

# HitForce

## SalesForce to D365 Migration

Simplify your CRM with a seamless SalesForce to Dynamics 365 migration

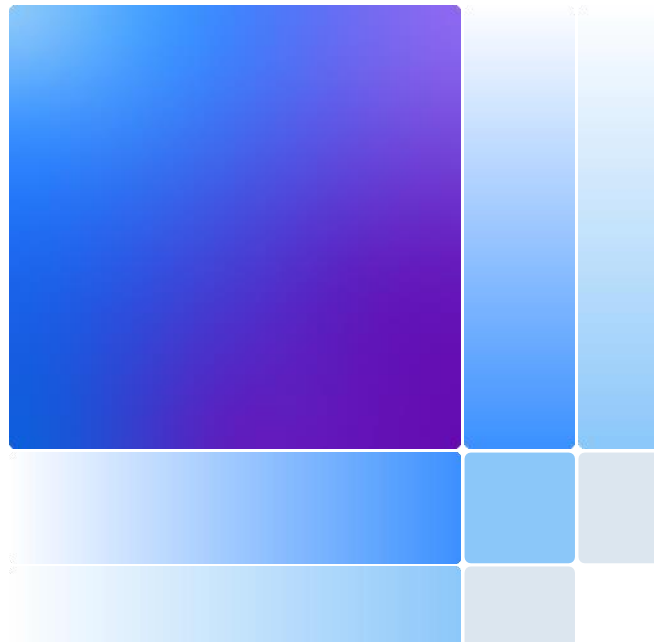
September 22, 2023



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- Highly customized, outdated legacy applications (Sales, Customer Service)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- Inaccurate, non-critical, and outdated reports and dashboards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.



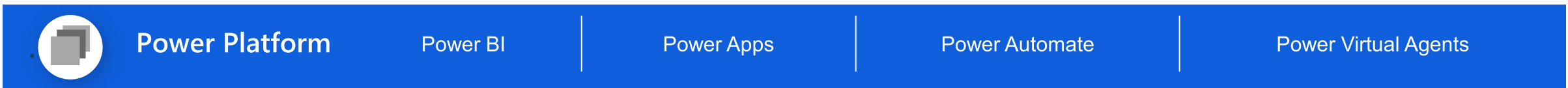
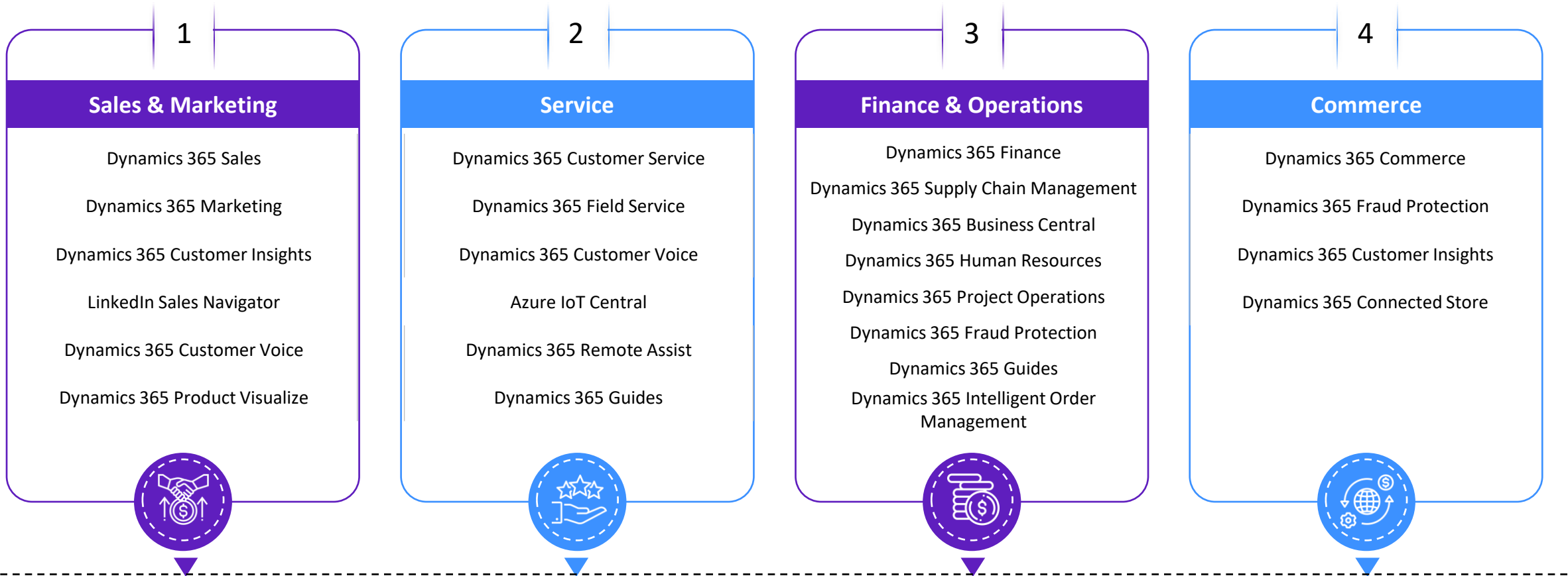
## Integration

