QUISITIVE

Salesforce to Dynamics 365 CRM Migration

Migrate with confidence to a healthcare-ready CRM built on the Microsoft Cloud

Purpose

Migrate confidently to a healthcare-ready CRM built on Microsoft Cloud for Healthcare. Consolidate Salesforce CRM, collaboration, and analytics into one platform to reduce costs, eliminate data silos, and enable AI-driven engagement.

Microsoft Play

Modernize and Consolidate on Microsoft Cloud

Personas

- CIO / CTO
- VP IT
- CRM / Applications Owner
- Head of Marketing or Outreach Ops
- Data & Integration Lead
- Security / Compliance Lead

Outcome

- One cloud for CRM, care coordination, analytics, and Copilot
- Improved data trust and visibility across patient, referral, and partner data
- Lower total cost of ownership and faster time to value

KPIs

- Time to go live faster
- User adoption up
- Data match rate up
- Platform cost down

The Challenge

Healthcare organizations using Salesforce alongside Microsoft Cloud for Healthcare face duplicate systems, disconnected data, and higher maintenance costs. Healthcare leaders need a secure, structured path off Salesforce and onto Microsoft Dynamics 365 that minimizes risk and disruption.

The Solution

Quisitive helps healthcare organizations migrate securely from Salesforce to Microsoft Dynamics 365 to unify patient engagement, operations, and analytics. Our structured framework preserves data integrity, meets HIPAA requirements, and connects CRM workflows directly to Microsoft Teams, Power Platform, Azure, and Microsoft Cloud for Healthcare. **We focus on:**

> Preserving data integrity and history

> Aligning with Microsoft Cloud for Healthcare data models

> Integrating with Teams, Power Platform, Azure, and security services

> Meeting healthcare-grade security and compliance requirements

Key Benefits

> **One platform for care and engagement** – Consolidate CRM, collaboration, and analytics into the Microsoft ecosystem to reduce integration points and simplify operations.

> **Improved data trust and visibility** — Move from scattered records to a single source of truth across patient, referral, and partner data.

> **Lower total cost of ownership** – Retire duplicate CRM platforms, custom connectors, and third-party integration layers. Standardizing on Microsoft allows you to leverage existing enterprise agreements, shared security, and common admin and support skills instead of funding two ecosystems.

> **AI and automation readiness** – Align data and permissions for Copilot, Fabric, and predictive analytics. Microsoft research shows 70% of healthcare executives plan to scale AI within 12 months but cite disconnected systems as their main barrier (Microsoft AI in Healthcare Study, 2024).

> **Faster time to value** – With Quisitive's prebuilt healthcare data model and accelerators, migrations are typically completed in 4–8 weeks, accelerating ROI and minimizing disruption.

Engagement Overview

Phase	Focus	Duration
Assessment	• Inventory Salesforce orgs, objects, integrations, and customizations • Identify PHI, compliance, and data residency considerations • Define scope and success criteria	1–2 weeks
Design & Mapping	• Map Salesforce entities and fields to Dynamics 365 and Microsoft Cloud for Healthcare schemas • Design authentication, security roles, and integration points (Teams, Power Platform, etc.)	1 week
Migration & Validation	• Execute secure migration in phases (test, UAT, production) • Validate data completeness, relationships, and core workflows • Align audit and logging with compliance requirements	2–4 weeks
Enablement & Optimization	• Train admins and key users • Configure dashboards, views, and queues for healthcare use cases • Document runbook and optimization recommendations	1–2 weeks

Deliverables

A Copilot-first platform designed for healthcare service delivery:

> Current-state assessment and migration roadmap

> Data and workflow mapping documentation

> Configured Dynamics 365 CRM environment

> Tested migration (UAT + production cutover)

> Post-migration optimization and governance recommendations

Dependencies

> Salesforce org and integration inventory

> PHI and compliance assessment

> Mapping to Microsoft Cloud for Healthcare schema

> Coordination with Teams, Power Platform, and Azure services

Risks to Manage

> Data mapping complexity and quality

> Cutover timing and stakeholder alignment

> Change management and end-user training

> Maintaining HIPAA and audit compliance during migration

Who Should Be Involved

| CIO / VP IT | CRM / Applications Owner | Data & Integration Lead | Security / Compliance Lead | Stakeholders from patient access, referral management, outreach, or care coordination

Typical Timeline & Investment

Duration: 4–8 weeks

Starting investment: from $65,000 USD (adjusted based on orgs, volume, and integration complexity)

Get Started

Plan your Salesforce to Dynamics 365 migration with Quisitive.

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