

# Microsoft Dynamics 365 vs. Salesforce

Exploring the difference  
between two leading  
CRM providers.

**Alithya**



# Table of contents

3. Overview
4. Two leaders in the CRM field
5. Two very different organizations
6. Comparison chart
7. Familiarity and ease of adoption
8. Integration
9. Business Intelligence
10. Cost
11. Top Reasons to Choose Dynamics 365
13. Why Microsoft
14. Why switch now
15. Why Alithya
17. Getting started
18. Sources



# Overview

Our businesses are overwhelmed with data. Thanks to digitization, we collect and store data on nearly every activity in our working day. However, just like a traditional filing cabinet full of physical files, this data is only relevant if you know how to use it.

Customer Relationship Management software could be seen like the digital version of the filing clerk – organizing and storing all the data from your organization ready to access at the click of a button. But it is also so much more than just data storage and organization.

With the right CRM platform, a business can not only access all their data, but make those important connections and analyze the data to enable your business to improve customer service, boost sales pipelines and grow revenue. It can give you the evidence to forecast and make more informed business decisions.



# Two leaders in the CRM Field



Salesforce and Microsoft Dynamics 365 emerge as the top contenders in the realm of CRM platforms.

They excel in areas such as sales force automation, customer engagement, business analytics, and business intelligence. When assessing their attributes, capabilities, and workflows, they exhibit remarkable parity. Thus, the question arises: How can one distinguish between them when making a choice?

Gartner classified Microsoft Dynamics 365 and Salesforce as leaders for CRM Customer Engagement <sup>1</sup>

# Two very different organizations



## Microsoft Dynamics 365

Microsoft is a multinational technology company with a revenue of \$211.9 billion in Fiscal 2023. Some 95 percent of the Fortune 500 companies are on the Microsoft Cloud, and more than 400,000 businesses use Dynamics every day. It has 669,000 apps in the Dynamics marketplace.



## Salesforce

Salesforce is a cloud-based software company with a revenue of \$31 billion in Fiscal 2023. It specializes in customer and sales automation software and was listed by Forbes as the world's second most innovative company. It has 3,400 AppExchange apps and approximately 80,000 employees.

	Microsoft Dynamics 365	Salesforce
Starting price	\$50 per user, per month	\$25 per user, per month
Free trial	Yes	Yes
Ease of use	Difficult	Difficult
Contact management	Yes	Yes
Lead management	Yes	Yes
Email marketing	Yes	Yes
Sales Forecasting	Yes	Yes
Built-in Automation	Yes	Yes
Reporting	Yes	Yes
Ecommerce Integrations	Add On or Plug In	Add On
Customer Support	Yes	Yes
Marketing Automation	Yes	Yes
Social CRM	Yes	Yes
Case Management	Yes	Yes
Territory Management	Yes	Yes
App Marketplace	Yes	Yes
Custom Workflows	Yes	Yes

# Familiarity and ease of adoption



The main difference between the two organizations is size and scope. Microsoft Dynamics 365 is part of the Microsoft platform, which is used by 1.5 billion people every day.

Many businesses already use Microsoft Office, which includes Outlook, Word, Excel, PowerPoint and OneNote. [Microsoft Dynamics 365](#) is a part of a family of software that is familiar to millions of people. Dynamics CRM can be accessed through a single Microsoft login.

Salesforce is a cloud-based software company, specializing in CRM software. More than 150,000 companies use Salesforce's CRM platform.

