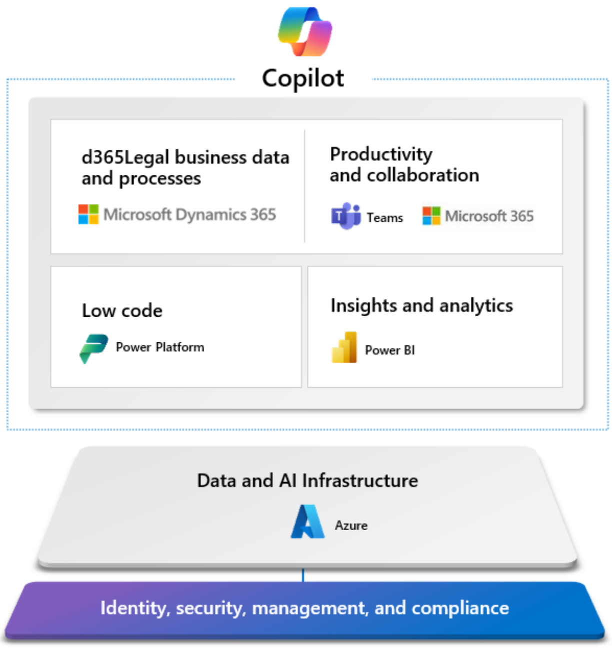

SOLUTION BLUEPRINT

Microsoft Dynamics 365 for Legal,
www.d365Legal.com

Visit Microsoft Marketplace: [Microsoft Marketplace | cloud solutions, AI apps, and agents]

Visit Learn.d365.Global: [Intro. Legal User Guide]

ABSTRACT

d365Legal is a Microsoft Dynamics 365 based industry solution designed to help law firms and corporate legal teams modernise matter management, client engagement, legal operations, finance integration, compliance, reporting, and productivity. This Solution Blueprint defines the target solution direction, business outcomes, operating model, scope boundaries, risks, dependencies, and success measures for a structured implementation using Microsoft's Success by Design approach.

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1 Executive Summary

d365Legal is a Microsoft Dynamics 365 based industry solution designed to help law firms and corporate legal teams modernise matter management, client engagement, legal operations, finance integration, compliance, reporting, and productivity. This Solution Blueprint defines the target solution direction, business outcomes, operating model, scope boundaries, risks, dependencies, and success measures for a structured implementation using Microsoft's Success by Design approach.

Success by Design is Microsoft's recommended framework for Dynamics 365 implementations. It promotes a disciplined lifecycle across strategy, initiation, implementation, preparation, and operation, with emphasis on business alignment, architecture validation, proactive risk management, solution readiness, adoption, and long-term operational health.

For d365Legal, the blueprint provides a common reference point for executive sponsors, practice leaders, legal operations teams, finance, IT, compliance, and implementation partners. It is intended to confirm what will be delivered, why it matters, how it will be governed, and how success will be measured.

Purpose of the Solution Blueprint

The purpose of this Solution Blueprint is to establish a shared, validated understanding of the d365Legal solution before implementation and deployment activities progress. It translates business objectives into an agreed solution direction and provides the foundation for implementation planning, governance, testing, adoption, and future optimisation.

- Confirm the business drivers, strategic objectives, and expected value of the d365Legal implementation.
- Define the target operating model and the high-level process, data, security, integration, reporting, and governance requirements.
- Clarify in-scope and out-of-scope capabilities, assumptions, constraints, and dependencies.
- Enable early identification of implementation risks, requirement gaps, stakeholder impacts, and readiness considerations.
- Provide a baseline for project governance, solution validation, testing, cutover, adoption, and post-go-live operational management.

Overview of d365Legal

d365Legal is a legal industry solution built on Microsoft Dynamics 365, Microsoft Power Platform, Microsoft Dataverse, and the broader Microsoft cloud ecosystem. It provides a configurable platform for managing the full lifecycle of legal work, from client and contact management through enquiries, conflict checks, matter opening, matter execution, time and activity capture, billing integration, document collaboration, reporting, and compliance oversight.

The solution is designed to support firms and legal teams that require a single source of truth for clients, matters, relationships, activities, documents, tasks, approvals, and operational performance. It uses Dynamics 365 capabilities for relationship management and workflow automation, Azure Web Apps for role-based user experiences, Power Automate for process orchestration, Power BI for insight, and Microsoft 365 integration for collaboration and productivity.

- **Client and relationship management:** consolidated view of clients, contacts, referrers, intermediaries, sectors, jurisdictions, and relationship history.
- **Matter lifecycle management:** structured matter intake, conflict checking, onboarding, matter opening, task tracking, status reporting, and matter closure.
- **Legal operations:** workflows for approvals, risk reviews, compliance checks, service delivery standards, and matter governance.
- **Finance and billing integration:** connection points for time capture, disbursements, WIP visibility, billing triggers, trust or client account considerations where applicable, and integration with finance platforms.

- **Document and collaboration services:** integration patterns for Microsoft 365, SharePoint, Teams, and legal document management platforms where required.
- **Reporting and intelligence:** dashboards for pipeline, matter status, revenue, utilisation, client service, risk, and operational performance.

Legal Industry Context and Business Drivers

Law firms and legal departments are operating in an environment of increasing client expectations, heightened regulatory obligations, pricing pressure, hybrid work, data security risk, and demand for greater transparency over legal service delivery. Clients expect faster response times, digital collaboration, predictable pricing, proactive communication, and measurable value. Legal leaders need better visibility across matters, workloads, revenue, compliance, risk, and client relationships.

Many legal organisations continue to rely on fragmented systems, spreadsheets, email-centric processes, isolated document stores, and manual reporting. This creates duplicated effort, inconsistent matter practices, limited visibility, inefficient handoffs, and difficulty scaling standardised service delivery across practices, offices, jurisdictions, and client teams.

- Improve client and matter visibility through a consolidated legal relationship and matter platform.
- Standardise matter intake, compliance, approvals, task management, and matter closure processes.
- Reduce manual administration through automation, templates, notifications, and guided workflows.
- Improve financial performance through better pipeline visibility, work tracking, billing readiness, and integration with finance systems.
- Strengthen compliance, risk management, confidentiality controls, and auditability.
- Enable insights through dashboards, performance measures, and operational analytics.
- Support scalable growth across practices, geographies, client segments, and service lines.

Target Operating Model Summary

The target operating model for d365Legal is based on a standardised, role-based, data-driven legal operations platform. It establishes clear ownership of client and matter data, consistent legal service delivery processes, governed automation, controlled access to sensitive information, and measurable operational performance.

Operating Model Area	Target State Summary
People and Roles	Role-based experiences for partners, lawyers, paralegals, legal operations, finance, compliance, marketing, and administrators.
Processes	Standardised workflows for enquiry, client onboarding, conflict checks, matter opening, matter planning, task management, billing readiness, and closure.
Data	Shared data 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 document management and finance systems.
Governance	Defined ownership for solution design, data quality, security, change control, release management, and operational support.
Performance Management	Dashboards and measures for matter volume, responsiveness, pipeline, revenue, utilisation, compliance status, client service, and adoption.

Key Business Outcomes and Success Measures

The success of d365Legal should be measured against business value, operational adoption, process efficiency, user experience, data quality, compliance, and platform sustainability. Measures should be confirmed during project initiation and baselined before go-live where possible.

Outcome	Success Measure
Improved client and matter visibility	Single view of client and matter information adopted by key practice groups, with reduced reliance on spreadsheets and email-only tracking.
Standardised matter lifecycle	Consistent use of agreed matter intake, conflict, opening, task, status, billing readiness, and closure processes.
Reduced administrative effort	Automation of routine notifications, approvals, task creation, reminders, and reporting activities.
Better financial and operational insight	Dashboards available for pipeline, matter progress, workload, billing readiness, revenue indicators, and practice performance.

Outcome	Success Measure
Stronger compliance and risk control	Improved auditability of conflict checks, approvals, confidentiality requirements, matter risk ratings, and mandatory process steps.
User adoption and productivity	Target users actively use d365Legal as the primary matter and client engagement platform within agreed adoption timeframes.
Scalable platform foundation	Solution design supports future practice groups, jurisdictions, integrations, automation, analytics, and AI-enabled productivity scenarios.

Scope, Assumptions, Constraints, and Dependencies

Scope

- Configuration of d365Legal core entities, forms, views, dashboards, business rules, and guided processes.
- Client, contact, relationship, enquiry, conflict, matter, task, activity, and matter closure management.
- Role-based security model aligned to legal confidentiality, practice group access, and administrative responsibilities.
- Integration for Microsoft 365, SharePoint, Teams, Outlook, finance systems, document management systems, and reporting platforms as required.
- Data migration planning for agreed legacy client, contact, matter, and reference data.
- Reporting, dashboard, governance, testing, deployment, training, and support planning.

Assumptions

- Executive sponsorship and practice leadership participation will be available for design decisions and governance.
- Business stakeholders will confirm priority practice areas, matter types, regulatory obligations, reporting needs, and process variations.
- Source data quality will be assessed before migration and data cleansing responsibilities will be assigned.
- Microsoft licensing, tenant configuration, Dataverse capacity, environments, and security prerequisites will be available in time for implementation.
- Integration endpoints and third-party systems will provide documented APIs, access credentials, test environments, and vendor support where required.

Constraints

- Implementation timelines may be constrained by stakeholder availability, regulatory review, data cleansing effort, integration readiness, and change management capacity.
- Customisation should be controlled to preserve platform maintainability, upgradeability, and alignment with Dynamics 365 and Power Platform recommended practices.
- Security and confidentiality requirements may restrict data visibility, reporting granularity, and cross-practice access.
- Legacy system limitations may affect the completeness, quality, and timing of migrated data.
- Budget, licensing, and environment capacity may influence phasing, automation scope, reporting depth, and integration sequencing.

