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XitForce

SalesForce to D365 Migration

Simplify your CRM with a seamless SalesForce to Dynamics 365 migration

September 22, 2023

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01

SalesForce to D365

Migration - drivers and benefits

Migration drivers

Flexible Hosting

- Multiple Deployment Options Private hosting, SaaS, on Prem, Cloud Platform options. SFDC only allows for one method – which is an on demand, multi tenant hosting solution
- Data Ownership In D365, the data belongs to you. If you'd like a more controlled setup, you can choose an on-premise solution

Support from SalesForce

- The lack of support from SalesForce can be a major challenge for organizations that use the platform
- In some cases, SalesForce support may only provide guidance on possible solutions rather than resolving the issues outright

Customizations

- SalesForce can be challenging to customize to meet the specific needs of different organizations and users.
- Highly customized, outdated legacy applications (Sales, Customer Service)

Data

- Smoother Data Pipelines, migration of Data Assets
- A lack of centralized data can lead to duplication of effort, errors, and missed opportunities
- Inaccurate, non-critical, and outdated reports and dashboards

Cost

- Licensing Costs SFDC Licenses are considerably more costly than D365 licenses.
- No hidden costs (mobile, offline access & knowledge base etc.)
- Data visualization backed by Power BI Firstly, Power BI pricing is significantly lower than SFDC Analytics Cloud.

Integration

- Robust Lead Nurturing with LinkedIn Integration D365 has native LinkedIn integration
- Dynamics 365 is the future of business productivity, and it's easy to see why with its seamless integration with the Microsoft ecosystem.

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Benefits of migrating to Microsoft Cloud

	Guiding Principles	Microsoft Cloud Capabilities
Transformational	• Going beyond lift and shift • Focus on Reduction of Technical Debt • Configure first, low code approach	• Interoperable & Synergized data, Infrastructure capabilities between Dynamics, Power Platform, Azure and M365
Automation Driven	• User centered Business Process Design • Automation of Manual Processes • Leverage of entire Microsoft cloud stack • Toolset driven Data Migration	• Tailored experiences and form factors to rive adoption & usability • Low code/Zero code automation through Power Automate
Insights Driven	• Optimized design for Reporting • Leverage out of the box AI • Optimize Integration options	• Multiple reporting driven options through Power BI, Dashboards, Views and Reports • Power Automate & Azure Services for Integration • Spectrum of AI Capabilities from out of the box Dynamics to Azure ML
Governance Oriented	• Planning for Governance • Leverage Adoption and Change Management • Optimized Deployment Planning	• Leverage Microsoft Learn • Leverage Azure Devops driven Application Lifecycle Management

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The world’s connected business cloud

