THE ESSENTIAL GUIDE FOR SWITCHING FROM SALESFORCE TO MICROSOFT DYNAMICS 365

HOW TO AVOID THE COMMON PITFALLS OF SWITCHING CRM SYSTEMS
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IT HAS BEEN DESCRIBED BY MANY CRM SOFTWARE PROVIDERS AS A SIMPLE FLIP OF THE SWITCH, CHANGING CRM SYSTEMS. THE TRUTH IS THERE ARE ALL TOO COMMON PITFALLS THAT CAN DELAY OR DERAIL YOUR SWITCH IF YOU AREN’T AWARE OF THEM OR HOW TO PLAN FOR THEM. THIS EBOOK WILL IDENTIFY THE FOUR KEY AREAS YOU MUST CAREFULLY PLAN FOR TO MAKE YOUR SWITCH SUCCESSFUL FROM SALESFORCE TO MICROSOFT DYNAMICS 365.
"We must be the change we wish to see in the world."
Surprisingly, a successful switch from Salesforce to Microsoft Dynamics 365 has just as much to do with planning within your business as it does with planning for change in the technology.

With the majority of technology implementations falling short or even failing, the devil is in the details, and we don’t mean making sure the right switch is turned on in a feature set. The success of technology has much to do with change management, key stakeholder buy-in and proper training to lead to the successful adoption of your new CRM for Microsoft Dynamics 365 solution. Here is how to plan for success:

IN Volving Key Stakeholders

The first best practice you can put into action to ensure your switch from Salesforce to CRM for Dynamics 365 is successful is getting the right parties and people involved early on in the planning process so that you have champions and advocates aligned when the switch is made.

This includes everyone from your executive team down to your CRM end users. Having the executive team involved allows you to move forward with the support and advocacy you need to drive user adoption for your new CRM system. Involving your current CRM users in the migration discussions from Salesforce to CRM for Dynamics 365 ensures you will have the best knowledge of what contacts, data, functionality and structure to move from Salesforce to Dynamics 365.

As you will learn in the later chapters of this guide, not all data or functionality in your current system should be applied to your new system. Your CRM end users are the best resource to help you filter through what should be migrated and what should be left behind.

Change Management

Organization-wide adoption of your new CRM for Microsoft Dynamics 365 solution requires you to prep, plan and execute the change with all the teams, departments and employees it impacts. Change management for your new system starts at the top. Your executive team, likely your CTO or Director of Technology, needs to reveal the strategic reason you are making the switch to Microsoft Dynamics 365 and the plan for executing this change over as seamless as possible for employees.

Of course, change management requires an abundance of upfront planning, so that the actual switch from Salesforce to Microsoft Dynamics 365 is simply following the detailed plan you’ve laid out for your technical execution team from data migration and user set-up through to employee training and successful user adoption.
Here are some questions you should be asking yourself to properly plan for a successful switch to Dynamics 365:

1. Do we have buy-in from all key stakeholders to make this transition successful?
2. Is this the best time for my business to go through this change (e.g. not during year-end or peak sales times)?
3. Do you have the proper support in place to get employees up to speed with training, documentation and user support to educate and accurately answer questions?
4. Have you planned an internal communication strategy to champion and promote the benefits to have employees take a vested interest in the new system’s success?
5. How will you track, recognize and reward wins as employees interact with and evolve with your new system to drive better performance and efficiencies?

The answer to these questions are key to drive the change management required for a successful Dynamics 365 adoption.

DEPLOYMENT OPTIONS

There is more than one way to get online, or if you prefer on-premise, with CRM for Dynamics 365. Coming from Salesforce, the luxury of more than one deployment option is a pleasant surprise that is sometimes overlooked.

There are actually three means of deploying CRM for Dynamics 365:

1. CRM for Dynamics 365 Online. This deployment is the most similar to your Salesforce CRM deployment. The greatest benefit with an online deployment is that it provides you the flexibility to access your CRM data from anywhere and on any device connected to the internet.

2. CRM for Dynamics 365 On-Premises. An On-Premises deployment is technical speak for deploying your CRM system on your own servers within your own data center. Historically, this is how most software systems have been installed and perhaps that is the reason you are choosing to migrate to CRM for Dynamics 365. The greatest benefit to an On-Premises deployment is the direct access it provides you to your data for closer integration, reporting and customization that is difficult to achieve online or in “the cloud.”