Dependencies

- Microsoft Dynamics 365, Power Platform, Dataverse, Microsoft 365, Azure, and identity/security services are provisioned and governed appropriately.
- Business process owners validate the target processes, exception handling, approval rules, and reporting requirements.
- Data owners support data profiling, cleansing, mapping, migration validation, and data governance decisions.
- Integration owners and vendors support interface design, connectivity, testing, and operational support models.
- Change management, communications, training, and adoption activities are planned alongside solution delivery.
- Project governance provides timely decision-making, risk escalation, release control, and post-go-live support readiness.

2 Success by Design Alignment and Blueprint Approach

d365Legal is a Microsoft Dynamics 365 industry solution designed to support modern legal operations, including client and matter management, business development, intake, conflict-aware workflows, document and knowledge processes, time and activity capture, finance integration, reporting, and operational governance. This Solution Blueprint applies Microsoft's Success by Design methodology as a structured approach for architecting, validating, implementing, and operating d365Legal in a way that reduces delivery risk and aligns the solution to measurable business outcomes.

The blueprint is intended to be a practical delivery artefact, not a static technical specification. It brings together business process design, application architecture, data strategy, integration design, security, reporting, application lifecycle management, testing, environment planning, and operational readiness into a single decision framework. It should be reviewed at project initiation, refined through implementation, and maintained as the source of truth for approved design direction.

Microsoft Success by Design Principles

Success by Design is Microsoft's prescriptive framework for Dynamics 365 implementations, built from real-world implementation experience and intended to help project teams proactively identify risk, validate architecture, and improve implementation outcomes. For d365Legal, the following principles guide the blueprint:

- **Outcome-led design:** Define legal business outcomes first, then map solution capabilities, data, processes, and adoption activities to those outcomes.
- **Process-focused implementation:** Use end-to-end legal processes such as lead-to-client, intake-to-matter, matter-to-bill, knowledge-to-outcome, and issue-to-resolution as the framework for scope and design validation.
- **Architecture fit and sustainability:** Prioritise configuration, standard Dynamics 365, Power Platform, Microsoft 365, and Azure capabilities before introducing custom extensions.
- **Risk-based assurance:** Identify risks early through structured reviews, design checkpoints, prototypes, test cycles, and go-live readiness assessment.
- **Roadmap alignment:** Ensure d365Legal remains aligned to Microsoft cloud architecture patterns, Dynamics 365 product direction, security model, Dataverse extensibility, and platform governance.
- **Adoption and operational readiness:** Treat training, support, transition, reporting, governance, and continuous improvement as core implementation deliverables.

Blueprint Objectives and Intended Audience

The objectives of this blueprint are to define the business and solution scope for d365Legal, document key architecture decisions, identify implementation dependencies, establish quality gates, and provide an agreed reference for delivery teams, sponsors, and governance stakeholders.

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, issues, deliverables, quality gates, and change control.
Administrators, support teams, and service owners	Prepare for transition to support, platform governance, release management, and ongoing optimisation.

Delivery Lifecycle: Strategize, Initiate, Implement, Prepare, and Operate

Strategize

The Strategize phase establishes the business case, transformation vision, success measures, target operating model, and road map for d365Legal. For a law firm or legal department, this phase should clarify which outcomes matter most: improved client engagement, better matter visibility, reduced manual administration, stronger compliance controls, faster intake, improved cross-selling, better reporting, or integration with finance and document management systems.

Initiate

The Initiate phase converts strategy into a coordinated implementation plan. The project team confirms scope, governance, delivery methodology, workstreams, environments, project schedule, quality gates, and the initial Solution Blueprint Review. Core baseline artefacts include the process catalogue, fit-gap assessment, solution architecture overview, data migration approach, integration inventory, security model, test strategy, training approach, and deployment plan.

Implement

The Implement phase designs, configures, extends, integrates, migrates, tests, and validates the solution. Workstreams should be managed around business processes and architecture domains, including client and contact management, matter management, referrals and business development, document and knowledge integration, finance integration, security and ethical walls, reporting, automation, and user experience. Topic-specific design reviews should be used to validate high-risk areas before implementation decisions become expensive to change.

Prepare

The Prepare phase confirms readiness for production. Activities include user acceptance testing, performance validation, security validation, data migration rehearsal, cutover planning, service transition, training delivery, adoption communications, support readiness, and go-live risk assessment. A formal go-live readiness review should confirm that open risks are understood, critical defects are resolved or accepted, support processes are operational, and business owners are ready to proceed.

Operate

The Operate phase focuses on stabilisation, support, monitoring, continuous improvement, and release management. d365Legal should be governed as a living platform, with regular reviews of adoption, user feedback, data quality, integration health, security access, reporting effectiveness, backlog priorities, and alignment with the Microsoft roadmap.

Architecture Decision Framework

Architecture decisions for d365Legal should be assessed against business value, Microsoft platform alignment, maintainability, security, scalability, extensibility, total cost of ownership, and operational risk. The default design position is to use standard Dynamics 365, Dataverse, Power Platform, Microsoft 365, and Azure services before customising. Exceptions should be justified, documented, reviewed, and approved.

3 Current State Assessment for Legal CRM and Matter Management

The current-state assessment establishes a shared understanding of how the firm manages client relationships, contacts, matters, referrals, business development activities, and reporting today. For many legal organisations, these processes are fragmented across Outlook, Excel, document management platforms, practice management systems, finance applications, and informal referral networks. This creates inconsistent client visibility, duplicated contact records, limited pipeline discipline, and difficulty tracking the commercial value of referrals, marketing campaigns, and relationship-building activities.

- Assess existing CRM, matter intake, contact management, referral tracking, marketing, and client development processes.
- Identify duplicate data, manual workarounds, disconnected systems, and gaps in ownership.
- Review how partners, fee earners, business development teams, legal assistants, and management currently use client and matter information.
- Document pain points in opportunity visibility, campaign effectiveness, client segmentation, matter history, and relationship intelligence.
- Validate current reporting limitations across pipeline, revenue influence, referral conversion, sector focus, and client engagement.

Future-State Vision for d365Legal

The future-state vision is to establish d365Legal as the firm’s central relationship and matter intelligence platform, built on Microsoft Dynamics 365, Power Platform, Dataverse, Microsoft 365, Copilot-enabled productivity experiences, and integration with legal operational systems. The solution will provide a single trusted view of clients, contacts, matters, referrals, business development opportunities, marketing interactions, and relationship ownership across practice groups, offices, sectors, and jurisdictions.

d365Legal will support a more proactive, data-driven, and collaborative firm by enabling relationship transparency, matter lifecycle visibility, structured referral management, targeted business development, and executive-level reporting. The platform will reduce reliance on informal knowledge, improve client service consistency, and provide the digital foundation for AI-assisted insights such as client risk signals, relationship strength, next-best actions, and opportunity recommendations.

Stakeholder Map and Business Ownership

Successful adoption of d365Legal requires clear business ownership, executive sponsorship, and joined-up governance across legal, commercial, technology, and operational stakeholders. The stakeholder map identifies who owns the business outcomes, who defines requirements, who governs data quality, and who is accountable for adoption across the firm.

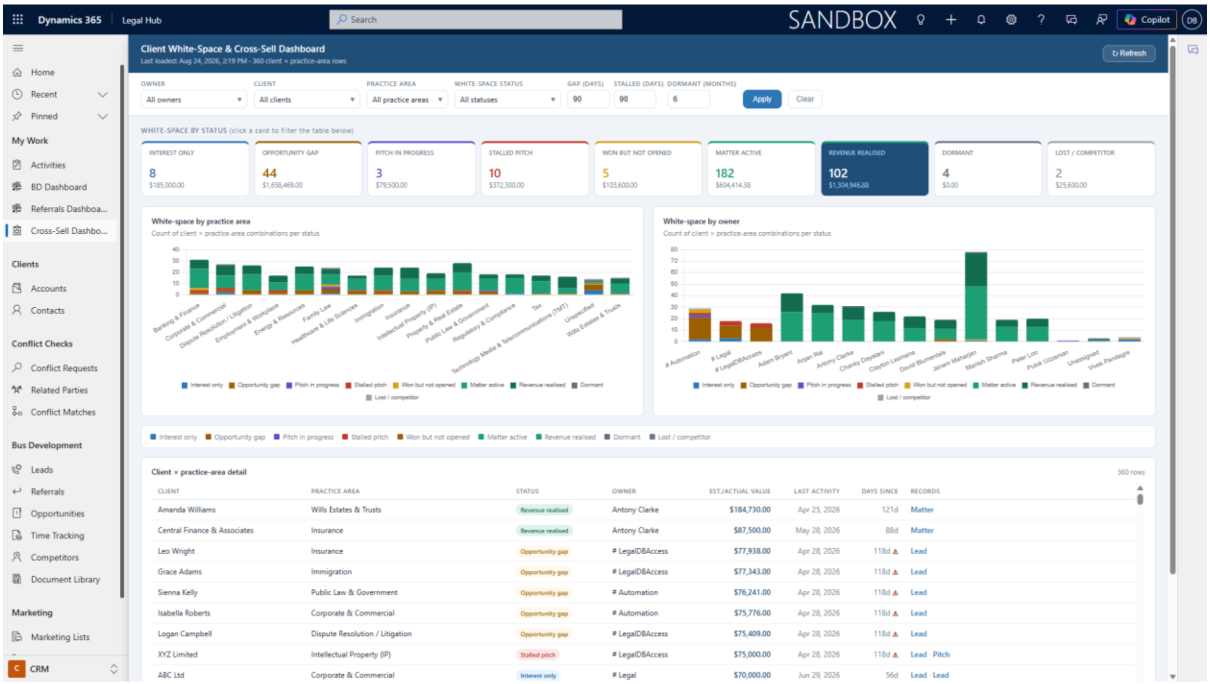
Stakeholder Group	Primary Responsibilities
Executive Sponsor	Owns the transformation case, removes barriers, approves investment, and champions firm-wide adoption.
Managing Partner / Practice Group Leaders	Define strategic client relationship priorities, matter growth objectives, sector focus, and partner participation expectations.
Business Development and Marketing	Own client segmentation, campaign planning, referral tracking, opportunity management, and relationship development processes.
Fee Earners and Partners / Legal Assistants	Maintain client, contact, matter, opportunity, and referral information and use insights to improve client engagement.
Legal Operations / Practice Management	Align matter workflows, intake, reporting, and operational processes with the target operating model.
IT and Security	Govern platform architecture, integration, identity, security, privacy, environments, and lifecycle management.
Data Owners and Stewards	Define data standards, quality rules, deduplication processes, and ownership of client, contact, matter, and referral data.