- 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.

# Benefits of migrating to Microsoft Cloud

	 <b>Guiding Principles</b>	 <b>Microsoft Cloud Capabilities</b>
 <b>Transformational</b>	<ul style="list-style-type: none"> <li>• Going beyond lift and shift</li> <li>• Focus on Reduction of Technical Debt</li> <li>• Configure first, low code approach</li> </ul>	<ul style="list-style-type: none"> <li>• Interoperable &amp; Synergized data, Infrastructure capabilities between Dynamics, Power Platform, Azure and M365</li> </ul>
 <b>Automation Driven</b>	<ul style="list-style-type: none"> <li>• User centered Business Process Design</li> <li>• Automation of Manual Processes</li> <li>• Leverage of entire Microsoft cloud stack</li> <li>• Toolset driven Data Migration</li> </ul>	<ul style="list-style-type: none"> <li>• Tailored experiences and form factors to drive adoption &amp; usability</li> <li>• Low code/Zero code automation through Power Automate</li> </ul>
 <b>Insights Driven</b>	<ul style="list-style-type: none"> <li>• Optimized design for Reporting</li> <li>• Leverage out of the box AI</li> <li>• Optimize Integration options</li> </ul>	<ul style="list-style-type: none"> <li>• Multiple reporting driven options through Power BI, Dashboards, Views and Reports</li> <li>• Power Automate &amp; Azure Services for Integration</li> <li>• Spectrum of AI Capabilities from out of the box Dynamics to Azure ML</li> </ul>
 <b>Governance Oriented</b>	<ul style="list-style-type: none"> <li>• Planning for Governance</li> <li>• Leverage Adoption and Change Management</li> <li>• Optimized Deployment Planning</li> </ul>	<ul style="list-style-type: none"> <li>• Leverage Microsoft Learn</li> <li>• Leverage Azure Devops driven Application Lifecycle Management</li> </ul>

