Microsoft Dynamics 365

Dynamics 365 Adoption Guide

Adoption Best Practices

Date 4-2-19

Why does adoption matter?

In the era of digital transformation, dramatic change is the new normal. The most successful companies are already reaping the rewards of digital transformation. Digital transformation enables organizations to attract the best talent, empower employees, and deliver innovative products and services all with streamlined operations – centered around exceptional customer experiences. Modern business applications drive improvements in data integrity and completeness that enable faster, better decisions and more effective actions. For organizations that adopt digital transformation as a business strategy, the results are market differentiation and competitive advantage. We created Dynamics 365 to meet these evolving business needs.

For many organizations, the prospect of embracing digital transformation is daunting. Consumers have seen vast improvements in digital products and lifestyle technologies in recent years, but most businesses have been slower to change. That's why we created the Dynamics 365 Adoption Guide.

We've compiled an easy-to-follow how-to guide that walks you and your team, step-by-step, through the best way to roll out Dynamics 365 to your organization. The insights we share come from our most successful customers, who have maximized the power of their investment, adopting multiple, integrated technologies that now form Dynamics 365. Throughout this guide you will find links to additional tools and resources as well as the Adoption Planning Workbook where you can build your custom approach to adoption.

Remember, you are not in this alone. There are many organizations who are currently launching Dynamics 365 technologies and you can connect with them in the *Microsoft Dynamics community* of experts and peers.

The successful adoption of new technology requires behavior change. And change can be hard.

It takes more than learning a new app. It's a fundamentally different way of working.

This change is about people.
And we're here to help.

We know from experience

- The successful adoption of new technology requires behavior change. And change can be hard.

- Change doesn't happen automatically. Most employees don't want to use new technology rolled out by their organization. [1]

- CEOs matter. When the CEO was engaged, the transformation project was more successful. [2]

- Setting targets is key. A well-defined set of financial and operational targets is a key component to successful transformation. [3]

- Learn from each other. Learning from co-workers is one of the most effective ways to adopt new technology. [4]

1) Creating organizational transformations, July 2008, McKinsey Quarterly, www.mckinsey.com
2) SharePoint End-User Study, Apr 2013, Microsoft Corporation
3) Microsoft 365 Usage Research, May 2016, Microsoft Corporation
4) CIO Executive Board Business Productivity Database

And we realize there are hurdles

Launching a new technology is more than a technical migration

Employees continue to use technical solutions that are not deployed by IT

Technical readiness and user readiness must go hand in hand

Your adoption approach can accelerate or impede results

Resistance to change is a normal human behaviour that needs to be addressed

80% of end users admit to using their communication tool of choice

Plan, pilot and deploy both readiness activities together
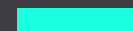
Understand team member personas in order to sell the value of the technology to users

Our successful customer navigate adoption by...

Defining a vision

Companies were most successful when they had a clearly defined vision and knew how the new technology would be used.

Getting leadership support

Successful projects obtained proactive support from senior leadership to encourage new technology use.

Training end-users

Organizations used multiple training formats to engage with employees across business units.

Raising awareness

Top performers used email, employee portals, posters, teaser videos, and newsletters.

Microsoft Dynamics 365

Our Adoption Framework guides you through the process and helps optimize results

We have created an easy-to-follow framework to guide you through the adoption process. Each phase is broken into simple steps that guide you to the best practices, resources, and tools you need to build and deploy a customized adoption approach.

Envision

Identify and prioritize scenarios while learning about available resources as you plan for rollout. This stage is critical to your journey as you're setting business goals to measure success.

- o **Assemble Your Team**
- o **Define Business Strategy**
- o **Determine Readiness**

Onboard

Work with your key stakeholders to build and launch your adoption plan. Prepare your environment and test your adoption approach with Early Adopters. Use feedback to make adjustments before scaling to the business.

- o **Build Your Adoption Plan**
- o **Launch to Early Adopters**
- o **Adjust Your Plan**

Drive Value

Full-scale deployment and business success depend on usage and satisfaction. This requires planning through the Envision and Onboard phases plus ongoing operational excellence.

- o **Monitor End User Adoption**
- o **Measure and Report Usage**
- o **Encourage Ongoing Engagement**

Microsoft Dynamics 365

Phase One: Envision

Envision

Identify and prioritize scenarios while learning about available resources as you plan for rollout. This stage is critical to your journey as you're setting business goals to measure success.

o **Assemble Your Team**

o **Define Business Strategy**

o **Determine Readiness**

Microsoft Dynamics 365

Who should be involved in your adoption effort?

