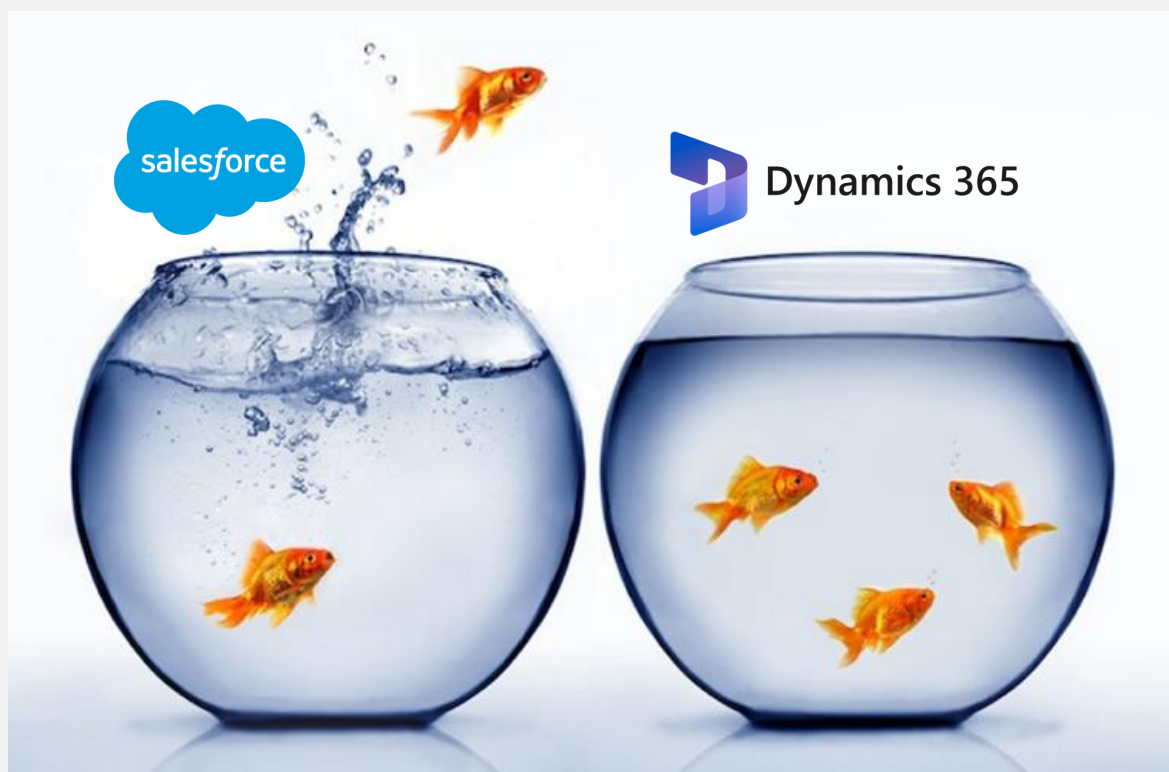




Migrating from Salesforce CRM to Dynamics 365 Sales

Exploring the benefits of CRM modernization



2025

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Unlock Strategic Growth by Modernizing Your CRM Platform

Today's market demands more than incremental CRM upgrades... it demands a platform that fuels intelligent, AI-driven growth.

By migrating from Salesforce Sales Cloud to Microsoft Dynamics 365 Sales, enterprises can consolidate onto a unified Microsoft ecosystem, reduce CRM operating costs by 30-50%, and gain immediate access to next-generation AI capabilities with Copilot, built directly into their daily workflows.

This strategic move future-proofs your sales organization, enabling faster decision-making, predictive insights, and streamlined collaboration across teams, all while unlocking substantial budget for reinvestment in innovation and revenue acceleration.

Now is not the time to maintain the status quo... it's time to transform your CRM from a cost center into a competitive advantage!



Unlocking Value: Migrating from Salesforce Sales Cloud to Microsoft Dynamics 365 Sales

Executive Summary

In today's climate, many enterprises are re-evaluating their CRM platform much like a family outgrowing an old minivan and seeking a modern upgrade. Moving from Salesforce Sales Cloud to Microsoft Dynamics 365 Sales can be that “upgrade,” unlocking strategic, technical, and financial value. This whitepaper outlines how consolidating onto the Microsoft cloud platform provides seamless integration across tools, **AI-readiness** with built-in Copilot intelligence, and significant **licensing cost savings**. Key benefits include



Platform Consolidation

Dynamics 365 Sales is part of a unified Microsoft ecosystem (spanning Azure, Microsoft 365, Teams, Power Platform, etc.), eliminating the fragmented patchwork of add-ons and third-party tools often required with Salesforce ([Salesforce Acquisitions: Innovation or Integration Headache?](#)). This integration reduces complexity and boosts user productivity from day one.