# The world's connected business cloud

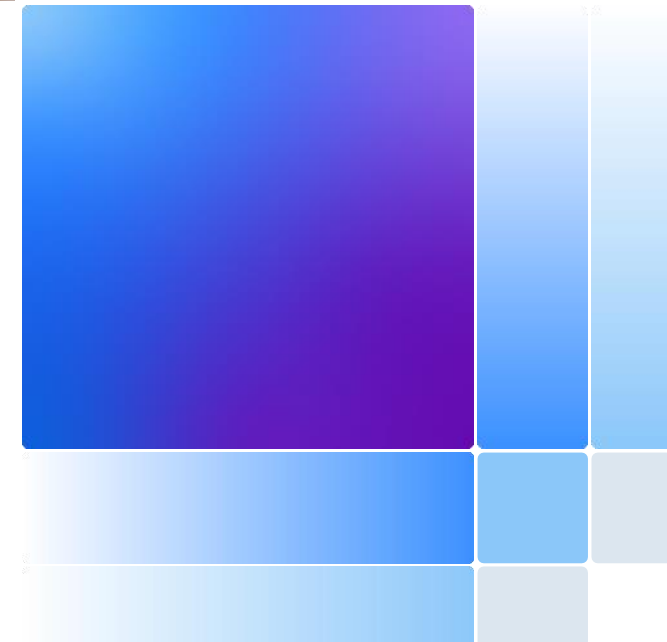




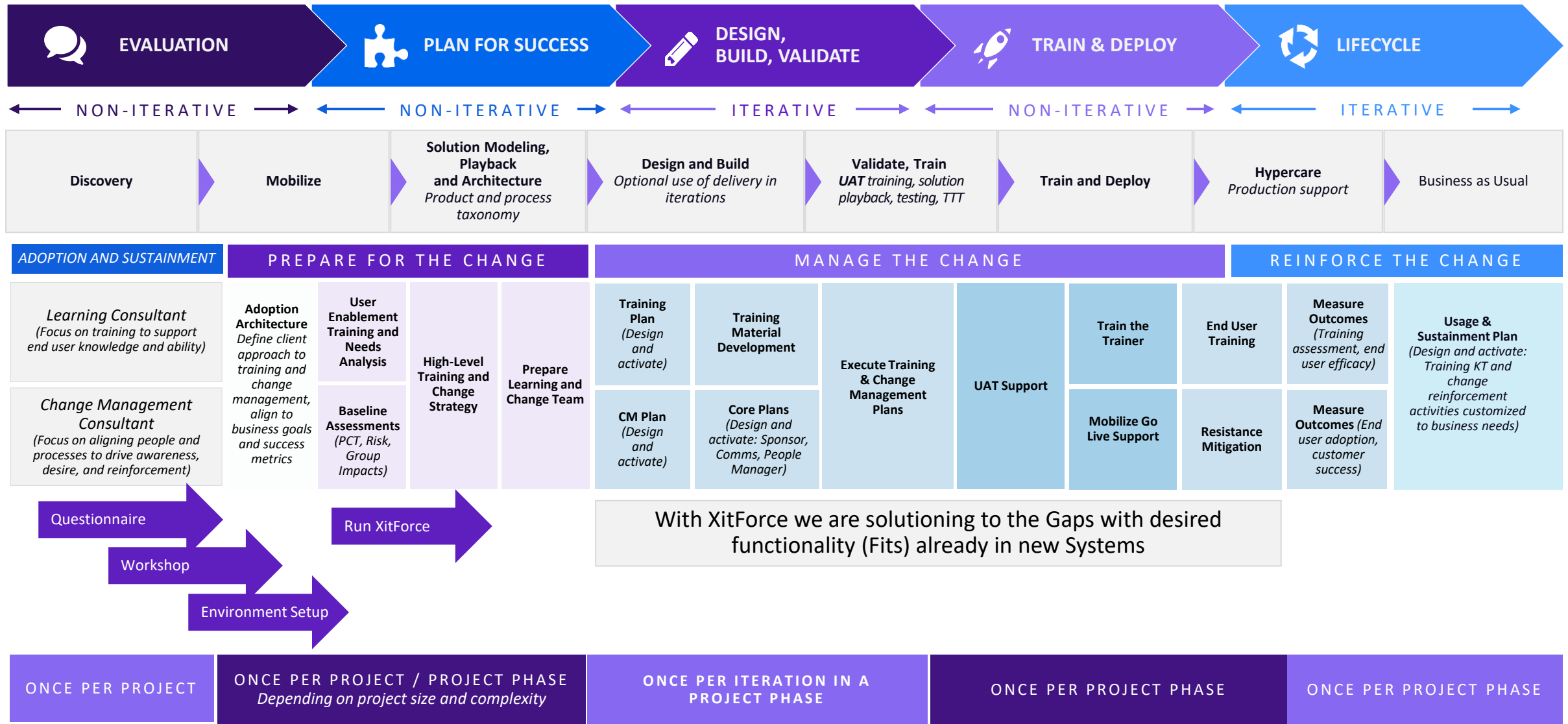
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# Our Approach