1

Sales & Marketing

Dynamics 365 Sales

Dynamics 365 Marketing

Dynamics 365 Customer Insights

LinkedIn Sales Navigator

Dynamics 365 Customer Voice

Dynamics 365 Product Visualize

2

Service

Dynamics 365 Customer Service

Dynamics 365 Field Service

Dynamics 365 Customer Voice

Azure IoT Central

Dynamics 365 Remote Assist

Dynamics 365 Guides

3

Finance & Operations

Dynamics 365 Finance

Dynamics 365 Supply Chain Management

Dynamics 365 Business Central

Dynamics 365 Human Resources

Dynamics 365 Project Operations

Dynamics 365 Fraud Protection

Dynamics 365 Guides

Dynamics 365 Intelligent Order Management

4

Commerce

Dynamics 365 Commerce

Dynamics 365 Fraud Protection

Dynamics 365 Customer Insights

Dynamics 365 Connected Store

Power Platform | Power BI | Power Apps | Power Automate | Power Virtual Agents

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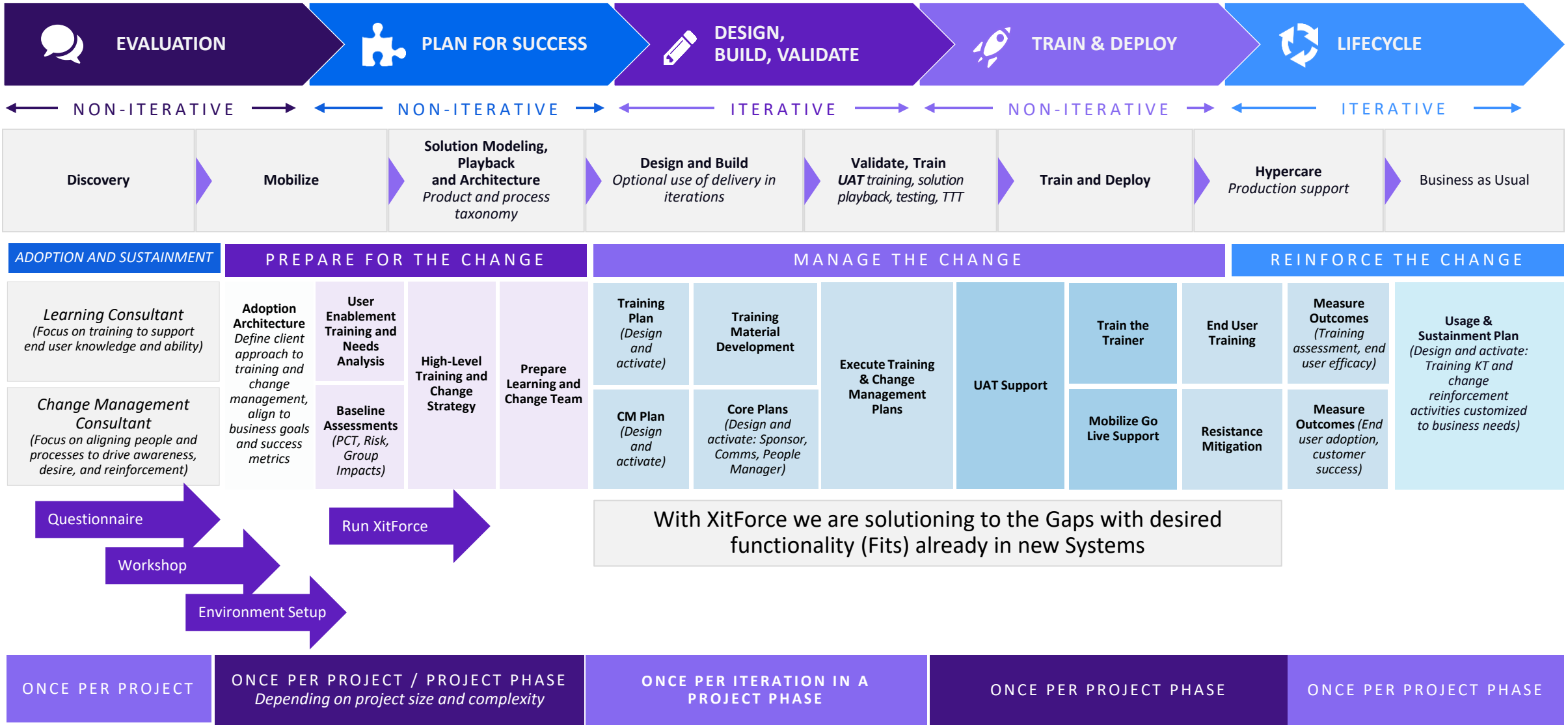
02

Our Approach

Consultative and lean

The high-level approach in “proven process”