3. CRM for Dynamics 365 in a Private Cloud. Similar to an On-Premises deployment, this keeps your CRM for Dynamics 365 solution private, not in your data center, but your Partner’s private data center (PowerObjects does this for clients). The greatest benefit to deploying in a Private Cloud is that you don’t have to manage the infrastructure of managing services, but you still get the direct access to the data for closer integration, reporting and customization as you would with an On-Premises deployment.
There are obviously pros and cons for each method of deployment, so here are the cliff notes to help you decide which deployment option is best for your organization.

<table>
<thead>
<tr>
<th>Deployment Methods</th>
<th>Pros</th>
<th>Cons</th>
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</thead>
<tbody>
<tr>
<td>Online</td>
<td>+ Low initial cost of ownership + Server/Infrastructure fully managed externally. + Little IT overhead or dependency</td>
<td>- Database storage limit is scaled - Added storage and licenses can be costly - Limits on reporting</td>
</tr>
<tr>
<td>On-Premise</td>
<td>+ Full control over environment, data and database + Limitless reporting capabilities + Query directly to database</td>
<td>- High initial cost of ownership - Server/Infrastructure internally required - Success highly dependent on Internal IT resources</td>
</tr>
<tr>
<td>Private Cloud</td>
<td>+ Some control over database and data + Server/Infrastructure fully managed externally + Little IT overhead dependency + Licenses or subscriptions available</td>
<td>- Moderate initial cost of ownership with licensing - Added storage, reporting and customizations is an expense</td>
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EXPANDING CRM FUNCTIONALITY

Switching from Salesforce to CRM for Dynamics 365 means migrating all your contacts, data and replicating your current CRM functionality. It also means you have the opportunity to do more with your CRM, extending and expanding the functionality to serve you and your customers better.

However, expanding or adding functionality during the migration from Salesforce to CRM for Dynamics 365 will impact timelines and increase the project complexity. Since you are already experiencing some level of disruption to your workforce, now may be the right time to expand the functionality to include all that your business will need moving forward. On the other hand, you may want to execute the straight migration from Salesforce to CRM for Dynamics 365 to be running on your new system as quickly as possible before adding new functionality.

You will have to decide what is best for your company and workforce, but there is definitely a plethora of options to add to your CRM for Dynamics 365 solution to meet your expanding business needs.
SIMPLIFY YOUR MOVE AND YOUR DATA

Planning ahead for how you will move your data out of Salesforce and into CRM for Dynamics 365 will save you much angst down the line. As the old adage goes, “failing to plan is planning to fail.” While you likely won’t fail in migrating your data over to CRM for Dynamics 365, you may end up migrating bad data, which can taint the data integrity of your new CRM system just as it did your old.

Here are the considerations you should make when it comes to your migration and your data when switching from Salesforce to CRM for Dynamics 365.

DATA CLEANSING

Over time, your CRM system has collected and housed legacy data that is no longer used or is inaccurate. It is also important to take note of how your data is currently structured and if the format of data storage has changed over time.

To ensure this inaccurate or outdated data is not migrated to pollute your new system and to consider the migration of legacy data that make need an updated data structure, you should formalize a data cleansing strategy prior to your migration. To define your data cleaning strategy, answer the following questions:

1. What resources are available to cleanse my data?
2. Who should be accountable for cleansing and checking the data (pre and post- migration)?
3. Should the data be cleansed in Salesforce or exported then cleansed?
4. What data should be migrated, archived and left behind?
5. If migrating legacy data, will any data require data restructuring to migrate?

Answering these questions will help you organize and simplify your data migration.

DATA EXPORT

When making the switch from Salesforce to CRM for Dynamics 365, your execution of the export of your data should also be planned. There are a few differences you should note.

KNOWN DATA EXPORT/IMPORT DIFFERENCES

**EXPORT FROM SALESFORCE:**
- All fields for export must be marked “visible”
- Not all fields can be exported
- Some entity types may not be available in Dynamics 365
- Record keys are case sensitive

**IMPORT TO DYNAMICS 365:**
- Some data may need to import as different custom entity types
- Not all calculated or custom fields will be available for import
- Global Unique IDs (record keys) are not case sensitive
"KNOWING AND RECOGNIZING DATA EXPORT/IMPORT DIFFERENCES WHEN PLANNING THE SWITCH FROM SALESFORCE TO CRM FOR DYNAMICS 365 HELPS PLAN YOUR MIGRATION AND YOUR RESOURCES ACCORDINGLY."
Knowing and recognizing these data export/import differences when planning the switch from Salesforce to CRM for Dynamics 365 helps plan your migration and your resources accordingly.