Legal Client Relationship Management Objectives

The client relationship management objectives define how d365Legal will help the firm strengthen strategic relationships, improve client insight, coordinate engagement across teams, and increase the quality of business development activity. The objective is not simply to capture contacts, but to create a relationship intelligence platform that supports measurable growth, retention, and service quality.

- Create a single client and contact view across practice groups, offices, sectors, and jurisdictions.
- Track relationship owners, relationship strength, key decision makers, influencers, referrers, alumni, and intermediaries.

- Support structured client account planning, sector plans, key client programs, and relationship review meetings.
- Enable coordinated engagement history across meetings, emails, events, campaigns, referrals, opportunities, and matters.
- Improve visibility of white-space opportunities, cross-sell potential, client service risks, and strategic growth priorities.



Matter, Client, Contact, Referral, and Business Development Objectives

d365Legal will align matter management and business development activities so the firm can understand how relationships generate work, how matters influence future opportunities, and how referrals convert into measurable value. The platform will connect matter history, client context, contact relationships, opportunity pipeline, event participation, referral sources, and campaign activity into a coherent business development operating model.

Domain	Strategic Objective
Clients	Maintain trusted client profiles, strategic account plans, sector alignment, client preferences, and client development priorities.
Contacts	Manage accurate contact records, roles, relationships, consent, communication preferences, and engagement history.
Matters	Provide matter context, matter history, responsible partners, practice areas, sectors, value indicators, and lifecycle stages.

Referrals	Track referral sources, referrer relationships, referral value, conversion outcomes, follow-up actions, and reciprocal opportunities.
Business Development	Manage pursuits, opportunities, campaigns, events, proposals, pipeline value, win/loss outcomes, and cross-sell initiatives.

Value Realisation Model and Benefits Tracking

The value realisation model links the d365Legal transformation case to measurable business outcomes. Benefits should be baselined during the Strategize phase, reviewed throughout implementation, and tracked after go-live through adoption dashboards, business development reporting, data quality measures, and executive governance reviews.

- **Revenue growth:** improved visibility of opportunities, referrals, cross-sell prospects, and strategic client plans.
- **Client retention:** stronger relationship ownership, improved engagement history, and early identification of client service risks.
- **Operational efficiency:** reduction in duplicate records, manual spreadsheets, fragmented reporting, and ad hoc matter/client tracking.
- **Data quality:** measurable improvements in completeness, accuracy, deduplication, consent capture, and ownership of key records.
- **Adoption:** active usage by partners, fee earners, business development teams, and legal operations against agreed role-based behaviours.
- **Management insight:** improved reporting across pipeline, sectors, practice groups, referral conversion, client growth, and business development return on investment.

Adoption, Change Management, and Communications Strategy

The adoption strategy will position d365Legal as a business transformation program rather than a technology deployment. Change management activities should be aligned to the firm's culture, partner-led ways of working, practice group priorities, and the different behaviours expected from partners, lawyers, assistants, marketing teams, and management. Communications should clearly explain why the change is required, what value it creates, what each role is expected to do differently, and how success will be measured.

- Establish executive sponsorship and visible partner advocacy for the transformation.
- Define role-based adoption journeys for partners, fee earners, assistants, business development, marketing, operations, and management.

- Create a communications plan covering the business case, project milestones, readiness activities, go-live, hypercare, and benefits realisation.
- Deliver practical training using realistic legal CRM, client development, matter, contact, referral, and opportunity scenarios.
- Use champions and practice group representatives to collect feedback, validate processes, and support local adoption.
- Track adoption through usage analytics, data completeness, pipeline quality, referral follow-up, and stakeholder feedback.

4 Initiate: Solution Scope Architecture and Governance

Project Governance and Delivery Model

The d365Legal implementation will be governed through a structured delivery model that combines executive sponsorship, product ownership, design authority oversight, workstream delivery, and release governance. The delivery model should support iterative delivery while maintaining disciplined control over architecture, security, compliance, cost, and scope.

Governance Body	Primary Responsibilities
Executive Steering Committee	Confirms business outcomes, approves budget and major scope decisions, resolves escalated risks, and ensures alignment to firm-wide strategy.
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	Prioritises backlog items, 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

The initial d365Legal scope should be defined around legal industry capabilities that deliver measurable value while establishing a reusable platform foundation. Scope should be divided into core release capabilities, controlled enhancements, and future roadmap items. This allows the program to balance early adoption with long-term extensibility.

- Release 1 should focus on matter management, client and contact management, opportunity or intake management, core workflow automation, foundational reporting, security roles, and initial integrations.
- Release 2 should extend capability into document management integration, advanced matter financials, activity capture, precedent automation, legal project management, conflict checks, staff and client portal capabilities.

- Future releases may include AI-assisted matter summarisation, advanced legal analytics, practice-area accelerators, knowledge management, billing integrations, and deeper Microsoft Copilot experiences.

Solution Architecture Overview

d365Legal will be delivered as a model-driven business application built on Dataverse, Dynamics 365, Power Platform, Microsoft 365, and Azure integration services. The architecture should favour configuration over custom code, reusable components over point solutions, and Microsoft cloud-native services over bespoke infrastructure.

The core architecture will include Dataverse as the system of engagement for legal operational records such as clients, matters, parties, activities, tasks, milestones, risks, documents metadata, legal requests, and practice-area-specific records. Integration services should connect d365Legal with finance, document management, identity, collaboration, reporting, and client-facing systems using secure and supportable patterns.

Dynamics 365 and Power Platform Application Landscape

Platform Area	Role in d365Legal
Dynamics 365 Sales or Customer Engagement	Supports client relationship management, opportunity management, referral tracking, pipeline visibility, and business development processes.
Dataverse	Provides the secure data platform for legal entities, matter records, relationships, activities, audit history, and extensible legal data models.
Power Apps	Delivers model-driven experiences for fee earners, legal assistants, partners, practice managers, and administrators.
Power Automate	Automates legal workflows such as matter opening, approvals, task generation, status notifications, conflict workflows, and integration triggers.
Power BI	Provides operational reporting across matter progress, workload, pipeline, financial indicators, SLA performance, and practice-area performance.
Microsoft Teams, Outlook, and SharePoint	Enable collaboration, email and activity capture, matter workspaces, document storage integration, and day-to-day productivity experiences.
Azure Integration Services	Supports controlled integration with finance systems, data migration tooling, document management platforms, external portals, and enterprise services.

Security, Privacy, Compliance, and Legal Data Governance Principles

The solution must be delivered for the confidentiality, privilege, sensitivity, and regulatory expectations associated with legal data. The security model should apply least privilege access, role-based permissions, business unit segmentation where required, audit logging, data retention controls, and secure integration patterns.

- Client and matter confidentiality must be protected through role-based access, team ownership, field-level security, and clear information barrier rules where required.
- Legal professional privilege and sensitive matter data should be classified and governed by appropriate retention, access, export, and audit policies.
- Compliance requirements should consider privacy legislation, records management obligations, discovery readiness, client contractual requirements, and jurisdiction-specific legal sector obligations.
- Integrations must use secure authentication, supportable APIs, monitored data flows, and explicit ownership of data quality and reconciliation.
- Administrative access should be limited, reviewed periodically, and separated between configuration, support, security, and environment administration roles.

Environment Strategy and Tenant Considerations

The environment strategy should separate development, testing, user acceptance, training, pre-production, and production activities. Each environment should have a defined purpose, ownership model, access policy, data refresh approach, backup strategy, and lifecycle process.

Environment	Purpose	Key Controls
Development	Configuration, build, unit testing, and technical prototyping.	Maker controls, source control linkage, unmanaged solution development, restricted sample data.
System Test	Integration testing, regression testing, and validation of deployment packages.	Managed solutions, test data governance, automated deployment validation.
User Acceptance Testing	Business validation of processes, roles, reports, integrations, and release scope.	Business-owned test scripts, controlled access, defect triage, acceptance sign-off.

Environment	Purpose	Key Controls
Training	End-user training, role-based walkthroughs, and adoption activities.	Curated training data, stable configuration, reset procedures.
Production	Live operational use of d365Legal.	Change control, monitoring, backup, support model, security monitoring, release calendar.

Application Lifecycle Management Strategy

The ALM strategy should provide repeatable, auditable, and controlled promotion of d365Legal changes from development through production. It should use managed solutions for downstream environments, a defined branching and release approach, automated deployment where practical, and documented release approval gates.

- Use solution layering principles to separate core platform components, d365Legal managed intellectual property, client-specific configuration, integrations, and reporting assets.
- Maintain backlog traceability from requirement to design decision, configuration item, test case, defect, release package, and deployment approval.
- Adopt maker governance for Power Platform usage, including naming conventions, connector controls, environment access, and review of custom flows and apps.
- Use release notes and deployment checklists for every deployment to test, UAT, pre-production, and production environments.
- Establish rollback, hotfix, and emergency change processes before go-live.

Implementation Backlog and Design Authority

The implementation backlog should be structured around business capabilities, user journeys, data objects, integrations, reporting outcomes, security controls, and adoption deliverables. Each backlog item should include a business owner, value statement, acceptance criteria, priority, dependency assessment, and release allocation.

The Design Authority will review backlog items that affect architecture, data model, integration strategy, security, compliance, performance, licensing, extensibility, or maintainability. Its purpose is not to slow delivery, but to ensure that each design decision supports a sustainable, supportable, and roadmap-aligned d365Legal solution.

