Microsoft Dynamics 365

Cutover Planning

Dynamics 365
Architecture Insights

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Agenda

- What, Why, and When

- Cutover Planning Resources

- Cutover Planning Key Success Factors

- Q&A

What, Why, and When

The overall project plan for cutover helps the project to anticipate and manage risks.

The cutover plan is the set of tasks required to transition from the old system to Dynamics 365

The objective of the cutover plan is to provide a highly reliable transition to Production use

The cutover planning should begin as early as possible during the Implement phase

What

The cutover plan should cover all the tasks required to prepare the business for cutover, the actual cutover tasks to transition to production, and the post Go Live tasks.

Why

There is very little room for errors and retries during the limited window of the final cutover – it must work flawlessly.

The detailed cutover plan ensures that all tasks for a successful transition, including preparation and validation tasks, are identified, practiced, refined and completed as expected.

When

The cutover planning should begin early in the Implement phase. This sets the right discipline for the team and helps to ensure that each of the cutover rehearsals are being conducted to mimic the final Go Live cutover with sufficient time to uncover issues and to address them iteratively.

A final practice cutover (mock cutover) should be conducted on production environment for first Go Live, 2-4 weeks before Go-Live

Cutover Planning Resources

Resources

- Cutover Strategy Workshop
[Cutover strategy for Dynamics 365 solutions - Learn | Microsoft Docs](#)

- Cutover and Remote Go-Live Strategy TechTalk
[Dynamics 365 Cutover and Remote Go Live Strategy | May 7, 2021 - Microsoft Dynamics Blog](#)

[Cutover strategy for Dynamics 365 solutions - Learn | Microsoft Docs](#)

[Microsoft Learn | Microsoft Docs](#)

✓ 900 XP

Cutover strategy for Dynamics 365 solutions

50 min • Module • 8 Units

★★★★★ 4.9 (19) [Rate it]

| Advanced | Solution Architect | Functional Consultant | Dynamics 365 | Sales | Marketing | Customer Service | Field Service |

| Finance | Supply Chain Management | Finance and Operations | Project Operations | Commerce | Human Resources |

The goal of the Cutover strategy workshop is to help ensure that a good approach is in place for the planning, incremental readiness, testing, and implementation of the cutover. You need to consider many different areas when you discuss a cutover strategy, and this workshop provides the necessary framework to review those key topics.

Learning objectives

In this module, you will:

- Learn about the Cutover strategy workshop
- Prepare for the Cutover strategy workshop
- Learn how to conduct the Cutover strategy workshop
- Follow up after the Cutover strategy workshop

⊕ Save

Prerequisites

- Knowledge of Dynamics 365 apps
- Basic knowledge of Success by Design concepts
- Extensive functional consultant knowledge
- Previous experience as a solution architect on a project is helpful
- Download an example of the template for this workshop from [GitHub location ⧉](#)

[Dynamics 365 Cutover and Remote Go Live Strategy | May 7, 2021 - Microsoft Dynamics Blog](#)