AI-First Capabilities

With Microsoft's multi-billion-dollar R&D investments driving innovation, Dynamics 365 comes with **Copilot** AI assistants out-of-the-box. Sales teams gain real-time insights, AI-guided content generation, and predictive analytics baked into their workflow – **no separate AI licenses needed**.



Cost Efficiency

Organizations could cut CRM costs by 30–50% by switching to Dynamics 365 ([Salesforce to Dynamics 365 Sales Migration - Netwoven](#)). Microsoft's simplified licensing and bundling means fewer surprise add-on fees. For comparable functionality, Salesforce often runs nearly 3× the cost per user once you factor in required add-ons.

In short, migrating to Dynamics 365 Sales enables enterprises to future-proof their CRM with a modern, AI-powered platform while yielding substantial ROI and lower total cost of ownership.



Section 1: Why Enterprises Are Rethinking Salesforce

For years, Salesforce has been the dependable family minivan of CRM, feature-rich and familiar. But as business needs evolve, many enterprises feel they've outgrown Salesforce and are eyeing a sleeker, more powerful ride.

Several factors are driving this reevaluation:



- ✓ **Rising Costs (Licenses & Integration):** Salesforce's licensing costs have steadily climbed. In 2023 Salesforce imposed a ~9% price hike, bringing an Enterprise Sales Cloud license to about \$165 per user/month ([Salesforce Increases Price After a Seven-year-long Hiatus: What You Need to Know](#)). But licenses are just the tip of the iceberg – advanced features (AI insights, analytics) often require costly add-ons. For example, adding Einstein analytics or conversation intelligence can tack on hundreds more per user. Moreover, integrating Salesforce with other systems (ERP, productivity apps, etc.) may require purchasing and maintaining additional tools (e.g. MuleSoft for integrations, Tableau for BI), further inflating the total cost. These rising direct and indirect costs are straining budgets.
- ✓ **Complexity of Administration:** Salesforce's flexibility can become a double-edged sword. Enterprises often accumulate a maze of custom objects, Apex code, and third-party plugins over years. This "sprawl" makes administration and upgrades increasingly complex and expensive. It's common to need dedicated Salesforce experts just to manage routine changes. In fact, the platform's very strength – deep customizability – can lead to over-customization, resulting in a system that is overly complex and less effective for core needs ([Microsoft CRM vs Salesforce CRM: Which is Better? - 365mechanix](#)). The administrative overhead (constant tuning, resolving integration issues, managing multiple orgs) is prompting companies to seek a simpler approach.

- ✓ **Fragmented Ecosystem & AI Silos:** Salesforce's solution stack has grown via acquisitions (Slack for collaboration, Tableau for analytics, MuleSoft for integration, etc.), but integrating these pieces has proven challenging (Salesforce Acquisitions: Innovation or Integration Headache?). Customers often face fragmented user experiences and disjointed data silos because these tools weren't natively designed as one platform. For example, using Salesforce's AI (Einstein) might not seamlessly connect with data in Slack or Tableau without custom work. This fragmented AI ecosystem contrasts with Microsoft's unified approach. Companies are increasingly valuing a single, cohesive platform for CRM, communication, and analytics, which Salesforce's patchwork struggles to provide.
- ✓ **Common Pain Points:** Beyond these strategic issues, everyday pain points plague Salesforce users. Sales reps often complain about context-switching between Salesforce and other apps (email, calendars, spreadsheets) to get their job done. If your business runs on Microsoft 365 for email and collaboration, Salesforce can feel like an island. Data duplication and integration gaps mean users lack a 360° customer view. Many organizations also find user adoption lagging when the CRM isn't fully utilized because it's not naturally woven into daily workflows (e.g. updating Salesforce requires extra effort versus Dynamics 365 which can log activities directly from Outlook or Teams). These issues are pushing enterprises to rethink whether the status quo CRM is truly enabling their teams or holding them back.

In summary, **the cost and complexity of Salesforce** – from escalating fees to admin burden and siloed add-ons – have many businesses saying it's time for a change. Like upgrading from a trusty old minivan to a modern vehicle with better mileage and new tech, organizations are looking for a CRM that fits their next stage of growth.



