

Salesforce to Dynamics 365 CRM Modernization Toolkit

A structured, low-risk enterprise
migration framework

Transition from fragmented CRM complexity
to a unified, AI-enabled engagement
platform.



The enterprise inflection point

Salesforce often delivers strong early momentum. Adoption is fast. New business units come online. Additional clouds and add-ons are introduced to cover new needs. Over time, customization expands, integrations multiply, and data spreads across environments.

Then the economics and operating reality shift. Leaders start to see:

- Rising run cost and licensing complexity
- Slower change cycles and upgrade friction
- Fragmented customer and revenue visibility
- Difficulty scaling AI beyond isolated use cases

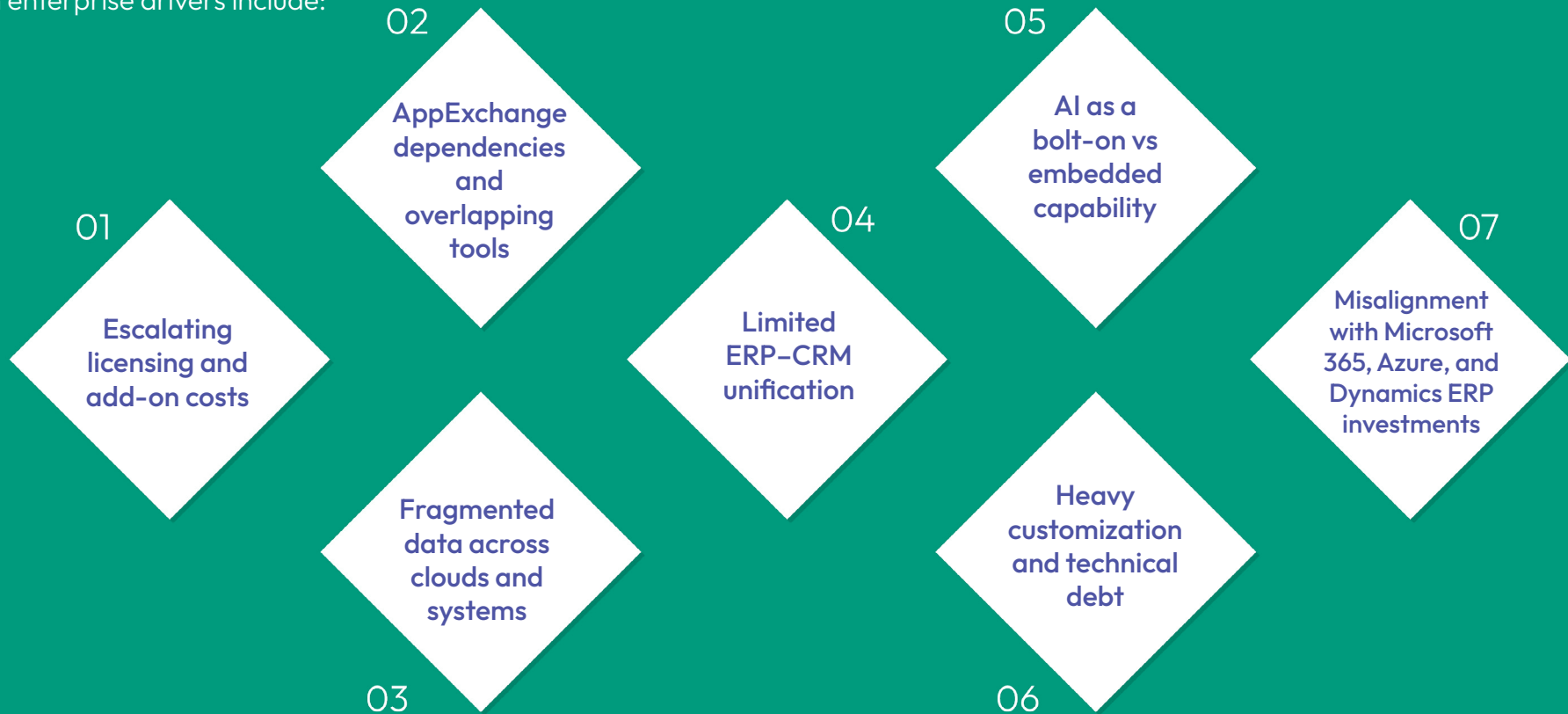
At that point, the CRM decision is no longer about features. It becomes an operating model decision: **simplify the platform, strengthen governance, and enable faster execution across commercial functions.**

This is not a system swap. It is a controlled CRM transformation.



Why organizations consider moving from Salesforce to Dynamics 365

Common enterprise drivers include:



For organizations already standardized on Microsoft, Dynamics 365 CRM modernization can reduce complexity and reinforce long-term digital strategy.

Business Impact & Expected Outcomes

Organizations modernizing to Dynamics 365 CRM typically target

10–20%

lower CRM TCO

(license/add-on
rationalization, lower
admin overhead)

15–20%

faster cycle times

(lead-to-opportunity,
quote-to-order, case
handling)

10–15%

sales productivity lift

(less manual work,
searching, handoffs)

20–30%

**faster reporting and
decision cycles**

(Power BI visibility)

10–20%

higher user adoption

(simpler workflows, Teams/
M365 alignment)

20–30%

**faster enhancement
delivery**

(configuration-first + Power
Platform)

5–15%

**productivity gains from
embedded AI**

(role/use-case dependent)

CRM becomes a strategic commercial platform—not a cost center. (Results vary by baseline and scope.)