Beyond the differences identified above, the actual act of exporting data out of Salesforce can be one of the more difficult aspects of switching to Microsoft Dynamics 365. You may select to export your Salesforce data by one of two options:

1. Web Services Export: You may directly extract the data yourself using Salesforce web services.

2. Contact Salesforce: You may contact Salesforce to perform the export for you by requesting an extraction of all your data in .csv format. The .csv file will separate each entity, including Accounts, Leads and other data.

Once you have the data exports, you must take special care that your files contain all of the available data by cross-referencing how many files should be moved with the number of actual files exported. This validation should be performed by business owners and should be based on a timestamp for accuracy. For discrepancies in data, it is best to contact Salesforce directly for assistance.

DATA STRUCTURED FOR NOTES

One stark difference to recognize between Salesforce and CRM for Microsoft Dynamics 365 is the difference in data structures for notes. Whereas Salesforce has multiple fields to take notes, Dynamics 365 only uses a single field. Hence, during your switch, all the notes fields must be concatenated to preserve all notes as you migrate.

DATA LOADING AND IMPORT

Particularly for large enterprises that use an enormous amount of data, it is a good idea to plan the initial data load ahead of the targeted launch date of CRM for Microsoft Dynamics 365. A good rule of thumb is to schedule this process at least two weeks ahead of the launch.

You should also schedule an incremental load the weekend before the scheduled launch date to ensure the actual importing of data is executed quickly and smoothly.

REPORT CLEANSING

Cleansing your reports is just as important as cleansing your data. Migrating stale, out-of-date reports will muddy the waters of your new CRM system, making it unclear to view what is current and applicable for your employees to mine and dissect accurate data.

As such, you should put into place a report cleansing strategy for the switch from Salesforce to Microsoft Dynamics 365. You should establish a report cleansing strategy, similar to your data cleansing strategy, for weeding out your outdated and inaccurate reports.

Here are the questions you should be asking yourself to build your strategy:

1. What resources are available to cleanse my reports?
2. Who should be accountable for cleansing and checking the reports (pre and post- migration)?
3. Should the reports be cleansed in Salesforce or exported then cleansed?
4. What reports should be migrated, archived and left behind?
5. Will any reports need to be rebuilt if custom report options were used?

If you still have questions about your report cleansing, reach out to your Microsoft Cloud Solution Provider. Your Microsoft Partner is the best resource for all your data, reports and migration related questions.

REPORT EXPORT/BUILDING

Again, reports work similarly to data when exporting from Salesforce. Proper planning can save some long-term headaches with a few notable differences between systems concerning reports.

**KNOWN REPORT EXPORT/IMPORT DIFFERENCES**

**EXPORT FROM SALESFORCE:**
- Some report types may not be available in Dynamics 365 (e.g. custom reports)
- Some legacy reports may not use current data structure for export/import

**IMPORT TO DYNAMICS 365:**
- Not all reports can be directly imported (e.g. custom reports)
- Custom reports will need to be recreated, possibly using different entities
- Not all custom reporting solution are available in Dynamics 365

Consider these report exporting differences when planning the switch from Salesforce to CRM for Microsoft Dynamics 365 to plan your migration and your resources accordingly.

Beyond the challenges identified above, the actual act of exporting reports from Salesforce can be done one of two ways:

1. **Web Services Export:** You may directly extract the reports yourself using Salesforce web services to .xls or .csv files.
2. **Contact Salesforce:** You may contact Salesforce to perform the export for you by requesting an extraction of all your data in .xls or .csv format.

Once you have the report exports, you must take special care that your files contain all of the available data. For discrepancies in data, it is best to contact Salesforce directly for assistance.

“YOUR MICROSOFT PARTNER IS THE BEST RESOURCE FOR ALL YOUR DATA, REPORTS AND MIGRATION RELATED QUESTIONS.”
CUSTOM REPORTS

Beyond cleansing the standard reports, custom reports must be evaluated separately as these reports will take more work than just a simple migration. First, analyze how often these custom reports are used and if they will be utilized moving forward in your new CRM for Microsoft Dynamics 365 solution. If the reports will not be recreated, will they be left behind or archived?

