SAP Marketing Cloud Migration to Microsoft Dynamics 365 Customer Insights

END OF LIFE OF SAP MARKETING CLOUD

End of SAP Marketing Cloud support on December 31, 2026

- The platform will no longer receive updates or enhancements.
- Growing risk of technological obsolescence for companies

Migration from SAP Marketing Cloud: Challenge & Opportunity

- Ensure operational continuity and technological modernization
- Choose an integrated and modern platform

Microsoft Dynamics 365 Customer Insights as a viable alternative

- Unified cloud platform that integrates CRM, marketing, and customer data
- Advanced Customer Data Platform capabilities and omnichannel marketing automation
- Generative AI support with Copilot for innovative marketing strategies
- Enables modernization of marketing approaches and ensures continuous innovation.

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KEY BENEFITS OF MICROSOFT DYNAMICS 365 CUSTOMER INSIGHTS

360° and Real-Time Customer View

The platform provides a **unified, dynamic view of each customer**, updated in real time from various touchpoints (ERP, e-commerce, retail, customer service). Customer behaviors **can be tracked and used for segmentation and automated triggers that react in real time to events** such as abandoned carts, VIP purchases, or support requests.

Seamless Integration within the Microsoft Ecosystem

As part of the Microsoft Dynamics 365 and Microsoft Power Platform suite, **Microsoft Dynamics 365 Customer Insights integrates effortlessly with enterprise systems**. It has native connectors to import data from SAP and third-party sources, and it integrates with Microsoft Power BI, Azure Synapse Analytics, Microsoft Power Automate, and Microsoft Power Apps to extend its capabilities.

Innovative Continuity

Microsoft is focusing its investments on the Dynamics 365 Customer Insights – Journeys as an evolution of Microsoft Dynamics 365 Marketing, **ensuring a continuous flow of innovations**. It represents a shift from an end-of-life product (SAP Marketing Cloud) to one that embodies the future of marketing according to Microsoft

Copilot and Integrated AI

Customer Insights features Copilot, Microsoft's generative AI assistant, **providing intelligent "out-of-the-box" marketing capabilities**. This includes content generation, segmentation suggestions, and journey creation using natural language. The Azure OpenAI Service ecosystem also **allows for the development of custom AI extensions** if needed.

In summary, migrating to Microsoft Dynamics 365 Customer Insights not only helps mitigate the risks associated with the retirement of SAP Marketing Cloud, but also modernizes corporate marketing by leveraging a scalable, data-driven cloud platform enhanced with artificial intelligence.

GUIDING PRINCIPLES FOR MIGRATION

Incremental Approach
Gradual migration to reduce risks and ensure operational continuity

Standard Capabilities
Maximize the use of the platform's out-of-the-box features

Robust Integrations
Design robust and scalable integration architectures

Data Quality
Cleanse and consolidate data to start with high-quality information

Migration best practices are based on these fundamental pillars derived from field experience. Adopting an incremental approach, fully leveraging the standard capabilities of the new platform, and designing robust integrations are essential for the success of the initiative.

MIGRATION 3 STREAMS

Our structured approach for the migration from SAP Marketing Cloud to D365 Customer Insights is based on 3 main streams. Each phase contains different steps to ensure a smooth transition and avoid disruptions.

Target Data Model in D365 Customer Insights

An effective migration is not just a technological lift & shift: it requires rethinking and mapping the data, objects, and processes from SAP Marketing Cloud into the data and functional model of Customer Insights. Main topics to be targeted:

- **Customers** (personal info, consents, preferences, KPIs)
- **Custom entity** (e.g.: loyalty, vouchers, «z» SAP tables)
- **Segments & target groups**
- **Campaigns** (SAP customer journeys)
- **Marketing templates**
- **Marketing interactions**

Migration of Data and Marketing Journeys

ETL tools, allow the handling of large volumes of data, continuous monitoring of the migration process. **Our recommended and tested on the field ETL is Azure Data Factory**, which integrates natively with D365 and also offers a dedicated connector for SAP HANA.

- **Data Extraction from SAP HANA:** Using Azure Data Factory for extractions via the SAP HANA connector
- **Transformation and Preparation:** Applying ETL rules to adapt the data to the format required by Dataverse, preventing duplicates and inconsistencies.
- **Loading into Microsoft Dataverse:** Data import using upsert mode via Azure Data Factory to maintain integrity and prevent duplication.
- **Testing in the UAT Environment**: Iterative validation on data subsets to ensure quality and reliability of the process before production.
- **Continuous Synchronization:** Continuous updating of newly migrated data to facilitate the final cut-over without operational interruptions.

Integration

Integration could leverage on two different layer:
- **Existing middleware layer**: assuming of a SAP centric company with existing SAP middleware
- **Azure integration Layer**: Use of Azure API Management, Service Bus, Azure Functions for an event-driven, scalable, and resilient integration. This layer will be used to decouple existing middleware and working as the bridge between it and Dataverse

Main integration blocks:
- **Use of existing SAP PO/CPI middleware:** Adapting existing interfaces to communicate with Dynamics 365 instead of SAP Marketing Cloud, reducing the impact on third-party systems
- **Azure cloud-native architecture:** Use of Azure API Management, Service Bus, Azure Functions, and Event Grid for an event-driven, scalable, and resilient integration.
- **Hybrid integration and advanced security:** A combination of SAP middleware and Azure services to ensure security, continuous monitoring, and high performance.

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