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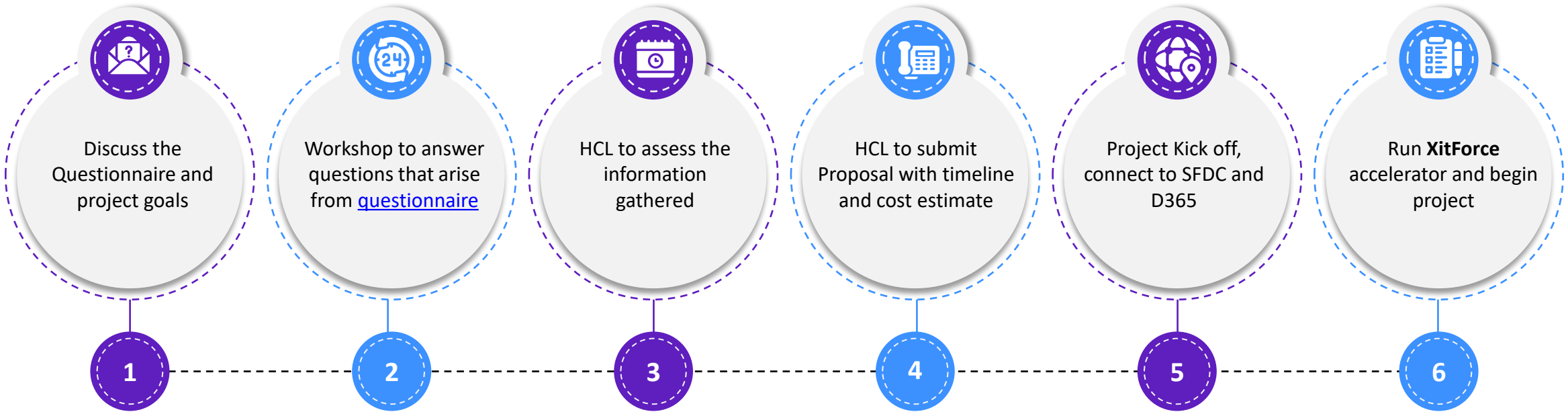
Typical steps in discovery and analysis



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Our technical approach

Extract

- Extract Entity Model from SFDC. Export to a csv File
- Extract Data from SFDC into staging environment

1

Transform

- Transform data to reflect D365 entity model
- Create Field Type Mapping records stored in D365
- Create D365 Solution and Publisher
- Configure Logging verbosity and persistence
- Select Entities and Fields to be migrated

2

Load

- Execute migration tool, create entities, fields and relationships.
- Load data from staging environment
- Import Custom Fields on:
  - Account, Contact, Lead, Opportunity, Case, Quote, Order, Campaign
- Evaluate log files and resolve failure

3

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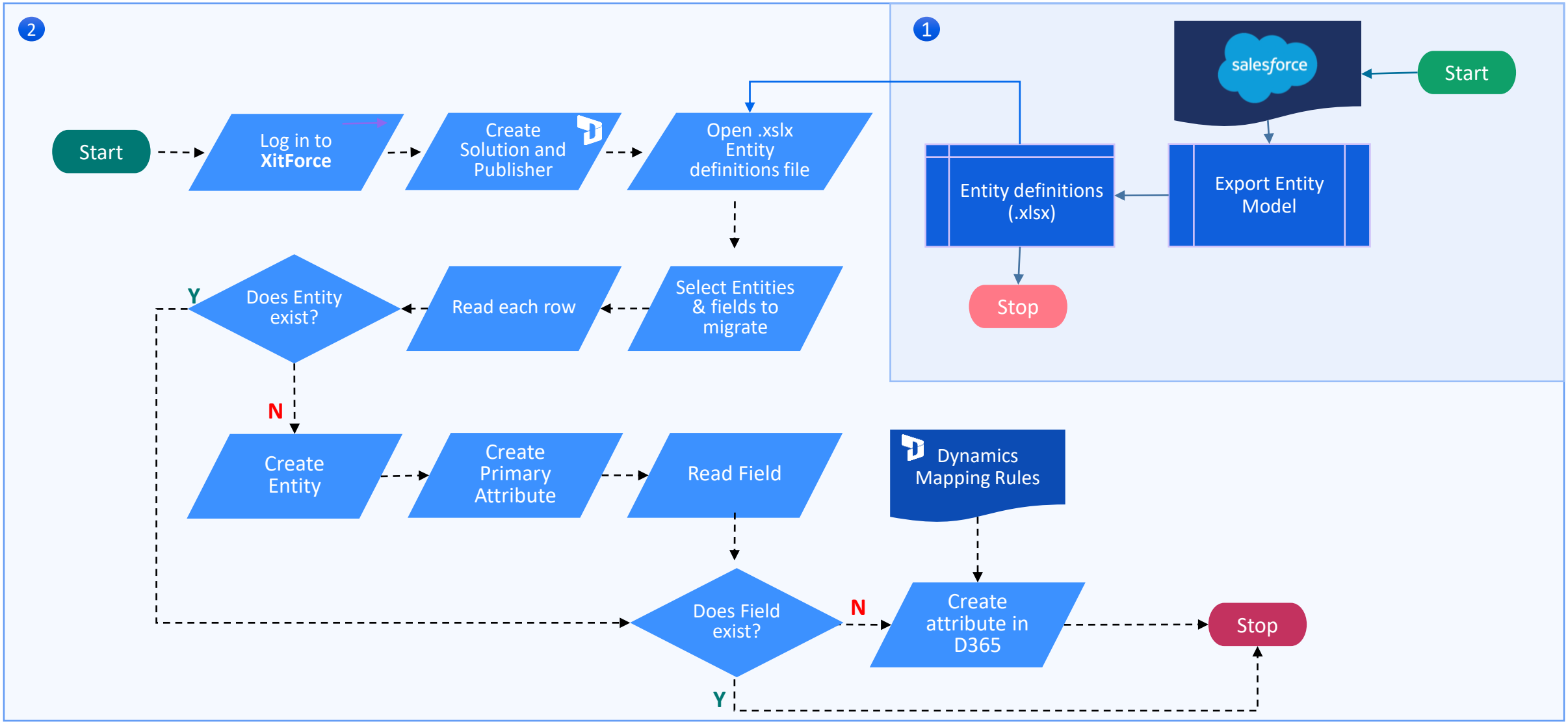
XitForce – replicating source structure at target

