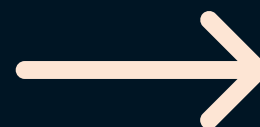


# Checklist for organizations introducing Business Process Flows

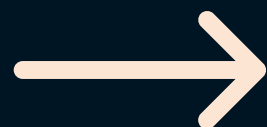
in Dataverse and  
Dynamics 365





# Is your organization ready for Business Process Flows?

Use this checklist to assess if implementing BPFs in Dataverse/Dynamics 365 will deliver value or cause friction.





# 1. Process Stability & Maturity

- The process you want to guide users through is clearly defined and documented.
- The process is stable, and used currently either on paper or in another system, with minimal recent changes and no major expected revisions.
- There is broad agreement across teams on how the process should work end-to-end.

**If you're still iterating or firefighting with your process, BPFs will lock you in too early.**



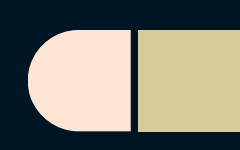


## 2. Purpose: Guidance Over Governance

- You want to guide users (especially new staff) through a standardized workflow.
- You're not relying solely on BPFs for enforcement or compliance — other controls exist.
- The process includes clear transitions between stages that map to actual business steps.
- You have confirmed by feedback that the stages in the BPF match with reality. For example if you have multiple required columns in a stage then will users have all the info can all be entered at the same time -otherwise it will not be possible to save the BPF (confirm)

**If you're forcing a rigid sequence to gain control, BPFs may backfire or be bypassed.**





## 3. Data Discipline

- You've identified the minimal required fields at each stage — no overkill.
- You've validated these with end users to avoid data entry fatigue or frustration.
- **Required fields** are relevant to the stage — not just there because “we might need it.”
- You don't need to use multi-select columns in the BPF stages
- You have a delineation between the columns for the **process** in the BPF control, and the columns for **data** in the record's form. It can be frustrating to users if data they need to reference after the process is complete is only shown in the BPF as they then have to click the BPF to open the stage

**Requiring too much, too early = resistance and bad data.**

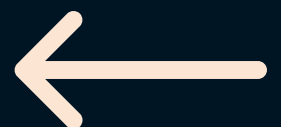




## 4. Team & Ownership Stability

- The teams involved in the process are stable and not undergoing major restructuring.
- There's a clear owner for the BPF and someone responsible for maintaining it.
- You've mapped out handoffs and stage transitions to real team responsibilities.

⚠️ If teams shift frequently or ownership is unclear, the BPF will quickly go stale.

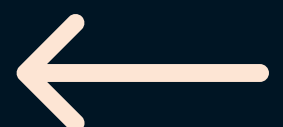




## 5. Training & Adoption Readiness

- You have a plan to train users on how to follow the BPF. Particularly around new aspects of BPFs in the User Interface: reactivating the BPF if they need to reopen it once it reaches the final stage, and how to query the data in views. Moving between stages and the concept of the current stage.
- Your users have basic Dynamics/Dataverse familiarity — BPFs won't be their first exposure.
- You have a feedback loop to iterate on the flow post-launch.

▶ **Launching a BPF without adoption planning is a shelfware risk**





## 5. Training & Adoption Readiness

- The BPF aligns with other system processes or automations (e.g., Power Automate).
- You've confirmed it won't conflict with existing workflows or custom logic.
- Reporting and KPIs are aligned with BPF stages and outcomes.
- The BPF stages work with your users so they can manage the process.

**⚠ BPFs in isolation can cause duplicated logic, inconsistent reporting, and user confusion.**