[Microsoft Dynamics 365 FastTrack TechTalks](#)
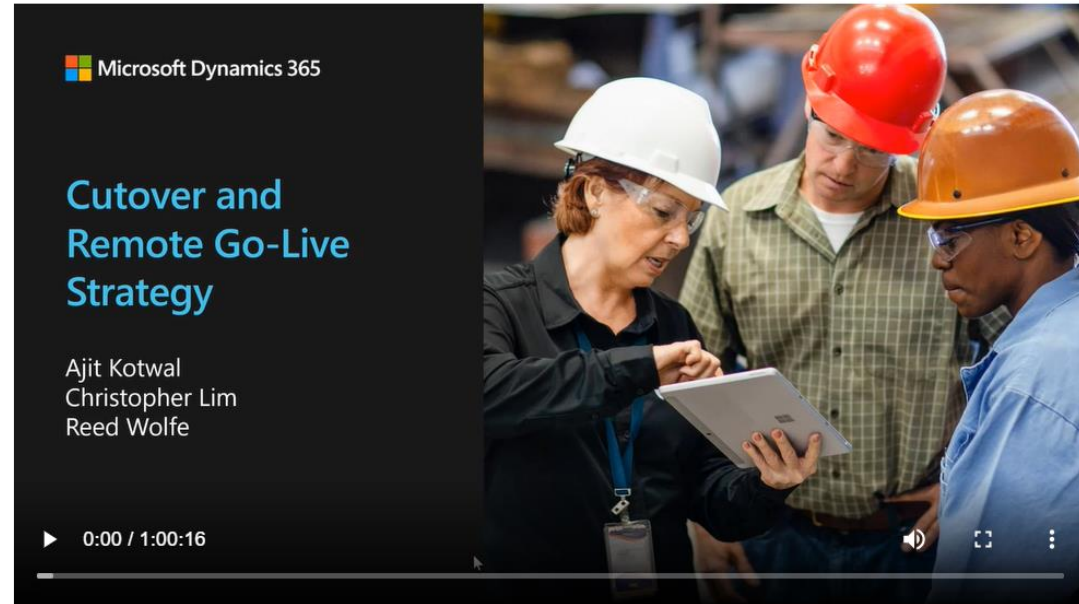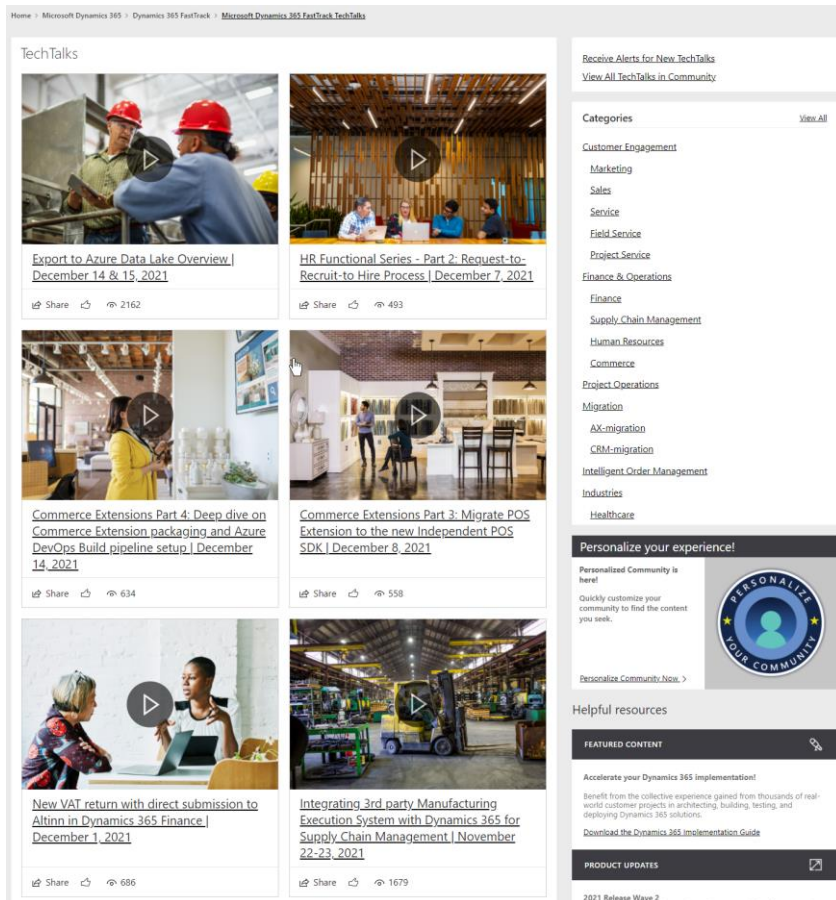
Presenters:

Ajit Kotwal, Principal R&D Solution Architect

Christopher Lim, Senior R&D Solution Architect

Reed Wolfe, Senior Program Manager

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In this TechTalk we describe the recommended methods to define the cutover strategy, prepare for the cutover and perform the cutover to Dynamics 365 applications. We will also describe the special considerations for remote Go Lives.

