



Salesforce Switch to Dynamics 365

The Definitive Guide

Decision | Migration | Success



Table of Contents

Introduction	Page 3
	Page 4
Section 1: Decision	
Why Switch?	Page 5
Feature Comparison	Page 7
Cost Comparison	Page 9
Salesforce Tactics	Page 10
	Page 12
Section 2 Migration	
Get Data Right	Page 13
Getting Your Data From Salesforce Reports	Page 14
Migrate Your Data	Page 16
	Page 19
Section 3: Success	
Onboard	Page 20
Adopt	Page 21
Achieve	Page 23
Conclusion	Page 27

Introduction

Switching from Salesforce to Microsoft Dynamics 365 is a strategic move that offers significant benefits, including cost savings, enhanced functionality, and improved user satisfaction. This comprehensive guide, "Salesforce Switch: The Definitive Guide to Switching to Dynamics 365," is designed to assist IT and business decision-makers through every stage of the transition process.

Based on insights from leading industry research and practical experience, we provide a detailed roadmap covering the decision-making phase, migration planning, and post-go-live success.

According to Nucleus Research, a significant portion of Salesforce customers express dissatisfaction due to poor usability, complex integrations, and inadequate support. Additionally, the rising costs of Salesforce, without corresponding increases in value, make the transition to a more cost-effective and user-friendly CRM like Dynamics 365 an attractive option.

Our guide aims to equip organizations with the knowledge and tools needed to make an informed decision, ensuring a smooth transition and long-term success.

From assessing your current CRM setup and understanding the financial and operational implications of switching, to managing data migration and optimizing post-implementation adoption, this guide covers it all.

Whether you're looking to reduce costs, enhance system usability, or leverage a more integrated CRM platform, this guide provides the essential steps and best practices for a successful switch to Dynamics 365.

51% of Salesforce customers would switch to another vendor.



1

Section 1: Decision



Why Switch?



“We Need to
Do More with
Less”

In today's economy, the pressure to do more with less is a common challenge faced by many organizations. Revenue leaders typically have about 18 months to demonstrate growth, making every decision critical. For IT leaders, this pressure is compounded by the need to justify significant CRM investments while delivering tangible business value.

Despite these investments, many find that the value delivered by Salesforce has not kept pace with its rising costs. Over recent years, Salesforce's value proposition has declined relative to competitors, with companies reporting diminishing returns on their investments.

A key factor in this dissatisfaction is the high cost associated with Salesforce

Many companies switching to Microsoft Dynamics 365 report saving over 40% on licensing, ongoing data, and storage costs, while gaining access to similar or superior features.

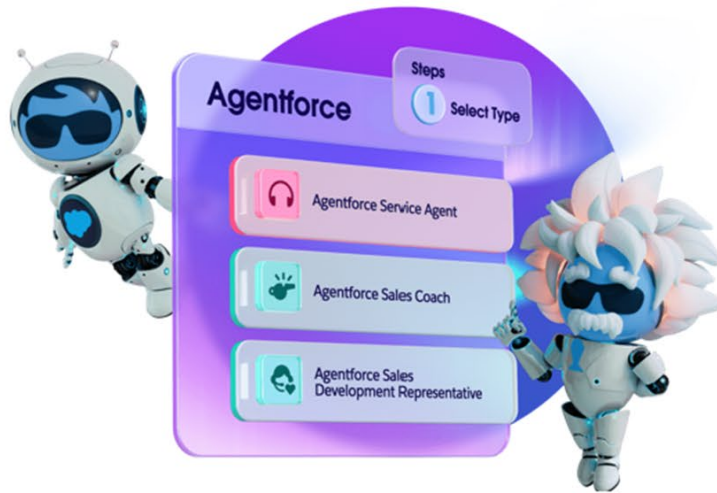
This cost efficiency is coupled with a more deeply integrated platform, as Microsoft Dynamics 365 has developed its features more organically compared to Salesforce's growth through acquisitions.

This deeper integration results in a more seamless user experience, with less need for third-party add-ons.

Switching to Dynamics 365 not only offers financial savings but also provides a more cohesive and integrated CRM solution, better aligned with the needs of modern businesses.

This makes Dynamics 365 an attractive choice for companies looking to optimize their CRM investments and drive sustainable growth.

AgentForce...



Salesforce's rebranding of Einstein Copilot to AgentForce marks a potential evolution in Salesforce AI, with a focus on proactive bot-like activities.

However, Salesforce's long-standing challenges in integrating acquisitions, including its recent acquisition of Air Kit AI, raise questions about Agentforce's readiness. Technical debt from previous integrations might slow the adoption of these new features.

At Dreamforce, Salesforce typically showcases multiple reference customers, but only one significant case study was highlighted this year.

This could be attributed to the short time between the Air Kit AI acquisition and the AgentForce launch, which raises concerns about maturity.

Additionally, the requirement for separate data cloud purchases for full functionality and the estimated \$2-per-conversation pricing may lead to unpredictable long-term costs.

Companies would need to look carefully at how many conversations an "Agent" would have and the real value of the conversations.

In contrast, Microsoft Copilot Agents offer a more integrated, cost-effective AI experience, with built-in AI capabilities across its ecosystem.

For organizations looking for a simpler, more predictable AI solution, Microsoft Copilot may present a stronger alternative, avoiding the complexities and costs tied to Salesforce's evolving approach.

The Data Is Not Trending in the Right Direction

Why Switch continued

Despite increases in CRM technology investments, key sales performance metrics like win rates, the percentage of representatives making quota, deal sizes, and sales cycle durations are moving in the wrong direction. The only indicator that is dramatically improving is the number of emails sent using automation - which if you have looked at your inbox lately is not having a positive impact.

This highlights a discrepancy where, even though there is more investment in CRM systems like Salesforce, the expected improvements in these critical areas are not being realized as anticipated.

80B

Tech
Investment

-30%

Win Rate

29%

Reps Made
Quota

41%

Emails Sent

-32%

Avg Deal
Value

+32%

Longer Sales
Cycle



OK our research tells us that despite the great promise of CRM the vast majority of companies are taking a one and done big bang approach with Salesforce versus looking at CRM as a product in an organization.

We've learned that companies who are performing the best look at CRM differently than an implementation of outlook or exchange or another IT project.

