

# 01 / Prepare for implementation

A good portal connects the visitor journey to a dependable internal process. This guide helps you prepare audience access, data, submissions and ownership before development begins.

## Microsoft Power Pages

### A practical readiness guide

For business owners, process leaders and the people who will use and support the solution. Use this guide to settle responsibilities, surface dependencies and prepare a focused implementation conversation.

| BEFORE                  | DURING AND AFTER                                                                                |
|-------------------------|-------------------------------------------------------------------------------------------------|
| Agree the process       | Validate the complete business journey, including exceptions and approvals.                     |
| Prepare the information | Rehearse migration, reconcile critical records and confirm ownership.                           |
| Prepare the people      | Test real roles, support the first operating cycles and agree how improvement will be measured. |

### Scope before software

Power Pages licensing differs from internal Power Apps usage and considers authenticated or anonymous website use, capacity and related services. Dataverse storage, integrations and identity requirements also affect the architecture and ongoing cost.

Prepared by Tripearltech | September 2026

Planning reference only. Product features, licensing and local requirements must be confirmed for your deployment. This guide does not replace an agreed statement of work or a detailed implementation plan.

## 02 / Settle the important decisions

Bring the owners of these areas into discovery. For each decision, record the current situation, the intended process, dependencies and who can approve the design.

| DECISION AREA           | WHAT TO PREPARE                                                                                                                   |
|-------------------------|-----------------------------------------------------------------------------------------------------------------------------------|
| Visitor journeys        | List customer, vendor and partner tasks, required information, correction steps and the status each visitor should see.           |
| Identity and membership | Agree invitations, registration, identity providers and how access changes when a person joins or leaves an organization.         |
| Record permissions      | Define permitted records and actions for each role; include explicit tests proving users cannot view another organization's data. |
| System ownership        | Identify authoritative ERP or CRM records, synchronization timing and the handling of rejected or delayed updates.                |
| Portal acceptance       | Test complete submission journeys, mobile use, authentication, cross-account isolation, errors and internal follow-through.       |

### Record one measurable outcome

Choose a practical measure related to the problem you are solving. Define its calculation and source, record a baseline and agree a review date. Avoid treating a software feature as a business result.

Outcome and baseline: \_\_\_\_\_

Business owner: \_\_\_\_\_

Target and review date: \_\_\_\_\_

### Decision gate

The business sponsor accepts the scope, owners and assumptions. Critical unresolved decisions have a named owner and a date for resolution.

## 03 / Use a visible delivery plan

Agree what evidence will be reviewed at each stage. The implementation team prepares the work; the relevant business owners accept whether it meets the agreed need.

| STAGE              | WORK AND ACCEPTANCE                                                                                                                                         |
|--------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Discover           | Map external audiences, visitor tasks and the internal work each request creates.<br>Gate: portal scope and business ownership agreed                       |
| Design             | Define the experience, identity model, record permissions and connected data flows. Gate: journey and access design accepted                                |
| Build & test       | Develop the portal and verify submissions, integrations, restricted records and difficult user journeys. Gate: functional and access scenarios passed       |
| Pilot & launch     | Invite representative users, rehearse support and release the portal with clear internal responsibilities. Gate: visitor and operational readiness approved |
| Maintain & improve | Monitor failed journeys and data exchanges, review access changes and prioritize improvements. Gate: site ownership and support model accepted              |

### Keep change decisions explicit

Record a requested change, why it matters, affected users, alternatives and its effect on cost, schedule and support. Separate approved scope from the future improvement backlog. Do not let informal requests silently change acceptance criteria.

### Name both sides of each handoff

For integrations and cross-team processes, identify who sends information, who accepts it and who responds if it fails. A technically successful exchange can still carry the wrong business meaning.

# 04 / Test the business, not just the screens

Select representative scenarios from your own organization. Include ordinary work, corrections, handovers and the situations that are difficult in the current process.

| CHECK              | EVIDENCE TO KEEP                                                                                                                               |
|--------------------|------------------------------------------------------------------------------------------------------------------------------------------------|
| Process acceptance | Scenario, responsible owner, inputs, expected result and observed result. Include at least one meaningful exception for each critical process. |
| Data quality       | Mapping, record counts or control totals, sample business checks and accepted treatment of historical records.                                 |
| Roles and access   | Tests for each real role, restricted records and approval boundaries. Confirm what users cannot do as well as what they can.                   |
| Connected systems  | Expected update timing, duplicate handling, failed messages, recovery and reconciliation. Test realistic volumes where relevant.               |
| User readiness     | Role-based practice, short job aids, trained internal champions and a support route users can explain.                                         |

## Product-specific focus

Test complete submission journeys, mobile use, authentication, cross-account isolation, errors and internal follow-through.

## Do not leave acceptance implicit

Prioritize defects by business impact. Record the approver and rationale for any accepted workaround. Retest the correction and affected scenarios before closing the issue.

Test owner: \_\_\_\_\_ Acceptance date: \_\_\_\_\_  
Outstanding critical issue: \_\_\_\_\_  
Decision and responsible approver: \_\_\_\_\_

# 05 / Launch with a plan for support

A target date is not evidence of readiness. Rehearse the transition, agree the go/no-go authority and keep implementation expertise available through the first important operating cycles.

| WHEN          | WHAT TO AGREE                                                                                                                   |
|---------------|---------------------------------------------------------------------------------------------------------------------------------|
| Before launch | Task sequence, owners, data timing, user communication, support contacts and criteria for pausing or recovering the transition. |
| First 30 days | Prioritize issues by business impact, validate critical records and support users through the first real operating cycles.      |
| Days 31-60    | Complete handover, resolve recurring problems and update job aids. Confirm monitoring and escalation ownership.                 |
| Days 61-90    | Compare early performance with the baseline and agree an improvement backlog. Set a manageable review cadence.                  |

## Define support before it is needed

Agree coverage, response arrangements and the distinction between defects, user questions, data corrections and new requirements. Assign ownership for integrations, access changes, product updates and periodic review.

## Bring these details to your first conversation

Current systems and major pain points; business locations and user roles; key process owners; connected providers; known data issues; desired outcomes and timing constraints.

## Plan the next step with Tripearltech.

Consulting, implementation, migration, integration, training and support.

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Official product reference: [Microsoft Power Pages](#). Validate current capabilities and terms during assessment.