Section 2: The Microsoft Advantage – An Integrated, AI-First Platform

Microsoft Dynamics 365 Sales offers a compelling alternative by delivering an **integrated, AI-first platform** that addresses Salesforce's shortcomings.

Here's how Dynamics 365 Sales stands out:



- ✓ **Unified Ecosystem and Seamless Integration:** Unlike Salesforce, which often requires bolting on external products, Dynamics 365 is inherently part of the broader Microsoft universe. This means native integration with the tools employees already use daily. For instance, Dynamics 365 connects effortlessly with **Microsoft 365 (Office)** apps, **Outlook email**, **Microsoft Teams**, **SharePoint**, and **Power Platform** ([Salesforce to Dynamics 365 Sales Migration - Netwoven](#)) ([Microsoft CRM vs Salesforce CRM: Which is Better? - 365mechanix](#)). A sales rep can update CRM opportunities directly from an Outlook email or Teams chat, and colleagues across the company can access CRM data through Teams without needing a separate license. The result is a 360° customer view and collaborative workflow that Salesforce struggles to match. Organizations no longer deal with kludgy integrations or context-switching between disparate systems... Dynamics 365 provides a one-stop, familiar interface that boosts user adoption and productivity from day one ([Salesforce to Dynamics 365 Sales Migration - Netwoven](#)).
- ✓ **Dynamics 365 Sales vs. Salesforce Sales Cloud – Feature Alignment:** In terms of core functionality, Dynamics 365 and Salesforce both cover the CRM essentials (accounts, contacts, lead and opportunity management, pipeline tracking, etc.). However, Dynamics 365 often delivers more out-of-the-box without requiring additional modules.

- ✓ For example, sales forecasting, lead scoring, and basic analytics are built into Dynamics 365 Sales (especially with Sales Insights enabled), whereas Salesforce might require the **Einstein add-on** for comparable capabilities. Moreover, Microsoft's platform extends beyond CRM into ERP (finance, supply chain, etc.) within the same Dynamics family.

If an enterprise wants to unify CRM and back-office operations, Microsoft offers that in one integrated suite. Salesforce, by contrast, focuses on CRM and relies on third-party solutions or AppExchange products for ERP or industry-specific needs. This breadth of Dynamics 365 can future-proof a company's investments, allowing easier expansion into new functional areas without needing an entirely new platform.

- ✓ **Copilot: AI Built-In from Day One:** A marquee advantage of moving to Dynamics 365 Sales is immediate access to **AI-powered sales assistance** via Microsoft **Copilot**. Microsoft has poured resources into AI (spending **\$27B on R&D in 2023 vs Salesforce's \$5B**, and it shows. Dynamics 365 Copilot, built on OpenAI's GPT, is embedded throughout the Sales application. Right out-of-the-box, sellers can leverage Copilot to **draft personalized emails, generate call summaries, recommend next-best actions, and forecast deal outcomes** using predictive analytics ([Microsoft CRM vs Salesforce CRM: Which is Better? - 365mechanix](#)).

These AI features are not limited trials or costly add-ons as they're included for Dynamics users. In contrast, Salesforce's AI (Einstein GPT and the newer Einstein Copilot announced in 2024) often comes at an extra cost or is still catching up in delivery. With Dynamics 365, organizations get an **AI-first CRM** where every user, from reps to managers, has a "co-pilot" to automate tasks and surface insights. This baked-in AI can dramatically shorten sales cycles and improve forecast accuracy, as the system actively helps users work smarter.

- ✓ **Native Microsoft 365, Teams, and SharePoint Integration:** Because Dynamics 365 is part of the Microsoft Cloud, it feels like a natural extension of the Office tools most enterprises rely on. **Document management** is a good example: Dynamics can automatically store and surface sales documents via SharePoint, so teams are always working on the latest proposal or contract without leaving the CRM. Collaboration is also streamlined, whereas a sales team can pin a Dynamics 365 opportunity to a Microsoft Teams channel, chat about it in real-time, and even edit CRM records from Teams. All the while, **Azure Active Directory** provides single sign-on and consistent identity management across Dynamics and other apps. The tight coupling of CRM with communication and productivity software means higher user engagement. One industry comparison noted that for organizations already using Office 365, **Dynamics 365 is the obvious choice for ease of use and native integration** with their existing ecosystem.