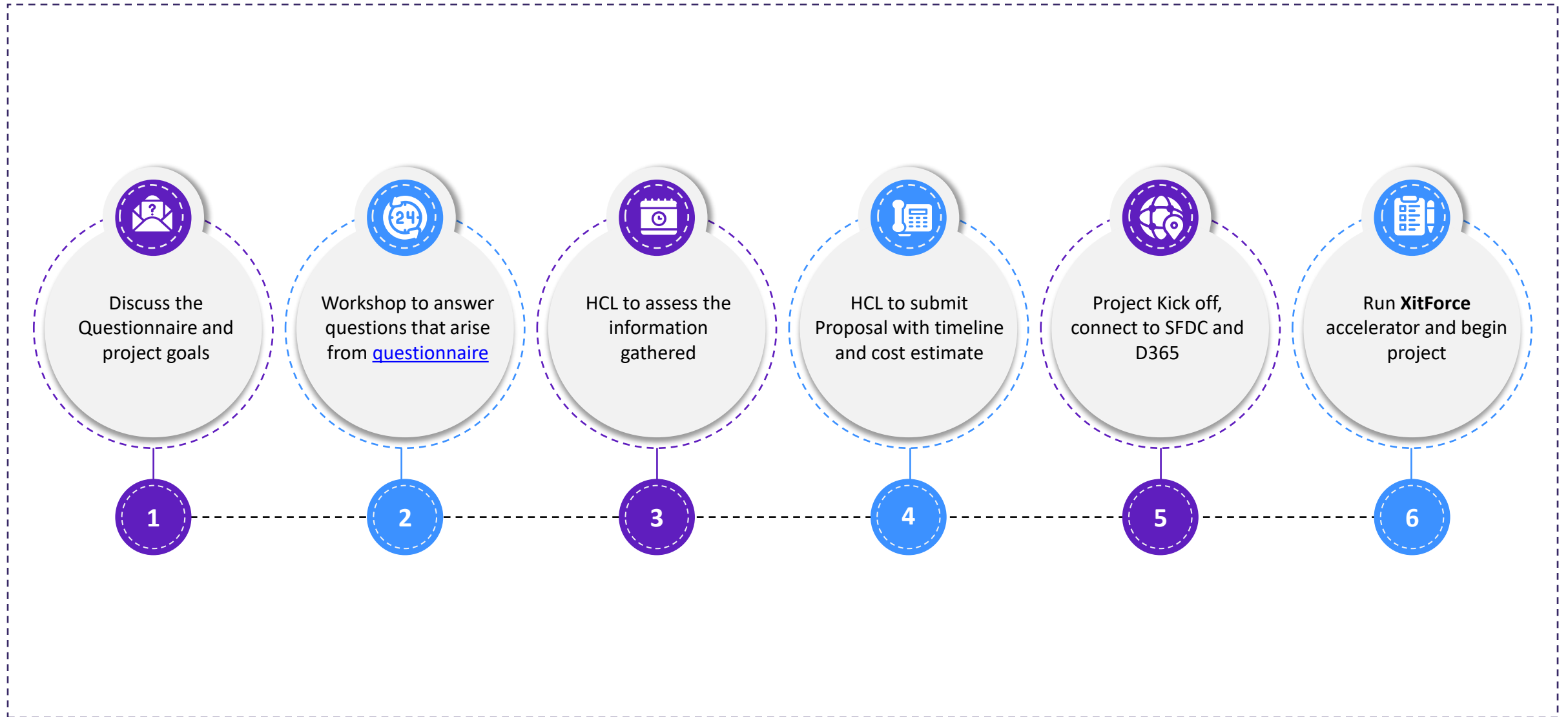
Consultative and lean



# The high-level approach in “proven process”



# Typical steps in discovery and analysis





# Our technical approach



## Extract

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

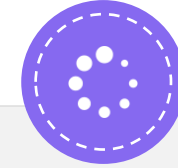
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## Transform