Initiate Phase Outputs and Next Steps

- Confirm executive sponsorship, business outcomes, decision rights, and delivery governance.
- Validate the initial scope, release roadmap, and minimum viable solution for d365Legal.
- Agree the conceptual architecture, application landscape, integration principles, and data governance model.
- Confirm the environment, tenant, security, and ALM approach before detailed build activity begins.
- Establish the backlog management process, design authority cadence, and Success by Design review checkpoints.

5 Implement: Solution Design

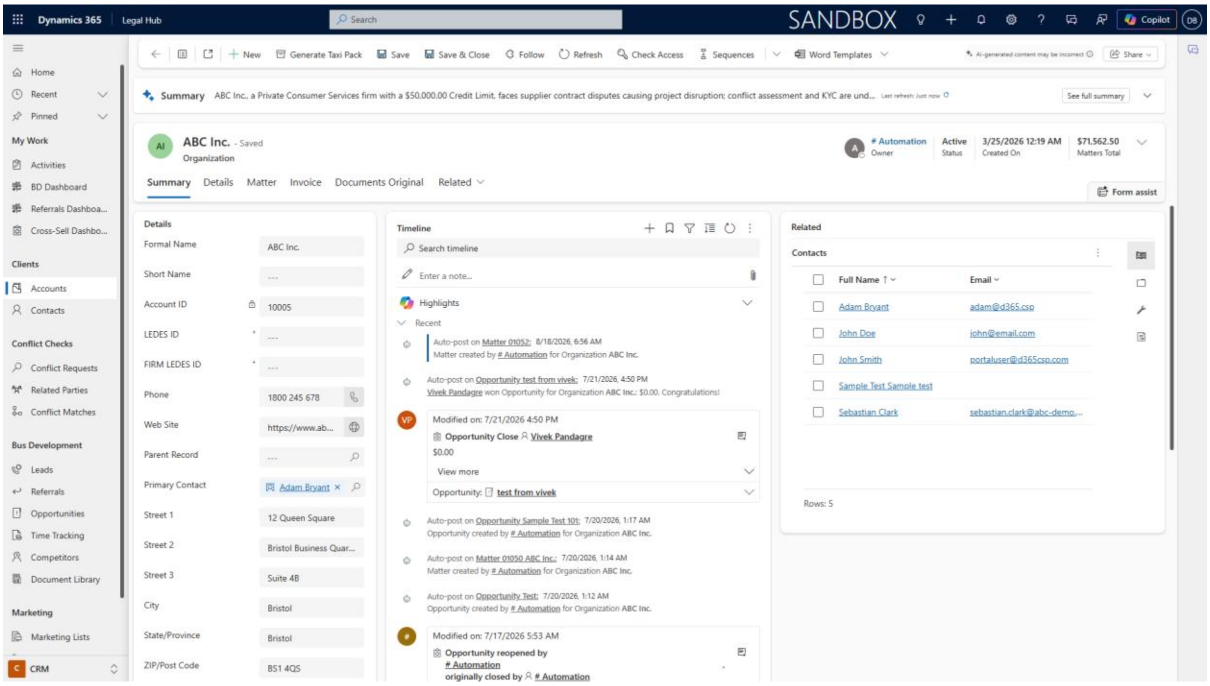
Functional Design Overview

d365Legal will provide a unified relationship, matter, opportunity, marketing, collaboration, document, reporting, and intelligence platform built on Microsoft Dynamics 365, Dataverse, SharePoint, Microsoft 365, Teams, Outlook, Power Automate, Power BI, and Copilot capabilities. The solution will support a client-centric operating model across client intake, conflict-aware relationship management, matter lifecycle management, referral tracking, business development, legal operations, and executive insights.

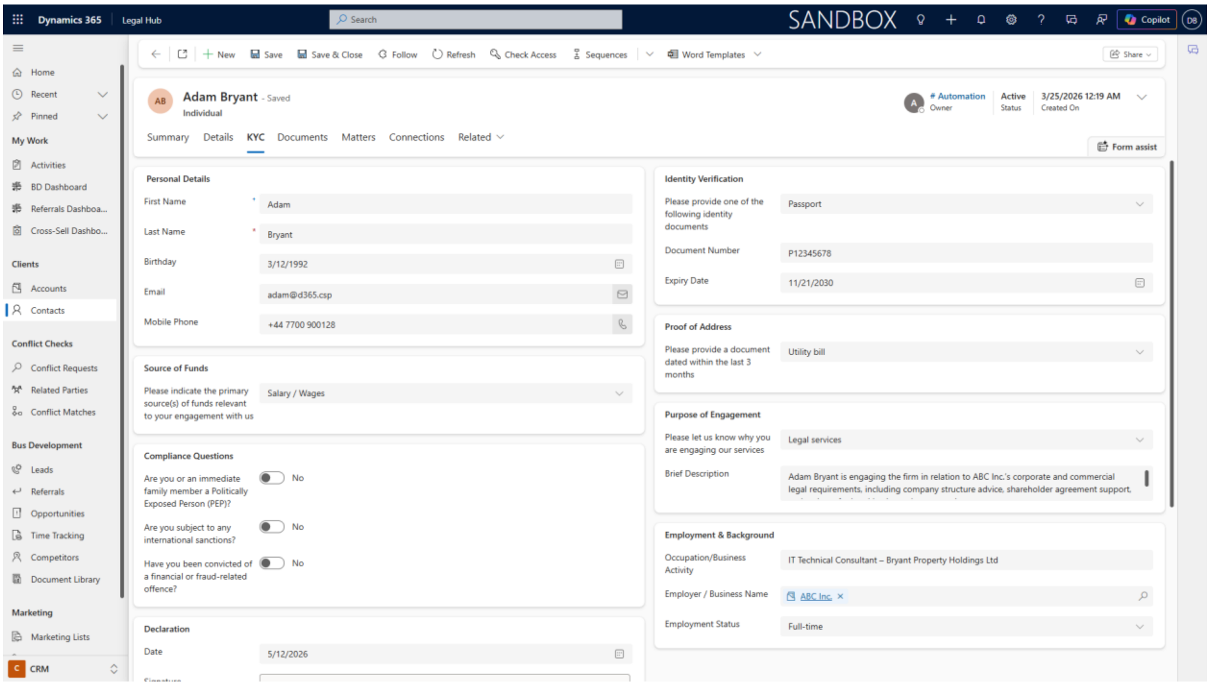
The functional delivery will prioritise standard Dynamics 365 and Power Platform capabilities wherever practical, extending the platform only where legal-sector requirements require specialised entities, workflows, security controls, ethical wall patterns, integrations, or analytics. Configuration decisions should be documented against business requirements, design rationale, build components, test outcomes, and acceptance criteria.

Client, Contact, Organisation, and Relationship Management

The relationship management design will establish accounts/companies, clients, contacts, related parties, referrers, intermediaries, counsel, suppliers, and internal relationship owners as controlled master data in Dataverse. Account and contact records will capture legal-sector attributes such as client status, jurisdiction, office, practice group, industry, key relationship partner, billing arrangements, strategic importance, risk profile, and communication preferences.

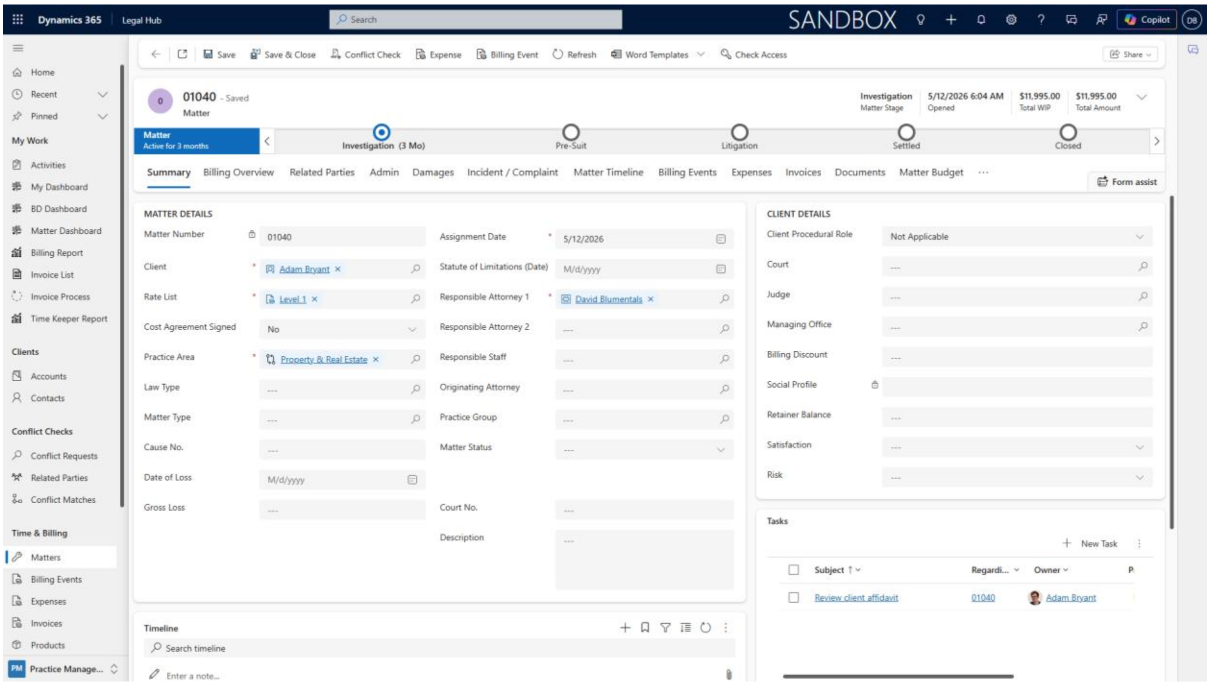


Relationship intelligence will be supported through structured links between people, companies, matters, opportunities, referrals, events, campaigns, activities, and documents. Duplicate detection, survivorship rules, naming conventions, data stewardship queues, and periodic data quality dashboards will be used to maintain client and contact data integrity.

