SOLUTION BLUEPRINT

Microsoft Dynamics 365 for Legal

d365Legal

Aligned to the Microsoft Success by Design methodology — target solution direction, business outcomes, operating model, scope, risks and success measures.

Prepared for executive sponsors and steering committee

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A legal industry solution, delivered with Microsoft rigour

d365Legal is a Microsoft Dynamics 365 industry solution helping law firms and corporate legal teams modernize matter management, client engagement, legal operations, finance integration, compliance, reporting and productivity. This blueprint is the shared, validated understanding of the solution before implementation progresses.



Common reference point

Confirms what will be delivered, why it matters, how it is governed and how success is measured.

Success by Design

Microsoft's disciplined lifecycle across Strategize, Initiate, Implement, Prepare and Operate.

One trusted view of clients, matters, relationships, activities, documents and performance.

Purpose of the Solution Blueprint

Confirm the case

Business drivers, strategic objectives and expected value of the d365Legal implementation.

Define the target

Operating model plus high-level process, data, security, integration, reporting and governance requirements.

Clarify boundaries

In-scope and out-of-scope capabilities, assumptions, constraints and dependencies.

Surface risk early

Implementation risks, requirement gaps, stakeholder impacts and readiness considerations.

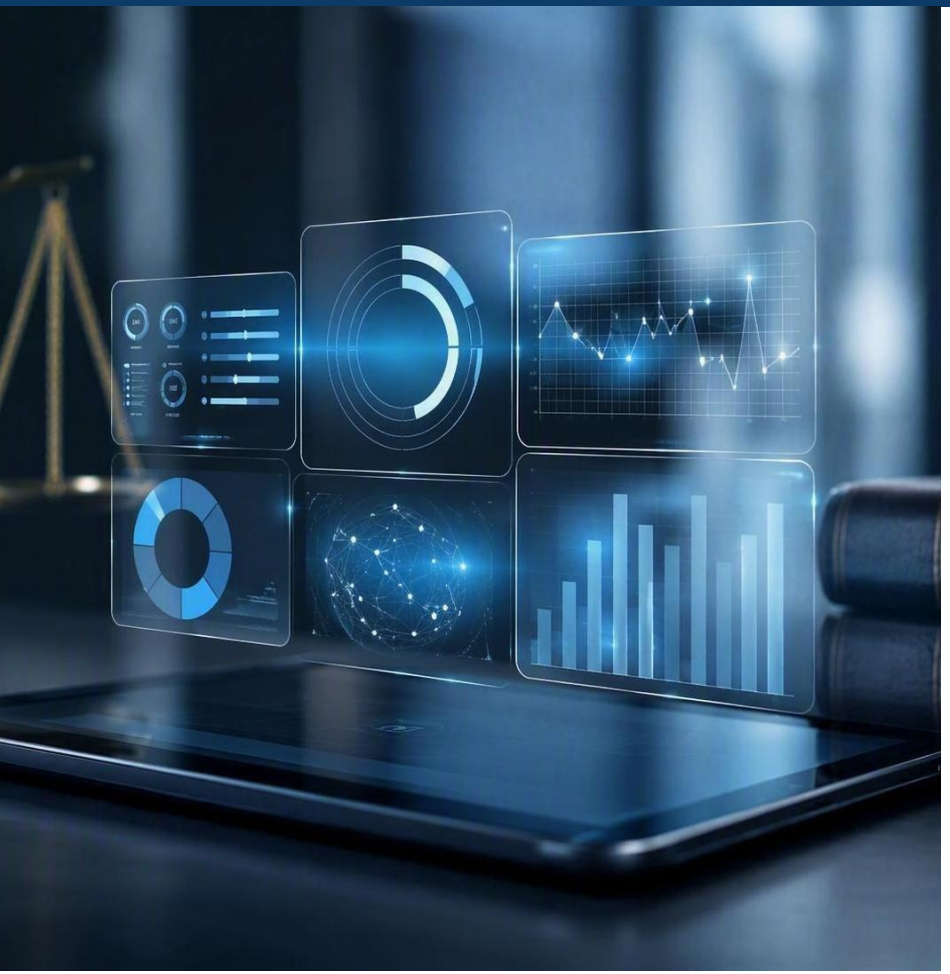
Baseline governance

Solution validation, testing, cutover, adoption and post-go-live operational management.

Living artefact

A practical delivery document reviewed at initiation, refined through implementation, maintained as truth.