- 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

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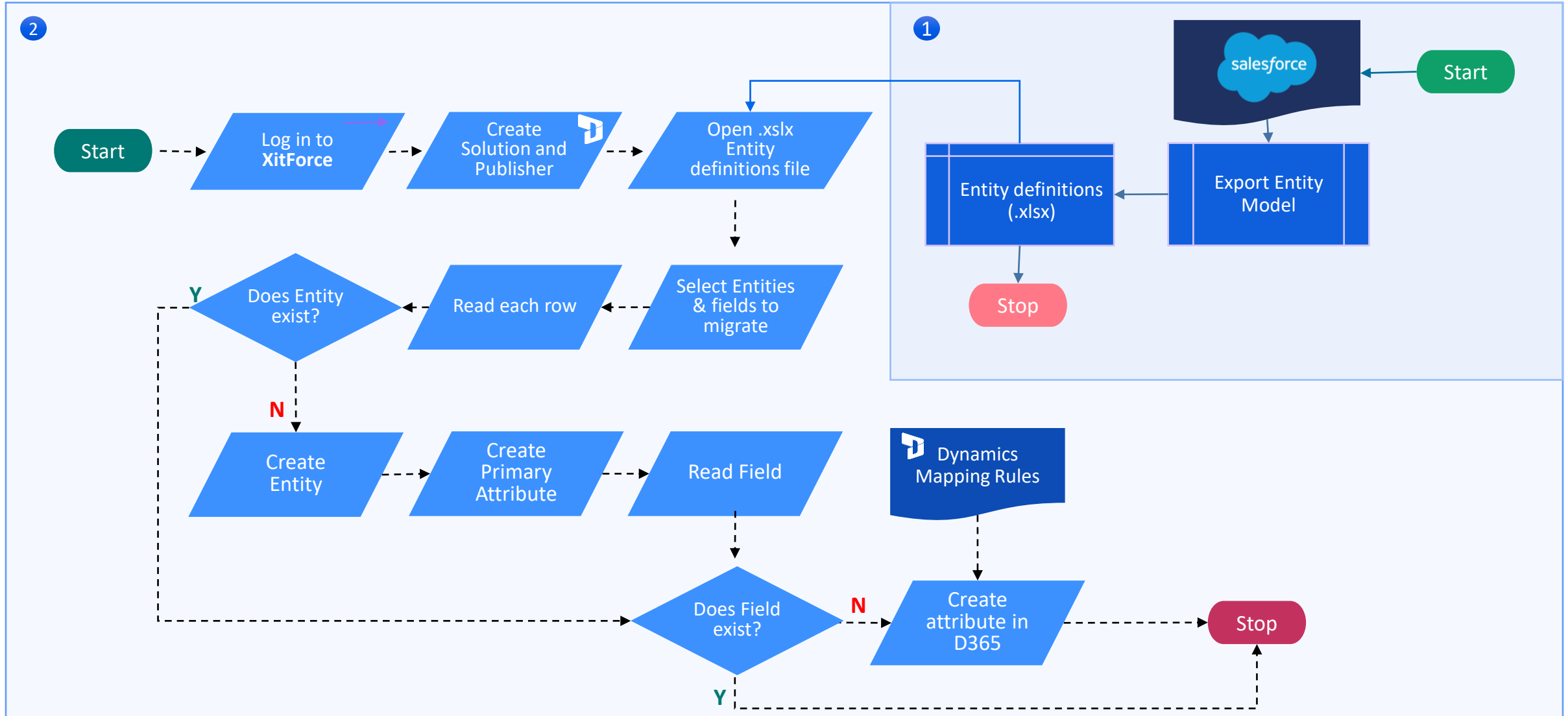