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[Download Presentation (pdf)](#)

[Download Sample Go Live Cutover Spreadsheet](#)

Cutover Planning Success Factors

Cutover Planning Success Factors

(aka "Greatest Hits")
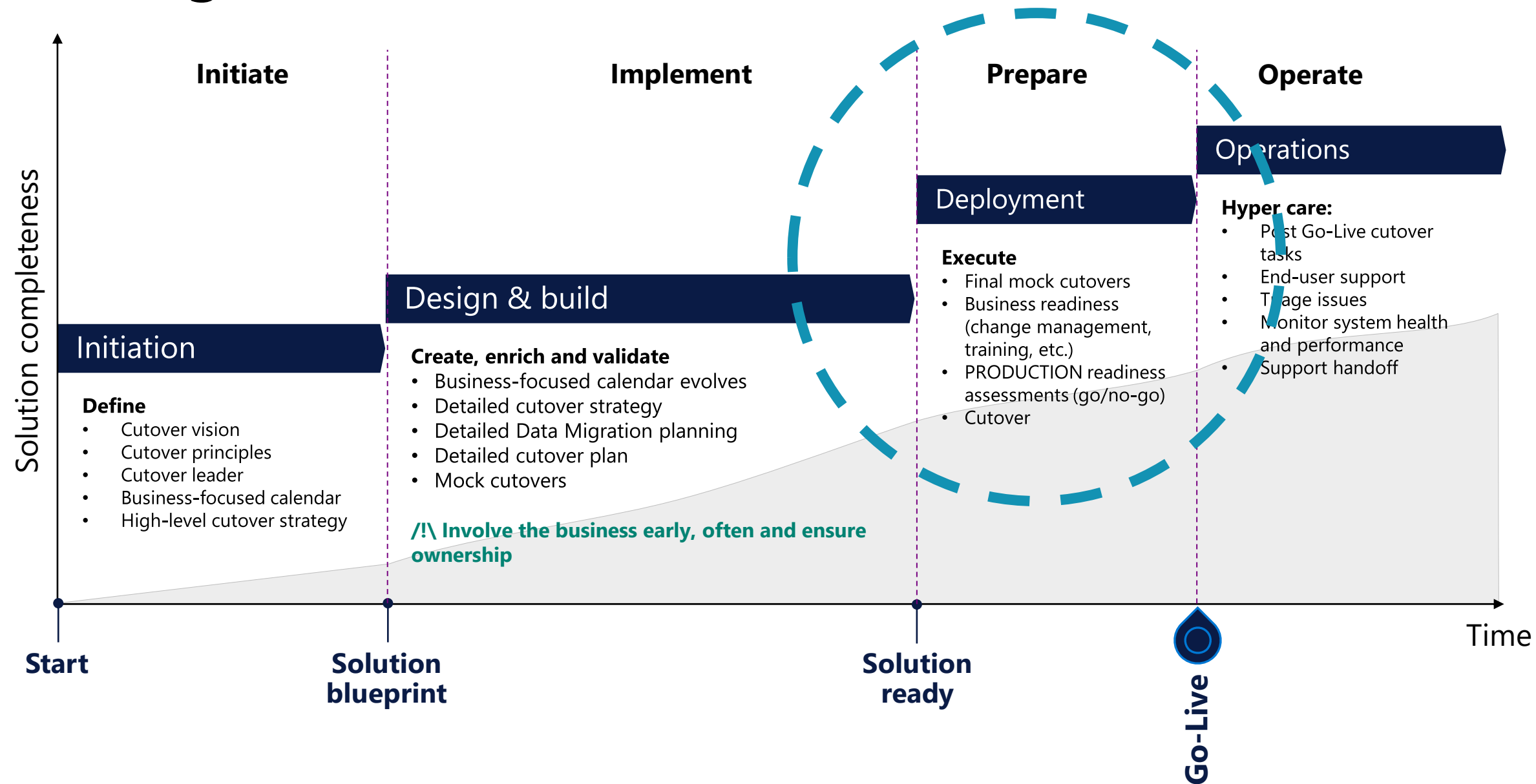
- Planning, Iterations, and Rehearsal

