d365Legal

Go-live planning checklist

Microsoft Dynamics 365 for Legal

Project delivery team

Proposed readiness gates and support handover

UAT completion
Data setup
User guides
Training
Hypercare
Ongoing BAU support

Readiness evidence and ownership

Suggested accountable roles. Record a named owner, due date and evidence link for each item.

Workstream	Completion evidence	Accountable role
UAT	Signed test summary and defect disposition	Business process owner
Data setup	Reconciliation and configuration approval	Data lead
User guides	Approved, accessible release versions	Change lead
Training	Role coverage and task assessments	Training lead
Hypercare	Staffed roster and tested escalation path	Hypercare lead
BAU support	Accepted handover and service agreement	Service owner

Initial status: To assess for every workstream. The sponsor records the final go/no-go decision.

UAT completion

Business owners confirm that the agreed legal workflows and access controls work end to end.

01 **Client intake and conflicts**

Test approved intake, conflict checks and exception handling.

02 **Matter delivery**

Test matter setup, key dates, documents and restricted access.

03 **Time to billing**

Test time, expenses, rates and invoice outputs in scope.

Acceptance checklist

All agreed tests executed

Critical defects resolved and retested

Residual risks accepted by the business

Business owner signs UAT exit

Evidence: test results, defect log, integration and performance results, signed UAT summary

Data setup and production controls

Data owners reconcile the final load and approve the configuration used by the business.

Data domain	Completion checks	Evidence
Clients and matters	Clean duplicates, validate relationships, confirm owners and key dates	Counts, samples and exception report
Commercial setup	Approve fee earners, price lists, billing rules and codes in scope	Configuration register and sample invoices
Opening transactions	Reconcile time, expenses, WIP and balances where migrated	Control totals and finance approval
Access and interfaces	Confirm roles, restricted matters, documents and integration accounts	Access tests and interface results

Final-load gate Rehearse migration, capture changes after the freeze, reconcile again and secure data-owner sign-off.

User guides ready for day one

Guidance reflects the approved release and the way each role will work.

Publication checklist

01 Cover the critical tasks for each role

02 Check screenshots against the release

03 Include exceptions and approved workarounds

04 Test links and access with ordinary users

Release package

Quick-start guide

Task instructions

Known issues and FAQs

How to request help

Gate: process owners approve content. The change lead publishes version, owner and review date.

Role-based training and readiness

Attendance shows participation. A practical task check demonstrates readiness to work.

Audience	Practice in a safe training environment	Completion evidence
Fee earners	Open a matter, find documents, record time and meet key dates	Task assessment and access confirmation
Intake and legal support	Create client records, check conflicts, maintain matters and documents	Scenario results and exception handling
Finance, if in scope	Review time, apply rates, prepare billing and reconcile interfaces	Billing walkthrough and control checks
Champions and support	Triage a case, reproduce an issue, use guidance and escalate	Support rehearsal and knowledge transfer

Training gate Training lead confirms coverage, catch-up sessions and a named champion for each team.

Cutover and go/no-go decision

Relative sequence only. The cutover lead confirms dates, dependencies and the decision authority.

01

Rehearse

- Time the runbook
- Test recovery
- Confirm dependencies

02

Prepare

- Freeze changes
- Confirm final extract
- Check support roster

03

Deploy

- Load and reconcile
- Run smoke tests
- Check integrations

04

Open access

- Record go/no-go
- Notify users
- Start hypercare

Go/no-go gate

Sponsor accepts the evidence and residual risks. Hold launch for unresolved critical blockers.

Hypercare operation and exit criteria

Enhanced support starts at launch and ends when the service owner accepts operational stability.

01 **One intake channel**

Capture business impact, matter context and safe evidence.

02 **Daily triage and response**

Prioritise, assign an owner and communicate the next update.

03 **Resolve and confirm**

Test the fix, confirm with the user and update guidance.

Proposed exit checklist

No unresolved critical incidents

Stable core workflows and interfaces

Backlog fits BAU capacity

Support team accepts ownership

Daily measures: severity, incident age, recurring issues, failed jobs and user readiness

Ongoing BAU support and handover

Business as usual support has clear ownership, agreed service levels and a funded operating model.

L1 Service desk

User help, access requests and initial triage

L2 Application team

Configuration, interfaces and problem investigation

L3 Partner / vendor

Product defects and specialist escalation under contract

Handover acceptance

Runbooks, access and monitoring ready

Knowledge transfer and open issues accepted

Service hours, priorities and contacts agreed

Operating calendar

Monitor integrations and scheduled jobs

Review incidents, access and capacity

Test updates before planned releases

Next action: assign named owners, agree due dates and review evidence at the readiness meeting. For more information, David@d365.Global, WhatsApp +61 409 245 354.