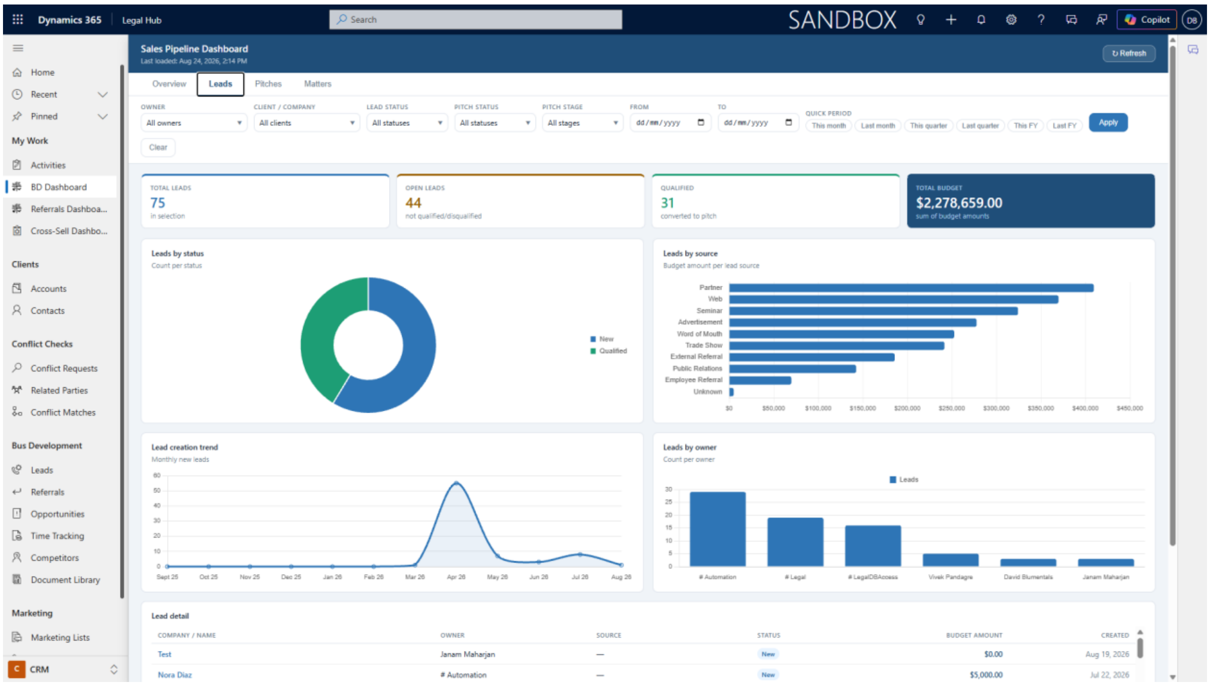


Matter, Opportunity, Referral, and Pipeline Management

The matter design will manage the lifecycle from enquiry and opportunity through intake, approval, opening, active management, key dates, reporting, closure, and post-matter review. Matters will be linked to clients, contacts, responsible partners, matter managers, practice areas, jurisdictions, related opportunities, referrals, teams, documents, activities, risk flags, and finance or practice management identifiers.



Opportunity and pipeline management will support legal business development by tracking prospective work, estimated value, probability, stage, source, referrer, sector, practice group, competitive position, next action, proposal status, win/loss reason, and expected close date. Referral records will capture inbound and outbound referrals, referral source, related client and matter, incentive or acknowledgement requirements, and compliance approvals where applicable.



Key Date, Task, Activity, and Outlook Integration Design

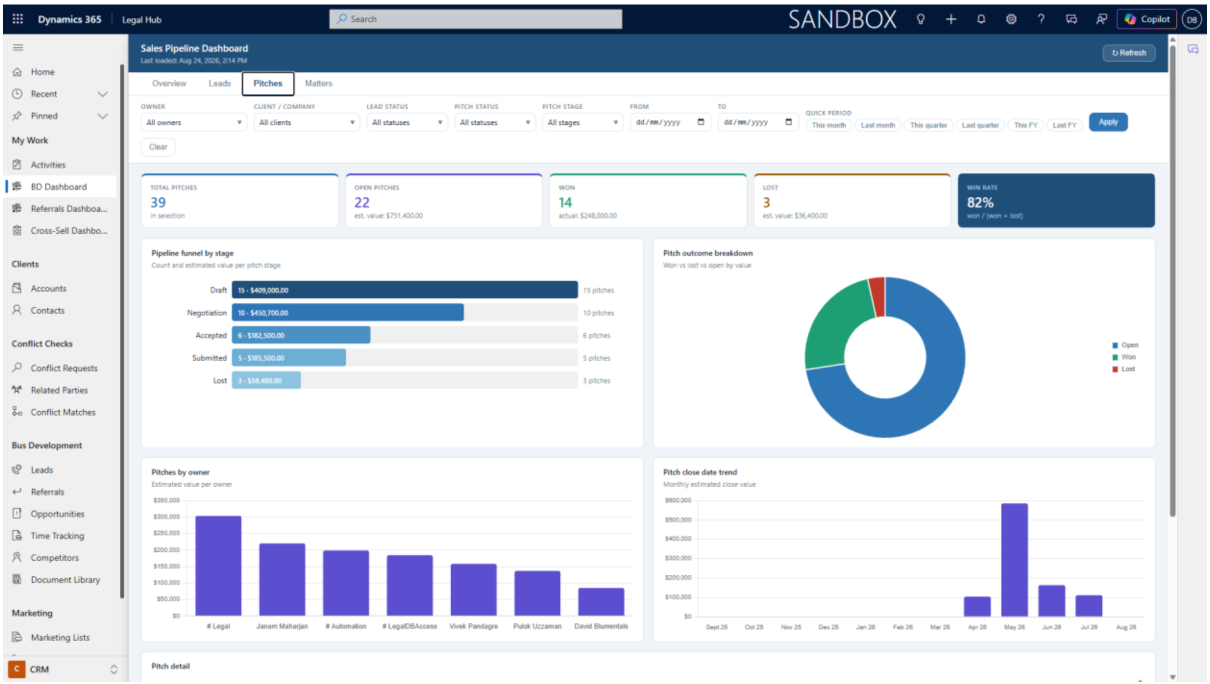
d365Legal will provide a structured activity and deadline model covering key dates, court dates, filing deadlines, limitation dates, review dates, renewal dates, follow-up tasks, phone calls, emails, meetings, and internal activities. Key dates will include ownership, escalation rules, completion status, reminders, dependencies, related matter, related document, and audit history.

Outlook integration will allow users to track emails, appointments, and tasks against clients, contacts, matters, opportunities, and campaigns. The delivery will define when server-side synchronisation, Dynamics 365 App for Outlook, shared mailboxes, queues, templates, and automatic categorisation should be used, while ensuring confidential correspondence is visible only to authorised users.

Marketing, Events, Campaigns, and Business Development Processes

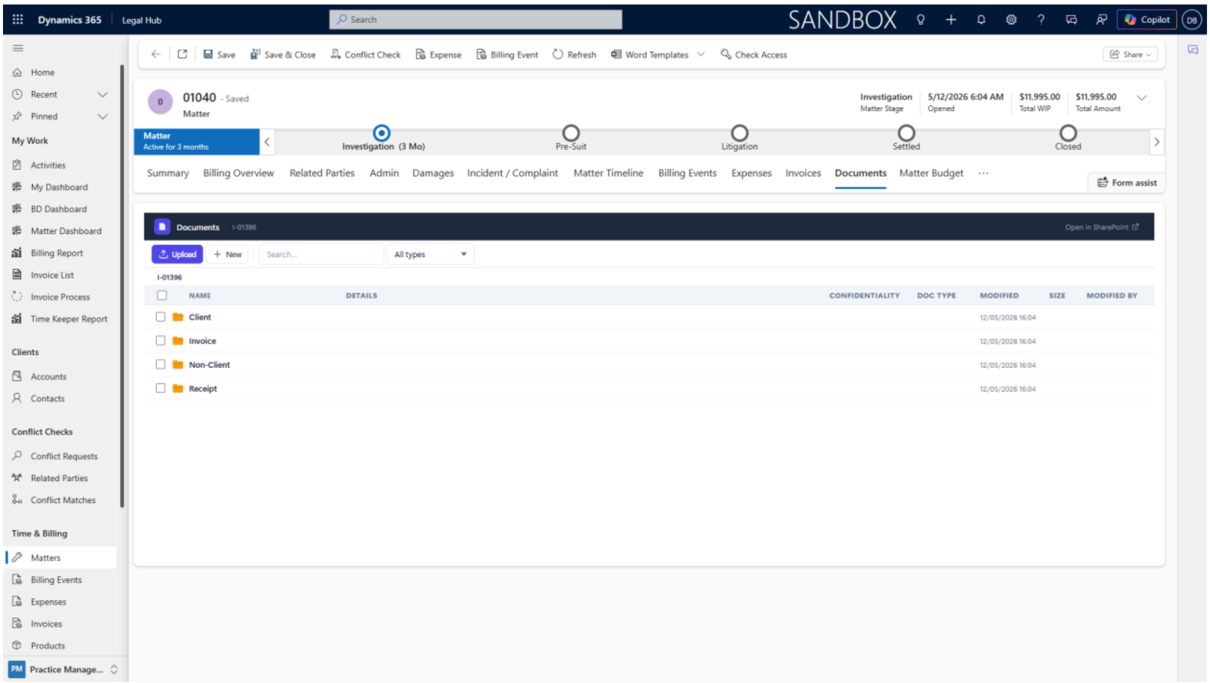
The marketing and business development design will support segmented client lists, campaigns, events, sponsorships, seminars, webinars, client alerts, newsletters, preferences, consent status, attendance, engagement, and follow-up activities. Campaigns and events will connect marketing outcomes to relationship strength, pipeline generation, referrals, and matter conversion.