- ✓ **Security, Compliance, and Reliability:** Microsoft's enterprise security and compliance standards also bolster the Dynamics 365 advantage. All data resides in Azure datacenters with robust encryption, identity protection, and compliance certifications (GDPR, HIPAA, SOX, and more). IT leaders often find comfort in leveraging the same security model and admin center for Dynamics as for their other Microsoft apps. This unified administration (for user provisioning, data governance, DLP policies, etc.) simplifies oversight compared to managing separate systems for Salesforce and other tools. Moreover, Microsoft's cloud reliability and global presence ensure that a move to Dynamics 365 meets enterprise-grade SLAs and performance needs worldwide.

In short, the Microsoft advantage is about unity and intelligence: one connected platform, infused with cutting-edge AI, that spans the breadth of business needs. Dynamics 365 Sales isn't just a CRM; it's a key piece of an integrated digital estate, ready to drive collaboration and growth in ways a siloed Salesforce environment cannot.



Section 3: Cost Savings & Licensing Simplification

One of the most compelling reasons decision-makers turn to Dynamics 365 Sales is the potential for major cost savings and a simpler licensing model. When comparing Salesforce vs. Microsoft, the financial difference can be striking.



Offers a wide range of add-ons, allowing businesses to tailor the CRM to their specific needs. However, these add-ons can significantly increase the total cost per user.



Dynamics 365

Provides a more cost-effective solution with many AI and analytics features included in the base license, reducing the need for additional purchases.

Below is an illustrative comparison of licensing needs for an enterprise-grade CRM deployment on each platform:



Capability	Salesforce Sales Cloud (Enterprise)	Microsoft Dynamics 365 Sales (Enterprise)
Base Sales CRM License	~\$165 per user/month paid annually	\$105 per user/month paid annually (full Sales app)
AI & Sales Intelligence	+ \$75/user (Einstein Add-on)	Included (AI insights built-in)
Conversation Intelligence (Calls/Emails AI analysis)	+ \$50/user	Included (built-in Sales Copilot features)
Analytics & BI	~\$75/user (Tableau CRM license)	\$20/user (Power BI Pro) or existing enterprise BI
Approx. Total per user	\$315+ per user/month	\$125 per user/month

Source: [Salesforce Sales Pricing | Salesforce US](#) , [Sales Pricing | Microsoft Dynamics 365](#)

Table: Rough license cost comparison for equivalent functionality. Microsoft's Dynamics 365 includes many capabilities out-of-the-box that require extra fees in Salesforce, resulting in a significantly lower total cost per user.

As the table highlights, achieving feature parity with Dynamics 365 often means **a Salesforce user pays nearly 3× more** when all the add-ons are factored in. These economics are driving CFOs and CIOs to reconsider their CRM spend. Moreover, Microsoft's licensing structure tends to be **more straightforward and flexible**.

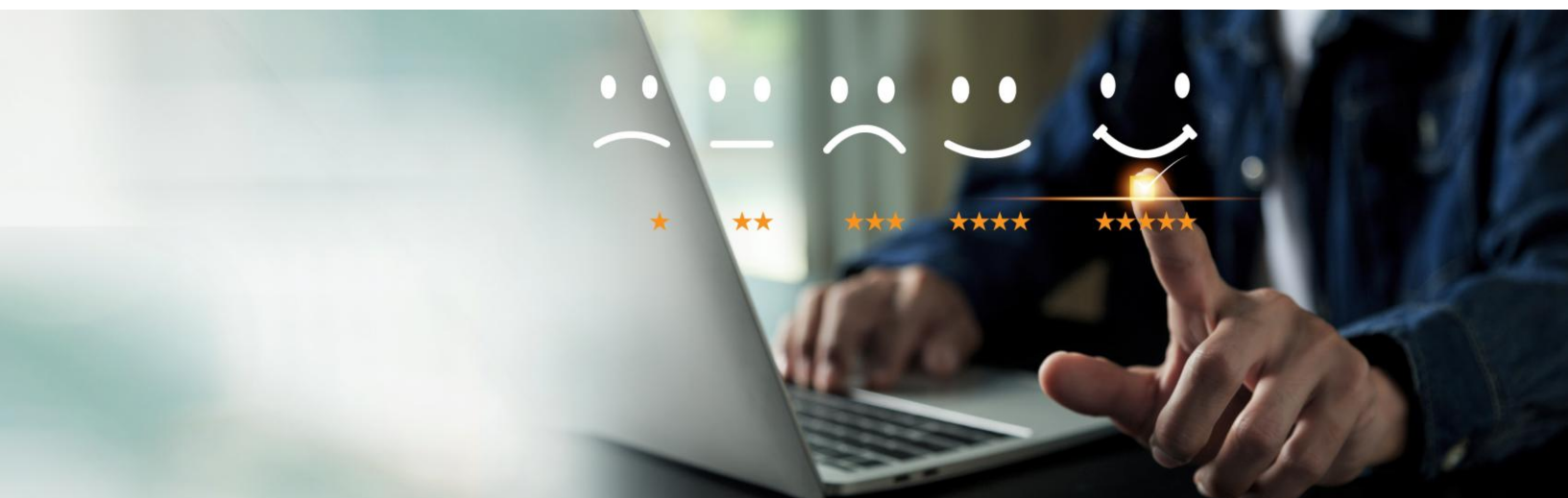
Some notable cost advantages of the Microsoft model include:

- ✓ **Bundled Value and Discounted Add-ons:** Microsoft allows organizations to bundle licenses and offers an “attach” pricing model. For instance, if you've purchased a base Dynamics 365 app (like Sales), you can add another Dynamics app (like Customer Service or Marketing) for a significant discount on the same user. Salesforce, in contrast, often requires full price for each cloud product, and its “Starter” bundles are aimed at SMBs with limited functionality. For enterprises needing multiple modules, Microsoft's bundling yields savings.

- ✓ **Leverage Existing Microsoft 365 Investments:** Many companies already pay for Microsoft 365 (Office) licenses for their employees. By moving to Dynamics 365, they can tap into **license synergy**. For example, users with a Microsoft Teams license can access and collaborate on Dynamics 365 data without a separate Dynamics license – something impossible with Salesforce. Additionally, if an organization has Power BI through a Microsoft 365 E5 license, they don't need to buy a separate analytics tool for CRM reports (unlike Salesforce, where Tableau would be an extra purchase).
- ✓ **Lower Cost for Light Users:** Microsoft offers **Team Member** licenses at a low cost (around \$8 per user) for users who only need read or basic write access to CRM data. This means you can affordably extend CRM access to a broad audience (finance, executives, etc.) who just need to view reports or update a few fields. Salesforce's closest equivalent (Platform licenses or limited access) are not nearly as inexpensive, leading to many companies restricting CRM access to only a core group due to cost. Dynamics 365's model encourages organization-wide visibility of customer data, improving transparency without ballooning licensing costs.
- ✓ **Elimination of Third-Party Add-Ons:** A subtle but important cost factor is the reduction of **third-party tools**. With Salesforce, enterprises often end up licensing third-party apps for things like data backup, mass email, contract management, etc., because those features aren't native or come at a premium. Microsoft's ecosystem frequently provides those capabilities natively (or via existing Microsoft tools). For example, instead of a separate backup service, you might use Power Platform or Azure services already in place. Instead of a third-party document generation tool, you might use SharePoint/Word templates integrated with Dynamics. By consolidating vendors, companies **trim the "hidden" costs** in their CRM program ([Salesforce to Dynamics 365 Sales Migration - Netwoven](#)).
- ✓ **Predictable Licensing and Support Costs:** Microsoft's pricing is typically **month-to-month or annual per user**, with transparent tiers, and it doesn't lock customers into multi-year contracts unless they choose. Salesforce often sells multi-year agreements and has been known to have more complex pricing terms (storage fees, API call limits that require upgrades, etc.). Many enterprises have found that Microsoft's approach leads to more predictable budgeting and fewer surprise overage fees. In complex deployments, working with a Microsoft partner can further optimize licenses to ensure you're not over-paying for unused capacity.

- ✓ **Real-World ROI:** The cost benefits aren't just theoretical – organizations have realized substantial savings by switching. Netwoven's experience shows that clients can **reduce CRM costs by 30–50%** post-migration ([Salesforce to Dynamics 365 Sales Migration - Netwoven](#)), freeing up budget for other innovations. In one case, a large cybersecurity firm projected **over \$4 million in savings in one year** on licensing alone after replacing Salesforce with Dynamics 365 ([A Salesforce to Dynamics 365 Sales Migration Journey for a Cybersecurity Firm](#)). These savings come not only from lower per-user fees but also from streamlined operations and not having to manage multiple systems.
- ✓ **Customer Perspective:** *"We were spending a fortune on Salesforce and still needed plug-ins for AI and analytics. After moving to Dynamics 365, our annual CRM costs dropped by 40%, and everything we need is included in one platform. Our sales team now works entirely out of Outlook and Dynamics – no swivel-chair between apps – which they absolutely love."*
– CIO, Global Manufacturing Firm (Netwoven client)