Is your CRM causing digital friction or is AI fueled? If you want to see how your business results with CRM are stacking up to benchmarks in your industry – please visit www.salesforceswitch.com.

Feature Comparison



Below is a comprehensive list of features for Salesforce Sales Cloud | Enterprise Edition. CongruentX has a calculator that will walk you through the features you have and the degree of fit of Dynamics 365 Sales. Visit www.salesforceswitch.com

- **Lead Management:** Track, filter, and qualify new leads efficiently.
- **Lead Assignment and Routing:** Automatically assign leads to the right sales reps.
- **Lead Scoring:** Utilize AI to prioritize leads based on their likelihood to convert.
- **Duplicate Blocking:** Prevent duplicate entries to maintain data quality.
- **Web-to-Lead Capture:** Capture leads directly from your company's website.
- **Mass Email:** Send targeted email campaigns and track their effectiveness.
- **Email Productivity Tools:** Features like real-time dynamic meeting scheduling and email tracking.
- **Campaign Management:** Manage and track marketing campaigns across various channels.
- **Email Templates:** Use pre-formatted emails for consistent communication.
- **Campaign Influence:** Allocate revenue across different marketing campaigns to measure ROI.
- **Account and Contact Management:** Comprehensive view of customer information and interactions.
- **Opportunity Management:** Track and manage deals through their lifecycle.
- **Customizable Sales Process:** Personalize sales milestones with Sales Path.
- **Task Management and Activity Feed:** Keep track of all customer interactions in one place.
- **Person Accounts:** Manage individual customer accounts effectively.
- **Sales Console Apps:** A consolidated view for faster sales processes.
- **Salesforce Meetings:** Detailed insights for meeting preparation and follow-up.
- **Reports and Dashboards:** Use out-of-the-box tools to visualize metrics and track performance.
- **Workflow and Process Automation:** Automate complex sales processes and workflows.
- **Quoting and Contract Approvals:** Streamline the creation and approval of quotes and contracts.
- **CRM Everywhere and Collaboration:** Access CRM data and collaborate from any device.
- **Mobile App and Offline Functionality:** Access CRM features on mobile devices, even offline.

If this looks like too much to go through - Our calculator creates a percentage fit based on the features of Salesforce Sales Cloud Enterprise that you selected and is compared to like functionality in Dynamics 365 Sales Enterprise - which at list price is over 40% lower monthly investment.

If you have Invested in Einstein Conversation Intelligence or any Generative AI Features - You should consider Dynamics Sales Premium which will still offer like or even improved functionality - still at a lower investment

Feature Comparison



Below is a comprehensive list of features for Salesforce Service Cloud | Enterprise Edition. CongruentX has a calculator that will walk you through the features you have and the degree of fit of Dynamics 365 Service. Visit www.salesforceswitch.com

- Case Management:** Comprehensive tools for case creation, tracking, and resolution.
- Service Console App(s):** Unified interface for agents to manage multiple cases and customer interactions.
- Knowledge Management:** Access to knowledge articles and solutions to assist in resolving customer issues.
- Omni-channel Routing:** Basic routing capabilities for managing inquiries from various channels.
- Omni-channel Supervisor:** Monitoring tools for managing agent workload and performance.
- Case Auto-Assignment:** Automatically route cases to the appropriate agents based on predefined criteria.
- Web and Email Case Capture:** Capture cases directly from web forms and email inquiries.
- Case Email Auto-Response:** Automated email responses to acknowledge receipt of customer inquiries.
- Case Escalation Rules and Queues:** Define rules for escalating cases and managing them in queues.
- Advanced Case Management:** Enhanced case handling capabilities, including milestone tracking.
- Service Contracts and Entitlements:** Management of service contracts and customer entitlements.
- Computer Telephony Integration (CTI):** Integration with telephony systems for managing phone interactions.
- Chat (Live Agent):** Real-time chat capabilities to assist customers.
- Orders Management:** Tools for managing customer orders within the service context.
- Work Order Management:** Manage work orders and service appointments.
- Asset Management and Product Tracking:** Track customer-owned products and assets.
- Next Best Action:** AI-driven recommendations for the best course of action.
- Customizable Reports and Dashboards:** Real-time, configurable analytics for monitoring service performance.
- Email Integration with Outlook and Gmail:** Seamless email integration for correspondence tracking.
- Web Services API:** Connect external systems to Salesforce using REST and SOAP APIs.
- Custom Profiles and Page Layouts:** Customization of user profiles and page layouts to fit specific roles.
- Lightning App Builder:** Build custom apps using a drag-and-drop interface.
- AppExchange App Integration:** Access a marketplace of third-party apps to extend Service Cloud capabilities.
- Unlimited Custom Applications:** Develop and deploy custom applications to meet unique business needs.
- Developer Sandbox and Pro Sandbox:** Environments for developing and testing customizations without affecting live data.
- Roles and Permissions:** Define roles and set permissions for different user groups.
- Full Sandbox and Partial Sandbox:** Testing environments to replicate the production setup for training or testing new features.
- Salesforce Identity:** Single sign-on (SSO) capabilities for seamless access across enterprise applications.

The Real Cost of Salesforce

While the list price of Salesforce.com is often 40% more than Microsoft Dynamics for similar functionality, the actual costs can be much higher due to various hidden fees.

These hidden costs can make Salesforce 2 to 2.5 times more expensive than Dynamics 365.

1. Data Storage Costs: Salesforce offers limited data storage, typically 10GB. Additional storage can be costly, with charges escalating rapidly.

2. API Calls: Salesforce imposes limits on API calls, which are crucial for integrations. Exceeding these limits results in extra charges.

3. Feature Limitations: Many advanced features, such as advanced analytics and AI (like Einstein), are only available in higher-priced plans or as add-ons, increasing costs.

4. Customization and Integration Costs: Customizing Salesforce and integrating it with other systems often require significant investments in development and consulting, driving up costs.

5. User Training and Support: Due to Salesforce's complexity, additional costs for user training and specialized support may be necessary.

In contrast, Microsoft Dynamics 365 offers a more transparent pricing model with fewer hidden costs. Its integration with other Microsoft products and comprehensive out-of-the-box functionality make it a more cost-effective choice.

Dynamics 365 provides more generous data storage and does not heavily restrict API calls, offering a more predictable investment.



