# 60.01 Inventory to deliver scenario board discovery workshop

The Inventory to deliver scenario board discovery workshop is designed to help establish a comprehensive understanding of the end-to-end inventory management and delivery process 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 Inventory to deliver 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 Inventory to deliver end-to-end business process is in scope for the Dynamics 365 project.
* The Inventory to deliver 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:
  + Warehouse managers - responsible for managing warehouse operations
  + Inventory managers - responsible for maintaining inventory levels
  + Logistics managers - responsible for managing inbound and outbound goods
  + Quality control managers - responsible for managing inventory quality
  + Transportation managers - responsible for managing freight and transportation
  + IT department - responsible for implementing and maintaining technology solutions to support the Inventory to deliver process
  + Finance department - responsible for tracking inventory costs and financial performance
  + Operations department - responsible for aligning inventory management with business operations
  + Legal and compliance department - responsible for ensuring regulatory compliance related to inventory management
  + Executive leadership - responsible for overseeing inventory strategies and ensuring alignment with strategic goals

## Objectives

* Understand the customer's process: Gain a clear understanding of the customer's intended Inventory to deliver 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 Inventory to deliver 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 Inventory to deliver 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 Inventory to deliver 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 Inventory to deliver process
  + What are the key scenarios in your Inventory to deliver 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 Inventory to deliver process?
  + How many total inventory items do you manage today?
  + How often do you update your inventory levels?
  + What systems or tools are you currently using for inventory management?
  + 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 inventory management system?
  + How do you currently manage and store inventory 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 inventory management 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?
* Inventory management
  + Inventory strategy
    - Does the customer need to manage on hand inventory across multiple systems?
    - Does the customer have a high inventory transaction volume?
    - Will inventory journals be used for the initial on-hand inventory data load?
    - Will counting journals be used for physical inventory counts?
    - Does inventory need to be blocked from other transactions while being counted?
    - Does the customer need to transfer inventory between intracompany locations (sites and/or warehouses)?
  + Quality strategy
    - Does the customer have quality management requirements?
  + Warehouse strategy
    - Does the customer have warehouse management requirements?
* Warehouse management
  + Architecture
    - Does the project team have a document that describes the distribution network and the specific warehouse layout(s)?
    - Are virtual warehouses and/or locations being used?
  + Configuration
    - Are there a large number of location directives configured in the system?
    - Are warehouse locations utilizing physical space constraints to control inventory capacity?
  + Products
    - Will product tracking dimensions be utilized (Batch or Serial number tracking)?
    - Are product variants configured in the system?
    - Are physical dimensions provided for all products in order to utilize volumetric location capacity constraints?
  + Process
    - How often is a cycle count performed?
    - How are orders released to the warehouse?
    - How are exceptions being managed?
    - Are you using any replenishment strategies?
    - Are you using any containerization strategies?
    - How is work managed and executed in the warehouse?
    - Does the customer have requirements to print labels as part of their warehouse operations?
    - Is the customer utilizing catch weight functionality?
    - Does customer have requirements to streamline their receiving process on the warehouse mobile application (WMA)?
  + Mobility
    - Will warehouse workers be using handheld scanning devices?
    - How will credentials be managed for the warehouse mobile application (WMA)?
  + Reconcilitation
    - Do you have a plan to regularly execute the WHS Cleanup jobs?
* Transportation management
  + Architecture
    - Does the project team have a document that describes the transportation network, including all shipping carriers?
  + Configuration
    - How is load capacity being managed?
    - Does the customer have contracts with any shipping carriers?
  + Products
    - Will hazardous goods be shipped through the transportation network?
  + Process
    - Are loads being tendered to carriers?
    - Does the customer have a requirement to provide tracking numbers for their orders?
    - Is the customer shipping small parcels?

## Scenario board

Following is a sample scenario board template for the Inventory to deliver process.



The image is a flowchart titled Inventory to Deliver Scenario Board that outlines a business process from inventory management to delivery. The top row depicts a basic flowchart of the business process areas for the Inventory 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 Inventory to deliver process.