Legal industry context and business drivers



Firms face rising client expectations, regulatory obligations, pricing pressure, hybrid work and data security risk — while still relying on fragmented systems, spreadsheets and email-centric processes.

- Consolidate client and matter visibility on one legal platform
- Standardize intake, compliance, approvals, tasks and matter closure
- Reduce manual administration through automation and guided workflows
- Improve pipeline visibility, work tracking and billing readiness
- Strengthen compliance, confidentiality controls and auditability
- Enable insight through dashboards and operational analytics
- Scale across practices, geographies, client segments and service lines

Target operating model

A standardized, role-based, data-driven legal operations platform with clear ownership of client and matter data.

Operating model area	Target state summary
People and roles	Role-based experiences for partners, lawyers, paralegals, legal operations, finance, compliance, marketing and administrators.
Processes	Standardized workflows for enquiry, onboarding, conflict checks, matter opening and planning, tasks, billing readiness and closure.
Data	Shared model for clients, contacts, matters, activities, documents, tasks, billing indicators, risk attributes and reporting dimensions.
Technology	Dynamics 365, Power Platform, Dataverse, Microsoft 365, analytics, integrations and optional legal DMS and finance systems.
Governance	Defined ownership for solution design, data quality, security, change control, release management and operational support.
Performance	Dashboards for matter volume, responsiveness, pipeline, revenue, utilization, compliance status, client service and adoption.

Key business outcomes and success measures

Outcome	Success measure
Client and matter visibility	A single view of client and matter information adopted by key practice groups, reducing reliance on spreadsheets and email.
Standardized matter lifecycle	Consistent use of agreed intake, conflict, opening, task, status, billing readiness and closure processes.
Reduced administrative effort	Automation of routine notifications, approvals, task creation, reminders and reporting activities.
Financial and operational insight	Dashboards for pipeline, matter progress, workload, billing readiness, revenue indicators and practice performance.
Compliance and risk control	Improved auditability of conflict checks, approvals, confidentiality requirements and mandatory process steps.
Adoption and productivity	Target users adopt d365Legal as the primary matter and client engagement platform within agreed timeframes.
Scalable foundation	Design supports future practice groups, jurisdictions, integrations, automation, analytics and AI scenarios.

Scope, assumptions, constraints and dependencies

Scope

- Core entities, forms, views, dashboards, business rules and guided processes
- Client, contact, enquiry, conflict, matter, task and closure management
- Role-based security aligned to legal confidentiality
- Microsoft 365, finance, DMS and reporting integration
- Data migration planning for agreed legacy data

Assumptions

- Executive sponsorship and practice leadership participation
- Stakeholders confirm priority practice areas and matter types
- Source data quality assessed before migration
- Licensing, tenant, Dataverse capacity and security prerequisites ready
- Integration endpoints provide documented APIs and vendor support

Constraints

- Timelines constrained by stakeholder availability and data cleansing effort
- Customization controlled to preserve upgradeability
- Confidentiality may restrict visibility and reporting granularity
- Legacy limitations affect completeness of migrated data
- Budget and capacity influence phasing and integration sequencing

Dependencies

- Microsoft platform and identity services provisioned and governed
- Process owners validate target processes and approval rules
- Data owners support profiling, mapping and migration validation
- Integration owners and vendors support design and testing
- Governance provides timely decisions and risk escalation

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Success by Design alignment

Microsoft's prescriptive framework for Dynamics 365 implementations — applied to reduce delivery risk and align d365Legal to measurable business outcomes.

Six principles guiding the blueprint

Outcome-led design

Define legal business outcomes first, then map capabilities, data, processes and adoption to those outcomes.

Process-focused

Use end-to-end processes — lead-to-client, intake-to-matter, matter-to-bill, issue-to-resolution — to frame scope.

Architecture fit

Prioritize configuration and standard Dynamics 365, Power Platform, Microsoft 365 and Azure capability before custom code.

Risk-based assurance

Identify risk early through structured reviews, design checkpoints, prototypes, test cycles and readiness assessment.

Roadmap alignment

Stay aligned to Microsoft cloud patterns, product direction, the security model and Dataverse extensibility.

Operational readiness

Treat training, support, transition, reporting and continuous improvement as core implementation deliverables.

Strategize · Initiate · Implement · Prepare · Operate

1

Strategize

Business case, transformation vision, success measures, target operating model and roadmap for d365Legal.