Second, in order to recreate these custom reports, there are a number of customizations and mappings that must be made. If you are currently using a custom reporting solution in Salesforce, will you want move that same solution to CRM for Microsoft Dynamics 365?

Third, can these custom reports be improved with further native functionality in Microsoft Dynamics 365? Again, working with your certified Microsoft Dynamics Partner will help you best determine the best plan of action moving forward with your custom reports.

EXPAND YOUR CRM BREADTH WITH INTEGRATIONS

Like Salesforce, CRM for Microsoft Dynamics 365 can be expanded far beyond the depths of traditional CRM systems. To prepare for your switch from Salesforce to CRM for Dynamics 365, make a list of integrations you currently use in Salesforce and decide which ones you would like to replicate when you make the switch.

For each integration you’d like to replicate in Dynamics 365, here are the questions you should be asking:

1. Are the adapters/connectors available in CRM for Dynamics 365? If not, will they have to be developed?
2. Is the data integration unidirectional or bidirectional?

Answering these questions will help you decide how to move forward with integrations in CRM for Dynamics 365.

Dynamics 365 further integrates with many other services to expand the functionality of your CRM solution:

DYNAMICS 365 FOR FINANCIALS AND OPERATIONS (ERP)

CRM for Dynamics 365 also extends beyond traditional CRM functionality with native business applications within the Microsoft Dynamics 365 platform, which includes Enterprise Resource Planning (ERP) functionality using additional business applications for Financials and Operations.

Dynamics 365 for Financials builds upon your existing CRM capabilities with built-in quoting, invoicing, purchasing, payment, reporting, inventory tracking and more. Dynamics 365 for Financials provides you a more comprehensive view of your business data than just CRM alone.
Dynamics 365 for Operations also adds a layer to your existing CRM functionality, with native warehousing, demand forecasting, e-commerce, budget planning, production floor management, POS system and more. Dynamics 365 for Operations delivers the key insights an ERP system provides to help you manage your growth.

PORTALS

If you currently use a customer portal in Salesforce or an out-of-the-box web portal for an additional cost, you will probably want to replicate that portal in CRM for Microsoft Dynamics 365.

Dynamics 365 Portals provide a single point of access and central place to pull dynamic information for your CRM, allowing you to extend your business processes by providing you similar functionality and external user access as your current customer portal in Salesforce.

When switching to Microsoft Dynamics 365, you also have the ability to customize your portal with .NET libraries, Silverlight, HTML files and more. If needed, PowerObjects can provide custom Dynamics 365 Portal development.

SHAREPOINT

If you are currently use a document storage solution in Salesforce, you will likely need a place to store documents when you switch to CRM for Microsoft Dynamics 365.

Microsoft SharePoint is a fully integrated document storage solution for CRM with Dynamics 365. SharePoint provides you with centralized access to your documents and resources from within CRM.

Depending upon the deployment option you select for CRM for Dynamics 365, SharePoint can easily be integrated into the Cloud or on-premises.

POWERPACK ADD-ONS

The PowerPack tools are designed to enhance the CRM capabilities of Microsoft Dynamics 365, while providing even greater functionality and efficiency, all for just $1-2 per user, per month.

Developed based on the needs and feedback from our customers, the PowerPack tools are not just simple customizations for sales productivity and marketing automation, but offer true features to help you get the most out of your Dynamics 365 investment.

OFFICE 365

If you currently use Microsoft Word, Excel, PowerPoint or other Microsoft Office suite products, these can also be easily integrated into CRM for Dynamics 365.

By integrating Microsoft Office 365 with Dynamics 365, you will have single sign-on access through identity federation. This also allows you to maintain a single set of user identities for your Active Directory domain and Dynamics 365.
Combining Office 365 with Dynamics 365 also gives you integrated business process application and productivity tools to work together to provide your employees a seamless, comprehensive and familiar platform to work within.

**POWER BI**

Business intelligence is a buzz word that isn’t easily defined. However, when you can build visual data and dashboards directly out of the business data you are collecting in your CRM system, you can showcase the power behind knowing and sharing more information.