**Inventory to Deliver Process Flow**

1. **60.10 Manage Warehouse Operations**
   * **Scenarios**
     + Warehouse layout optimization
     + Inventory tracking systems
     + Automated storage and retrieval systems (AS/RS)
     + Cross-docking
   * **Compliance**
     + Safety regulations
     + Fire safety standards
     + Environmental regulations
   * **Policies**
     + Warehouse safety policies
     + Inventory handling procedures
     + Equipment maintenance schedules
2. **60.20 Maintain Inventory Levels**
   * **Scenarios**
     + Just-in-time (JIT) inventory
     + Economic order quantity (EOQ)
     + Safety stock management
     + Reorder point system
   * **Inventory Types**
     + Raw materials
     + Work-in-progress (WIP)
     + Finished goods
     + Spare parts
   * **Counting Scenarios**
     + Spot counting
     + Full inventory
     + Periodic counting
     + ABC counting
   * **Movement Scenarios**
     + Bulk stocking
     + Picking replenishment
     + Production floor replenishment
     + Location transfer
     + Warehouse transfer
     + Site transfer
   * **Policies**
     + Stock rotation policies
     + Inventory audit procedures
     + Counting policies
     + Scrapping policies
3. **60.30 Process Inbound Goods**
   * **Scenarios**
     + Receiving shipments
     + Quality inspection
     + Put away processes
     + Customer returns
   * **Compliance**
     + Import/export regulations
     + Hazardous materials handling
     + Customs documentation
   * **Policies**
     + Receiving procedures
     + Inspection protocols
     + Return merchandise authorization (RMA) process
     + Supplier performance evaluation
   * **Receiving Methods**
     + Advanced Shipping Notices (ASNs)
     + Direct-to-stock receiving
     + Staging and sorting
     + Cross-docking
4. **60.40 Process Outbound Goods**
   * **Scenarios**
     + Packing and labeling
     + Shipping and dispatch
     + Supplier returns
   * **Compliance**
     + Shipping regulations
     + Export documentation
     + Carrier requirements
   * **Policies**
     + Order fulfillment procedures
     + Packaging standards
   * **Picking Styles**
     + Cluster picking
     + Cart picking
     + Wave picking
     + Zone picking
     + Batch picking
   * **Packing Styles/Methods**
     + Standard packing
     + Custom packing
     + Eco-friendly packing
     + Bulk packing
     + Gift packing
   * **Shipping Methods**
     + Standard shipping
     + Express shipping
     + Freight shipping
     + International shipping
5. **60.50 Manage Inventory Quality**
   * **Scenarios**
     + Quality control checks
     + Batch tracking
     + Expiry date management
     + Defective goods handling
     + Inventory holds
     + Quarantine inventory
   * **Compliance**
     + Quality standards (ISO 9001)
     + Industry-specific regulations
     + Product recall procedures
   * **Policies**
     + Quality assurance protocols
     + Non-conformance reporting
     + Corrective and preventive actions (CAPA)
6. **60.60 Manage Freight and Transportation**
   * **Scenarios**
     + Freight consolidation
     + Route optimization
     + Carrier selection
     + Freight cost management
   * **Compliance**
     + Transportation regulations
     + Hazardous materials transportation
     + International shipping laws
   * **Policies**
     + Freight management policies
     + Carrier performance evaluation
     + Transportation insurance
7. **60.80 Analyze Warehouse Operations**
   * **Metrics**
     + Inventory turnover rate
     + Order accuracy rate
     + Warehouse utilization
     + Picking efficiency
   * **Reports**
     + Inventory reports
     + Operational efficiency reports
     + Compliance reports
     + Cost analysis

# 60.02 Inventory to deliver storyline design review workshop

The Inventory to deliver storyline design review workshop is a crucial step in refining the design of the inventory management and delivery process. This workshop focuses on reviewing the storyline or happy path defined in the Inventory to deliver 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 Inventory to deliver 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:
  + Warehouse managers - responsible for managing warehouse operations
  + Inventory managers - responsible for maintaining inventory levels
  + Logistics managers - responsible for managing inbound and outbound goods
  + Quality control managers - responsible for managing inventory quality
  + Transportation managers - responsible for managing freight and transportation
  + IT department - responsible for implementing and maintaining technology solutions to support the Inventory to deliver process
  + Finance department - responsible for tracking inventory costs and financial performance
  + Operations department - responsible for aligning inventory management with business operations
  + Legal and compliance department - responsible for ensuring regulatory compliance related to inventory management
  + Executive leadership - responsible for overseeing inventory strategies and ensuring alignment with strategic goals

## Objectives

* Demonstrate Dynamics 365 capabilities: Showcase how Dynamics 365 can address the identified pain points and improve the Inventory to deliver 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?

