

Deployment Best Practices

Do's

Thorough Planning

- **Do:** Invest time in comprehensive planning before the deployment. Understand the specific needs and requirements of your organization.
- **Do:** Consider user roles, project structures, and data governance to ensure the deployment aligns with organizational goals.

User Training and Adoption

- **Do:** Provide extensive training for end-users, administrators, and other stakeholders. This includes training on using BrightWork 365, Power Platform components, and any customizations.
- **Do:** Foster a culture of user adoption. Communicate the benefits of the new solution and provide ongoing support to address user concerns.

Integration with Power Platform

- **Do:** Leverage the capabilities of the Power Platform for enhanced functionality. Integrate Power Apps, Power Automate (formerly Flow), and Power BI where applicable to streamline processes and provide valuable insights.
- **Do:** Ensure proper data flow and connectivity between BrightWork 365 and other Power Platform components.

Administration

- **Do:** Name Power Platform environments and URLs correctly, i.e., BrightWork DEV, and customer-bw365-dev.crm.dynamics.

Don'ts

Overly Complex Configurations

- **Don't:** Overcomplicate the system with unnecessary customizations. Keep configurations aligned with business needs and avoid unnecessary complexity that could lead to maintenance challenges. This includes overly complex workflows or external system integrations.
- **Don't:** Implement features or customizations without a clear understanding of their impact on performance and user experience.

Neglecting Security and Compliance

- **Don't:** Neglect security considerations. Ensure that proper permissions and access controls are in place to protect sensitive information.
- **Don't:** Ignore compliance requirements. Understand and adhere to regulatory standards that

may apply to your industry.

Skipping Testing

- **Don't:** Skip thorough testing before rolling out the deployment. Test various scenarios to identify and address any potential issues or bugs.
- **Don't:** Deploy changes directly to a production environment without proper testing in a staging or development environment.

Requirements Assumptions

- **Don't:** Assume a requirement is too complex for the initial start without first discussing it with your CSP as it may not be as complex as you think, or BrightWork may have done something similar in the past that would mitigate the complexity. At least you have had the conversation with your CSP and mutually agreed to park it for the Evolve.
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