QUISITIVE

Salesforce to D365 Assessment

Migrating from Salesforce to Dynamics 365 allows for easier integration with your Microsoft technology stack. Streamlined and often times lower licensing costs, Dynamics 365 provides additional functionality that Salesforce CRM does not offer.

With extensive experience in the Microsoft ecosystem, we have a deep understanding of how to appropriately apply cloud technology to effect positive change across a broad variety of businesses and industries.

Quisitive's **Salesforce to Microsoft D365** Assessment helps organizations migrate their workloads to Dynamics 365 efficiently by outlining a solution plan that takes their specific business needs, challenges, and outcomes into account.

We will also evaluate if your organization will need any additional business applications modules, such as Dynamics 365 Finance, Dynamics 365 Supply Chain Management, Dynamics 365 Commerce, Dynamics 365 Human Resources, Dynamics 365 Sales and Marketing, or Dynamics 365 Field Service.

Our assessment approach is made up of 5 distinct stages:

1 Discovery: Questionnaire and Review

We start with discovery workshops where we learn more about your current state and identify unmet needs. Once complete, we share and discuss our findings in a preliminary scoping call where we review the recommended assessment program, including the internal and client resources required.

2 Feedback: Stakeholder Workshops

We then conduct a series of workshops with key organizational stakeholders, focused on eliciting feedback about existing systems and structures with the goal of defining a desired future state.

3 Alignment: Fit-Gap Analysis

Our fit-gap analysis will review feedback and identify recommended actions and determine the appropriate migration approach.

4 Review: Solution Assessment

In this phase, we determine the high-level scope of the solution in terms of business process, functional and non-functional requirements, and integrations and interface requirements. We also make recommendations for gap closure and perform a cost assessment.

5 Present: Management Review

Finally, we present the details of the solution assessment to the client, including:

- A demonstration of Intelligent Edge KPI's and Business Central core functionality and process concepts
- An outline of high-level project phases and milestones
- A recommended migration approach

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