Negotiating for Your Company

When negotiating with Salesforce, it's crucial to be aware of their common tactics to ensure a fair deal. One key tactic is the "Business Desk and Divide and Conquer" strategy. Salesforce often attempts to isolate different stakeholders within a company, negotiating separately with each to create confusion and leverage conflicting information. To counter this, it's essential to establish a unified decision-making process and a centralized negotiation team. This team should maintain clear and consistent communication, ensuring that all departments are aligned and informed.

43% of customers felt that Salesforce is more concerned with its own success.

Another important consideration is leveraging your broader Microsoft relationship, especially if you're considering transitioning to Dynamics 365. Unlike Salesforce, which may keep its sales team unaware of discounts offered to other clients,

Salesforce also capitalizes on timing and fiscal year manipulation. Understanding vendor fiscal calendars is critical, as Salesforce often aligns contract renewals and negotiations with their fiscal year-end to maximize revenue. In contrast, Dynamics 365 provides more flexibility, allowing contract renewals and negotiations to align with the customer's budget cycle. This flexibility can be beneficial, particularly in managing financial planning and ensuring cost predictability. Lastly, consider the impact of budgeting cycles. Salesforce may push for contract decisions that align with their budget cycles, potentially leading to rushed decisions or unfavorable terms. Dynamics 365, however, offers more accommodating payment plans, including options for true-ups and other flexible vehicles. This approach emphasizes fairness and cost predictability, making it easier for companies to manage their budgets effectively. By understanding and navigating these tactics, you can negotiate more effectively and secure a better deal.

Is Salesforce Trying to Stop You From Looking at Other AI Options?

AI? As Long as its Salesforce...



In the rapidly evolving landscape of artificial intelligence, companies are continually seeking innovative solutions to stay ahead. Microsoft, for instance, has made substantial investments in AI, amounting to an estimated 47 billion dollars, according to industry analysts. This massive investment underscores Microsoft's commitment to advancing AI technologies and providing cutting-edge solutions to its customers. In contrast, Salesforce's investment in AI research and development is much less transparent. While Salesforce does not publicly disclose its AI R&D spending, analysts estimate that the company has invested around 500 million dollars.

This relatively modest investment suggests a more cautious approach to AI innovation compared to Microsoft's extensive efforts.

Many CIO groups have expressed concerns that Salesforce uses its contracting processes to lock companies into its AI offerings. These contracts often include clauses that restrict customers from exploring other AI solutions, potentially limiting their access to more advanced or innovative technologies. As one Executive Steering Participant CIO noted, "It's very apparent they see AI as a threat and want to lock their customer base in." This approach raises concerns about Salesforce's commitment to fostering an open and competitive AI landscape, where companies can freely explore the best solutions for their needs.



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Section 2: Migration



Get Data Right

Data integrity is crucial for the success of any CRM system. According to Salesforce.com research, 91% of CRM data is bad, and 70% of it decays every year. Ensuring the accuracy and relevance of data during migration is paramount.

Relevance: It's essential to evaluate whether the data serves a current or future purpose. Data that does not have a clear use in the new system should not be migrated, as it can clutter the system and reduce efficiency. Prioritize data that directly supports business processes and decision-making.

Quality: High-quality data is characterized by its accuracy and completeness. Only data meeting these standards should be considered for migration. Low-quality data, on the other hand, should be discarded or flagged for potential enrichment. This step helps maintain the integrity of the new CRM system and ensures that users have access to reliable information.

Compliance and Legal

Requirements: Certain data may need to be retained for compliance, auditing, or legal reasons. Even if this data is not actively used, it must be preserved according to regulatory requirements.

Applying First Principles Thinking to Data Migration:

1. Identify Core Objectives for Data Migration: Clearly define what the data migration aims to achieve.

2. Categorize and Evaluate Data: Group data by relevance and quality.

3. Set Criteria for Data Worth Migrating: Establish standards for data inclusion.

4. Data Cleansing and Optimization: Remove duplicates and correct errors.

5. Leverage Automation and AI: Utilize advanced tools to streamline the migration process.

6. Stakeholder Involvement and Feedback: Engage with key stakeholders to ensure all relevant data is considered.

7. Post-Migration Review and Adjustment: Conduct a thorough review after migration to make necessary adjustments.

By following these principles, organizations can ensure a smooth transition to a new CRM system, maintaining data quality and compliance.

Getting Your Data From Salesforce

Exporting data from Salesforce is an essential step in migrating to a new CRM system like Dynamics 365.

However, it's crucial to understand the process and limitations involved. Salesforce offers a Data Export Service that allows customers to schedule weekly or monthly exports, ensuring data is regularly backed up.

For a more comprehensive solution, customers can request a full data export from Salesforce support, which provides a one-time export of all data.

Important Considerations:

1.Data Retention Policies: Be aware of Salesforce's data retention policies and ensure that data is exported before contract expiration. This precaution helps avoid any loss of critical information.

2.Visibility of Fields: Not all data fields in Salesforce are automatically available for export. Only fields marked as "visible" can be included. Additionally, some entity types in Salesforce may not have direct equivalents in Dynamics 365, which can complicate the migration process.

3.Data Sensitivity and Integrity: When importing data into Dynamics 365, some adjustments may be necessary. For instance, certain data may need to be mapped to different custom entity types. It's also important to note that while Salesforce record keys are case-sensitive, Dynamics 365's Global Unique IDs (GUIDs) are not. This difference must be accounted for to ensure data integrity during migration.

By understanding these nuances, companies can better prepare for the transition, ensuring that their data is accurately and securely transferred to Dynamics 365.



Reports

Both Salesforce and Microsoft Dynamics 365 offer robust CRM reporting capabilities. However, many companies find that the transition to Dynamics 365 can streamline their reporting processes significantly.

A common scenario is the perceived need for a large number of reports in Salesforce, often ranging from 50 to 75. This is typically due to the limited flexibility in Salesforce's standard reporting tools, which often require multiple distinct reports to address different business questions.

In Dynamics 365, the **Advanced Find** and **Saved View** features offer powerful alternatives. These tools allow users to create dynamic, custom views of their data, meeting and often exceeding the functionality of traditional reports. With Advanced Find, users can easily filter, sort, and group data without needing to create separate reports for each variation.

This flexibility can dramatically reduce the number of reports required, as a single view can serve multiple business needs.