Dynamics 365 integrates with Microsoft Power BI to help you build that visual data your executive, sales, marketing and services teams need to make better decisions. Power BI is stacked with pre-built dashboards and connectors that help you extend your intelligence through integrating external data sources as well.

**FLOW**

Many customer relationship management systems come with workflow capability to automate processes, such as Salesforce. Dynamics 365 goes beyond the scope of just workflow functionality through integrating tightly with Microsoft Flow to bring native workflow management into the Dynamics 365 platform.

Flow can automate business processes and connect your employees to the all services and applications you utilize (e.g. Dropbox, Slack, Twitter) well beyond the confinement of your Microsoft services.

**APPSOURCE**

Just as Salesforce has App Cloud to extend the functionality of your CRM system, Microsoft offers AppSource. AppSource offers nearly 300 extendable business applications for Dynamics 365, with the number of apps available growing daily.

Microsoft has a large, diverse and healthy Independent Software Vendor (ISV) community that develops extendable functionality for the Dynamics 365 platform, which means if you can dream it for your CRM, it likely already exists.

**POWERAPPS**

Switching CRM platforms likely means you are going to leave behind most of your frustration, but you may also lose a few of the functions you enjoy. Since Salesforce and Dynamics 365 are completely different CRM platforms with different ecosystems, there likely won’t be every add-on integration available.

However, in this case for Dynamics 365, you can build a custom application to quickly connect your system, data and teams with the familiar functionality you use through publishing to Microsoft PowerApps. You can publish your apps to your organization on the web or through mobile to provide additional tools within the Microsoft platform.
INTEGRATION WITH EXTERNAL SYSTEMS

When you have been using system integrations in Salesforce that you want to continue to use when switching to Microsoft Dynamics 365, you’ll need to consider the following questions:

1. Do you have any batch exports configured in Salesforce that deliver to an external system? Will you want these to be replicated in Dynamics 365?
2. Are you prepared for the difference in file management with point-to-point integration in Dynamics 365 versus the flat-file organization of Salesforce? How will you prepare to handle the difference in file management?

With access to AppSource and PowerApps, both with the ability to build apps for Dynamics 365, there is likely no integration or extended functionality that you leave behind in Salesforce that can’t be replicated. The question is, how will you be able to build upon that scope in your new CRM system?

GET EMPLOYEES ONBOARD QUICKLY THROUGH TRAINING

To ensure a smooth transition from Salesforce to CRM for Dynamics 365, employee training is key. Many companies make the assumption that all CRM systems are the same and your team will ramp up based on their experience with their previous CRM. This is a gross miscalculation that can kill productivity.

Training on CRM for Dynamics 365 can help you get the most of your investment, leading to improving user adoption and productivity quickly. PowerObjects offers a wide range of Dynamics 365 trainings through CRM University.

REQUEST A CUSTOM TRAINING

Let us guide your training efforts by creating custom materials and trainings for your team.

ATTEND CRM UNIVERSITY TRAINING IN-PERSON

Expand your CRM for Dynamics 365 knowledge through regularly scheduled offerings at one of our PowerObjects training centers.

WATCH CRM UNIVERSITY ONLINE

Learn at your own pace with our online catalog of on-demand courses that can be watched anywhere, any time.

PURSUE A ROLE-BASED CRM UNIVERSITY CERTIFICATE

Pursue a CRM University Certificate for specific learning paths, including CRM Administrator, CRM Trainer, CRM Developer, and more.
FINAL THOUGHTS

If we have done our job right in making this guide informative and entertaining enough to read through, you now know the common pitfalls to avoid when making the switch from Salesforce to Microsoft Dynamics 365. Armed with this information, and a little help from a Certified Cloud Solution Provider, you are ready to successfully make the transition to Microsoft Dynamics 365.

A critical factor in making the switch successful is ensuring your employees are adequately trained on your new CRM for Dynamics 365 solution. Check out our online training, boot camps and resources for Dynamics 365 to assist with the training and onboarding.

If you’ve taken the time to think about and plan for the considerations we’ve laid out in this guide, your chances for success and high user adoption rates when you make the switch to Dynamics 365 are going to vastly improve. Don’t forget, your friendly CRM and Dynamics 365 experts at PowerObjects are available to answer any further questions you may still have about making about switching from Salesforce to Microsoft Dynamics 365.