



How to Successfully Migrate from Salesforce to Microsoft Dynamics 365

Are you considering a switch from Salesforce to Microsoft Dynamics 365? This could be a wise move, as Salesforce is often used as a standalone solution, while Dynamics 365 offers a comprehensive platform and ecosystem for business applications powered by Artificial Intelligence. Your CRM should do more than just support sales; it's essential to understand how an integrated platform like Dynamics 365 can help your organization achieve new goals and streamline operations.

By implementing Dynamics 365 CRM, you gain access to a wide array of tools that go beyond basic CRM functions. Unlike traditional SaaS, Dynamics 365 functions as a true Platform-as-a-Service (PaaS). Understanding its seamless integration capabilities will highlight the benefits of transitioning from Salesforce to Dynamics 365 CRM.

Some interesting survey reports:

Cost-Effective Solutions

95% of Salesforce Functionality Achievable through alternative vendors at a fraction of the cost!

Positive ROI

Quick Returns Organizations transitioning away from Salesforce have achieved a positive ROI in **less than 12 months!**

Why Migrate from Salesforce to Microsoft Dynamics 365?

Salesforce and Dynamics 365 cater to a comparable user demographic, making both platforms appropriate for medium-sized businesses and larger enterprises. While their pricing structures are similar, Dynamics 365 tends to offer more flexible and cost-effective options, particularly at the lower tier. Initially, the feature sets of Dynamics 365 CRM appear comparable to Salesforce, but a deeper examination reveals several compelling reasons to consider making the switch.

Platform Advantage

Salesforce was designed from the beginning as a cloud application, making it ideal for organizations that use remote servers and browser-based software. However, for those wanting on-premises hosting and ownership, Salesforce may not be suitable, but Salesforce doesn't offer office applications or a standard low code platform. This means that your users waste valuable time clicking between applications, checking their calendar or collaborating in teams rather than getting work done.

In contrast, Dynamics 365 offers more flexibility in implementation, is fully integrated and lets you do almost everything from a single screen. You can use its Sales and Service components in a fully cloud-based setup without ever opening Outlook or Teams, and you can even choose to deploy modules like Finance and Operations on-premises to protect your valuable data.

Superior AI Integrations

Dynamics 365 now features AI integrations in its Sales and Service models, including sales predictions and natural language processing, with additional AI capabilities continuously being added. While Salesforce has also integrated AI through tools like Einstein, these features often come at extra costs. Both Salesforce and Microsoft offer enterprise-level resources for organizations seeking AI tools, with Microsoft introducing strong AI capabilities in 2017 for its Dynamics and Office 365 solutions.

App Integrations

While Salesforce has invested heavily in its AppExchange, boasting over 2,600 integrations, Microsoft has quickly developed its own AppSource. Dynamics 365's strong app connections allow businesses to utilize Microsoft Power BI and PowerApps plus Power Automate to customize applications from existing data.

Organizations using Microsoft software will find Dynamics 365 especially beneficial. Although Salesforce offers some integration with Microsoft apps, the native connections in Dynamics 365 offer unique advantages.



Key Steps for a Successful Salesforce to Microsoft Dynamics 365 Migration

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◆ Cleanse Your Data

If you've been using Salesforce for some time, you likely have legacy data that may no longer be necessary. Before migrating to a new system, it's important to cleanse your data to avoid wasting time and resources on irrelevant information.

During the cleansing process, focus on:

- **Inconsistencies:** Standardize naming conventions to ensure your data is organized and accessible.
- **Completeness:** Check for missing information in records and merge duplicates to enhance data value.
- **Accuracy:** Update or delete outdated information, such as old email addresses.

Also, apply these principles to your Salesforce reports by cleaning up or removing old, unused, or outdated reports.

◆ Map Your Data

After cleansing your system of legacy data, the next step is to determine which data will be migrated to Dynamics 365. This involves identifying the specific objects you need to transfer and mapping them from your Salesforce interface to the Dynamics 365 interface, ensuring data types align across both platforms.

To simplify the migration and testing process, many users opt to add a field to the objects/entities they plan to move. By populating this field with the ID value from Dynamics, you create an easy reference to the original Salesforce record. This enables quick testing and comparison, ensuring that your data migrates correctly before pulling in all your records.

◆ Plan Integrations

Salesforce is known for integrating with numerous applications, but before migrating, it's essential to review your current integrations and plan accordingly.

Identify which systems Dynamics 365 needs to connect with and assess your existing integrations to determine any that may be unnecessary. Since Dynamics 365 may replace more than just Salesforce, consider these questions:

- Does this tool benefit the business?
- Can Dynamics fulfill this function with its built-in features?
- Is this tool compatible with Dynamics, or is there an alternative connector?

Discussing integration plans with your Dynamics implementation team early will help ensure a smooth transition that fits your business timeline.

◆ Migrate Your Data

With the right support, data migration can be quick and straightforward. Before you start, ensure that:

- Every field you intend to export is set to "Visible" in Salesforce, as hidden fields won't transfer and may result in missing data.
- Some field types, like formula fields, cannot be exported; identify these early and plan to recreate them in Dynamics later.
- Salesforce Record IDs are case-sensitive, while they are not in Dynamics.

While importing, you can leverage a pre-defined import template that Microsoft Dynamics 365 offers to account for variations in calculated fields and custom entity types between platforms. You can also opt for a batch migration, gradually transferring portions of your data to Microsoft Dynamics 365 over time.

Why Choose Korcomptenz as Your Migration Partner:

With over 20 years of experience as a Microsoft Dynamics 365 Gold partner and a Salesforce partner, we are uniquely equipped to meet your migration needs. We understand your concerns about complexity, time, and cost, which is why we offer rapid solutions through our Microsoft Dynamics solution framework. This framework is specifically designed for complex migrations, helping to minimize risks while ensuring that sensitive data remains secure.

Our migration expertise offers you the following benefits:

- Efficiently Establish a New D365 Environment:**
Automatically generate solutions and schema directly from Salesforce outputs using an intuitive, user-friendly interface.
- Streamline Focus on Enhancements:**
Quickly transfer Salesforce functions to D365, eliminating manual configuration and ensuring accurate, like-for-like functionality.
- Eliminate Manual Coding:**
Utilize Azure Gen AI to rapidly transfer Salesforce functions to D365, allowing you to concentrate on improvements instead of setup.
- Enable Early Integration Efforts:**
Take advantage of our quick schema creation to facilitate early integration during the development cycle, reducing migration time and ensuring a smooth user transition.
- Immediate Data Migration Capabilities:**
Create data maps through ADF using our integrated pipeline, providing you with instant data migration capabilities.

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