Moreover, Microsoft Dynamics 365 offers deep integration with **Microsoft Excel**, allowing users to export CRM data into Excel for further analysis.

This integration is particularly valuable as it enables real-time data editing within Excel, providing a familiar and powerful tool for data manipulation. With proper training, users can quickly learn to leverage these tools, enabling them to slice and dice their data in ways that previously would have required IT support.

This not only empowers users but also reduces the dependency on technical teams for report creation and data analysis. As a result, companies often experience greater efficiency and more insightful decision-making capabilities with Dynamics 365.



Make the Move



Migrating data from Salesforce to Microsoft Dynamics 365 requires careful planning and understanding of the export/import processes.

Microsoft FastTrack offers tools that can automate and streamline the data migration process, ensuring a smooth transition.

Data Export Options:

1.Web Services Export: Utilize Salesforce web services to directly extract your data. This method allows for more control and customization during the extraction process.

2.Salesforce Assistance: Alternatively, request a .csv data extraction from Salesforce. This method typically involves receiving separate files for each entity, such as Accounts, Leads, and Contacts.

Validation and Accuracy:

After exporting data, it's crucial to validate the files. Compare the expected number of records and fields with the actual exported data. Address any discrepancies with Salesforce support to ensure no critical information is missing.

Data Structure Differences:

One of the significant differences between Salesforce and Dynamics 365 is the handling of notes. Salesforce may use multiple fields for notes, while Dynamics 365 consolidates them into a single field. During the migration, concatenate these fields to preserve all relevant information.

Data Loading Strategy:

For large enterprises, it's advisable to plan the initial data load at least two weeks before the official launch of Dynamics 365. This allows ample time to address any issues that arise.

Additionally, schedule an incremental data load just before the launch to ensure that the most up-to-date information is included.

By following these steps and utilizing tools from Microsoft FastTrack, organizations can achieve a seamless data migration, ensuring data integrity and minimizing disruptions during the transition.



3

Section 3: Success



CRM Success

We have learned that CRM Success is more important now than ever. Buyer expectations have changed plus the way we sell and serve has changed. Nine out of ten companies actually think that the way they treat their customers is a critical part of their competitive advantage.

Companies have made massive investments in technologies to keep up with client and even employee expectations. CRM has grown to be a \$60 billion industry alone. With the massive number of new CRM solutions and peripheral solutions in the sales engagement space marketing automation ecosystem and service areas is actually much bigger than that.

Regrettably success with CRM can be quite elusive. Across the industry companies who say they are satisfied with their CRM solution is about 50% in the most generous surveys. So really CRM success - using the old approach is a flip of the coin

CongruentX was founded to help companies Get CRM Right so they can outgrow their competitors. In sussing out why CRM overall has not been successful for so many firms it really comes down to two reasons.

The way we consume information has changed but the way CRM is implemented has not changed.

The Way We Consume Information has Changed

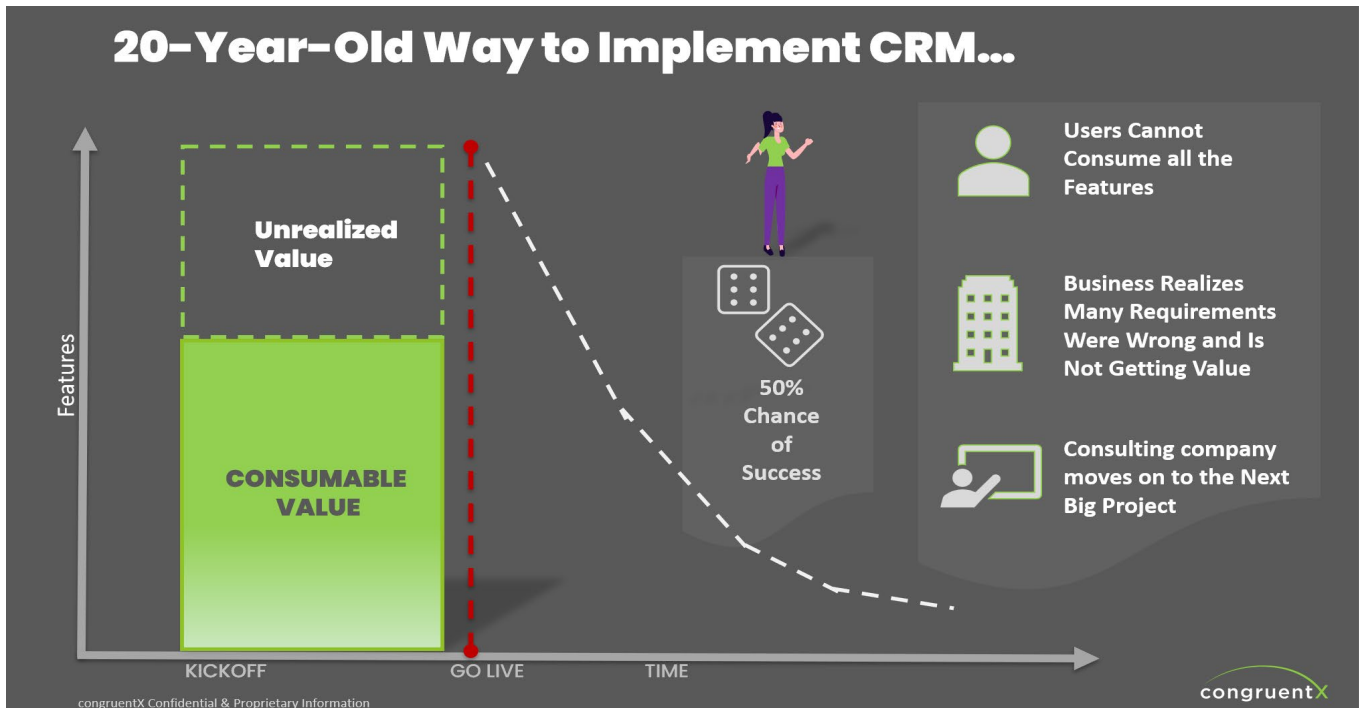
The first reason CRM is not typically successful is hidden in plain sight. At home people consume technology in context. for example if someone is going for a walk their Apple Watch might say "Looks like you are going for a walk do you want to track it"? Or if you want to know what the weather is going to be you just ask a less Alexa or Google. There are no big forms to fill out.