- Business Engagement

- Business Calendar

- Data Quality

- Coordination and Communication

Planning, Iterations and Rehearsal

Solution completeness → (vertical axis)

Time → (horizontal axis)

Initiate

Implement

Prepare

Operate

Operations

Hyper care:
- Post Go-Live cutover tasks
- End-user support
- Triage issues
- Monitor system health and performance
- Support handoff

Deployment

Execute
- Final mock cutovers
- Business readiness (change management, training, etc.)
- PRODUCTION readiness assessments (go/no-go)
- Cutover

Design & build

Create, enrich and validate
- Business-focused calendar evolves
- Detailed cutover strategy
- Detailed Data Migration planning
- Detailed cutover plan
- Mock cutovers

/!\ Involve the business early, often and ensure ownership

Initiation

Define
- Cutover vision
- Cutover principles
- Cutover leader
- Business-focused calendar
- High-level cutover strategy

Start

Solution blueprint

Solution ready

Go-Live

Business Engagement

01 Cutover Leader
Unified vision
Directs multiple disciplines
Provides business perspective

02 Vision
Definition/expectation of "cutover" from the business
Business goals from the cutover
Business scope/requirements for cutover
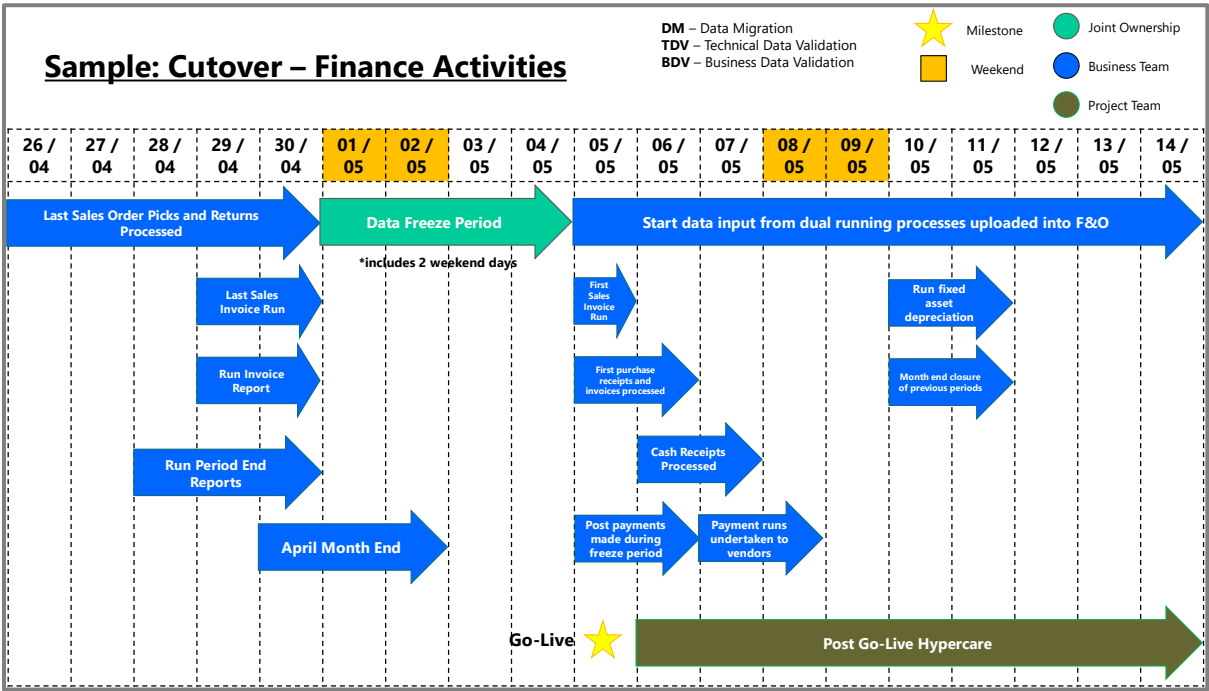
03 Principles
Business driven?
Driver for all related disciplines (e.g. data migration)?
Repeatable, scalable, multi-rollout
Ownership of data, security etc.