Business development processes will include opportunity qualification, pursuit planning, proposal coordination, pitch team assignment, client feedback capture, win/loss review, and account planning. Where appropriate, Dynamics 365 Customer Insights, marketing automation tools, or external event platforms may be integrated through Dataverse, APIs, or Power Automate.



Document Management with SharePoint and Microsoft 365

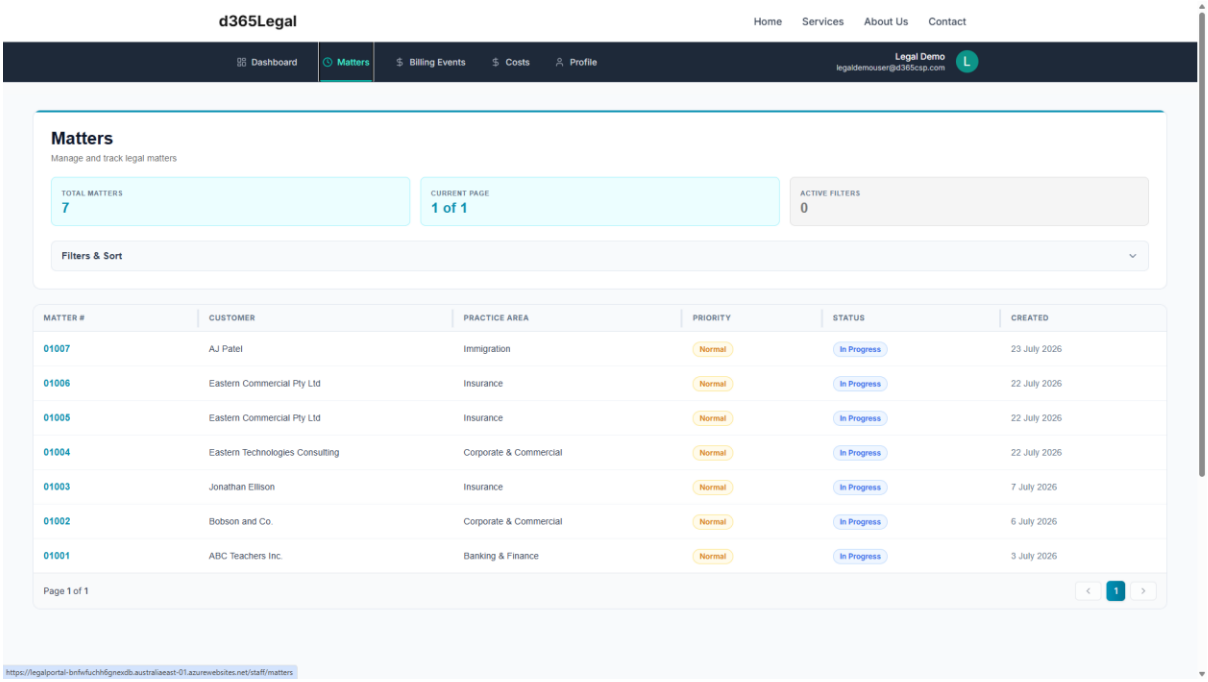
Document management will use SharePoint and Microsoft 365 as the preferred collaboration and storage foundation, with Dynamics 365 providing matter-aware context and metadata. The design will define site, library, folder, and metadata patterns for clients, matters, pitches, events, campaigns, templates, precedent documents, working documents, and closed matter archives.



Document security will align with the Dataverse access model wherever practical, while recognising that SharePoint permissions, document lifecycle rules, retention labels, sensitivity labels, external sharing controls, and audit requirements must be governed separately. Integration design will address document creation, template generation, email filing, search, versioning, records management, and coexistence with any existing legal document management system.

Self Service Portals for Staff and Clients

d365Legal includes modern self-service portal capabilities that extend the legal practice platform beyond internal users and provide secure, convenient digital access for clients, lawyers, and staff. The portals are hosted in Microsoft Azure using Azure Web App Services and are developed as responsive web applications using Next.js and TypeScript, with Microsoft Dataverse acting as the secure backend system of record. Through the client portal, clients can view matter progress, submit enquiries, exchange messages, upload and access documents, review invoices, update profile information, and engage with the firm at any time without requiring a full Dynamics 365 licence. The staff and lawyer portal provides a simplified web interface for managing matters, tasks, deadlines, costs, billing events, documents, dashboards, and day-to-day practice activity while keeping all data synchronised with d365Legal in Dataverse. Authentication and access control can be managed through Microsoft Entra ID, supporting secure identity, role-based permissions, and a scalable Microsoft cloud architecture designed for modern, client-facing legal service delivery.



Teams Collaboration and Communication Design

Teams will be used to support matter teams, practice groups, client teams, project teams, and internal collaboration. The design will define when a Team, channel, private channel, shared channel, group chat, meeting, or standard activity record is appropriate, and how each collaboration space is linked back to the relevant client, matter, opportunity, campaign, or internal initiative.

Governance will cover naming conventions, lifecycle management, guest access, external collaboration, retention, confidential matter collaboration, meeting notes, file storage, recordings, and handover to business-as-usual support. Sensitive matters must use restricted Teams and SharePoint spaces governed by ethical wall and confidentiality requirements.

Data Model, Entity Design, and Master Data Management

The Dataverse data model will include core records for accounts, contacts, relationships, matters, opportunities, referrals, campaigns, events, key dates, tasks, activities, documents, teams, practice groups, jurisdictions, industries, offices, fee earners, client teams, risk flags, and integration references. Entity design will favour standard tables where possible and custom tables only where legal-specific data or behaviours cannot be adequately represented through configuration.

Master data management will define authoritative sources, data owners, validation rules, controlled vocabularies, duplicate management, data cleansing responsibilities, reference data loading, audit controls, and stewardship processes. Key master data areas include clients, contacts, accounts, employees, practice areas, jurisdictions, industry classifications, matter types, opportunity stages, referral sources, and marketing preference categories.

Data Migration Strategy and Legacy System Mapping

The migration strategy will identify source systems, extract methods, transformation rules, data quality issues, field mappings, ownership, cutover timing, reconciliation rules, and archival decisions. Legacy systems may include CRM databases, spreadsheets, practice management systems, finance systems, document management systems, marketing platforms, Outlook contacts, SharePoint repositories, and bespoke legal applications.

Migration waves should separate reference data, master data, open operational data, historical matter data, documents, activities, and reporting history. Each migration cycle will include profiling, cleansing, mapping, transformation, loading, validation, reconciliation, exception handling, business sign-off, and rollback planning.

Security Roles, Access Model, Confidentiality, and Ethical Walls

The security model will combine business units, teams, security roles, field-level security, record ownership, sharing rules, Microsoft Entra ID groups, conditional access, sensitivity labels, audit logging, and environment governance. Role design will support users such as partners, lawyers, assistants, business development staff, marketing users, finance users, knowledge managers, administrators, integration users, and external collaborators where approved.

Confidentiality and ethical wall requirements will be implemented through matter-level access restrictions, restricted teams, private SharePoint locations, controlled Outlook tracking, auditable access requests, conflict and confidentiality flags, and exception approval workflows. Security testing must confirm that users cannot view, search, report on, export, or collaborate on restricted matters unless explicitly authorised.

Integrations with Finance, Practice Management, HR, Document Management, and External Systems

Integration design will define the systems of record, integration patterns, APIs, middleware, authentication, data ownership, error handling, monitoring, retry logic, latency expectations, and reconciliation requirements. Common integration domains include finance, billing, time recording, practice management, HR, identity management, document management, client portals, marketing platforms, external data providers, e-signature platforms, and regulatory or court systems.

Each integration will have an agreed interface specification covering source, target, trigger, frequency, payload, field mapping, transformation, validation, security, performance, monitoring, support ownership, and fallback process. Integration testing will include happy path, exception path, volume, security, recovery, and reconciliation scenarios.

Automation Design using Power Automate and Business Rules

Automation will be implemented using Power Automate cloud flows, Dataverse business rules, real-time validation where appropriate, calculated and rollup columns, notification rules, approval workflows, scheduled jobs, and integration-triggered processes. Candidate automations include matter opening, key date creation, referral acknowledgement, opportunity stage progression, task escalation, document workspace provisioning, approval routing, marketing follow-up, and data quality remediation.

Automation design must avoid unnecessary complexity, excessive synchronous processing, duplicate triggers, unbounded loops, and hidden business logic. Each automation will include a design record, trigger definition, owner, run frequency, exception handling, monitoring approach, security context, test cases, and operational support procedure.

Reporting, Dashboards, Power BI, KPIs, and Analytics

The intelligence design will provide operational dashboards, management reporting, Power BI analytics, embedded Dynamics 365 charts, and executive insights. Reporting domains include client relationship health, relationship ownership, matter activity, matter status, key dates, opportunity pipeline, referral performance, campaign engagement, event attendance, business development activity, cross-sell opportunities, data quality, security exceptions, and adoption metrics.

KPIs should be defined with clear business ownership, calculation logic, refresh frequency, security trimming, source data lineage, and acceptance criteria. Power BI datasets and reports should be designed for performance, governed sharing, row-level security, and alignment with the firm’s management reporting cadence.

Copilot, AI, and Intelligent Assistance Scenarios

Copilot and AI scenarios will focus on productivity, relationship insight, summarisation, drafting assistance, follow-up generation, knowledge discovery, and guided user actions. Potential scenarios include summarising client history before a meeting, drafting matter updates, identifying next-best actions for opportunities, generating event follow-up notes, surfacing incomplete matter data, and assisting users with natural language search across Dynamics 365 and Microsoft 365 content.

AI design must include governance for privacy, confidentiality, ethical walls, legal privilege, data residency, prompt behaviour, content grounding, auditability, responsible use, and user training. AI features should be introduced through controlled pilots, measurable productivity outcomes, and security reviews before broader adoption.

Non-Functional Requirements

Non-functional requirements will address performance, scalability, availability, maintainability, security, compliance, usability, accessibility, recoverability, monitoring, supportability, and lifecycle management. The design must define expected user volumes, concurrent activity, data growth, integration throughput, report refresh windows, automation volumes, document storage growth, and service-level expectations.