At work - well-intentioned teams create large forms over data containing lots of information but not a lot of context for the user and what they're trying to do at that particular time. At home people get insights in context - at work people get big forms over data and regrettably not a lot of context.



The Way We Consume Information Has Changed

CRM Success



CRM Implementation Approach Hasn't Kept Up

The 20 year old approach to implementing CRM is to get a large list of features, tries to implement them all at one time and don't account for humans ability to consume features all at one time or for course corrections in the event some of the features were not accurate or the business changes.

An implication of this old approach is a negotiation where the purchasing team wants to buy as many features as they can and implement them as fast as possible to minimize cost.

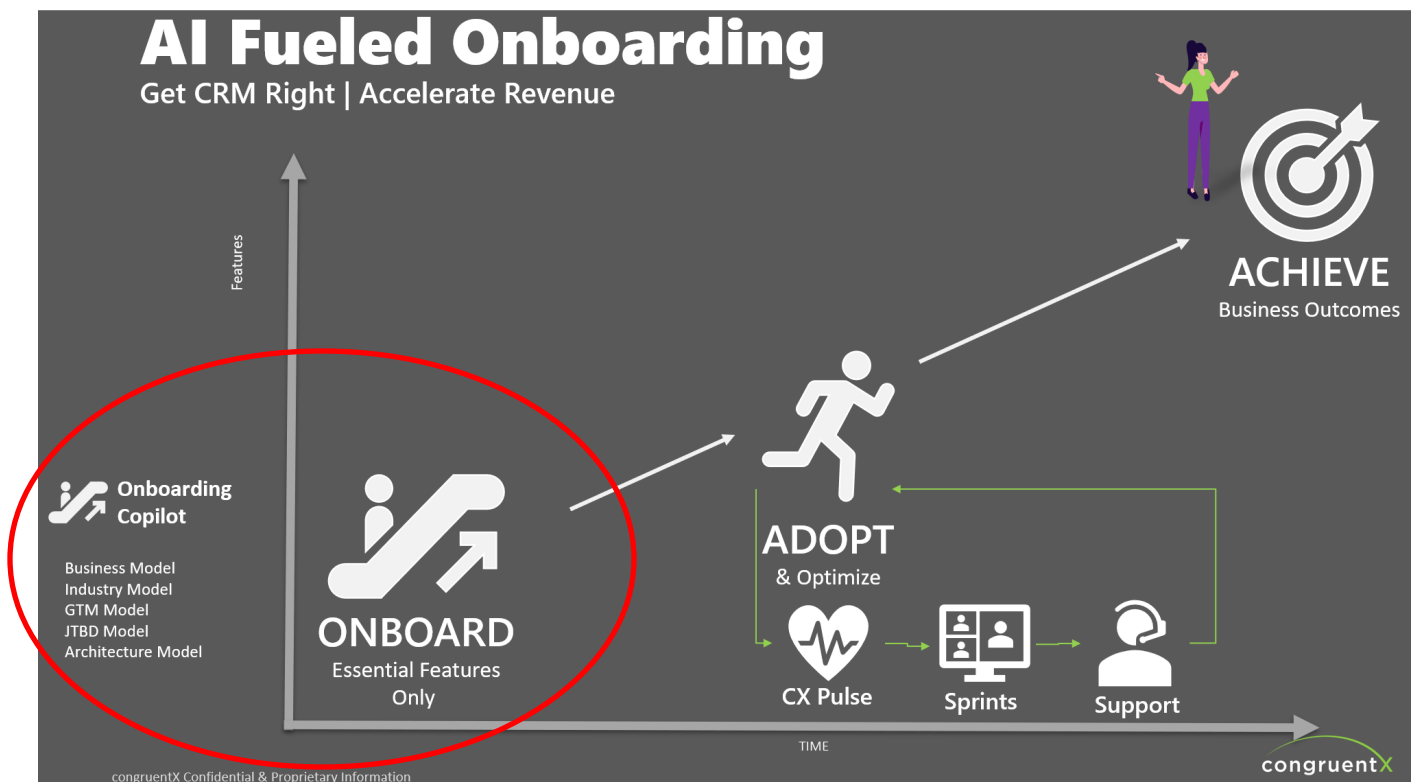
At the same time the consulting company wants to keep a large team busy so a shorter timeline actually works out better for the systems integrator and they're consulting team as well.

As a result - too many features are rolled out at one time, they are forced to consume big forms over data in the name of a "360 degree view" of the customer, the users cannot consume the features, nor is a mechanism in place to course correct for the features that are not right and the consulting company has moved on to their next big project.

At best this approach results in significant unrealized value. At worst – it results in a project failure and a disastrous impact on the business.

