

Level of Effort Salesforce Migration Evaluation

WHAT WILL IT TAKE AND HOW TO GET STARTED
MIGRATING FROM SALESFORCE TO DYNAMICS 365

OVERVIEW

So, you might want to migrate off Salesforce.

We built the Level of Effort Evaluation to help people conceptualize what migrating from Salesforce to Microsoft Dynamics 365 could look like. This preliminary conversation will give you confidence that a move will (or won't) be worth the effort based on your individual goals and current state and help us scope a potential project for the future.

Engagement overview

Time investment: 2-4 hours

Time will vary and depend on how much of Salesforce you're currently using and the level of complexity in the current state.

- If you're primarily using standard objects, the session will be closer to 2 hours.
- If you have a lot of customization or multiple products (like Sales and Service), the session will be closer to 4 hours.

Resource investment: 1-2 people from your team who understand your current Salesforce implementation inside and out and can walk us through the current state from end to end.

Cost: Free

AGENDA

What we'll do

During our session, we'll work with your team to:

- Understand your current processes
- Get a walkthrough of the current state of your implementation
- Understand what works and what needs improvement in the current state
- Talk through integrations and data sources
- Learn who on your team is using it and how
- Discuss what an ideal future state looks like

What you'll walk away with

After the session, our team will deliberate and outline a future state proposal for your migration including cost, general timelines, and resource considerations for your team. You'll walk away from the engagement with the future state proposal, an idea of what it's like to work with a partner on a migration, and a thoughtful and clear process for what comes next.