Optional for Sales



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WIP

XitForce – how is it different?

Features	Available Tools in Market	HCLTech's XitForce Suite
Discovery component to understand the current structure at source, i.e., SalesForce	●	●
Replicate structure, relationships at target (D365) and copy data from source (D365) to target (D365)	●	●
Comprehensive report on passed and failed cases (along with reasons)	●	●
Integration with market leading tools, e.g., add, add, etc.	○	●
Rerun failed cases	○	●
Run selected objects or attributes (rows or columns) for due diligence	○	●

○ Not or partially available ● Available

Sample screenshots

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Elements of Execution

Common risks and mitigation strategy

CATEGORY	DESCRIPTION	IMPACT	PROBABILITY	MITIGATION STRATEGY
Functional	• Not building existing SFDC functionality correctly	High	Medium	• Using XitForce to automatically migrate functionality
Technical	• Not creating the columns to exact specifications causing issues with data migration and usability	High	Medium	• Using XitForce to automatically migrate functionality to exacting specifications
Operational	• Dedicated Environments for migration not available or difficult to obtain • Entity Model Changes during the migration track • Security, resources unable to access the data., • What happened, no visibility into what succeeded and what failed	High	Medium	• Provision environments ahead of time • Create approval process for entity model changes once the base model is defined • Ensure migration team members have correct privileges to access required data.. • Adding logging and reporting as a requirement. Migration verification tests
Comms	• Lack of planning around Comms management	High	Medium	• Identify a Communication management owner before the project begins
Change	• User Acceptance	High	High	• Involve key stakeholders at the project inception for their buy-in.