Such outcomes underscore a clear ROI: a simpler, consolidated Microsoft solution not only cuts licensing costs but also drives indirect savings (maintenance, integration effort, user efficiency). For decision-makers, the financial case for change – especially in an era of tight IT budgets – makes migrating to Dynamics 365 a smart fiscal move alongside the technical advantages.



Section 4: Netwoven's Proven Migration Approach

Successfully transitioning from Salesforce to Dynamics 365 Sales requires the right expertise and methodology. Netwoven, a Microsoft Solutions Partner with deep CRM experience, has developed a proven migration approach that ensures a smooth, scalable transition with minimal disruption ([Salesforce to Dynamics 365 Sales Migration - Netwoven](#)).

Our approach combines robust technology tools with careful planning and change management:



- ✓ **Scalable “Mass Migration” Methodology:** Netwoven has executed **numerous complex CRM migrations** over two decades, including large Salesforce deployments with millions of records and global user bases. We use a scalable methodology that can handle high data volumes and parallel workstreams – meaning we can migrate multiple business units or regions in phases without slowing down the business. A key first step is a thorough **Assessment & Planning** phase, where we evaluate your existing Salesforce org (schema, custom code, integrations) and map it to Dynamics 365's Common Data Model ([Salesforce to Dynamics 365 Sales Migration - Netwoven](#)). This up-front analysis, powered by our tools, ensures we capture all custom objects, fields, and dependencies.

- ✓ **Semantic Model Analysis Engine:** We leverage a proprietary **Semantic Model Analysis Engine** to analyze your Salesforce data model in depth. This tool scans Salesforce metadata (objects, relationships, validation rules) and intelligently maps it to Dynamics 365 entities and fields. By understanding the “semantics” of your Salesforce setup (e.g., how a custom object relates to Opportunities), we can create a one-to-one or one-to-many mapping in Dynamics with high accuracy. The benefit **is no detail is overlooked** – all critical data and configurations find a home in the new system. This engine dramatically accelerates the design phase, giving our architects a blueprint of how your Salesforce translates into the Dynamics schema.

- ✓ **Automated Migration Engine (Data & Code):** For the execution, Netwoven employs an automated **Migration Engine** that handles data extraction, transformation, and loading into Dynamics 365. During **Data Migration & Transformation**, we extract data from Salesforce (using APIs or database exports), then cleanse and deduplicate it ([Salesforce to Dynamics 365 Sales Migration - Netwoven](#)). The engine preserves relationships between records (accounts, contacts, activities, etc.) so that the context isn’t lost in the new system ([Salesforce to Dynamics 365 Sales Migration - Netwoven](#)). It also brings over attachments, notes, and activity history as needed, with options to archive legacy data that’s no longer active ([Salesforce to Dynamics 365 Sales Migration - Netwoven](#)). On the technical side, our Migration Engine can convert common Salesforce constructs (like tasks, events, product catalogs) into Dynamics equivalents automatically. For any custom Apex logic that needs to be reimplemented (e.g., validation rules or triggers), our team identifies and rebuilds those using Dynamics 365 workflows or Power Automate. **Automation** is key – by scripting repeatable migration tasks, we reduce human error and can re-run migrations in test environments multiple times to ensure accuracy.



- ✓ **Phased Rollout with Rigorous Testing:** Netwoven’s approach typically uses **phased rollout** to mitigate risk. We might start with a pilot group or a single business unit to migrate, validate, and adjust before broader deployment. Our process includes extensive **Testing & Validation** – running dual systems to compare data and conducting user acceptance testing to confirm the new Dynamics environment meets requirements ([Salesforce to Dynamics 365 Sales Migration - Netwoven](#)). We address any gaps in reports, workflows, or integrations during this phase. Once ready, we execute the final cut-over, often over a weekend, to minimize downtime. The go-live is carefully managed and includes **post-migration optimization** steps like performance tuning and enabling AI features (Copilot, etc.) for immediate benefit ([Salesforce to Dynamics 365 Sales Migration - Netwoven](#)). By following a structured sequence (assessment → data migration → validation → deployment), our clients experience zero data loss and minimal interruption to their operations during the switchover.