Ditch the Big Bang and Start with the Essentials

Onboard



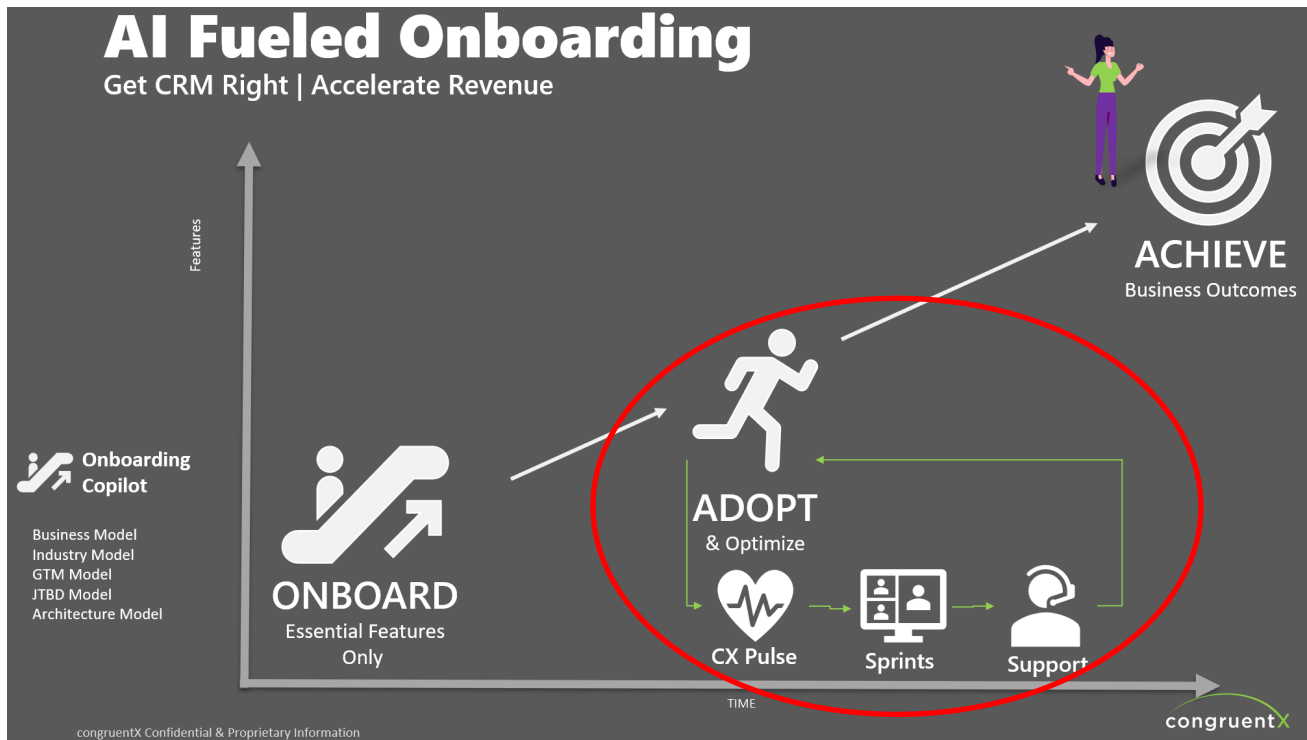
During the step of onboarding – you should bring the people from our client’s team who own the go to market strategy, the people who own the technology, and the people who use the technology to walk out the go to market strategy ie the users - together in design thinking sessions to iterate on the business outcomes and what is most important.

At this point the team looks at what each personas goals are, where they are encountering digital friction - then solves for how to make it functional, easy and enjoyable – leveraging the Microsoft stack as fuel.

Based on the feedback from that team and the business requirements and timelines congruentX and our client implements only what we call the essential features to start with. These are the features that are business necessary and features that are consumable by the users at one time

Adoption is the Cornerstone to Success

Adopt



Driving successful product adoption for a new CRM customer requires a strategic approach focused on delivering continuous value throughout the customer journey not a big bang. This begins with defining clear success metrics aligned with the customer's business objectives and establishing key performance indicators that can be regularly tracked and reported. The approach emphasizes proactive engagement, where the provider consistently interacts with the customer to ensure they are fully leveraging the CRM solution. This can include comprehensive onboarding, personalized training sessions, periodic health checks, and a robust support system that anticipates and addresses issues before they become significant obstacles.

To ensure long-term adoption and satisfaction, it's crucial to design the customer journey with strategic touchpoints that encourage deeper engagement and expanded use of the CRM over time. CX does this with sprints. This phased implementation should focus on delivering early wins that demonstrate immediate value, building confidence and driving broader adoption across the organization. Regular feedback loops and data-driven insights allow for real-time adjustments to the adoption strategy, ensuring that the CRM solution remains aligned with the evolving needs of the customer.

Adoption Continued

One of the biggest highlights of our research is the best companies are driving CRM adoption by providing users with contextual experiences instead of overwhelming them with large, complex forms.

The best companies are typically integrating smaller, context-specific interactions into users' workflows significantly enhances user engagement and data quality, making CRM tools more intuitive and user-friendly.