# 60.10.001 Manage warehouse operations deep-dive discovery workshop

The Manage warehouse operations deep dive discovery workshop is designed to help your organization effectively manage warehouse 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 managing warehouse operations, key reporting requirements, budget definitions, and other critical policies.

## Assumptions

* Key stakeholders involved in warehouse operations management decisions are available and willing to participate.
* Current warehouse operations management strategies, reporting requirements, and budget processes are documented and accessible.
* Participants have a basic understanding of warehouse operations management principles and standards.
* Relevant data on warehouse operations management 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 managing warehouse operations?
  + What systems are currently used for managing warehouse operations?
  + Can you describe the current processes for managing warehouse operations?
  + What are the main pain points in your current warehouse operations management process?
* Volume of transactions
  + How many transactions do you process monthly/annually for managing warehouse operations?
  + What is the average value of these transactions?
* Approval processes and policies
  + What approval processes are in place for managing warehouse operations?
  + Are there specific policies that govern warehouse operations management?
* Compliance and regulatory concerns
  + Are there any compliance or regulatory requirements related to managing warehouse operations?
  + How do you currently ensure compliance with these requirements?

# 60.20.001 Maintain inventory levels deep-dive discovery workshop

The Maintain inventory levels deep dive discovery workshop is designed to help your organization effectively maintain inventory levels 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 maintaining inventory levels, key reporting requirements, budget definitions, and other critical policies.

## Assumptions

* Key stakeholders involved in inventory management decisions are available and willing to participate.
* Current inventory management strategies, reporting requirements, and budget processes are documented and accessible.
* Participants have a basic understanding of inventory management principles and standards.
* Relevant data on inventory management 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 maintaining inventory levels?
  + What systems are currently used for maintaining inventory levels?
  + Can you describe the current processes for maintaining inventory levels?
  + What are the main pain points in your current inventory management process?
* Volume of transactions
  + How many transactions do you process monthly/annually for maintaining inventory levels?
  + What is the average value of these transactions?
* Approval processes and policies
  + What approval processes are in place for maintaining inventory levels?
  + Are there specific policies that govern inventory management?
* Compliance and regulatory concerns
  + Are there any compliance or regulatory requirements related to maintaining inventory levels?
  + How do you currently ensure compliance with these requirements?

# 60.30.001 Process inbound goods deep-dive discovery workshop

The Process inbound goods deep dive discovery workshop is designed to help your organization effectively manage the processing of inbound goods 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 processing inbound goods, key reporting requirements, budget definitions, and other critical policies.

## Assumptions

* Key stakeholders involved in inbound goods processing decisions are available and willing to participate.
* Current inbound goods processing strategies, reporting requirements, and budget processes are documented and accessible.
* Participants have a basic understanding of inbound goods processing principles and standards.
* Relevant data on inbound goods processing 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 processing inbound goods?
  + What systems are currently used for processing inbound goods?
  + Can you describe the current processes for processing inbound goods?
  + What are the main pain points in your current inbound goods processing process?
* Volume of transactions
  + How many transactions do you process monthly/annually for processing inbound goods?
  + What is the average value of these transactions?
* Approval processes and policies
  + What approval processes are in place for processing inbound goods?
  + Are there specific policies that govern inbound goods processing?
* Compliance and regulatory concerns
  + Are there any compliance or regulatory requirements related to processing inbound goods?
  + How do you currently ensure compliance with these requirements?

# 60.40.001 Process outbound goods deep-dive discovery workshop

The Process outbound goods deep dive discovery workshop is designed to help your organization effectively manage the processing of outbound goods 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 processing outbound goods, key reporting requirements, budget definitions, and other critical policies.