2

Initiate

Scope, governance, methodology, workstreams, environments, quality gates and the first Solution Blueprint Review.

3

Implement

Design, configure, extend, integrate, migrate, test and validate around business processes and architecture domains.

4

Prepare

UAT, performance and security validation, migration rehearsal, cutover, training, adoption and go-live risk assessment.

5

Operate

Stabilization, support, monitoring, release management and continuous improvement as a living platform.

Architecture decisions are assessed against business value, platform alignment, maintainability, security, scalability, extensibility, total cost of ownership and operational risk — configuration before customization.

Blueprint objectives and intended audience

Audience	Use of the blueprint
Executive sponsors and steering committee	Confirm business outcomes, investment alignment, scope boundaries and governance expectations.
Legal operations and practice leaders	Validate legal processes, role-based needs, adoption priorities and operational reporting requirements.
Solution architects and technical leads	Guide application, data, integration, security, environment, ALM and extension decisions.
Project managers and workstream leads	Manage delivery scope, dependencies, risks, deliverables, quality gates and change control.
Administrators, support and service owners	Prepare for transition to support, platform governance, release management and ongoing optimisation.

03



Current state and future vision

From fragmented CRM, spreadsheets and informal referral networks to a single relationship and matter intelligence platform.

Current state versus the d365Legal future state

TODAY

- Processes fragmented across Outlook, Excel, DMS, practice management and finance
- Duplicate contact records and manual workarounds with unclear ownership
- Limited pipeline discipline and low visibility of referral value
- Inconsistent client segmentation and matter history
- Reporting gaps across revenue influence, referral conversion and engagement

WITH d365LEGAL

- A single trusted view of clients, contacts, matters, referrals, opportunities and relationship ownership across practice groups, offices, sectors and jurisdictions
- Structured referral management and targeted business development
- Matter lifecycle visibility and executive-level reporting
- Copilot-enabled insight — client risk signals, relationship strength and next-best actions
- Less reliance on informal knowledge; consistent client service

Stakeholder map and business ownership

Stakeholder group	Primary responsibilities
Executive sponsor	Owns the transformation case, removes barriers, approves investment and champions firm-wide adoption.
Managing partner and practice leaders	Define client relationship priorities, matter growth objectives, sector focus and partner participation.
Business development and marketing	Own segmentation, campaign planning, referral tracking, opportunity management and relationship development.
Fee earners, partners and assistants	Maintain client, contact, matter, opportunity and referral information and act on the resulting insight.
Legal operations and practice management	Align matter workflows, intake, reporting and operational processes to the target operating model.
IT and security	Govern architecture, integration, identity, security, privacy, environments and lifecycle management.
Data owners and stewards	Define data standards, quality rules, deduplication and ownership of client, contact and matter data.

Value realisation and adoption strategy

Benefits are baselined during Strategize, reviewed through implementation and tracked after go-live via adoption dashboards and executive governance.

Revenue growth

Visibility of opportunities, referrals, cross-sell prospects and strategic client plans.

Client retention

Stronger relationship ownership and early identification of client service risk.

Efficiency

Fewer duplicate records, spreadsheets and ad hoc matter tracking.

Data quality

Measurable gains in completeness, accuracy, deduplication and consent capture.

Adoption

Active role-based usage by partners, fee earners, BD and legal operations.

Management insight

Reporting across pipeline, sectors, referral conversion and BD return on investment.

Positioned as a business transformation program, not a technology deployment — executive sponsorship, role-based adoption journeys and a champion network.

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Initiate: scope, architecture, governance

Converting strategy into a coordinated implementation plan with disciplined control over architecture, security, compliance, cost and scope.

Project governance and delivery model

Governance body	Primary responsibilities
Executive steering committee	Confirms business outcomes, approves budget and major scope decisions, resolves escalated risks and ensures firm-wide alignment.
Project board	Monitors delivery progress, manages dependencies, confirms release readiness and oversees commercial and resourcing decisions.
Design authority	Owns architecture principles, approves significant design decisions, governs extensions and prevents unnecessary customisation.
Product ownership group	Prioritizes backlog, validates business outcomes, clarifies requirements and accepts delivered functionality.
Workstream leads	Manage functional, technical, data, integration, security, testing, change and training activities.