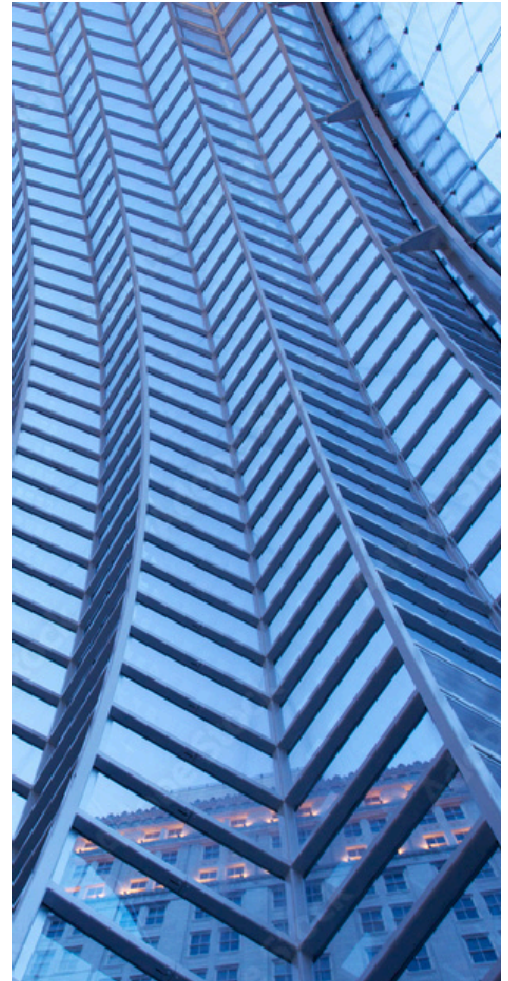
# Integration

A lot of people think Dynamics 365 is easier to use because it's already integrated with Office 365. This means data from both applications is automatically synced.

Your employees can do business deals right from Outlook, they can make sales calls and hold online meetings with Skype for Business. Dynamics 365 also includes the business apps you need all in one place.

[Salesforce is more limited](#). You can access it directly from Outlook, but there's no data synchronization. You also need a lot of third-party applications for Salesforce, and they're not free. For example, if you want to do accounting tasks using Salesforce, you'll have to connect to QuickBooks for more functions. If you work in customer service, you'll need another third-party product such as Zendesk.

Which brings us to another point. Adding third-party software isn't that simple. Some business owners have complained that they needed help from an IT pro to do it.





# Business Intelligence

The business intelligence category, where Microsoft scores 5 compared to Salesforce's 3.4, is of particular importance. AI and machine learning are transforming the way that businesses work these days.

Research by Microsoft itself shows that organizations that are already on the AI journey are outperforming other organizations by 5% on factors like productivity, performance and business outcomes.

Organizations that invest in establishing the right approach, specifically by developing underlying values, ethics and processes, outperform those that are not by 9%.

Microsoft's Dynamics 365 offers robust analytics, including machine learning, AI, and Power BI, enhancing seller productivity and providing advanced insights for informed decision-making.

With its deep integration with Power BI, Dynamics 365 enables detailed analytics, giving your organization a competitive edge. [Gartner has consistently recognized Microsoft as a leader in analytics and business intelligence for over 15 years, further validating its capabilities.](#)

Both Dynamics 365 and Salesforce simplify report generation and analysis with intuitive drag-and-drop tools, real-time charts, and customizable dashboards, offering a comprehensive view of your sales pipeline and business performance.

# Cost

Microsoft scores well in all areas, as does Salesforce, when it comes to reputation for depth of functionality, company direction and customer satisfaction. [Where Microsoft really outshines Salesforce is on value](#). We have to look at more than just the cost benefits of Dynamics 365 - also the integration with other Microsoft products and its depth of functionality. Microsoft Dynamics 365 will give you all the incredible benefits of a leading CRM platform, without breaking the budget.

	Dynamics	Salesforce
Sales Professional	\$65 USD/User/Month	\$75 USD/User/Month
Sales Enterprise	\$95 USD/User/Month	\$150 USD/User/Month
	<a href="#">Additional pricing info</a>	<a href="#">Additional pricing info</a>




# Top Reasons Customers Choose Dynamics 365



There are many organizations that offer CRM software and technology. The leading CRM businesses may offer very similar functionality and processes, so it is important to consider what makes them different. Most businesses will want a CRM platform that is easy to integrate, that is fully adoptable by their employees, and does not use up all of the budget just to keep it going. [Microsoft Dynamics 365 is the leading CRM platform that offers your business all of these things.](#)

# Top Reasons Customers Choose/Switch to Dynamics 365

	 Microsoft	Status Quo
Rationalized Platform	Complete platform with broad best-in-class workload capability	Overlapping capabilities, disconnected platforms
Superior Cloud	IaaS/PaaS/SaaS, Analytics, Encryption, Identity, Intelligence, IoT	No IaaS, limited DC investment, multiple technology platforms
Focus on Complete Productivity	Designed for Office, social / Insights included, Business Process UI	Lower-fidelity integrations, less immersive, mixed commitments
Balanced Partnership	Yearly true-down, combined support / accountability, multiple workloads	Pre-committed multi-year contracts, application level support only
Built for Intelligence	Already uses intelligence suite, rich roadmap with heavy AI investment	Hard-coded models, lacks stand-alone assets, many roadmap only
Unmatched Value	Lowest total TCO, transparent pricing / discounts, no metering	Higher license price, hidden costs, high metering / configuration costs