Our 6-phase migration framework

A repeatable methodology designed to protect continuity, reduce risk, and modernize capabilities.

Phase 1

CRM Value & Architecture Assessment

Architecture, licensing, tech debt, integrations, data quality, AI readiness, value baseline.

Outcome: A quantified migration opportunity report aligned to business objectives.

Phase 2

Functional & Capability Blueprint

Map sales/service/marketing/ analytics/security/ecosystem; classify as standard D365, Power Platform, optimize, or retire.

Outcome: Modernize and simplify—avoid recreating legacy inefficiencies.

Phase 3

Data Migration & Governance Framework

Profiling, cleansing, de-duplication, retention, mapping validation, controlled cycles with parallel validation.

Outcome: Trusted data and reliable cutover readiness.

Phase 4

Process Modernization & Optimization

Forecasting, lead/opportunity insights, case automation, Teams collaboration, Power BI analytics, Copilot productivity.

Outcome: Faster execution, improved decision quality, and reduced operational drag.

Phase 5

Deployment & Cutover Strategy

Big bang, phased, BU-based, or parallel run; UAT governance, exec checkpoints, enablement, adoption dashboards.

Outcome: Predictable deployment with minimized disruption.

Phase 6

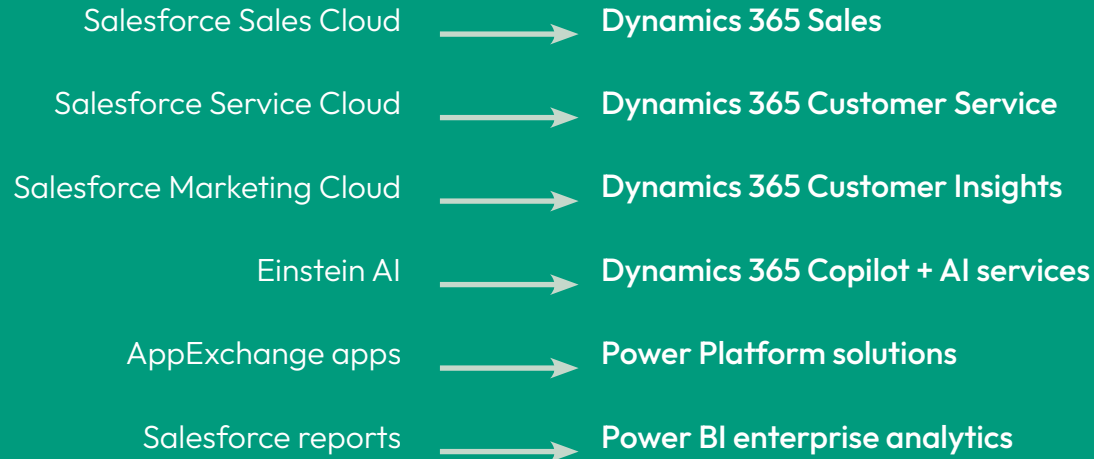
AI & Unified Platform Enablement

Copilot assistance, predictive forecasting, next-best actions, unified ERP+CRM analytics, Power Platform extensibility.

Outcome: A connected, AI-enabled engagement platform—built to evolve.

Salesforce to Dynamics 365 transition map (at a glance)

Typical transitions include:



Where appropriate, we rationalize third-party add-ons and consolidate functionality natively.

Governance and risk controls to ensure continuity, stability, and measurable outcomes

- Executive steering model and decision checkpoints
- Data validation gates and sign-offs
- Integration certification testing
- Adoption measurement dashboards
- Business value tracking via our Business Value Register



What makes this toolkit enterprise-ready

ERP + CRM unified architecture expertise

Value-first assessment and KPI baselining

Repeatable migration templates and accelerators

Proven data governance and validation approach

AI-enabled modernization layer

Executive-level ROI and value tracking framework

Scalable rollout capability for global organizations

We treat CRM modernization as an enterprise transformation program—not a technical migration project.



Conclusion

Modernizing from Salesforce to Dynamics 365 is a chance to do more than move systems—it's an opportunity to **simplify the CRM estate, tighten governance, and turn customer engagement into measurable execution**. With a structured, value-led approach, you reduce risk, protect continuity, and unlock a unified platform that's ready for Copilot, Power Platform innovation, and ERP+CRM visibility.

Start with a CRM Modernization Assessment. We'll baseline cost and complexity, identify quick-win workflows, and deliver a KPI-aligned roadmap to move from “current state” to a governed, AI-enabled Dynamics 365 engagement platform.



Expert-led Transformations & Impact-led Growth

At Korcomptenz, we lead with expertise – in technology and domain to deliver solutions that align with your business goals. We leverage our experience and robust partner ecosystem to elevate your processes, powering your transformation journey toward impactful growth.

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