Transforming to this new way of working requires buy-in and support from across the business. We have identified four key groups who will bridge technology and business outcomes that matter to your organization.

Each group has a specific role in implementation and should be engaged early and often. The next few pages will outline the specific role these team members will play.

1) Executive Sponsors

2) Success Owner

3) Early Adopters

4) Champions

"Access free Mott MacDonald developed a network of technology champions by engaging the employees who are most interested and enthusiastic about the new capabilities. The company made sure the champions were well trained and sent them out into the business to coach and communicate with colleagues."

MOTT MACDONALD

Microsoft Dynamics 365

How can Executive Sponsors drive project success?

Executive Sponsors should:

- Help the project team identify and prioritize their top business needs.

- Play a role in communicating the vision to leaders across the organization.

- Actively participate in and use the Dynamics 365 capabilities to help drive and reinforce adoption.

- Promote the adoption process. Studies show that 87% of successful transformation projects had visible engagement by Executive Sponsors.

Ensure they understand the ABCs:

A Active and visible participation

B Building a coalition with their executive peers

C Communicating directly with employees

Who are Success Owners and why are they important?

Success Owners ensure business goals are realized by helping people use and get value from the new Dynamics 365 solution.

Success Owners should:

- Identify and engage the right stakeholders.

- Translate the organization's set business goals into Dynamics 365 scenarios.

- Create an adoption plan to drive usage and realize value from Dynamics 365.

- Ensure communications and training are successfully implemented.

Who are Early Adopters?

Selecting the right participants for the Early Adopter Program is key to gain valuable insights and inform the organization-wide launch.

The list below describes the types of employee to include in your program:

- Users from different lines of business and departments, preferably those that work together on a project or business process.

- Likely Champions or leaders who will become advocates during the broad launch to the entire organization.

- Users who typically struggle with technology. It's important to understand and address their needs during launch.

- IT and help desk team members who will support users during launch.

- Important: Leave out the CEO and upper management. While it can be tempting to ask for the CEO's involvement, keeping them out of the Early Adopter Program provides an opportunity to smooth out any issues before they are exposed during the rollout.

Who are Champions?

Champions evangelize and help train their teams on the new ways of working. They build awareness, understanding, and engagement throughout the community.

Champion will:

- Create the groundswell of enthusiasm that grows adoption.

- Build a circle of influence among their teams.

- Bring the new ways of working to life across teams.

- Identify business challenges and possible solutions.

- Provide feedback to the project team and sponsors.

- Reduce strain on core project team through active, ongoing engagement.

Microsoft Dynamics 365

Other team members to include to adoption efforts

Many people throughout your organization will have important responsibilities during the launch of a new technology. The chart below provides a summary of those roles. We have created a template so you can identify and document your team in the Adoption Planning Workbook

Focus	Yammer network facilitation	Department
Executive Sponsor	Communicate high-level vision and values of Dynamics 365 to the company	Executive Leadership
Success Owner	Ensure the business goals are realized from your Dynamics 365 rollout	Any department
Program Manager	Oversee the entire Dynamics 365 launch execution and rollout process	IT
Champions	Help evangelize Dynamics 365 and manage objection handling	Multiple departments
Training Lead	Manage and communicate training content about Dynamics 365	IT or other
Department Leads (Stakeholders)	Identify how specific departments will use Dynamics 365 and encourage engagement	Any department (management)
IT Specialists	Oversee all technical aspects of the rollout, including integrations	IT
Communication Lead	Oversee company-wide communications about Dynamics 365	Corp Communications, IT or other

Note: Though we recommend having each of these roles fulfilled throughout your rollout, you may find that you don't require them all to get started with your identified solutions. The companion Adoption Team Member Role Details has complete descriptions.

Microsoft Dynamics 365

Define your solution strategy

Partner...
with your core team to refine your objectives

Identify...
the important business objectives and challenges and start to recognize areas of opportunity to improve work processes

Host a workshop...
to delve deeper into current challenges, strategies and goals. Include department leads, lines of business, IT and other stakeholders who can help brainstorm how Dynamics 365 can be used in your organization.