Cutover Strategy should start with a cutover leader from the business who helps define and enforce the business vision and guiding principles for the cutover

The business-focused cutover calendar

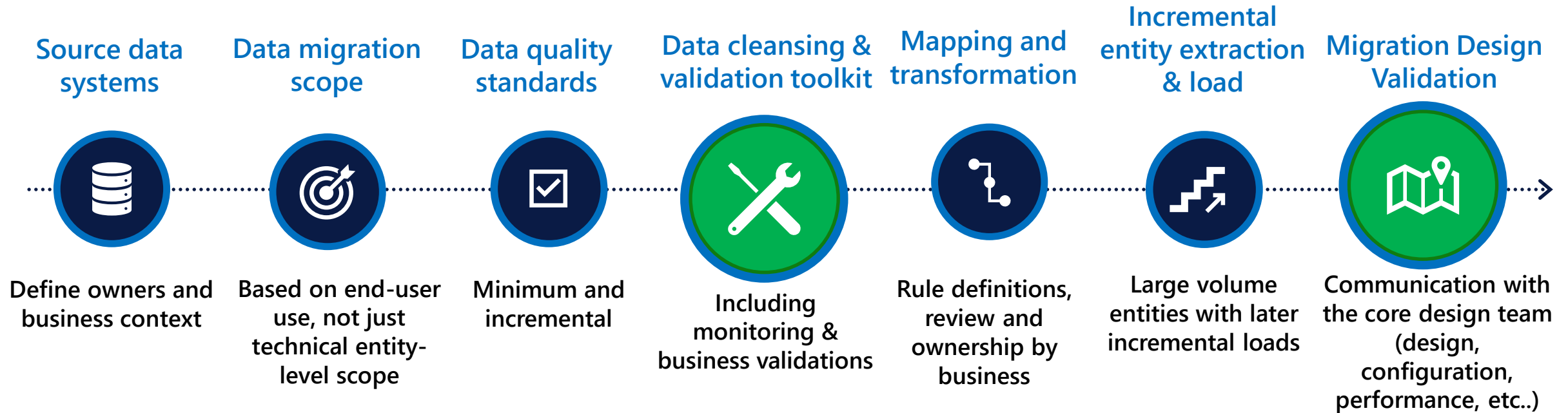## What are the key elements of a business-focused cutover calendar?

- **The key business processes that the business needs to conduct around the Go-Live**

- The key business activities that may need to be added or changed to accommodate the special needs for cutover

- The high-level technical cutover tasks and milestones overlaid on the key business tasks

Data Quality

Source data systems	Data migration scope	Data quality standards	Data cleansing & validation toolkit	Mapping and transformation	Incremental entity extraction & load	Migration Design Validation
Define owners and business context	Based on end-user use, not just technical entity-level scope	Minimum and incremental	Including monitoring & business validations	Rule definitions, review and ownership by business	Large volume entities with later incremental loads	Communication with the core design team (design, configuration, performance, etc..)

Common risks observed

- **Poor quality of migrated data** leading to business operations disruptions and project dissatisfaction after Go-Live
- The data migrated into Dynamics 365 apps is **not sufficiently usable** by the project until very late – sometimes not until UAT !
- Transformation and mapping **rules are not always reviewed** by the business data owners resulting in "hidden errors" and mismatched expectations
- **Design changes** wrong-foot the data migration team

Mitigations

- Ensure **Data Cleansing** (at source) is business-owned, well-defined, and well-managed with tooling and monitoring.
- Make sure that the data migration team is directly informed of the possible Dynamics 365 design changes
- Pay attention to the needs of the project for incremental (and usable) data in the target system
- Plan for incremental validation of mapping and transformation rules with the business
- Do not try to automate transformations where the rules are vague as it will probably add to complexity without improving quality

Coordination and Communication

Communication rules

- Rules for the remote and hybrid sessions – explicitly secure the needed time for everyone
- Ensure everyone is heard
- Train the team on the tools to be used.

