

Service Description for 1ClickFactory BestPath Assessment for AX

Introduction

1ClickFactory's BestPath Assessment will provide you with more visibility into your Dynamics AX upgrade project complexity and help you make a more informed decision as to which upgrade tactic (upgrade, re-implementation, or a mix) is the most beneficial for your customer to move to the new Dynamics AX version.

Why should you choose a BestPath Assessment?

- **Comprehensive Solution Analysis & Recommendations:** Get your customer's solution analysis driven recommendations about which upgrade tactic (upgrade, re-implementation or a mix) is the least problematic and the most cost-effective way to move your customer AX solution to the newest version.
- **Clear Project Plan:** Receive a clear plan (including (your) the Partner's, customer's and (our) 1ClickFactory's roles and tasks in the project) for precise project planning and execution.
- **Better Manage Project Risk:** Gain greater visibility into your customer's solution complexity to better manage the project's risks and avoid costly mistakes.

BestPath Assessment Service Deliverables

- **Initial Project Assessment:** the initial assessment of your upgrade project.
- **BestPath Assessment Workshop:** a workshop with you, the Partner, to analyze your customer's solution.
- **BestPath Solution Re-Assessment:** a solution re-assessment and recommendations for the most beneficial upgrade path (upgrade, re-implementation or a mix).
- **Preliminary Project Execution Plan:** preliminary Project Plan preparation.

BestPath Assessment Service Workflow



BestPath Assessment Workshop (Step 3 & 4 of the workflow)

Agenda:

1. Team introduction.
2. Description of possible project scenarios and how each differs.
3. Detailed review of AX Upgrade Assessment results.
4. Solution complexity and modifications analysis together with you, the Partner, which includes:
 - Modifications in conflict with a new functionality (upgrade or re-implement);
 - Unused modifications;
 - Modifications not existing in a standard version, but must be re-implemented based on the standard solution or technology changes; and
 - Data consistency and data integrity.
5. Solution re-assessment, risks identification in all projects scenarios and recommendations formulation.
6. Preliminary Upgrade Project Plan.

BestPath Assessment Workshop Deliverables:

- Preliminary Upgrade Project Scope
- Preliminary Upgrade Project Plan

Key considerations for an Upgrade BestPath Assessment for AX:

Before planning your upgrade strategy, you and your customer should discuss these factors:

- **Changes in business requirements:**
 - Need to use new functionality that is available in a new version.
 - Existing old functionality that no longer meets business needs.
 - Higher integrity, security and reliability requirements.
- **Business reorganization or restructure:**
 - Change in organization's structure.
 - Business process change, reengineering and implementing workflows.
- **Data:**
 - Data quality consistency and integrity.

- Substantial volumes of historical data (purge or archive).
- **Customizations:**
 - Customizations implemented in new standard version.
 - Retiring old, unused customizations.
 - The risk of moving old customizations to a new version.
- **ISV solutions and integrations with 3rd party applications:**
 - New functionality replaces existing 3rd party applications.
 - Business critical integrations to include in new version.
- **Time & budget:**
 - Available budget for the project.
 - Expected timeline to complete.
 - Downtime limitation for a cutover.
 - Internal and external project resources.

To request your 1ClickFactory BestPath Assessment for AX, please contact us by e-mail at service@1clickfactory.com.

Important: 1ClickFactory works directly through Microsoft Partners only. If you do not represent a Microsoft Partner, to get an initial proposal please contact us by e-mail at service@1clickfactory.com and we will contact you and/or your Microsoft Partner with more information.

This service may be terminated if the terms and conditions established in the Service Agreement for the 1ClickFactory BestPath Assessment for AX Service are not followed.

Additional Services

We also provide Dynamics Partners with several assets and services to help you plan the best upgrade strategy for moving your customers to Microsoft Dynamics 365 for Finance and Operations. Here is a quick list of services to help you prepare for the move to Microsoft Dynamics 365 for Finance and Operations:

- Register for a What's New in Dynamics 365 for Finance and Operations Workshop:
 - [Register now](#) to learn what's new with Dynamics LCS and Azure.
 - [Register now](#) to learn what's new from a technical perspective in the latest AX release.
 - [Register now](#) to gain solution extensibility development skills.
- Request a [FREE Upgrade Assessment](#)