Consider these questions to drive the conversation:

How the solution relates to the organization's broader strategy, goals and objectives

How it impacts the experience and work delivered by the stakeholders

How its inclusive of the broader holistic processes, product or customer lifecycle

Microsoft Dynamics 365

Identify your Scenarios

What is a Scenario?

Scenarios cover the ways your people will use Dynamics 365 to address business challenges and achieve organizational, cultural, tangible or individual adoption outcomes

Why are Scenarios important?

- They allow teams to understand how Dynamics 365 can help them achieve more.

- They act as input and validation of Dynamics 365 awareness messaging.

- They support awareness and readiness activities by putting products in context; people will know when and how to use them.

Explore what's possible

The Dynamics 365 Content Library is a collection of recommended use cases to showcase ideas on how to use the products to your best advantage in a way that's relevant to you.

Access the free webinars, ebooks, analyst reports and more in our content library to learn how Dynamics 365 can optimize your company.

Get started: *explore.dynamics.com*

Microsoft Dynamics 365

Create scenarios for multiple teams and departments

You can use the worksheet below to document business scenarios for specific departments and then capture your scenarios in the *Adoption Planning Workbook.*

As someone in...
(Team)

I want to...
(Description of what
I want to do)

Using...
(Specific application of
the technology)

**I'll know this is
successful when...**
(Solutions success
measure)

As someone in...
Sales Management

I want to...
have a single view of customers that provide insights about our relationship and ways that we can add more value to the customer without inconsistent data in different systems.

Using...
Dynamics 365 for Sales to centrally store and share a single version of customer relationship data that also surfaces insights that my team can use to engage more deeply.

I'll know this is successful when...
My sales team can easily collaborate and share customer insights that accelerate the number and close rates of deals.

Define your success criteria

Champions evangelize and help train their teams on the new ways of working. They build awareness, understanding, and engagement throughout the community.

Champion will:

- Identify key performance indicators (KPIs) that should improve based on adopting various business scenarios.

- Establish KPI benchmarks and users' Dynamics 365 knowledge.

- Choose criteria to help you show leadership the impact your Dynamics 365 solution is having on the organization.

- After rollout, use the end user surveys to measure satisfaction and progress against your benchmark.

View sample KPIs in the Adoption Planning Workbook.

Establish KPI Benchmarks

Choose criteria to demonstrate the impact of your Dynamics 365 implementation against each success measure. We have provided ideas below and scorecard templates in the Adoption Planning Workbook for you to effectively track and report success.

Success measure	Method	Example goal
Cross-sell & Up-sell Capture & share cross-sell opportunities for related products with cross-department sales teams, customer 360 with AI-based recommendations	**Quantitative** **Dynamics 365 Sales** • Improve Revenue per Customer • Improve Up-Sell Opportunities • Increase Order Value / Attach Rate • Create up-sell leads	New revenue from existing customers increasing from 15% to 20%
Cost to Serve Increase efficiency of agents serving customers with a more productive user experience, using lower-cost channels such as Bots and increased self-service	**Quantitative** **Dynamics 365 Customer Service** • Lower cost channel shift • Increase first-time resolution • Reduce resolution times • Increase service efficiency	60% of customer cases resolved in (first) one call
Increase Production Capacity Increase production output with pre-emptive issue avoidance and increased visibility and insight to feed improved capacity planning	**Quantitative** **Dynamics 365 Finance** • Increased Plant Utilization • Reduce Downtime Costs • Optimize production plans • React faster to production issues • Minimize setup/change-over times • Optimize long-term capacity	Increase gross margin from 50% to 60% by increasing output with existing production facilities

Microsoft Dynamics 365

Determine your organization's readiness

What is Readiness?

Willingness and preparedness of your users and your organization to move to Dynamics 365

Why are Scenarios important?

- Every organization approaches change differently, depending on region, work style, professional profile, and other elements of the organization.

- Determine how receptive (or not) your users are likely to be to changing the way they work and adopting new technology.

- You will need to create a rollout plan that reflects the readiness of your organization.

Resistance is normal. Anticipate and plan ahead!