# Why Microsoft?

Microsoft is a **trusted leader** in business applications and low-code solutions



**97%** of Fortune 500 companies choose Dynamics 365 or Power Platform

**40K+** customers use Copilot features in Dynamics 365 or Power Platform

**500K** organizations use Dynamics 365 or Power Platform every month

**30+** year history of enhancing and redefining CRM and ERP solutions

# Why switch now?

Although it is considered a leader in the CRM space, Salesforce seems to have a difficult time keeping its customers satisfied. Nucleus found 51 percent of Salesforce customers would switch to another CRM solution if given the opportunity.

According to Gartner, Salesforce increased pricing by 8% to 33% for multiple products in August 2023

## The bottom line:

- / 95 percent of Salesforce functionality is achievable through alternative vendors at fractions of the cost
- / 43 percent of Salesforce customers felt Salesforce is more concerned with its own success as a company than the success of its customers
- / Most organizations moving away from Salesforce received a positive ROI in less than 12 months
- / Salesforce no longer a leader in the CRM market

# Why Alithya?

Choosing a CRM platform is one thing. But it is also important to consider who you will get to help you to implement it. *Alithya has been successful in delivering Microsoft technology to businesses for more than 20 years and named Microsoft Partner of the Year numerous times.*

We possess an exclusive methodology guaranteed to streamline and accelerate implementation and adoption. Before you look at the technology, process or budget, you first need to look at what will make the biggest difference to your organization in the shortest amount of time.

When we partner with an organization, we discuss with them a range of possible business outcomes and ask them to focus on two or three that they most want to achieve.



There are three fundamental reasons why we focus on outcomes:

1. Offering an agreed business justification for the project
2. Allowing us to keep the project focused so that a rapid roll-out is possible
3. Providing agreed metrics for short and long-term success

# Why Alithya?

“Our vision for this CRM project was to provide a better customer experience than our competitors, and Microsoft Dynamics has helped us do so.”

Kathy Buchanan  
CRM System Administrator  
AAA Cooper Transportation

“The Alithya team helped us hone in on the fact that it’s not just about putting the software in and expecting great results; you’re changing process, and you’re changing culture. If you are really serious about it and you want to realize the benefits that the CRM platform can provide, the cultural adaption aspect is paramount.”

Grant Johanson  
Senior Project Manager  
Briggs Equipment

“Alithya has helped us migrate from Salesforce to Dynamics 365. They migrated all of our data for us, as well as helped us build out our system. Any hiccups or problems we had along the way, they were right there to eliminate those roadblocks and get us to where we needed to be. Dynamics allows us to have all of our data in one central location and gives us that foundation to better engage our customers.”

Kathy Martin  
CRM Administrator  
Heat and Control





# Getting Started

As we've shown you, both Dynamics 365 offers great features and can be customized to suit your needs. Take a hard look at what systems you already have in place, what features your teams need to boost their performance and how much you're willing to spend, and most importantly the future road map and R&D spend.

If you would like to learn more about how other businesses have benefited by working with Alithya to implement Microsoft Dynamics 365 into their organizations, or if you would like more information about how Alithya can help your organization, visit: [alithya.com](http://alithya.com).

[Alithya.com](http://Alithya.com)

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# Sources

[/1.](#)

[Gartner classified Microsoft Dynamics 365 and Salesforce as leaders for CRM Customer Engagement](#)

[/2.](#)

[Comparison Chart](#)

[/3.](#)

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# About Alithya

ALITHYA GROUP INC. IS A LEADER IN STRATEGY AND DIGITAL TRANSFORMATION IN NORTH AMERICA. Founded in 1992, the Company counts on thousands of professionals in Canada, the United States and Europe. Alithya's integrated offering is based on four pillars of expertise: strategy services, application services, enterprise solutions and data and analytics. Alithya's Microsoft practice covers a wide array of capabilities, including Dynamics, Azure, IoT, AI, business and advanced analytics, digital solutions, application development and architecture.