## Assumptions

* Key stakeholders involved in outbound goods processing decisions are available and willing to participate.
* Current outbound goods processing strategies, reporting requirements, and budget processes are documented and accessible.
* Participants have a basic understanding of outbound goods processing principles and standards.
* Relevant data on outbound goods processing 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 processing outbound goods?
  + What systems are currently used for processing outbound goods?
  + Can you describe the current processes for processing outbound goods?
  + What are the main pain points in your current outbound goods processing process?
* Volume of transactions
  + How many transactions do you process monthly/annually for processing outbound goods?
  + What is the average value of these transactions?
* Approval processes and policies
  + What approval processes are in place for processing outbound goods?
  + Are there specific policies that govern outbound goods processing?
* Compliance and regulatory concerns
  + Are there any compliance or regulatory requirements related to processing outbound goods?
  + How do you currently ensure compliance with these requirements?

# 60.50.001 Manage inventory quality deep-dive discovery workshop

The Manage inventory quality deep dive discovery workshop is designed to help your organization effectively manage inventory quality 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 managing inventory quality, key reporting requirements, budget definitions, and other critical policies.

## Assumptions

* Key stakeholders involved in inventory quality management decisions are available and willing to participate.
* Current inventory quality management strategies, reporting requirements, and budget processes are documented and accessible.
* Participants have a basic understanding of inventory quality management principles and standards.
* Relevant data on inventory quality management 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 managing inventory quality?
  + What systems are currently used for managing inventory quality?
  + Can you describe the current processes for managing inventory quality?
  + What are the main pain points in your current inventory quality management process?
* Volume of transactions
  + How many transactions do you process monthly/annually for managing inventory quality?
  + What is the average value of these transactions?
* Approval processes and policies
  + What approval processes are in place for managing inventory quality?
  + Are there specific policies that govern inventory quality management?
* Compliance and regulatory concerns
  + Are there any compliance or regulatory requirements related to managing inventory quality?
  + How do you currently ensure compliance with these requirements?

# 60.60.001 Manage freight and transportation deep-dive discovery workshop

The Manage freight and transportation deep dive discovery workshop is designed to help your organization effectively manage freight and transportation 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 managing freight and transportation, key reporting requirements, budget definitions, and other critical policies.

## Assumptions

* Key stakeholders involved in freight and transportation management decisions are available and willing to participate.
* Current freight and transportation management strategies, reporting requirements, and budget processes are documented and accessible.
* Participants have a basic understanding of freight and transportation management principles and standards.
* Relevant data on freight and transportation management strategies, reporting requirements, and budget definitions are 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 managing freight and transportation?
  + What systems are currently used for managing freight and transportation?
  + Can you describe the current processes for managing freight and transportation?
  + What are the main pain points in your current freight and transportation management process?
* Volume of transactions
  + How many transactions do you process monthly/annually for managing freight and transportation?
  + What is the average value of these transactions?
* Approval processes and policies
  + What approval processes are in place for managing freight and transportation?
  + Are there specific policies that govern freight and transportation management?
* Compliance and regulatory concerns
  + Are there any compliance or regulatory requirements related to managing freight and transportation?
  + How do you currently ensure compliance with these requirements?

# 60.80.001 Analyze warehouse operations deep-dive discovery workshop

The Analyze warehouse operations deep dive discovery workshop is designed to help your organization effectively analyze warehouse 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 analyzing warehouse operations, key reporting requirements, budget definitions, and other critical policies.

## Assumptions

* Key stakeholders involved in warehouse operations analysis decisions are available and willing to participate.
* Current warehouse operations analysis strategies, reporting requirements, and budget processes are documented and accessible.
* Participants have a basic understanding of warehouse operations analysis principles and standards.
* Relevant data on warehouse operations 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 warehouse operations?
  + What systems are currently used for analyzing warehouse operations?
  + Can you describe the current processes for analyzing warehouse operations?
  + What are the main pain points in your current warehouse operations analysis process?
* Volume of transactions
  + How many transactions do you process monthly/annually for analyzing warehouse operations?
  + What is the average value of these transactions?
* Approval processes and policies
  + What approval processes are in place for analyzing warehouse operations?
  + Are there specific policies that govern warehouse operations analysis?
* Compliance and regulatory concerns
  + Are there any compliance or regulatory requirements related to analyzing warehouse operations?
  + How do you currently ensure compliance with these requirements?