Readiness factors

There are key factors that will help you understand how prepared your organization is for the transition to Dynamics 365

Clear vision for the company shift

Clear vision for the induvial shift

Amount of overall change required

Executive alignment

Use the Adoption Planning Workbook to assess your organization

Microsoft Dynamics 365

Phase Two: Onboard

Onboard

Work with your key stakeholders to build and launch your adoption plan. Prepare your environment and test your adoption approach with Early Adopters. Use feedback to make adjustments before scaling to the business.

o **Build Your Adoption Plan**

o **Launch to Early Adopters**

o **Adjust Your Plan**

Drive awareness through end user engagement

Success Owners ensure business goals are realized by helping people use and get value from the new Dynamics 365 solution.

Communications

- Identify and Deploy a variety of tactics

- Focus on the "What's in it for me?"

- Tailor plan to company and culture

- Send out communications

Engagement Events

- Engage Executive Sponsors to kick off launch

- Staff events with IT and Champions

- Distribute banners and leaflets

- Place demo booths in cafeteria/foyer

- Host online events for remote offices

Communicate value to the business through scenarios

Delivering Value

Report and build on wins

Review scenarios and determine the best use cases to be utilized for the organization-wide launch. Scenarios will help inform the communications plan by:

- Translating core scenarios into uses that solve real business problems

- Determining which scenarios make sense for the company to promote in its Dynamics 365 launch

- Using the resources associated with each scenario to implement email announcements and training activities

Identify
and prioritize scenarios

Measure
and share success

Plan
and execute

Microsoft Dynamics 365
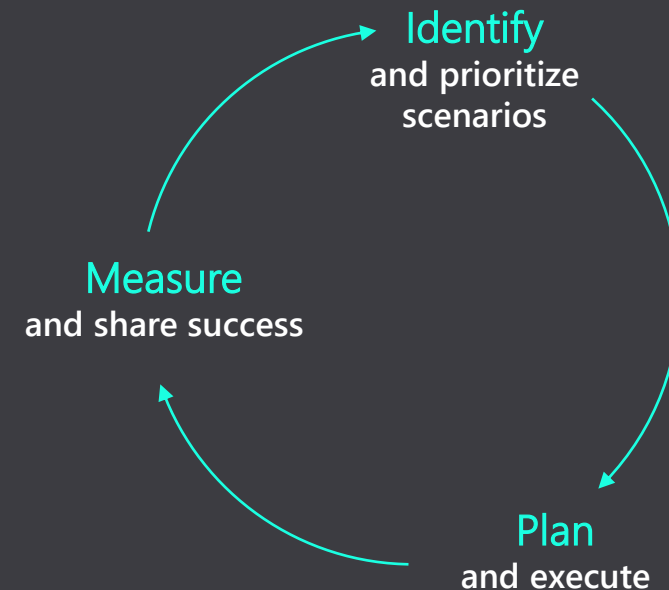
Incorporate success stories

Success stories are often just as valuable as quantitative measures when demonstrating Dynamics 365 success.

Throughout the rollout, project team members and Champions should identify examples that demonstrate cross-functional collaboration and teamwork and share them by using Yammer or Teams.

Leverage these examples in your communications to generate excitement and demonstrate the impact of Dynamics 365.

What makes a good success story?

Time. The story should begin with a time marker so the audience knows when it happened.

Characters. The story should feature names, so the audience knows who was involved.

Events. The story should recount the events that took place.

Visuals. The audience should be able to picture what happened.

Microsoft Dynamics 365

Create launch events

The following are some resources, ideas, and tactics to help create an effective Dynamics 365 solution launch:

- Planning Team and Champions wear T-shirts featuring the name of the Dynamics 365 solution.

- Dynamics 365 solution banners, posters, and leaflets displayed throughout the offices.

- Demo booths in cafeteria/foyer to showcase the various Dynamics 365 solution tools and features, and to provide hands-on experience.

How to choose your launch events

Consider your goals for using Dynamics 365. How can your launch event support your business objectives?

Consider your company culture. What types of activities will resonate with your leadership and your employees?

Consider your time and resources. Can you mix and match activities to plan something that suits your needs and fits into your schedule?

Consider existing company events. Is there an upcoming company event near the roll-out of Dynamics 365 that could incorporate your launch?

Microsoft Dynamics 365

Develop your communication strategy

Develop a communications strategy that will generate awareness and excitement before the launch and share usage success after launch. Consider the following best practices when building your approach:

Ensure staff are considered when putting together the messaging to help them identify, "What's in it for me?"

Pick a mix of activities including email, posters and physical events, and plot them along the project timeline.