- ✓ **Change Management & User Adoption:** We recognize that a CRM migration is not just a technical project – it’s a significant change for users. Netwoven includes robust change management in our methodology. This involves early stakeholder engagement, training programs, and support resources to ensure users are comfortable with Dynamics 365. We often run side-by-side comparisons to show sales teams how their daily tasks become easier in the new system (for example, tracking emails directly from Outlook into Dynamics instead of manually logging activities). During post-launch, we provide **AI-powered onboarding with Microsoft Copilot** tutorials and live support to drive adoption ([Salesforce to Dynamics 365 Sales Migration - Netwoven](#)). By focusing on user experience (and not just data migration), we help clients realize the full value of Dynamics 365 quickly. After launch, our team remains available for hyper-care support and any refinements or additional integrations the client wants to pursue. reduce human error and can re-run migrations in test environments multiple times to ensure accuracy.

Netwoven’s end-to-end services – from initial readiness assessments to go-live and beyond – have been honed to **de-risk the migration process**. Our **“semantic” analysis tools** ensure fidelity of your data and business logic, while our migration accelerators reduce project timeline and cost. With a phased approach and attention to change management, we make the journey from Salesforce to Dynamics 365 both predictable and successful. In short, we don’t just migrate your CRM; we help transform it into a modern system that your organization will readily embrace.

Section 5: Embracing AI & Future-Proofing

Migrating to Microsoft Dynamics 365 Sales isn't just a cost play or a technical upgrade – it's a strategic move to future-proof your sales organization. By unifying on Microsoft's cloud, enterprises set the stage for advanced analytics, pervasive AI, and scalable innovation.

Here's how making this switch empowers a forward-looking strategy:



- ✓ **Unified Data for Analytics & Automation:** In the Microsoft ecosystem, your customer data, communications, and business processes reside on a common platform (Azure and Dataverse). This unified data estate is gold for analytics and process automation. Companies can leverage **Power BI** to run live dashboards and deep analytics on CRM data combined with ERP or marketing data – without complex ETL from external systems. With Salesforce, achieving the same often meant exporting data to a warehouse or paying for Tableau CRM. On Azure, you can apply machine learning models or advanced AI on your integrated data to uncover trends (for example, using Azure Synapse or AI Builder with Power Platform). Additionally, **Power Automate** (part of Power Platform) allows easy automation across your CRM and other apps. Need to route a sales lead from web to CRM to a Teams alert? It's trivially done with low-code flows in the Microsoft world. By moving to Dynamics 365, organizations can tap into an entire suite of Microsoft technologies to drive automation, business intelligence, and insights on top of their sales data. The outcome is better, faster decision-making grounded in a **single source of truth**.

- ✓ **Copilot AI Across the Board:** Microsoft’s vision of AI is not confined to the CRM – it extends **Copilot capabilities across Dynamics 365, Teams, Office, and Power BI**. This means after migrating, you can deploy AI assistants in multiple domains: a Copilot in Teams that summarizes your Teams meetings and updates CRM, a Copilot in Outlook that drafts sales proposals drawing on CRM data, or a Copilot in Power BI that answers natural language questions about sales performance. Because it’s one ecosystem, these AI agents work in concert using the same underlying Microsoft Graph and Dataverse data. Salesforce’s AI (Einstein Copilot/Agentforce) is largely siloed within the Salesforce universe, whereas Microsoft’s Copilot can span across Word documents, emails, spreadsheets, chat conversations, and CRM records seamlessly. For example, a sales manager could ask **Power BI Copilot** to “show me the pipeline by region and highlight any stalled deals,” and then use **Dynamics 365 Copilot** to draft a coaching email to reps of those stalled deals – a continuous AI-assisted workflow. By embracing Dynamics 365, companies are effectively future-proofing with an **AI-ready foundation**. As Microsoft continues to roll out new generative AI features, Dynamics users will be first in line to get these innovations (often included in existing licenses). This positions an organization to continuously improve productivity with each wave of AI advancements ([Dynamics 365 vs Salesforce: CRM Comparison](#)) ([Dynamics 365 vs Salesforce: CRM Comparison](#)).