## Load













- 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

# xitForce – replicating source structure at target



# HitForce – how is it different?

Features	Available Tools in Market	HCLTech's HitForce 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		

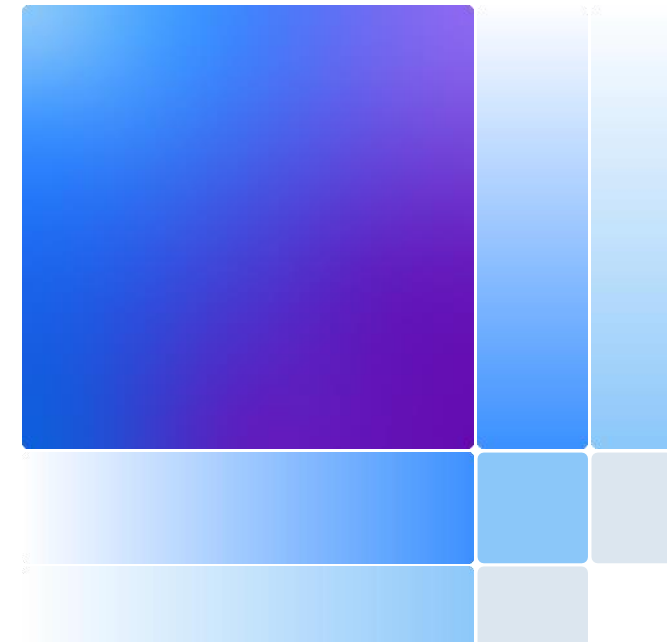
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[Sample screenshots](#)








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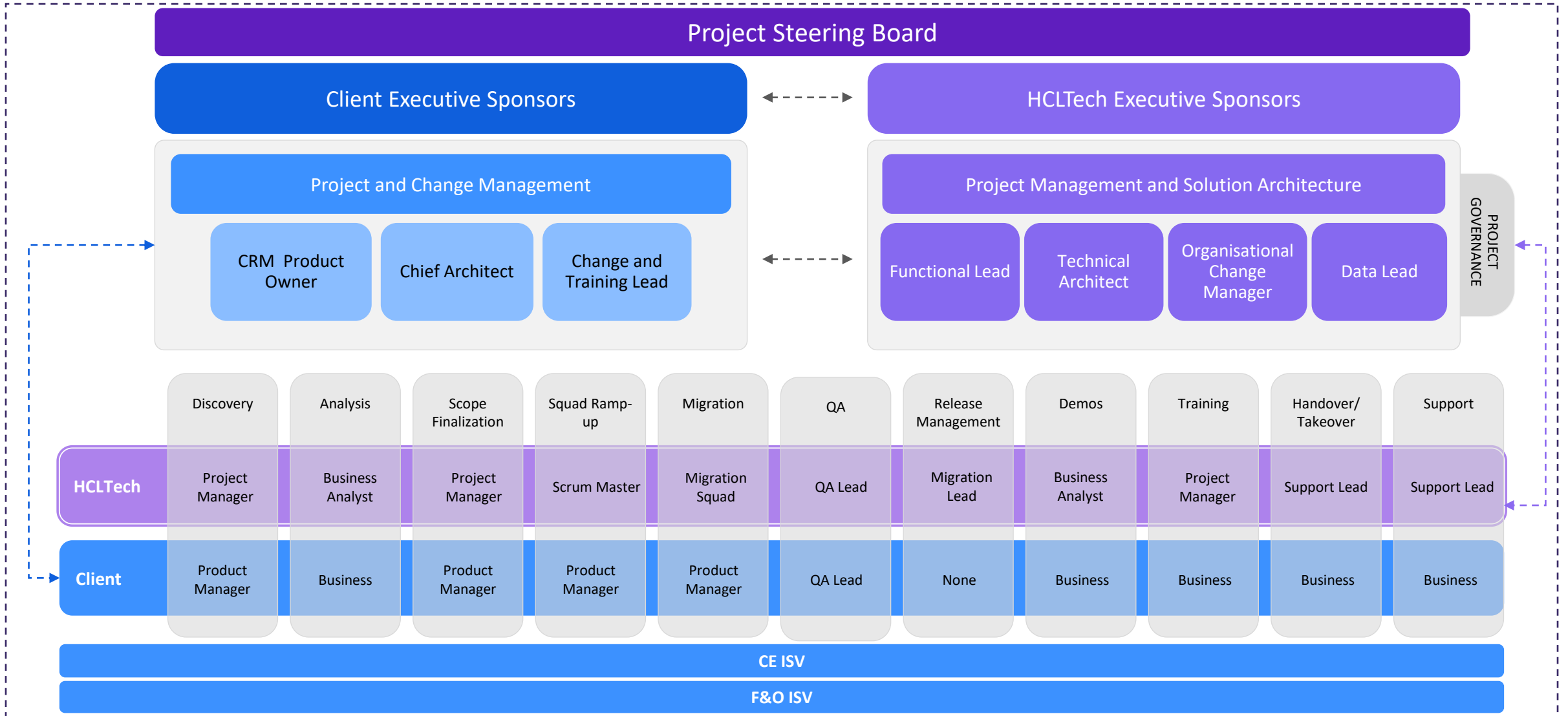
# Elements of Execution