Schedule events where people can experience the products and ask questions.

Tailor activities for driving awareness to company and culture.

Having a leader send out a communication announcing Dynamics 365, hosting a launch event, or sharing the benefits during an all-hands meeting will go a long way in validating its importance and getting everyone on board with using the new technology.

Complete the Communications Assessment and use the planning template in the *Adoption Planning Workbook.*

Build your training strategy

Focus on the why
Make sure employees know why the change is happening, what's in it for them, and why they're being asked to change.

Use real work scenarios
Use tasks or business processes that are familiar to your audience to draw them into learning how to use the technology.

Use multiple formats
Training end users should take on multiple forms to accommodate different learning styles, geographical barriers and resource constraints.

Reinforce
Make the training stick with reinforcement options like on-demand training, lunch and learn sessions, and new employee training options.

Consider training best practices

When you are putting together your training program, take into consideration:

The current productivity tools you are running

If you are currently running a productivity system, you may need to spend an increased effort in the training stage, as it will require a change in behavior.

The technology literacy of the staff

You need to understand how tech-savvy your staff are when planning your training program. This will help to determine how easily they will pick up new ways to work.

The current change programs

It is important to understand what other programs are currently running in the business, so do not overwhelm or confuse your staff.

Training preferences of your staff

It is important to understand the best way to deliver training to your organization, whether it be in person, through assisted or unassisted online tutorials, or other methods.

Microsoft Dynamics 365

Align your training strategy to the launch plan

Design your training strategy to scale with your launch. Start with the groups that will champion Dynamics 365, then prepare IT, before launching to the broader organization.

Core Team

- Managers
- Early Adopters
- Change Champions
- Executive Sponsors

IT Preparation

- Administration course for IT resources
- Formal accreditation

Business Groups

- Auditorium Training
- Online/On-Demand Training
- Brown Bag sessions

Ongoing Engagement

- Lunch & Learn
- Tips and Tricks

Use the Adoption Planning Workbook to assess the training needs of your organization and build your approach to training.

Microsoft Dynamics 365

Access learning and training resources

Access free online training resources to help launch your Dynamics 365 solution.

Microsoft Learn provides step-by-step guided learning by job role and product, including videos, tutorials, and hands-on learning resources.

Check in with Microsoft Dynamics community of experts and peers. Get answers by posting questions in the forums, reading blog and how-to articles, and watching videos.

Microsoft Learn
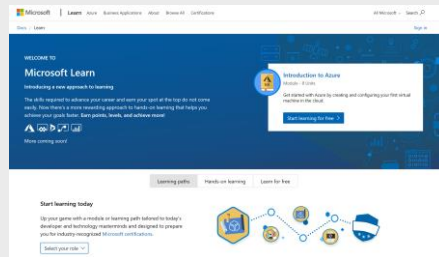
Primary destination for Dynamics 365 learning with videos, tutorials, and hands-on learning.

Dynamics 365 Webinars

Product-based training to help ready people to use the services and apps effectively.

Dynamics 365 Tutorials
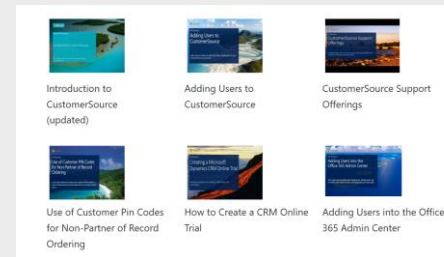
Get up and running quickly with the basic info you need to be productive right away.

Dynamics 365 YouTube Channel
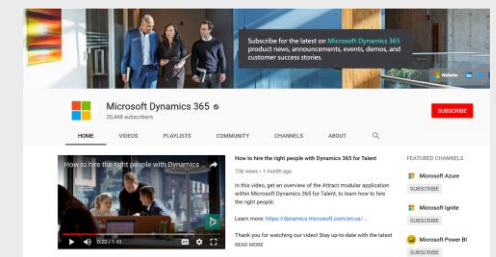
Discover how Dynamics 365 can help you grow your business.

Build a sustainable Champions Community

Success Owners ensure business goals are realized by helping people use and get value from the new Dynamics 365 solution.

Champions:

- Should be formally trained to increase their depth and breadth of knowledge.

- Should be encouraged and empowered to guide, teach, and train their peers.

- Need consistent positive reinforcement that affirms the impact of their efforts.

