyzing business performance?
  + How do you currently ensure compliance with these requirements?