Scope definition and release strategy

Release 1

FOUNDATION

- Matter management
- Client and contact management
- Opportunity and intake management
- Core workflow automation
- Foundational reporting and security roles
- Initial integrations

Release 2

EXTEND

- Document management integration
- Advanced matter financials
- Activity capture and precedent automation
- Legal project management
- Conflict checks
- Staff and client portals

Future

DIFFERENTIATE

- AI-assisted matter summarization
- Advanced legal analytics
- Practice-area accelerators
- Knowledge management
- Billing integrations
- Deeper Microsoft Copilot experiences

Dynamics 365 and Power Platform landscape

Platform area	Role in d365Legal
Dynamics 365 Sales / Customer Service	Client relationship management, opportunities, referral tracking, pipeline visibility and business development.
Dataverse	Secure data platform for legal entities, matter records, relationships, activities, audit history and extensible models.
Power Apps	Model-driven experiences for fee earners, legal assistants, partners, practice managers and administrators.
Power Automate	Automates matter opening, approvals, task generation, status notifications, conflict workflows and integration triggers.
Power BI	Operational reporting across matter progress, workload, pipeline, financial indicators and SLA performance.
Teams, Outlook and SharePoint	Collaboration, email and activity capture, matter workspaces and document storage integration.
Azure integration services	Controlled integration with finance, migration tooling, DMS platforms, external portals and enterprise services.

Security, compliance and environment strategy

Legal data governance principles

- Confidentiality via role-based access, team ownership, field-level security and information barriers
- Privilege and sensitive matter data classified with retention, access, export and audit policies
- Privacy legislation, records management, discovery readiness and jurisdictional obligations
- Secure authentication, supportable APIs and monitored data flows for every integration
- Administrative access limited, periodically reviewed and separated by duty

Environment strategy

Development	Build, unit test, prototyping — maker controls, source control, unmanaged solutions
System test	Integration and regression testing — managed solutions, deployment validation
UAT	Business validation of processes, roles, reports — scripts, defect triage, sign-off
Training	Role-based walkthroughs — curated data, stable config, reset procedures
Production	Live use — change control, monitoring, backup, support model, release calendar

05



Implement: solution design

A unified relationship, matter, document, reporting and intelligence platform — standard capability first, extended only where legal practice demands it.

Functional design across the legal lifecycle

Clients & relationships

Accounts, clients, contacts, referrers, intermediaries and counsel as controlled Dataverse master data with legal-sector attributes.

Matter & pipeline

Enquiry to opportunity, intake, approval, opening, active management, key dates, closure and post-matter review.

Key dates & Outlook

Court dates, filing and limitation deadlines, reminders and escalation, with tracked email, appointments and tasks.

Marketing & BD

Segmented lists, campaigns, events, consent, attendance and follow-up connected to pipeline and matter conversion.

Documents

SharePoint and Microsoft 365 as the storage foundation with matter-aware context, metadata, templates and retention labels.

Teams collaboration

Matter, practice group and client teams with naming, lifecycle, guest access and ethical-wall governed spaces.

Portals, BC4Legal and HR4Legal



Self-service portals

Azure Web App portals built in Next.js and TypeScript on Dataverse. Clients view matter progress, exchange messages, upload documents and review invoices without a full Dynamics licence; staff manage matters, tasks, deadlines, costs and billing events. Secured by Microsoft Entra ID.

BC4Legal

Legal finance and practice management powered by Dynamics 365 Business Central — connecting CRM, matter management, case workflows, time and billing, trust or client account processes and financial management in one Microsoft cloud platform. Synchronization with d365Legal removes duplicate entry across client, matter, contact, invoice and financial records.

HR4Legal

Purpose-built HR management on Dynamics 365 for people, roles, teams, performance, onboarding, leave, skills and compliance. Employee, matter, client and workload data is synchronized so partners, managers and practice leaders see capacity, utilization, development needs and staffing requirements against real-time practice activity.

Data, security, integration and automation design

Data model & migration

- Core Dataverse records for accounts, contacts, matters, opportunities, referrals, key dates and activities
- Standard tables first; custom tables only where legal behaviour demands
- Master data ownership, validation rules and duplicate management
- Migration waves separate reference, master, open, historical and document data
- Each cycle: profile, cleanse, map, load, reconcile, sign off, rollback

Security & ethical walls

- Business units, teams, roles, field-level security, sharing rules and Entra ID groups
- Matter-level restrictions, restricted teams and private SharePoint locations
- Conflict and confidentiality flags with exception approval workflows
- Auditable access requests and controlled Outlook tracking
- Negative testing confirms restricted matters cannot be viewed, reported or exported