Maintainability will be supported through managed solutions, environment strategy, configuration documentation, naming standards, source control where applicable, deployment pipelines, test automation opportunities, monitoring dashboards, support runbooks, administrator training, and periodic health reviews.

Testing Strategy

The testing strategy will cover unit testing, system testing, integration testing, regression testing, security testing, performance testing, migration testing, reporting validation, automation testing, and user acceptance testing. Tests will be mapped to requirements, business scenarios, roles, data sets, integrations, reports, security conditions, and acceptance criteria.

User acceptance testing will validate end-to-end legal business processes such as client onboarding, matter opening, restricted matter access, key date management, opportunity conversion, referral tracking, campaign follow-up, document collaboration, Outlook tracking, dashboard review, and executive reporting. Defects will be triaged by severity, business impact, release priority, and readiness for go-live.

Traceability Matrix

Requirement Area	Design Artefact	Build Component	Test Evidence	Acceptance Criteria
Client and relationship management	Account, contact, relationship, and master data design	Dataverse tables, forms, views, duplicate rules, dashboards	System test and data quality validation	Authorised users can create, maintain, search, and report on clean relationship data

Requirement Area	Design Artefact	Build Component	Test Evidence	Acceptance Criteria
Matter and opportunity management	Matter lifecycle, opportunity pipeline, referral design	Tables, business process flows, automations, security roles	End-to-end UAT scenarios	Users can manage intake, pipeline, matter opening, progression, closure, and reporting
Security and ethical walls	Access model and restricted matter design	Roles, teams, sharing, field security, SharePoint restrictions	Security test cases and negative access tests	Unauthorised users cannot view, search, report, export, or collaborate on restricted content
Integration and migration	Interface specifications and migration mappings	Connectors, APIs, Power Automate flows, migration packages	Integration tests, reconciliation reports, migration sign-off	Data moves accurately between systems with monitored errors and reconciled outcomes
Reporting and AI	KPI catalogue, Power BI model, Copilot scenario design	Dashboards, reports, datasets, AI configuration and governance controls	Report validation, security trimming tests, pilot feedback	Insights are accurate, secure, actionable, and aligned to business decisions

Governance, Review, and Approval

The Solution Blueprint should be reviewed as a living design baseline throughout implementation. Any approved design changes should be assessed for business impact, security impact, integration impact, migration impact, reporting impact, test impact, support impact, and release impact. The final approved blueprint becomes the reference point for build completion, test readiness, deployment readiness, and post-go-live support transition.

6 Prepare: Go Live Readiness and Adoption

Purpose and Success by Design Context

This section of the Solution Blueprint defines the Prepare-phase approach for d365Legal, the Microsoft Dynamics 365 legal industry solution. It aligns with Microsoft's Success by Design guidance by treating go-live readiness as a formal quality gate, ensuring that the business solution, data, people, support model, and operating controls are ready before production launch.

The objective is to launch d365Legal with confidence, minimise operational disruption, achieve user adoption across legal, finance, matter management, compliance, and executive teams, and establish a stable transition into early life support and ongoing operations.

Go-Live Readiness Assessment

The Go-Live Readiness Assessment confirms that d365Legal is fit for operational use and that all critical business, technical, security, compliance, and support prerequisites have been met. The assessment should be performed iteratively during the Prepare phase and formally reviewed at defined checkpoints with the project sponsor, business owners, solution architect, data migration lead, test manager, change manager, and support lead.

Readiness Area	Assessment Focus	Evidence Required
Scope and business process alignment	Confirms that the solution being deployed supports the agreed matter lifecycle, client engagement, conflict checking, compliance, billing, document, and reporting processes.	Signed scope baseline, process catalogue, design decisions, approved backlog exclusions.
Solution acceptance	Confirms that configured Dynamics 365 apps, Power Platform components, integrations, security roles, and d365Legal extensions are ready for production use.	UAT sign-off, defect status, release notes, configuration workbook, security role matrix.
Testing completion	Confirms that user acceptance testing, system integration testing, regression testing, security testing, and performance testing have met agreed exit criteria.	Test summary report, defect burn-down, performance results, integration validation evidence.
Data readiness	Confirms that client, matter, contact, employee, workflow, document metadata, legacy reference data, and financial integration data are	Migration reconciliation report, exception register,

Readiness Area	Assessment Focus	Evidence Required
	cleansed, mapped, migrated, and reconciled.	business sign-off by data owner.
People and adoption readiness	Confirms that legal professionals, partners, administrators, finance users, and support staff are trained and ready to use the new solution.	Training completion report, champion readiness checklist, communication plan evidence.
Operational readiness	Confirms that production support, monitoring, escalation, knowledge management, and hypercare operating procedures are in place.	Support model, runbooks, service desk scripts, monitoring plan, escalation matrix.

Cutover Strategy and Deployment Plan

The cutover strategy defines the controlled sequence for moving d365Legal from implementation environments into production. It should include environment preparation, final configuration deployment, data migration execution, integration enablement, validation, business sign-off, user access activation, and transition to hypercare.

- **Cutover governance:** Establish a cutover manager, workstream leads, checkpoint owners, command centre schedule, escalation path, and approval authorities.
- **Deployment sequencing:** Deploy managed solutions, environment variables, security roles, Power Automate flows, plugins, integrations, model-driven app changes, portals, reports, and required Power BI assets in a controlled order.
- **Business suspension window:** Define when legacy matter creation, client updates, billing reference updates, and document metadata changes are frozen to protect data integrity.
- **Verification activities:** Validate role-based access, core matter workflows, client and contact search, conflict checking, document management links, Outlook or Teams integration, financial integration, and reporting.
- **Rollback and contingency:** Define decision points, technical rollback options, data recovery approach, communication templates, and business continuity procedures.

Data Migration Rehearsal and Validation

Data migration rehearsal is a mandatory readiness activity for d365Legal because legal operations depend on accurate client, matter, contact, relationship, compliance, document, and financial reference data. Each rehearsal should prove that legacy data can be extracted, transformed, loaded, reconciled, and accepted by business owners within the agreed cutover window.

- Run at least one full-volume migration rehearsal using production-like data and timings.
- Validate field mappings, duplicate detection, mandatory fields, ownership, security, reference data, and audit requirements.
- Reconcile migrated records against legacy source totals by entity, practice group, office, matter status, and responsible lawyer where applicable.
- Capture and triage exceptions, including invalid client-matter relationships, incomplete contact data, missing billing references, inactive users, and unsupported legacy values.
- Obtain formal sign-off from business data owners before final production migration.

Training Strategy for Users, Administrators, and Support Teams

The training strategy prepares all user groups to perform their day-to-day activities in d365Legal from go-live. Training should be role-based, scenario-driven, and aligned to the legal business processes that users will perform, rather than limited to feature demonstrations.

Audience	Training Focus	Readiness Evidence
Legal professionals and matter teams	Client and matter management, activity capture, document links, task management, workflows, reporting, and collaboration.	Attendance records, completion assessments, scenario-based exercises.
Partners and practice leaders	Pipeline, client relationship insights, matter visibility, performance dashboards, approvals, and compliance oversight.	Executive briefing completion, dashboard validation, approval workflow testing.
Administrators	Security roles, user provisioning, reference data, queues, workflows, configuration management, and environment administration.	Admin runbook sign-off, production access checks, support handover completion.
Support teams	Incident triage, known issues, knowledge articles, escalation routes, monitoring, and service level expectations.	Service desk scripts, hypercare roster, escalation matrix, knowledge base readiness.

Adoption Plan and Change Champion Network

The adoption plan ensures that d365Legal is embedded into everyday legal operations and that users understand the business reasons for the change. A change champion network should represent practice groups, offices, functional teams, and administrative groups. Champions provide local feedback, validate training materials, reinforce standard processes, and help resolve adoption barriers during and after go-live.

- Define adoption success measures such as active users, matter creation compliance, workflow completion, activity capture, dashboard usage, and support ticket trends.
- Publish targeted communications explaining what is changing, when it changes, what users must do, and where to get help.
- Use champions to conduct floor walks, virtual drop-in sessions, practice group briefings, and feedback collection.
- Track adoption risks and prioritise interventions for teams with low usage, repeated support issues, or process deviations.

Hypercare Model and Early Life Support

Hypercare provides intensified support immediately after go-live while the organisation stabilises on d365Legal. The model should combine business process support, application support, technical support, data support, and change management support in a coordinated command centre.

- **Duration:** Define an initial hypercare period, commonly two to four weeks, with extension criteria based on incident volume and severity.
- **Support channels:** Provide agreed channels such as service desk tickets, Teams channels, daily clinics, and champion escalation routes.
- **Command centre cadence:** Hold daily triage meetings during the early days of go-live, reducing frequency as stability improves.
- **Metrics:** Track incident count, severity, resolution time, recurring issues, user adoption, data exceptions, integration failures, and business continuity impacts.
- **Transition:** Move from hypercare to business-as-usual support when operational acceptance criteria are met and ownership is formally transferred.

Operational Acceptance Criteria

Operational acceptance confirms that d365Legal can be run, supported, monitored, and governed after go-live. Acceptance should be based on objective criteria agreed before deployment and reviewed by business and IT owners.

- Production environment is provisioned, secured, monitored, and backed up according to organisational standards.

- All priority-one and priority-two defects are resolved or have approved mitigations.
- Data migration reconciliation is complete and accepted by business data owners.
- Integrations, reporting, workflows, notifications, and document management connections are operational.
- Support teams have approved runbooks, knowledge articles, escalation paths, and access rights.
- Administrators are trained and able to perform key operational tasks.
- Business continuity, rollback, and post-go-live communication procedures are approved.

Go/No-Go Decision Framework

The Go/No-Go Decision Framework provides a transparent basis for deciding whether d365Legal should proceed to production. The decision should be made by the steering committee or authorised governance group using evidence from readiness assessments, test results, migration rehearsals, training completion, support readiness, and unresolved risk status.