# Common risks and mitigation strategy

CATEGORY	DESCRIPTION	IMPACT	PROBABILITY	MITIGATION STRATEGY
 <b>Functional</b>	<ul style="list-style-type: none"> <li>Not building existing SFDC functionality correctly</li> </ul>	High	Medium	<ul style="list-style-type: none"> <li>Using XitForce to automatically migrate functionality</li> </ul>
 <b>Technical</b>	<ul style="list-style-type: none"> <li>Not creating the columns to exact specifications causing issues with data migration and usability</li> </ul>	High	Medium	<ul style="list-style-type: none"> <li>Using XitForce to automatically migrate functionality to exacting specifications</li> </ul>
 <b>Operational</b>	<ul style="list-style-type: none"> <li>Dedicated Environments for migration not available or difficult to obtain</li> <li>Entity Model Changes during the migration track</li> <li>Security, resources unable to access the data.,</li> <li>What happened, no visibility into what succeeded and what failed</li> </ul>	High	Medium	<ul style="list-style-type: none"> <li>Provision environments ahead of time</li> <li>Create approval process for entity model changes once the base model is defined</li> <li>Ensure migration team members have correct privileges to access required data..</li> <li>Adding logging and reporting as a requirement. Migration verification tests</li> </ul>
 <b>Comms</b>	<ul style="list-style-type: none"> <li>Lack of planning around Comms management</li> </ul>	High	Medium	<ul style="list-style-type: none"> <li>Identify a Communication management owner before the project begins</li> </ul>
 <b>Change</b>	<ul style="list-style-type: none"> <li>User Acceptance</li> </ul>	High	High	<ul style="list-style-type: none"> <li>Involve key stakeholders at the project inception for their buy-in.</li> </ul>

# A typical operating model



# Lessons Learned

 <b>AREA</b>	 <b>PLAN OF ACTION</b>
SME availability	Blocking SME calendars for workshops and Migration Verification Testing
<p>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.</p>	<p>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.</p>
<p>Neglecting to share one or more Solution and Publisher across multiple tracks and teams. Resulting in an inconsistent entity model with multiple prefixes.</p>	<p>Early adoption of common Solutions and Publishers creates a common nomenclature across all tracks.</p>
<p>Long running migrations can run for 24 hours or more. Blocking access for that long is not always an option.</p>	<p>Consider phased onboarding as opposed to a single flick of the switch. Rollout by region or feature based.</p>
<p>Loss of testing data with migration incremental build. Functional team has to re-enter testing data</p>	<p>Create micro data import scripts up front add updating the scripts to the migration build.</p>

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