Modern Service Management Operational Roles and Tasks for Dynamics 365

IT Service Management

Duration: 5 Days [Onsite]
Difficulty: 300 - Advanced

Description

This offering presents how to adapt services to Dynamics 365 that require a role shift because cloud changes IT operations roles, it does not remove them. It is designed to help you gain insight into your current cloud operations and discover how you can enable your organization by improving the delivery performance of your team and extracting more value from the technologies your team supports.

Also, this solution provides a recommended approach to manage and maintain Dynamics 365. The business outcome includes lowering the total cost of ownership to run and maintain the system.

Objectives

- **Manage the service**: Manage and maintain Dynamics 365 so that you get full value from your investment.
- **Align Roles**: Implement key Dynamics 365 major and secondary roles required to operate Dynamics 365.
- **Tasks**: Execute tasks recommended for maintaining a steady state

Outcomes

- Service dependencies map for Dynamics 365-based service
- Dynamics 365 major and secondary roles' description
- Power Platform major and secondary roles' description
- Dynamics 365 operational tasks and activities list
- Roles and tasks are assigned to your team members

Methodology

Learn by example
Participate in group discussions and learn from presentations and demonstrations to learn how to effectively maintain and operate the Dynamics 365 environment.

Develop a plan
Define a structured plan to manage team organization in terms of tasks, frequency, least task privilege, online procedure, and so forth.

Scope

This offering is scoped for building your Dynamics 365 and Power Platform management tasks plan.

Agenda

Day 1
- Service map workshop

Day 2
- Role assessment and Service map review

Day 3
- Responsibility Assessment

Day 4
- Task list Assessment and
- Review and finalize assessment results

Day 5
- Close-out

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Delivery Outline

Requirements	

Participants
▪ Executive Sponsor, Project Manager, Architects, Technology SME's (Subject Matter Experts), Process Owners (Incident, Change & SLM), Service Owner
Skill Requirements
▪ Basic Azure administration knowledge
Time Commitment
▪ Five full-day engagement with relevant roles
	Delivery Requirements
	▪ Computer with Microsoft Office
	  ▪ Excel
	  ▪ Visio
	  ▪ PowerPoint

Assessment and Knowledge Transfer		
Scoping	Scope	▪ Agree on scope.
Day 1	Kick-off	▪ Preview the engagement with all stakeholders, introduce the team members, define roles and responsibilities, and set expectations for deliverables and schedule.
Day 1	Service Mapping	▪ Solidify and document scope of the service/technology being assessed. ▪ Ensure that the right team members are involved in the role assignment. ▪ Service Catalog overview, service definition exercise, operational roles and tasks list.
Day 1	Service Mapping – Data Gathering	▪ Collect service map information, identify the different components and which team/person is responsible.
Day 2	Create Service Map	▪ Build the Service Map; team conversation about additional finding
Day 3	Service Map Review and Finalization	▪ Complete the service map by incorporating any additional findings or thoughts from the team.
Day 3	Operational Roles and Tasks Role Assignment	▪ Assign teams within the customers organization to the predefined roles – ensure the least privilege is utilized while assigning the different roles.
Day 4	Map Tasks to Roles & Operational Roles and Tasks Role Assignment	▪ Ensure that every active task is assigned to a defined role. ▪ Identify opportunities to improve efficiency and establish clear ownership of tasks. ▪ Create a defined knowledge management plan.
Day 5	Review Roles and Tasks Assignment	▪ Review any gaps in assignment of Roles and Tasks.
Day 5	Close-out Meeting	▪ Review deliverables and work done. Agree on action items.

For more information: Please contact your Microsoft Representative for more details.

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