

AIM Assessment for Dynamics on-premises customers



Start your journey to the cloud with a baseline technical and functional review of your current on-premises solution, along with specific recommendations and considerations.

Deliverables

The final report documents insights, analysis, and recommendations for moving to Dynamics 365 cloud.

- Business objectives overview
- ISV overview with recommendations
- Technical dependencies and recommendations
- Recommendations on ideal upgrade approach
- Migration next steps

Objectives

- Understanding the benefits of moving from an older, on-premises solution to the cloud
- Identify business objectives and tie those into the functionality of Dynamics 365 cloud
- Learn how to optimize the migration process with a focus on reducing effort and costs



Solutions

Dynamics CRM, AX, NAV, GP, SL, and Business Central on-premises



Timeline

Estimated 4-8 hours



Geography

Worldwide



Participants

Project Manager
System Admin
Solution Architect
Database Admin
Solution Owner
Developer
IT Manager

AIM Assessment

The AIM Assessment is comprised of three parts: a functional evaluation, technical evaluation, and additional evaluation.

1. Functional evaluation

The functional assessment examines your current business processes and determines how you might most benefit from the new capabilities and enhancements available in Dynamics 365 cloud.

In this phase, the partner assesses and documents the following:

- High-level business process and functional review to understand the current on-premises business processes and map those to the capabilities of Dynamics 365 in the cloud
- High-level assessment of the new capabilities and enhancements in Dynamics 365 cloud relevant to the customer's business objectives
- High-level assessment of customizations and ISVs implemented, evaluating used ISVs and provide alternatives for ISV solutions where relevant (e.g., new features in Dynamics 365 cloud may eliminate the need for an ISV solution)

2. Technical evaluation

During the technical assessment, the partner identifies the current technical architecture and evaluates different modernization options.

In this phase, the partner assesses and documents (at minimum) the following:

- **Integrations:** Integrations that will need to be updated to be compatible with the cloud.
- **Database:** Amount of schema and data that will need to be relocated to the cloud.
- **Custom code:** The amount of code that will need to be assessed for cloud readiness.
- **Processes:** Custom workflows, business process flows, dialogs, and custom actions that will need to be evaluated for cloud compatibility.
- **Reporting:** The amount of custom reports that will need to be refactored and/or rescoped for cloud computability.
- **Licensing:** The number and types of Dynamics 365 licenses needed to transition to the cloud.



3. Key recommendations and next steps

- **Recommended Upgrade Approach:** Assess and recommend the type of migration suited for the customer's needs
- Next steps in the migration journey

AIM Assessment Process

1. Kickoff

Before kickoff

- Fill out the client questionnaire
- Review AIM Assessment client roles and responsibilities to assist your organization through this process

Kick-off meeting

- Project team, roles and responsibilities
- Migration assessment overview
- Migration assessment timeline
- Actions items and next steps

2. Discovery

Current system discovery

- Partner examines current business processes
- Partner examines use of Dynamics on-premises system components, including existing configurations, customizations and integrations

Questionnaire follow-up

- Follow-up questions from responses to client questionnaire

3. Analysis

Analysis inputs

- Client questionnaire and follow-up
- Platform assessment data

Note: *Neither Microsoft nor partner will access—nor will you provide access—to Personally Identifiable Information (PII) that is housed within your current Dynamics on-premises solution.*

4. Report

AIM Assessment report

- Business objectives overview, tied to Dynamics 365 and Microsoft functionality with the objective of standardizing or reducing customizations and complexity through out-of-the-box features
- ISV overview with recommendations for cloud alternatives and/or out-of-the-box functionality
- Technical dependencies and recommendations for integrations, database, custom code, processes, reporting, licensing, etc.
- Recommendations on ideal upgrade approach
- Migration next steps