- ✓ **Governance, Extensibility, and Compliance:** A critical aspect of future-proofing is ensuring the platform can evolve and scale while maintaining governance and security. Dynamics 365, governed under the umbrella of Azure Active Directory and Microsoft’s security framework, offers robust **governance controls**. Administrators can manage permissions with granular, role-based access, enforce data loss prevention policies across applications, and monitor usage through a unified admin center. Microsoft’s cloud also adheres to stringent compliance standards – helpful for regulated industries that need HIPAA, FINRA, FEDRAMP, or GDPR compliance attestation from their vendors. By consolidating CRM into the Microsoft cloud, organizations simplify compliance audits since many controls are uniformly applied.

In terms of extensibility, Dynamics 365 is highly flexible: you can extend it with Power Apps (for custom interfaces or mobile apps), embed Power BI visuals, or even use the Power Platform’s low-code tools to create new automation or AI models (with AI Builder) on your CRM data. Additionally, a vast partner ecosystem and AppSource marketplace offer pre-built solutions and integrations.

Need a CPQ (configure-price-quote) tool or a specialized industry module? Chances are there's a certified add-on that plugs into Dynamics 365 seamlessly. The key is that any extensions or customizations you add inherit the security and manageability of the Microsoft cloud, and they won't break when Microsoft updates the platform (thanks to Microsoft's backward compatibility commitments). This stands in contrast to some experiences with Salesforce, where heavy custom code can break with Salesforce's seasonal releases, or integrating a new acquisition product might require a separate login or data sync.

- ✓ **Future-Proofing Your CRM Investment:** Perhaps the biggest strategic benefit is knowing that by aligning with Microsoft's roadmap, you're investing in a platform built to keep pace with the future. Microsoft's massive ongoing R&D investment, coupled with a clear commitment to an AI-powered, cloud-integrated vision, ensures that Dynamics 365 will continually evolve with new features, often delivered at no extra cost within existing subscriptions.

Migrating now also gives organizations early access to Microsoft's latest Copilot enhancements and the new generation of AI Agents, including the Sales Qualification Agent, Predictive Insights Agent, and others being rolled out across the Microsoft 365 ecosystem. Companies that move early are first to benefit from these modular AI advancements, embedding intelligence directly into sales, service, and collaboration workflows without disruptive upgrades.

Imagine this: your VP of Sales receives an AI-driven report every Monday morning highlighting forecast gaps, complete with AI-drafted coaching emails ready to send to reps with stalled deals, all automated, without lifting a finger. This is the level of operational intelligence and proactive enablement made possible by a unified, AI-first Microsoft platform.



Microsoft's Responsible AI framework and built-in governance further provide C-level assurance that AI adoption is managed ethically, securely, and in compliance with evolving global standards, a critical distinction compared to Salesforce's more fragmented AI landscape.

Moreover, the platform is built to scale: whether your business doubles in size, expands into new regions, or needs to integrate CRM systems post-acquisition, Microsoft's cloud infrastructure can handle it without forcing performance limitations or costly upgrades.

In essence, moving to Dynamics 365 Sales gives you a CRM that grows with you. You'll be positioned to seamlessly exploit emerging technologies leveraging the latest in AI, analytics, cloud innovations, IoT integration, real-time data streams, metaverse collaboration, and innovations yet to be imagined; simply because your core systems are on a modern, extensible foundation.

It's not just about solving today's problems (though it does); it's about creating a launchpad for tomorrow's opportunities. In a rapidly changing tech landscape, that peace of mind and innovation advantage is invaluable. .



Conclusion

Is your organization ready to leave the “minivan” behind and accelerate into the future with a modern, AI-infused CRM? The opportunities in migrating from Salesforce to Dynamics 365 Sales are too significant to ignore – from streamlined workflows and happier users to tangible cost savings and a future-ready platform. **Netwoven is here to help you take the next step.**

As a trusted Microsoft Solutions Partner, Netwoven invites you **to engage with our team for a personalized readiness assessment or a pilot migration workshop.** In a short session, we can evaluate your current Salesforce environment, identify the quick wins of a move to Dynamics 365, and even demo Copilot’s capabilities on your own data. This is a no-obligation opportunity to see first-hand what an upgrade could mean for your business.

Don’t let your CRM become a roadblock to innovation. **Contact Netwoven** today to schedule a migration readiness assessment or to learn more about how we can make your transition seamless and successful. It’s time to unlock the full value of your CRM – and drive your enterprise forward with the power of Microsoft Dynamics 365 Sales.

Visit [Netwoven](https://netwoven.com) or call us at +1 877 638 9683 to schedule your complimentary strategy assessment.