- Need a clear plan to execute.

Microsoft Dynamics 365

Incorporate Champions Community into the launch plan

Adoption Approach

| Identify key stakeholders | Identify/Prioritize business scenarios | Create & execute a success plan | Measure, share success, and iterate |

Business Scenarios

Dynamics 365 early adoption program with champions

Identify and launch additional solutions

Highlight and share success

Communications and Training

Organize and develop Champions Community

Organization-wide launch: communications, training, events, success stories

Inform stakeholder

Identify champions

Execute Champions Community

IT and Governance

Supervise licensing, security and governance discussions

Support global launch

Build and launch your Early Adopter Program strategy

An Early Adopter Program gives your organization early insights that will help you bring Dynamics 365 to life for all users. Think of it as a dry run, among a representative group, that will help you prepare for full-scale launch.

Working with Early Adopters lets you test your ideas and collect feedback that will help your project team bring that "WOW" factor to your full, organization-wide launch.

Why is this program important

Identify pitfalls. Gather initial feedback and identify potential stumbling blocks to help shape your final launch plan.

Collect feedback. Get feedback from users on the identified goals and scenarios for your Dynamics 365 implementation.

Solve problems. Troubleshoot potential issues with a smaller group of users prior to an organization-wide launch.

Recruit Champions. Develop a pool of potential enthusiasts to recruit from. These individuals will help colleagues adopt Dynamics 365 once the full rollout takes place.

Use Early Adopter feedback to adjust your adoption approach

Success Use feedback from Early Adopters to revisit your communications, training, and feedback plans. Adjust your overall approach based on the input received.

Consider bringing your Early Adopters into the Dynamics 365 Champions group so they can continue to support their peers through the transition.

Microsoft Dynamics 365

Phase Three: Drive Value

Drive Value

Full-scale deployment and business success depend on usage and satisfaction. This requires planning through the Envision and Onboard phases plus ongoing operational excellence.

o **Monitor End User Adoption**

o **Measure and Report Usage**

o **Encourage Ongoing Engagement**

Track KPIs and end user adoption

If your organization is not meeting its KPIs, explore whether there are issues around adoption.

Satisfaction surveys can help you understand your users' knowledge of and sentiment toward the new Dynamics 365 solution. The results can provide insights into the rollout and potential ideas about how to fine tune your adoption plan:

- Circulate a baseline survey to users before the new solution is rolled out, to gather insights about the existing processes.

- Conduct a survey halfway through your launch to gather data about users' experiences with the solution.

- Create new awareness or training content to address any outstanding needs that arise.

- After rollout, use a final survey to assess user satisfaction. You can release this survey 90 days after launch, and then in quarterly increments to help measure user adoption, satisfaction and productivity.

Access reports and tracking tools

Dynamics 365 provides reports available to indicate your current user engagement levels for the different parts of the service.

You can view Common Data Service for Apps analytics right from the Power Platform Admin center to quickly view adoption and user metrics for your organization.

Refer back to these reports to measure against your success criteria and identify areas for improvement.

Continue to track KPIs using your customized scorecard in the Adoption Planning Workbook.