Integration

- Finance, billing, time recording, practice management, HR and identity
- DMS, client portals, e-signature, court and registry systems
- Interface spec per integration: trigger, payload, mapping, security, monitoring
- Defined error handling, retry logic, latency and reconciliation
- Testing covers happy path, exception, volume, security and recovery

Automation & AI

- Power Automate flows, business rules, rollups, approvals and scheduled jobs
- Matter opening, key dates, referral acknowledgement, escalation and provisioning
- Copilot for client history summaries, matter updates and next-best actions
- Governance for privacy, privilege, data residency, grounding and auditability
- Introduced through controlled pilots with measurable productivity outcomes

Traceability from requirement to acceptance

Requirement area	Design artefact	Build component	Test evidence	Acceptance criteria
Client and relationship management	Account, contact and master data design	Dataverse tables, forms, views, duplicate rules	System test and data quality validation	Authorized users create, maintain, search and report on clean relationship data
Matter and opportunity management	Matter lifecycle, pipeline and referral design	Tables, business process flows, automations, roles	End-to-end UAT scenarios	Users manage intake, pipeline, opening, progression, closure and reporting
Security and ethical walls	Access model and restricted matter design	Roles, teams, sharing, field security, SharePoint restrictions	Security and negative access test cases	Unauthorised users cannot view, search, report, export or collaborate
Integration and migration	Interface specifications and migration mappings	Connectors, APIs, flows, migration packages	Integration tests, reconciliation, migration sign-off	Data moves accurately with monitored errors and reconciled outcomes
Reporting and AI	KPI catalogue, Power BI model, Copilot design	Dashboards, datasets, AI configuration and controls	Report validation, security trimming, pilot feedback	Insights are accurate, secure, actionable and aligned to decisions

06

Prepare: go-live readiness

Go-live readiness treated as a formal quality gate — solution, data, people, support model and operating controls proven before launch.

Go-live readiness assessment

Readiness area	Assessment focus	Evidence required
Scope and process alignment	Solution supports the agreed matter lifecycle, client engagement, conflict, compliance, billing and reporting processes.	Signed scope baseline, process catalogue, design decisions
Solution acceptance	Configured apps, Power Platform components, integrations, roles and extensions ready for production.	UAT sign-off, defect status, release notes, security role matrix
Testing completion	UAT, SIT, regression, security and performance testing have met agreed exit criteria.	Test summary, defect burn-down, performance results
Data readiness	Client, matter, contact, employee and reference data cleansed, mapped, migrated and reconciled.	Reconciliation report, exception register, data owner sign-off
People and adoption	Legal professionals, partners, administrators, finance and support staff trained and ready.	Training completion report, champion checklist, comms evidence
Operational readiness	Production support, monitoring, escalation, knowledge and hypercare procedures in place.	Support model, runbooks, monitoring plan, escalation matrix

Cutover, migration rehearsal and hypercare

Cutover strategy

- Cutover manager, checkpoint owners, command centre schedule and escalation path
- Controlled deployment sequence for solutions, roles, flows, integrations, portals and reports
- Business suspension window protecting matter, client and billing data integrity
- Verification of access, matter workflows, conflict checks, document links and reporting
- Rollback decision points, data recovery approach and business continuity procedures

Migration rehearsal

- At least one full-volume rehearsal using production-like data and timings
- Validate mappings, duplicate detection, mandatory fields, ownership and audit needs
- Reconcile against legacy totals by entity, practice group, office and matter status
- Triage exceptions: invalid client-matter links, missing billing references, inactive users
- Formal sign-off from business data owners before production migration

Hypercare

- Two to four week hypercare period with defined extension criteria
- Service desk, Teams channels, daily clinics and champion escalation routes
- Daily triage during early go-live, reducing as stability improves
- Track incidents, severity, resolution time, adoption and integration failures
- Transition to business-as-usual once operational acceptance criteria are met

Go / No-Go decision framework

Decision area	Go criteria	No-go or conditional-go indicators
Business readiness	Process owners have signed off scope, UAT, training and operational procedures.	Unresolved process gaps, untrained critical users or absent business ownership.
Solution readiness	Critical components deployed, tested, documented and accepted.	Open critical defects, failed integrations, security issues or unstable environments.
Data readiness	Migration rehearsal successful, reconciliation complete, exceptions acceptable.	Data quality issues affecting client, matter, compliance, billing or reporting.
Support readiness	Hypercare resourcing, runbooks, channels, monitoring and escalation active.	No confirmed support ownership, incomplete runbooks or unclear escalation.
Risk posture	Residual risks understood, documented, assigned and accepted by governance.	High-impact risks without mitigation, decision owner or business acceptance.