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

Prepare-Phase Deliverables

- Go-Live Readiness Assessment and action plan.

- Approved cutover strategy, deployment plan, rollback plan, and communications schedule.
- Completed data migration rehearsal report and reconciliation sign-off.
- Role-based training plan, completion report, and supporting quick reference materials.
- Adoption plan, change champion network, and adoption measurement dashboard.
- Hypercare operating model, command centre schedule, support runbooks, and escalation matrix.
- Operational acceptance checklist and business-as-usual transition plan.
- Go/No-Go decision pack for steering committee approval.

7 Operate: Support, Optimisation and Roadmap

Support Model, SLAs, and Escalation Paths

The support model for d365Legal should define clear ownership across the legal business, internal IT, the d365Legal support team, Microsoft support, and any third-party integration providers. A tiered model is recommended: Level 1 for user guidance and triage, Level 2 for configuration and functional support, Level 3 for technical investigation, integrations, custom components, performance, and data issues, and vendor escalation for Microsoft platform or ISV product issues.

Priority	Example legal scenario	Target response	Target resolution or workaround
Priority 1 — 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
Priority 2 — High	Major function unavailable for a practice group or office; integration failure affecting daily operations	Within 4 business hours	1–2 business days, subject to complexity
Priority 3 — Medium	Functional defect, reporting issue, workflow exception, or configuration change request	Within 1 business day	Scheduled into support or release backlog
Priority 4 — Low	How-to question, minor usability issue, enhancement request, or documentation update	Within 2 business days	Addressed through knowledge base, training, or roadmap planning

Service Management and Incident Handling

Service management should follow a disciplined operating rhythm that includes incident logging, classification, root-cause analysis, communication, remediation, and post-incident review. Incidents should be recorded with business impact, affected user groups, impacted legal process, environment, component, screenshots or logs, and any immediate workaround. For recurring issues, the support team should create problem records and corrective actions to reduce repeat service disruption.

- Maintain a central service desk queue for incidents, requests, change items, and enhancement candidates.
- Define named service owners for core legal processes such as matter lifecycle, client onboarding, conflict workflows, billing, reporting, integrations, and document automation.

- Use standard categorisation to distinguish platform incidents, configuration defects, user training issues, data issues, integration failures, security concerns, and product enhancement requests.
- Publish regular support summaries covering incident volumes, priority trends, recurring causes, service performance, and planned corrective actions.

Release Management and Continuous Improvement

d365Legal should operate with a controlled release management process that balances agility with stability. Changes should move through defined environments such as development, test, user acceptance testing, and production. Each release should include documented scope, affected processes, solution components, test evidence, deployment steps, rollback approach, communication plan, and post-release validation.

Continuous improvement should be managed through a prioritised backlog that includes user feedback, operational pain points, automation opportunities, regulatory requirements, analytics improvements, Copilot and AI opportunities, and Microsoft platform capabilities. Release cadence may include emergency fixes, monthly minor releases, quarterly enhancement releases, and strategic roadmap releases aligned to business planning cycles.

Monitoring, Governance, and Platform Health

The operating model should include proactive monitoring of Microsoft Dataverse capacity, solution performance, integration reliability, security roles, audit settings, environment usage, data quality, workflow execution, plugin performance, Power Automate runs, API limits, and backup or recovery posture. Governance forums should review platform health, risk items, support trends, change backlog, and adoption metrics on a recurring basis.

- **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 requirements.
- **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 obligations, privacy, and legal industry regulatory obligations.

Evergreen Updates and Microsoft Roadmap Alignment

Because Dynamics 365 and the Microsoft Power Platform are evergreen cloud services, d365Legal must include a disciplined approach to reviewing Microsoft release plans, early access features, deprecations, mandatory updates, and platform changes. The support team should assess each Microsoft release wave for relevance to the legal solution, including Dataverse, model-driven apps, Power Automate, Power BI, Copilot, security, integration capabilities, and administration features.

Roadmap alignment activities should include release note review, impact assessment, regression testing, stakeholder communication, administrator briefings, and adoption planning for relevant new features. This ensures d365Legal remains aligned to Microsoft's product direction while reducing the risk of unexpected change impacting production users.

Value Realisation Review and Benefits Tracking

The Operate phase should include regular value realisation reviews to confirm that d365Legal is delivering measurable business outcomes. Benefits should be linked to the original business case and should be tracked using agreed metrics such as user adoption, matter opening cycle time, client onboarding efficiency, reduction in manual administration, billing readiness, document automation usage, reporting timeliness, pipeline visibility, compliance control effectiveness, and user satisfaction.

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 activities	Quarterly
Compliance and governance	Audit coverage, security exceptions, approval compliance, and policy adherence	Quarterly

Future Enhancements and Product Roadmap

The d365Legal roadmap should be maintained as a living plan that combines client-specific priorities, legal industry trends, Microsoft roadmap capabilities, and d365Legal product direction. Future enhancements should be prioritised using business value, risk reduction, regulatory need, user demand, implementation complexity, and strategic alignment.

- **Short-term roadmap:** Stabilisation, issue remediation, user adoption improvements, reporting refinements, and high-value configuration changes.
- **Medium-term roadmap:** Expanded automation, improved client onboarding, integration enhancements, matter financial visibility, document generation, and Power BI dashboards.
- **Long-term roadmap:** AI-assisted legal workflows, Copilot-enabled matter summarisation, predictive insights, advanced compliance controls, self-service client portals, and deeper integration with Microsoft 365, Teams, SharePoint, and legal finance systems.

Operate Phase Outcomes

By applying the Operate phase of Microsoft Success by Design to d365Legal, the organisation establishes an operational model that protects service reliability, encourages continuous improvement, aligns the solution with Microsoft’s cloud evolution, and ensures that ongoing investment in Dynamics 365 continues to deliver measurable legal business value.

8 Appendices and Reference Materials

This section defines the appendices and project reference materials that support the d365Legal Solution Blueprint. In line with Microsoft's Success by Design approach, these artefacts provide the evidence base for architecture decisions, implementation readiness, risk management, data migration, security, integrations, reporting, and go-live governance. They should be maintained as controlled project documents throughout the Initiate, Implement, Prepare, and Operate phases.

Glossary of Legal and Technology Terms

The glossary provides a common language for legal, business, and technology stakeholders. It should define key terms used across the d365Legal implementation, including matter, client, contact, conflict check, retainer, trust account, legal service request, document automation, workflow, Dataverse, Power Platform, model-driven app, security role, environment, solution, integration, API, data migration, and reporting dataset.

Architecture Diagrams

The architecture appendix should include current-state, target-state, and transition-state diagrams for d365Legal. Diagrams should cover the Dynamics 365 and Power Platform application landscape, Dataverse data model, Azure services, Microsoft 365 integration, identity and access management, reporting layers, external legal systems, and integration patterns. Each diagram should identify system boundaries, ownership, environments, data flows, security zones, and operational dependencies.

Integration Catalogue

The integration catalogue documents all inbound, outbound, and bi-directional integrations required for d365Legal. Typical integrations may include Microsoft Outlook and Exchange, SharePoint or NetDocuments for document management, Teams, accounting and billing systems, identity providers, e-signature platforms, court or registry systems, client portals, payment gateways, and reporting platforms. For each interface, the catalogue should capture purpose, data entities, frequency, source, target, authentication, error handling, monitoring, ownership, and Success by Design review status.

Data Migration Inventory and Field Mapping

The data migration inventory identifies all legacy data sources, target Dataverse tables, migration scope, cleansing requirements, transformation rules, data ownership, retention requirements, reconciliation approach, and validation criteria. Field mapping should cover clients, contacts, matters, activities, documents, tasks, parties, billing references, conflict history, matter classifications, practice groups, and custom legal attributes. The appendix should distinguish mandatory, optional, derived, deprecated, and excluded fields.

Security Role Matrix

The security role matrix defines how access to d365Legal is governed across legal practice groups, business services, system administration, and external collaboration scenarios. It should map personas to Dynamics 365 security roles, Dataverse privileges, business units, teams, field-level security, row-level access, document permissions, and reporting access. Key personas may include partner, senior lawyer, associate, paralegal, legal assistant, finance user, practice manager, knowledge manager, client portal user, and system administrator.

Reporting Catalogue

The reporting catalogue lists operational, management, compliance, and executive reports required from d365Legal. It should include matter pipeline, client engagement, conflict check status, matter ageing, workload allocation, SLA performance, fee earner activity, document production, risk and compliance, client portal usage, and adoption reporting. For each report, capture report owner, audience, source data, refresh frequency, filters, security trimming, delivery channel, and acceptance criteria.

Risk, Issue, Assumption, and Dependency Register

The RAID register provides a single project control point for risks, issues, assumptions, and dependencies. It should capture integration dependencies, data quality risks, legacy system access constraints, security and privacy implications, user adoption risks, legal compliance requirements, third-party vendor dependencies, environment availability, licensing assumptions, and go-live readiness blockers. Each item should include owner, impact, probability, mitigation, target date, status, and escalation path.

Decision Log

The decision log records material architecture, configuration, integration, migration, security, reporting, and process decisions made during the project. It should include the decision statement, options considered, rationale, decision owner, approval date, impacted workstreams, dependencies, and any required follow-up actions. This supports traceability and protects the solution blueprint from undocumented design drift.

Success by Design Checklists and Review Outputs

This appendix stores outputs from Success by Design-aligned reviews, workshops, and readiness assessments. It should include solution blueprint review findings, architecture review actions, security review outcomes, data migration review observations, integration design review outputs, reporting and analytics review notes, test strategy validation, performance considerations, cutover readiness, go-live assessment outputs, and post-go-live transition actions.

Reference Documents and Supporting Materials

This appendix contains the source documents and supporting materials used to develop and validate the d365Legal Solution Blueprint. Typical references include business requirements, process maps, user stories, fit-gap analysis, technical design documents, environment strategy, test strategy, training plan, support model, licensing assumptions, implementation plan, vendor specifications, data extracts, sample reports, legal compliance requirements, and client-approved governance material.