Multi-channel communication

- Provide more than one area for communication (e.g., one channel per workstream in addition to the main channel)
- Consider a buddy system for critical areas – one person acts, the other checks
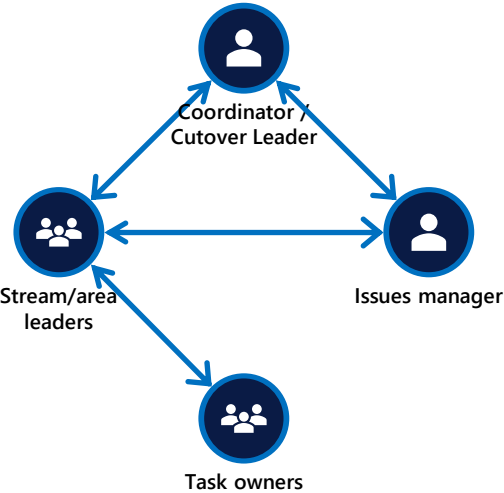
Issue tracking

- Define the mechanisms for Issue Tracking
- Clear escalation paths will be essential
- Identify an issue manager to coordinate problem resolution in parallel with the "normal" execution

Local site liaison

- Consider local "site liaisons"/PMs/point of contact
- For simultaneous implementations at multiple locations (branches, stores, etc.) may need one per site

Area Lead	Area	Contact name	Email	Working hours Phone	Emergency Phone	Day 1 AM	Day 1 PM	Day 2 AM	Day 2 PM	Day 3 AM	Day 3 PM
					A= Active duty, S=Stand by, N= Not available						
Lead #1	CE	CE SME #1				A	S	A	S	S	S
Lead #2	HR	HR SME #2				N	A	A	S	S	A
Lead #2	HR	HR SME #3				A	S	S	A	N	S
Lead #3	FIN	FIN SME #1				N	S	A	S	N	A
Lead #3	FIN	FIN SME #2				N	A	S	N	N	S
Lead #3	FIN	FIN SME #3				N	A	S	N	N	S
Lead #3	FIN	FIN SME #4				N	A	S	N	N	A
Lead #3	FIN	FIN SME #5				A	S	A	N	N	S
Lead #3	FIN	FIN SME #6				N	S	N	A	A	S
Lead #3	FIN	FIN SME #7				A	S	N	A	S	S
Lead #3	FIN	FIN SME #8				A	N	N	S	A	A
Lead #4	IT	IT SME #1				S	N	A	S	S	S
Lead #4	IT	IT SME #2				A	N	A	S	S	S
Lead #4	IT	IT SME #3				A	N	A	S	A	S
Lead #5	Legacy	Legacy SME #1				A	S	A	N	A	A
Lead #5	Legacy	Legacy SME #2				A	S	A	N	A	S
Lead #6	Integration #1	Int SME #1				S	N	A	N	A	A
Lead #7	Integration #2	Int SME #2				S	N	A	N	N	N
Lead #8	Integration #3	Int SME #3				N	N	A	N	N	N

Coordinator / Cutover Leader

Stream/area leaders

Issues manager

Task owners

Cutover plan template | Sample

Detailed Plan

- Consider the details required per step to help make its completion **unambiguous and repeatable**

- Ensure that there are "firebreaks" at the right points to allow for **focused team reviews**

- Keep this master cutover plan (and the steps) under change control as early as possible

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S
	Step ID	Step Last edited by	Category	Must wait for step #	Must wait until step # done	Step Readiness Status	AREA-FIN	AREA-MFG	AREA-WH	AREA-HR	AREA-IT	System	Step description	Step link to further data	Result validated by	Central / Local	Primary Assigned to	Secondary Assigned to	Area Lead

Firebreak/Review Call#1
Steps Continued..

Tracking the mocks/rehearsals

During rehearsals, noting the start & end times helps the team:

- Build a **realistic** Go-Live cutover plan based on previous experience
- Proactively manage any areas of risk prior to the Go Live cutover

Tracking the Go-Live cutover

Comparing the start & end times to the plan helps the team:

- Detect **early signs of issues**
- Assess progress
- Make any corrections necessary
- Communicate with downstream resources

Q&A

Thank you

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