



# Migrate to Dynamics 365

Lower costs. Faster time to value.

Dynamics 365 is a powerful and cost-effective solution with a lower cost of ownership than Salesforce.



# Common Salesforce complaints

## Cost

- **High Cost of Ownership:** High initial costs, add-on fees, and extended contracts can make Salesforce expensive.
- **Proprietary Programming Language:** Apex, Salesforce's proprietary language, makes finding skilled developers challenging and increases customization costs.
- **Integration Costs:** Additional payments are required for each integration connector, adding to overall costs.

## Functionality

- **Lack of Native Integration:** No native integration with Microsoft Office, BI solutions, or ERP systems, hindering seamless workflows.
- **Additional Costs for Add-On Functionality:** Features, including mobile and offline access, come at an extra cost, increasing total expenses.
- **Steep Learning Curve:** Platform complexity leads to frustration and poor adoption.



# Migrate from Salesforce and do more with Dynamics 365



**Microsoft Dynamics 365 is the leading solution for AI-powered salesforce automation, marketing, and customer service.**

## **Advanced AI Capabilities**

Dynamics 365 utilizes Azure AI services, offering advanced tools like machine learning, natural language processing, and cognitive services to deliver AI-driven insights and automation, boosting productivity and decision-making.

## **Enhanced Decision making with AI-Driven Insights**

Dynamics 365's advanced AI analyzes vast amounts of data to provide real-time, actionable insights across various business functions to help you identify trends, predict outcomes, and make informed decisions faster.

## **Seamless Integration with Microsoft Products**

Dynamics 365 integrates effortlessly with other Microsoft services like Office 365, SharePoint, and Power BI, enhancing productivity and collaboration.

## **Unified Service Dashboard**

The unified service dashboard in Dynamics 365 provides a comprehensive view of customer interactions and service metrics, improving customer service management.

## **Customization and Flexibility**

Dynamics 365 offers extensive customization options using widely known programming tools and languages, allowing businesses to tailor the platform to their specific needs without proprietary language limitations.

## **Lower Cost of Ownership**

Dynamics 365 generally offers a lower cost per user and a lower total cost of ownership, including storage, support, and sandbox environments.

# Migrate from Salesforce and do more with Dynamics 365



**TrellisPoint provides painless and cost-effective migrations from Salesforce to Dynamics 365.**

## **Streamlined data-mapping**

TrellisPoint's exclusive migration engine utilizes extensive pre-configured data-mappings to reduce manual processes and cut migration time.

## **Custom data matching**

TrellisPoint ensures precise data transfer by matching and creating new, custom fields to guarantee all data is moved accurately.

## **Data cleansing**

We'll work with you to cleanse outdated data, enhance functionality, and create automated workflows tailored to your business processes.

# About TrellisPoint Migration Engine offer

Migrate up to 100,000 of your sales Account and Contact records and related Users from Salesforce to Microsoft Dynamics 365 for a pre-defined set of fields.

## Agenda

- **Day 1 Assessment & Data Collection**
  - Provide Assessment Web meeting
  - Gather existing Salesforce system details
  - Collect sample data for out-of-the-box Account & Contact data fields to be migrated
  - Audit Salesforce database to identify current, retired and deleted users
- **Days 2-4 Cloud Deployment**
  - Deploy an out-of-the-box Microsoft Dynamics 365 Cloud environment
  - Import all identified historical Salesforce.com users into Microsoft Dynamics 365
  - Assign licenses and existing Salesperson security role to Microsoft Dynamics 365 users
  - Perform data migration using TrellisPoint's Migration Engine
- **Days 5 Review and Launch**
  - Joint review of migrated data
  - Provide 1-hour Microsoft Dynamics 365 interface overview

All migration is subject to certain assumptions about the data to be migrated from Salesforce.com to Microsoft Dynamics 365. To perform any migration, TrellisPoint must have login credentials and access to the Salesforce.com API.

Estimates for extending this implementation to include additional entities, fields, configurations, customization, etc. will be provided upon request.

**TrellisPoint**  
Growth the Strategic Way  
Microsoft Solutions Partner

## MIGRATE FROM SALESFORCE TO DYNAMICS 365

### MIGRATE IN 1 WEEK

This 1-week blueprint is designed to securely and efficiently migrate up to 100,000 of your critical Account, Contact, and related users from Salesforce to Dynamics 365.

#### PAINLESSLY MIGRATE FROM SALESFORCE TO DYNAMICS 365 IN 1-WEEK

Microsoft Dynamics 365 is the leading solution for AI-powered salesforce automation, marketing, and customer service. TrellisPoint's exclusive migration engine provides a low-risk option for organizations seeking to lower technology costs by quickly migrating from pricey Salesforce subscriptions to a budget-friendly Dynamics 365 plan.

**Streamlined data-mapping**  
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**Custom data matching**  
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**Data cleansing**  
We'll work with you to cleanse outdated data, enhance functionality, and create automated workflows tailored to your business processes.

#### MIGRATION ROADMAP

##### DAY 1 ASSESSMENT & DATA COLLECTION

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- Audit Salesforce database to identify current, retired and deleted users

##### DAYS 2-4 CLOUD DEPLOYMENT

- Deploy an out-of-the-box Microsoft Dynamics 365 Cloud environment
- Import all identified historical Salesforce.com users into Microsoft Dynamics 365
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- Perform data migration using TrellisPoint's Migration Engine

##### DAYS 5 REVIEW AND LAUNCH

- Joint review of migrated data
- Provide 1-hour Microsoft Dynamics 365 interface overview

#### ABOUT TRELLISPOINT

TrellisPoint is a strategic growth consulting firm and Microsoft Solutions Partner specializing in technologies such as Microsoft Dynamics, Power Platform, and AI (Copilot), and transformation services such as business process engineering and organizational change management. We collaborate with growing companies that are looking to transform technology from a cost center into a key differentiator. Our proven TrellisPoint Success Framework delivers flexible solutions that will provide value for your present and future requirements. At TrellisPoint, your success is our success.

#### Seamless Integration with Microsoft Products

Dynamics 365 integrates effortlessly with other Microsoft services like Office 365, SharePoint, and Power BI, enhancing productivity and collaboration.

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# Industries Served



Construction



Financial Services



Information Technology



Manufacturing



Non-Profit



Retail



Professional Services



Distribution



Healthcare



## MILESTONES/VALUES

-  **Implementing Microsoft Business Applications since 1998**
-  **Providing D365 Implementation Services Since the 2001 Beta Release of "Microsoft CRM"**
-  **Microsoft Business Applications Partner - 100% Microsoft Focused since 2018**
-  **Emphasize Reputation Over Revenue**
-  **Guided by "The Business Why"**
-  **Proven D365 Project Methodology**

# Why TrellisPoint?

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