

Synergy Implementation Methodology (SIM) Roadmap

Project Planning	Requirements	Concept Design / Configure	Testing / Training	Go-live Preparation	Support / Maintain
<p>Initiate\Plan</p> <ul style="list-style-type: none"> Develop Project Charter Identify Stakeholders Define Scope Plan Communications Identify Risks Assign Initial Resources Define Change Control Process Develop Key, Critical Processes <p>Define Project Plan</p> <ul style="list-style-type: none"> Identify Work Breakdown Structure Develop Preliminary Estimate Develop Preliminary Schedule <p>Execute\Monitor</p> <ul style="list-style-type: none"> Define Project Rules Project Kick-off Meeting Identify Project Team Roles Review Hardward Rqmts 	<p>Initiate\Plan</p> <ul style="list-style-type: none"> Set Expectations & Goals Identify Phase Deliverables Collect Initial Requirements <p>Execute\Monitor</p> <ul style="list-style-type: none"> Project Team Plan & Prepare Review Workflow Documents Review Requirements Documents Identify/Validate Key Business Processes <p>Needs Assessment/Rqmts Analysis</p> <ul style="list-style-type: none"> Review As-is Workflows Identify Data / Information Rqmts Identify Reporting Rqmts Identify System Integration Rqmts Identify User Needs <p>Develop Prototype for Key Concepts</p> <ul style="list-style-type: none"> Prove Workflows Prove Information Rqmts Prove Reporting Rqmts Conduct Prototype Presentation <p>Define Implementation Project Scope</p> <ul style="list-style-type: none"> Document System Key Rqmts Approve Key Workflow Processes Approve Mgmt. Reporting Rqmts Approve Integration Points 	<p>Initiate\Plan</p> <ul style="list-style-type: none"> Update Scope of Work\Risks Set Expectations & Goals Identify Phase Deliverables Assign Resources Update Estimate and Schedule <p>Execute\Monitor</p> <ul style="list-style-type: none"> Project Team Plan & Prepare Review Prototype & Key Processes <p>Prepare Environment</p> <ul style="list-style-type: none"> Network & System Requirements Install Dynamics SL & SQL Document Installation Define Build / Test Environment <p>DSL Conceptual Design Decisions</p> <ul style="list-style-type: none"> Critical design decision recommendations Define Master Record Schemas & Usage Identify Record Values\Lists Define High-level Integration Rqmts Define High-level Data Flow Approval/Sign-off on Concepts <p>Configure System</p> <ul style="list-style-type: none"> Configure Master Record Create Record Values\Lists Complete Initial System Setup Preliminary Consultant Validation Identify Potential System Gaps Develop Solution for Gaps Approval\Sign-off Initial Setups Backup DB & Restore to TEST <p>Develop Test Plan</p> <ul style="list-style-type: none"> Identify Testing Objectives Develop Test Plan & Schedule Approve Testing Objectives & Plan 	<p>Initiate\Plan</p> <ul style="list-style-type: none"> Update Scope of Work\Risks Set Expectations & Goals Identify Phase Deliverables Assign Resources Update Estimate and Schedule <p>Execute\Monitor</p> <ul style="list-style-type: none"> Project Team Plan & Prepare Discuss Standard Process Documents Review Key, Critical Processes Discuss Source Documents for Testing <p>Develop Transaction Flows</p> <ul style="list-style-type: none"> Prepare Key, Critical Process Documents Update Standard Process Documents <p>Data Conversion Plan</p> <ul style="list-style-type: none"> Identify Source Date Export and Prepare Source Data Test Data Import Files Prepare Cut-over Plan <p>Execute Transaction Test Plan</p> <ul style="list-style-type: none"> Install and Test Customizations Conduct Testing Activities Test Workflow Processes Document Workflow Procedures Resolve System Design Issues Prepare Screen Mod Mockups Submit for Estimates Approve and Build Screen Mods Sign-off on Testing Results <p>Evaluate Management Reporting</p> <ul style="list-style-type: none"> Management Reporting Matrix Prepare Report Mockups Submit for Estimates Approve and Build Reports Sign-off on Management Reporting 	<p>Initiate\Plan</p> <ul style="list-style-type: none"> Update Scope of Work\Risks Set Expectations & Goals Identify Phase Deliverables Assign Resources Update Estimate and Schedule <p>Execute\Monitor</p> <ul style="list-style-type: none"> Project Team Plan & Prepare End User Training Planning Data Conversion Planning Final Go-live Planning <p>End User Training</p> <ul style="list-style-type: none"> Dynamics SL Module Training End User Workflow Training Develop Closing Procedures End User Go-live Planning Meeting <p>Final Go-live</p> <ul style="list-style-type: none"> Sign-off on Go-live Readiness Prepare Source Open Docs Prepare Data Import Files Prepare Production DB Import Source Data Load Open Docs Print Audit Trail Reports Close Opening Month Go Live on Dynamics SL 	<p>Initiate\Plan</p> <ul style="list-style-type: none"> Update Scope of Work\Risks Set Expectations & Goals Identify Phase Deliverables <p>Execute\Monitor</p> <ul style="list-style-type: none"> Project Team Plan & Prepare Review outstanding items Prepare for Closing Conference <p>End User Support</p> <ul style="list-style-type: none"> Provide Synergy Support Finalize Month-End Processes Sign-off by End Users <p>Project Close Conference</p> <ul style="list-style-type: none"> Introduce Client Services Review MS CustomerSource Review Technical Support Plans Complete Open Issues Review Criteria for Success Review Customer Satisfaction Executive Sponsor Sign-off Planning Phase II (if needed) <p>Customer Case Study</p> <ul style="list-style-type: none"> Document Business Case Study Present Case Study to Microsoft
<p>Close</p> <p>Deliverables</p> <ul style="list-style-type: none"> Project Charter Responsibility Matrix Project Communication Plan Project Plan with Target Dates Authorization to Proceed 	<p>Close</p> <p>Deliverables</p> <ul style="list-style-type: none"> Validate Key, Critical Business Processes Prototype System Requirements Authorization to Proceed 	<p>Close</p> <p>Deliverables</p> <ul style="list-style-type: none"> Compilation of Concept Documents Transaction Flow Document(s) System Configuration Document Test Plans 	<p>Close</p> <p>Deliverables</p> <ul style="list-style-type: none"> Updated System Configuration Updated Transaction Workflows Screen & Report Mods Sign-off Test Plan Sign-off Preliminary Cut-over Plan Sign-off 	<p>Close</p> <p>Deliverables</p> <ul style="list-style-type: none"> End User Training Plan Final Cut-over Plan Data Conversion Plan Month-End Closing Procedures Standard Module Documentation DSL User Manuals DSL Report Assistants 	<p>Close</p> <p>Deliverables</p> <ul style="list-style-type: none"> Project Archival Documentation Client Services Key Information Budget to Actual Report