07



Operate: support and roadmap

Governing d365Legal as a living platform — service reliability, continuous improvement and alignment with Microsoft's evergreen cloud.

Support model, SLAs and escalation

A tiered model: L1 user guidance and triage, L2 configuration and functional support, L3 technical, integration and data investigation, with vendor escalation to Microsoft or ISVs.

Priority	Example legal scenario	Target response	Target resolution or workaround
P1 — Critical	System unavailable for all users; matter intake, billing or document access blocked	Within 1 business hour	Continuous effort until service restored or workaround agreed
P2 — High	Major function unavailable for a practice group or office; integration failure affecting daily operations	Within 4 business hours	One to two business days, subject to complexity
P3 — Medium	Functional defect, reporting issue, workflow exception or configuration change request	Within 1 business day	Scheduled into the support or release backlog
P4 — Low	How-to question, minor usability issue, enhancement request or documentation update	Within 2 business days	Addressed via knowledge base, training or roadmap planning

Service management follows a disciplined rhythm — incident logging, classification, root-cause analysis, communication, remediation and post-incident review — with named service owners for matter lifecycle, client onboarding, conflict workflows, billing, reporting, integrations and document automation.

Governance cadence, platform health and evergreen alignment

Operational governance

Monthly review of support metrics, incidents, capacity, release outcomes and environment management.

Business governance

Quarterly review of adoption, benefits, process improvements, roadmap priorities and practice group needs.

Technical governance

Review of integrations, security, data model changes, ALM standards, performance and technical debt.

Compliance governance

Review of auditability, information barriers, matter security, retention, privacy and regulatory obligations.

Platform health

Proactive monitoring of Dataverse capacity, flow runs, plugin performance, API limits and recovery posture.

Evergreen alignment

Assess each Microsoft release wave: release notes, impact assessment, regression testing and adoption planning.

Value realisation and benefits tracking

Benefit area	Example measure	Review cadence
Matter lifecycle efficiency	Average time to open, update and close matters	Monthly and quarterly
Client and contact management	Completeness of client records, duplicate reduction, onboarding cycle time	Quarterly
Practice visibility	Pipeline, matter status, work-in-progress and fee earner reporting adoption	Monthly
Automation and productivity	Use of automated workflows, document generation, notifications and Copilot-assisted activity	Quarterly
Compliance and governance	Audit coverage, security exceptions, approval compliance and policy adherence	Quarterly

Benefits are linked to the original business case and reviewed by governance — sustaining measurable legal business value from continued Dynamics 365 investment.

Product roadmap horizons

SHORT TERM

Stabilization, issue remediation, adoption improvements, reporting refinements and high-value configuration changes.

MEDIUM TERM

Expanded automation, improved client onboarding, integration enhancements, matter financial visibility, document generation and Power BI dashboards.

LONG TERM

AI-assisted legal workflows, Copilot matter summarization, predictive insight, advanced compliance controls, client portals and deeper Microsoft 365 integration.

Prioritized on business value, risk reduction, regulatory need, user demand, complexity and strategic alignment.

Reference materials and controlled artefacts

Glossary

Common language across legal, business and technology stakeholders.

Architecture diagrams

Current, target and transition state across apps, Dataverse, Azure and identity.

Integration catalogue

Purpose, entities, frequency, authentication, monitoring and ownership per interface.

Migration inventory

Sources, target tables, cleansing rules, mappings, retention and reconciliation.

Security role matrix

Personas mapped to roles, privileges, business units, teams and record access.

Reporting catalogue

Owner, audience, source, refresh, filters, security trimming and acceptance.

RAID register

Risks, issues, assumptions and dependencies with owner, mitigation and escalation.

Decision log

Decision statement, options, rationale, owner, approval date and follow-up.

NEXT STEPS

Approve the blueprint and mobilize

- Confirm sponsorship, business outcomes, decision rights and delivery governance
- Validate initial scope, release roadmap and the minimum viable solution
- Agree conceptual architecture, application landscape and data governance
- Confirm environment, tenant, security and ALM approach before implementation
- Establish backlog management, design authority cadence and Success by Design checkpoints

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