Customer Engagement Sample Metrics

![Microsoft Dynamics 365]
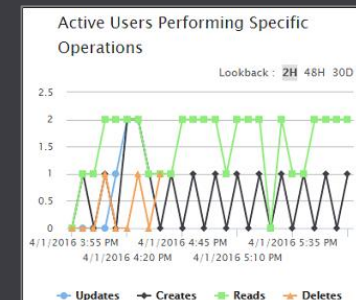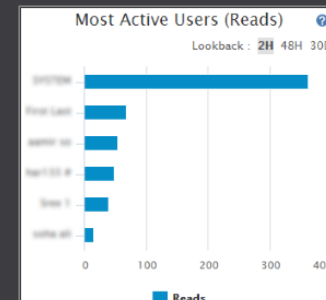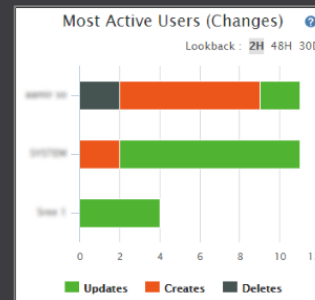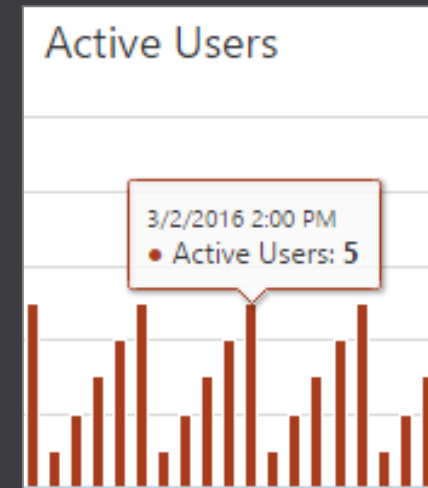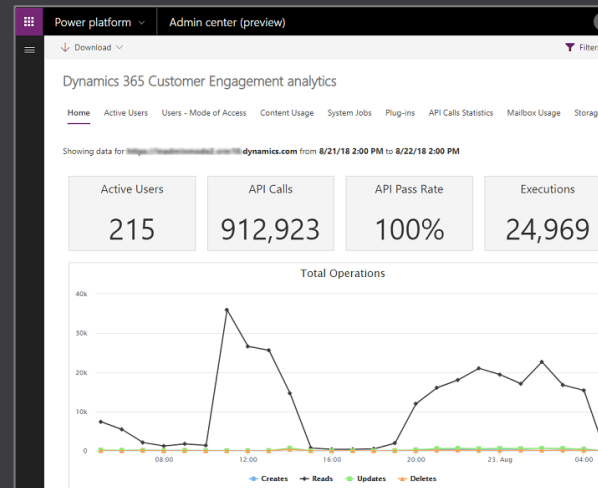
Increase adoption over time with ongoing activities

Determine remaining Dynamics capabilities to leverage.
- Review Dynamics Release notes for new features
- Work with CSM on your Heatmap for Dynamics capabilities

Join the _D365UG User Group for Dynamics 365_.
- Independent member-driven education, networking, events
- Post questions, find answers, learn, connect with peers

Learn how _PowerApps_ can extend your Dynamics solution.
- Enables non-technical users to build custom extensions
- Drive more value and user engagement

Create a Yammer group or Teams channel to continue conversations on best practices and new features.

Quarterly review of next projects involving Dynamics, incorporating new features delivered.

Share success stories showing how people are using Dynamics 365 in innovative and impactful ways.

Host additional engagement events like town hall meetings or lunch & learns to drive end-user engagement.

Set challenges and run competitions to celebrate how people best use Dynamics 365 to work differently.

Remember these proven strategies when driving deeper engagement

Reward people for changing their work behaviors – cultural evolution is critical to adoption.

Define examples and patterns workers can relate to.

Provide training to help workers get the most value from the new tools.