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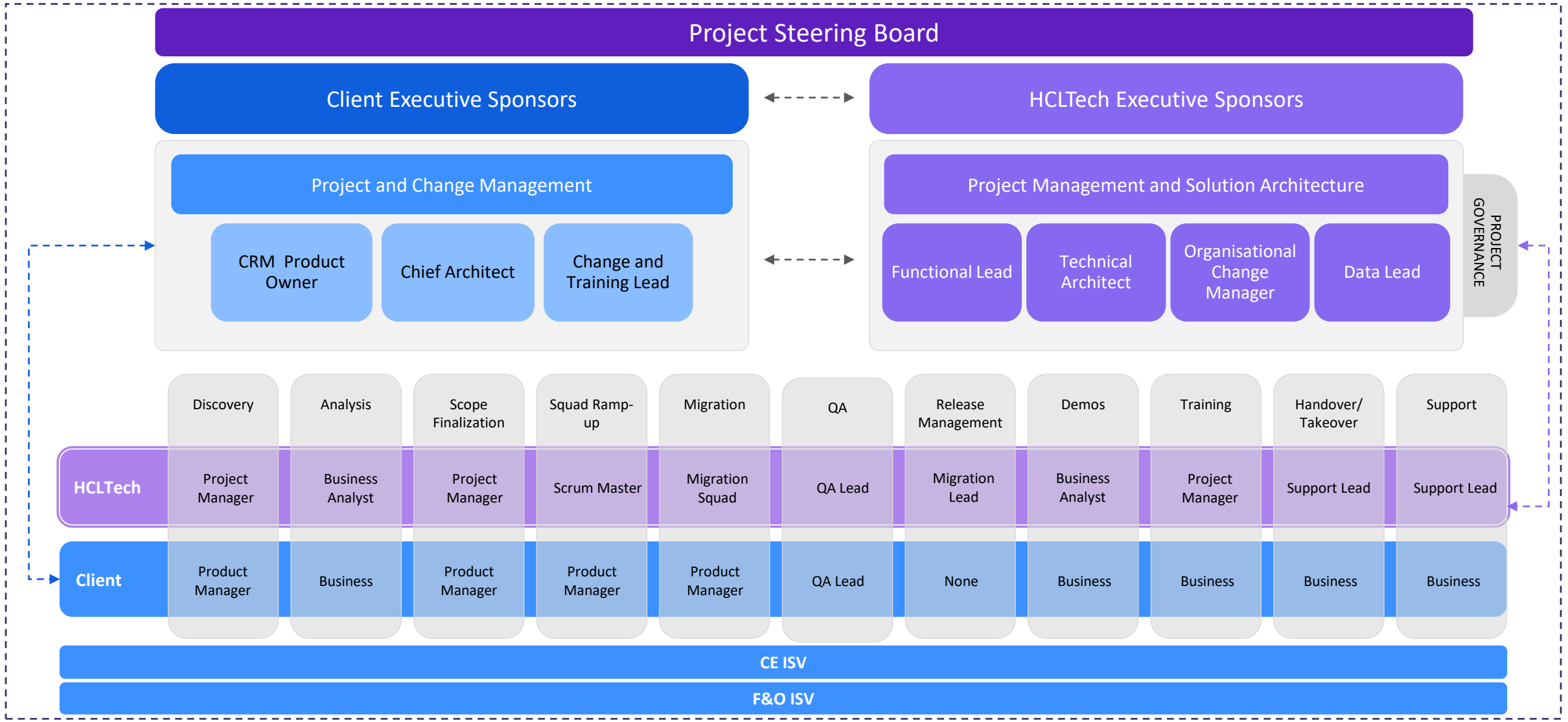
A typical operating model

WIP



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Lessons Learned

AREA	PLAN OF ACTION
SME availability	Blocking SME calendars for workshops and Migration Verification Testing
In an Agile environment, Migration is part of a larger initiative with multiple tracks, i.e. Development, Integration, Infrastructure. All tracks running in parallel with different cadences but all dependent on entity model.	Requires a strict communication and approval process for entity model changes. Add a Migration resource to multiple scums. Creating a Scrum of Scrums (SOS) for all tracks to share entity model requirements.
Neglecting to share one or more Solution and Publisher across multiple tracks and teams. Resulting in an inconsistent entity model with multiple prefixes.	Early adoption of common Solutions and Publishers creates a common nomenclature across all tracks.
Long running migrations can run for 24 hours or more. Blocking access for that long is not always an option.	Consider phased onboarding as opposed to a single flick of the switch. Rollout by region or feature based.
Loss of testing data with migration incremental build. Functional team has to re-enter testing data	Create micro data import scripts up front add updating the scripts to the migration build.

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