What Doesn't



Forms



What Does

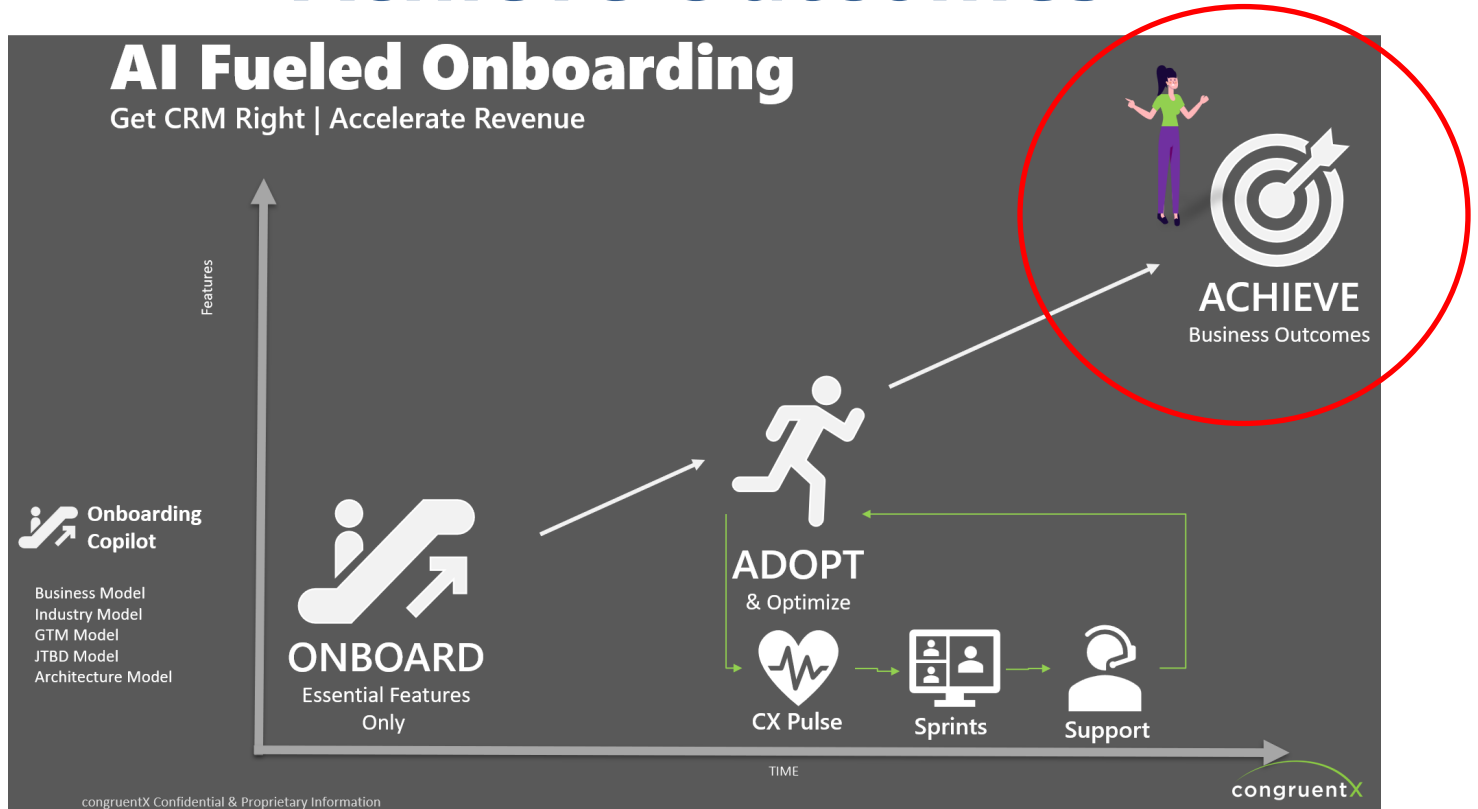


Context

One of the biggest mistakes is to build large forms over data CRM application experiences. This is often in the misguided view that 360-degree view means that the user needs to see everything about the customer all the time.

A best practice is to think about what the person is trying to do and figure out what they need at that moment in time, and to make it functional, easy and enjoyable.

Achieve Outcomes



To maximize impact, it's essential to adopt a phased implementation approach that prioritizes early wins. These initial successes are crucial for building momentum and demonstrating the CRM's value to key stakeholders. By delivering quick, measurable results, you can foster greater buy-in across the organization, leading to broader adoption and deeper integration of the CRM into daily business processes. This approach also emphasizes continuous engagement with the customer through regular check-ins, feedback loops, and data-driven insights, allowing for real-time adjustments that keep the CRM solution aligned with evolving business needs and goals.

Ultimately, driving business outcomes with a CRM solution is about creating a sustained impact that grows over time. This requires not only a robust implementation plan but also a commitment to ongoing support and optimization. By maintaining a close partnership with the customer and leveraging data to guide

Keeping a focus on the north star of business outcomes with the vehicle to diagnose act and course correct is critical to achieving business outcomes.

CRM Data as Fuel

For growing companies, the journey towards enterprise value is significantly influenced by the quality of data within their CRM systems and the behaviors this data drives.

This chapter explores how these companies can leverage high-quality data, facilitated by AI integration, to instigate impactful business behaviors, focusing on congruentX's AI Fueled Revenue Accelerator for Dynamics 365.

The adoption of CRM systems and the integration of AI is not just about accumulating data; it's about cultivating a data-driven culture within the organization. Quality data becomes the lifeblood of strategic decision-making, influencing everything from sales tactics to customer engagement strategies.

When CRM data is accurate, comprehensive, and easily accessible, it empowers teams to make informed decisions, aligning their actions with the company's broader growth objectives.

One of the key benefits of good CRM data is the ability to analyze and understand unit economics - the direct revenues and costs associated with a particular business model expressed on a per-unit basis.

This understanding is crucial for companies as it provides insights into the most profitable areas of their business, helping to identify and replicate successful strategies across the portfolio.

The AI Fueled Revenue Accelerator for Dynamics 365 by congruentX plays a pivotal role in this process. It not only helps in capturing and analyzing data but also in translating it into actionable insights. This tool allows companies to break down their revenue streams, understand customer behaviors, and identify potential areas for optimization.

By applying AI to unit economics, companies can gain a granular understanding of their revenue engine, enabling them to make strategic decisions that drive growth and profitability.

Bowtie Model for Leveraging Unit Economics Data

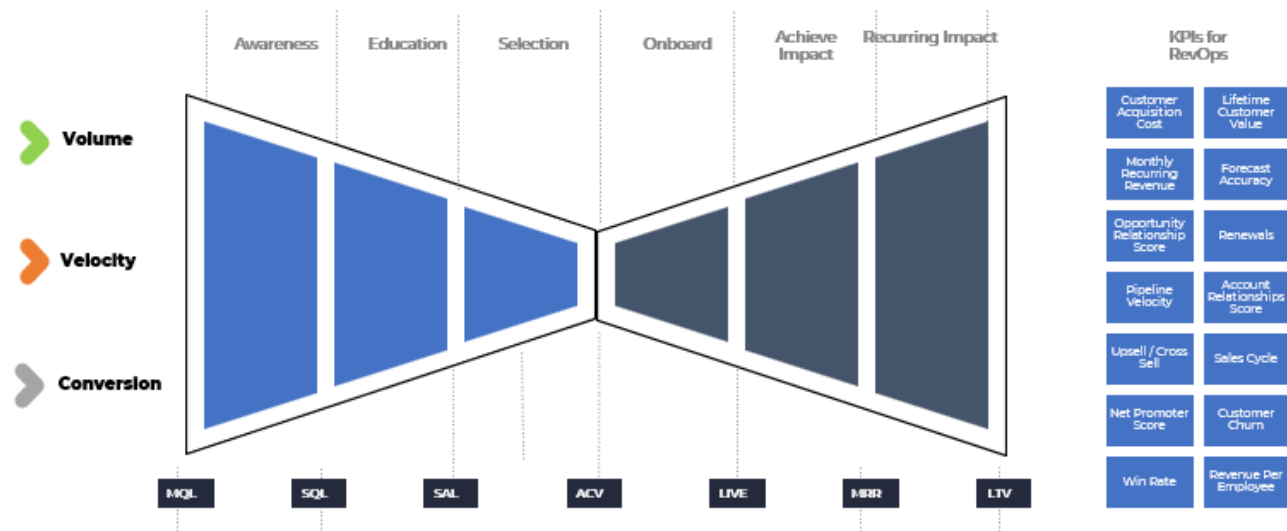
Revenue Factory

The Winning by Design Bowtie model offers an innovative way to visualize a revenue engine, extending beyond the traditional pipeline to resemble a bow tie, emphasizing not only the initial value derived from acquiring a customer but also the long-term value that customer brings.

This model examines the revenue journey across three key dimensions at every stage. First, it considers the volume, which is the number of units or deals at each stage. Then it looks at the velocity, or the time each unit spends in a given stage. Lastly, it evaluates the conversion, which is the movement of units from one stage to the next.