Continue to find your Champions - advocates for change within the business - including executives, managers, and admins.
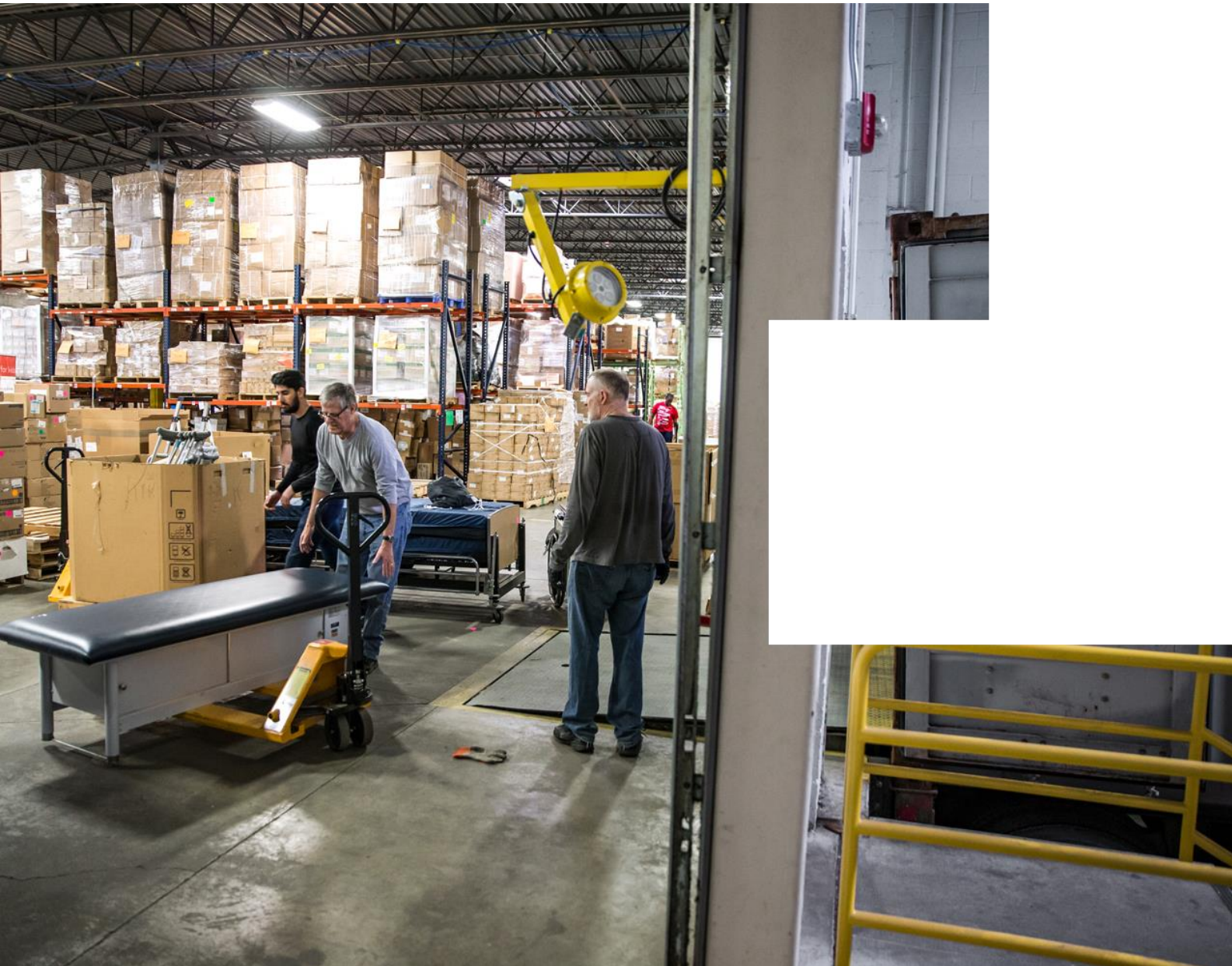
Microsoft is here to support you

Bookmark these resources to continue driving end user engagement throughout your adoption journey.

Dynamics 365 Community

Dynamics experts and peers in the community. Get answers by posting questions in the forums, reading blog and how-to articles, and watching videos.

Dynamics 365 Complete Docs
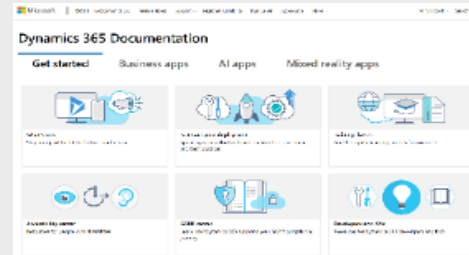
Documentation, blogs, release notes and complete resources for admins, developers and IT professionals.

Dynamics 365 Content Library

Access the free webinars, ebooks, analyst reports and more in our content library to learn how Dynamics 365 can optimize your company.

Product Websites
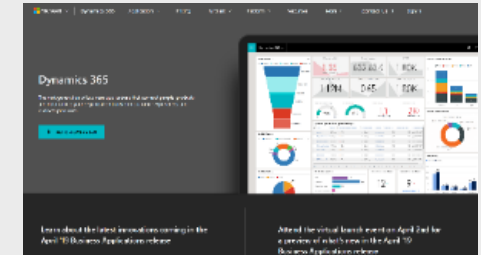
Product specific websites for additional details.

What's next?

Now that you have reviewed the Dynamics 365 Adoption Guide and learned the critical steps for successful technology adoption, it's time to get to put your knowledge into practice.

Click through to the Adoption Planning Workbook to find customizable worksheets and templates that will help you create your own plan and put it into action. We've compiled useful suggestions to help you to assemble your team, create your adoption strategy, and launch your Dynamics 365 solution in your workplace.

Remember, you are not in this alone. Many organizations are currently adopting Dynamics 365 technologies. You can connect and share what works and what doesn't in *Microsoft Dynamics community* of experts and peers.

Microsoft Dynamics 365