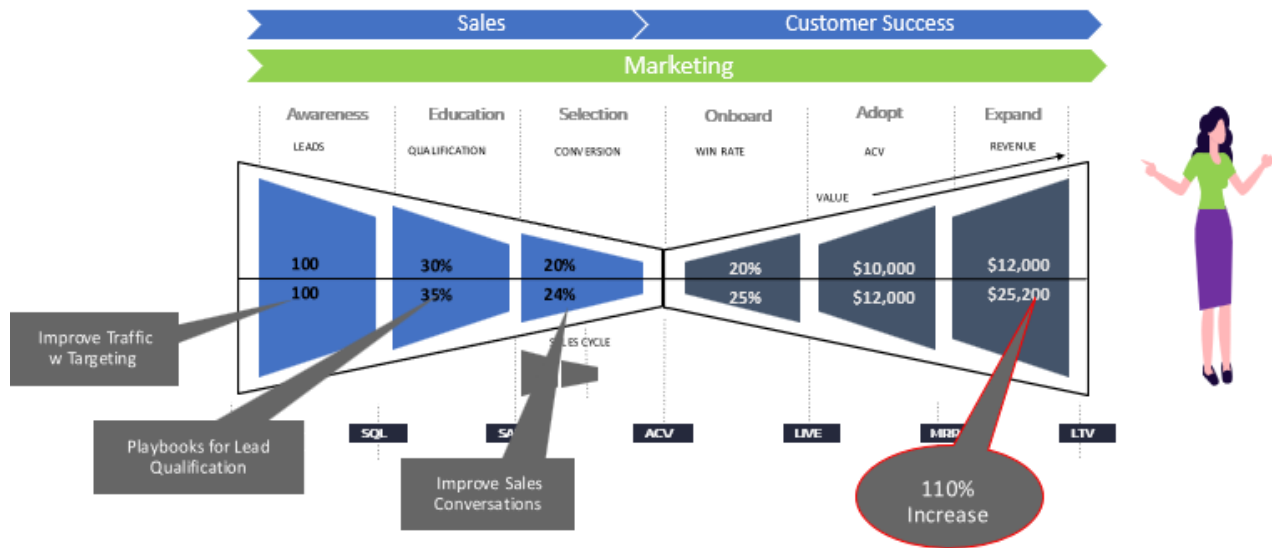
By analyzing these dimensions, the Bowtie model allows us to fine-tune our revenue engine with the same precision one would apply to optimize a manufacturing plant's shop floor, ensuring efficiency and longevity in customer value.

CongruentX AI Fueled Revenue Accelerator – powered by Dynamics 365 and Microsoft AI is the first ever CRM Solution with Unit Economics data built right in.



Bowtie Model for Leveraging Unit Economics Data

Chapter 4 continued



Often traditional pipeline analysis drives linear solutioning. A simple example would be if I'm getting 100 leads and I want to double my revenue then that means I need to find 200 leads.

Just like a factory that leverages lean thinking - a revenue engine that leverages the bow tie funnel and unit economics visible right inside CRM with congruentX - can solve for key constraints. By solving for multiple key constraints this revenue engine can ultimately see not linear but exponential changes.

In the example above the company can improve traffic targeting around their ideal client profile so the same number of leads are better leads.

They can leverage sales playbooks to better qualify the leads and a conversation intelligence engine like DialogueCopilot to implement playbooks in sales conversations to ask better questions and improve win rates.

The bow tie funnel allows for post sale analysis. They could solve for making a bigger impact early and driving higher adoption to increase stickiness and expansion revenue.

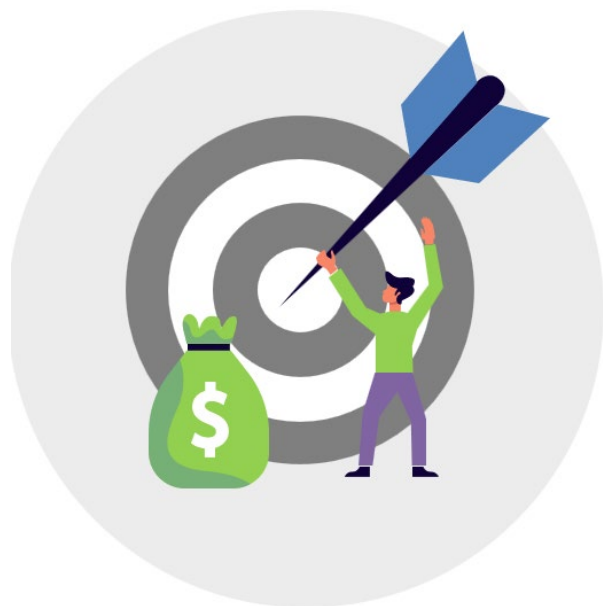
So, that same 100 leads become worth twice as much per customer and ends up twice as much revenue long term.

Summary

Switching from Salesforce to Microsoft Dynamics 365 is a strategic decision that can lead to significant benefits in terms of cost savings, enhanced functionality, and improved user experience. Throughout this guide, we've detailed the critical steps for a successful transition, from the initial decision-making process to the complexities of data migration and the strategies for achieving long-term success with Dynamics 365.

Dynamics 365 offers a more integrated, flexible, and cost-effective CRM solution compared to Salesforce, which is often burdened with hidden fees and less transparent pricing. By leveraging the powerful tools and services provided by Microsoft, including deep integrations with other Microsoft products and advanced features like AI-driven insights, organizations can achieve greater efficiency and a more cohesive user experience.

www.salesforceswitch.com



As you move forward with your CRM transition, keep the focus on aligning your technology with your business goals. This guide provides the roadmap, but success will ultimately depend on careful planning, continuous engagement, and a commitment to optimizing your CRM strategy for the long term.

With the right approach, switching to Dynamics 365 can be a transformative step for your organization, driving sustainable growth and competitive advantage

About the Author



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Chuck Ingram is the Chief Executive Officer of congruentX. A company that helps companies achieve real business outcomes with Dynamics 365 the Power Platform and Artificial Intelligence.

He worked as Innovation Lead for North America for the Digital Sales and Service practice at Avanade. He started working with Microsoft CRM in its earliest days at Microsoft, where he worked for 9 years.

Chuck had a chance to work with many of the strategic projects as the new product developed into an actual enterprise-ready CRM solution.

He and his partners started congruentX to help companies Get CRM Right so they can outgrow their competitors.

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