

SEAMLESSLY MIGRATING FROM SALESFORCE TO MICROSOFT DYNAMICS 365 CE: A STRATEGIC GUIDE

NEXXER

Many organisations rely on Salesforce as their CRM, but as business needs evolve, the question arises: Is there a better option? Increasingly, organisations are migrating to Microsoft Dynamics 365 Customer Engagement (CE) to leverage deeper integration with the Microsoft ecosystem, advanced AI capabilities, and cost efficiencies that support long-term growth.

At Nexer, we specialise in making this transition smooth, efficient, and risk-free, ensuring businesses unlock the full potential of Dynamics 365 CE with minimal disruption.

Why Move from Salesforce to Dynamics 365 CE?

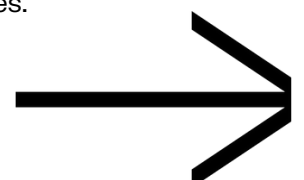
Migrating from Salesforce is a strategic decision, one that should be driven by clear benefits and the opportunity to build a truly integrated business ecosystem.

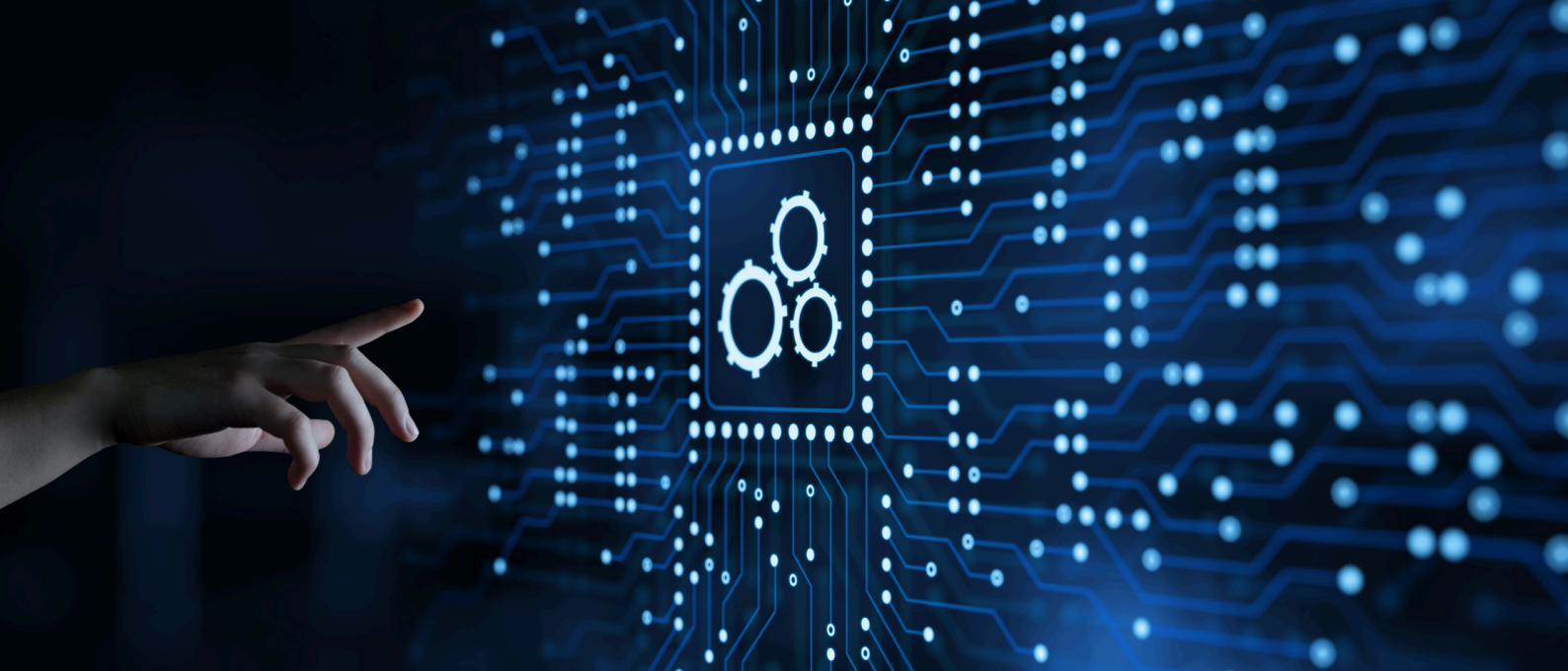
Seamless Integration Across the Microsoft Stack

Unlike Salesforce, Dynamics 365 CE is designed to work natively with Microsoft applications, including Outlook, Teams, SharePoint, and Power BI. But more importantly, if your business uses Dynamics 365 Business Central or Finance & Supply Chain Management, you gain seamless integration across ERP and CRM, ensuring real-time visibility into financials, supply chain data, and customer interactions without disconnected systems.

Lower Total Cost of Ownership

Salesforce often comes with higher licensing costs and additional fees for customisations. Dynamics 365 CE offers a more cost-effective subscription model, especially for organisations already invested in Microsoft 365, enabling a more unified platform without extra integration expenses.





AI-Driven Productivity with Microsoft Copilot

Dynamics 365 CE is built with AI-powered automation that drives predictive insights, smarter customer interactions, and streamlined workflows—without requiring third-party AI solutions. Microsoft Copilot enhances productivity with intuitive AI-driven recommendations, saving time and boosting efficiency.

Customisation & Flexibility

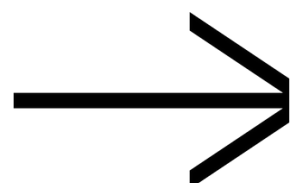
While both platforms support customisation, Dynamics 365 CE is deeply integrated with Power Platform, enabling low-code automation and workflow tailoring without excessive reliance on developers. Businesses can easily modify processes, build apps, and automate tasks using Power Automate and Power Apps—all within the Microsoft ecosystem.

Security & Compliance Advantage

Microsoft offers enterprise-grade security and global compliance frameworks, making Dynamics 365 CE an ideal solution for industries with strict regulatory requirements. With built-in data governance, advanced identity management, and comprehensive threat protection, businesses can ensure compliance while maintaining a secure environment.

THE POWER OF A FULLY INTEGRATED BUSINESS ECOSYSTEM

By choosing Dynamics 365 CE alongside Business Central or Finance & Supply Chain Management, your organisation gains a true end-to-end solution, where ERP and CRM work together seamlessly. This unified platform ensures financial transactions, inventory updates, sales data, and customer interactions are all interconnected, giving your business unmatched operational visibility and efficiency.



The Nexer Approach: A Seamless Migration Journey

Migrating from Salesforce can be complex, but with Nexer as your trusted implementation partner, we ensure a structured, low-risk transition with minimal downtime. Our proven methodology includes:

1. Discovery & Planning

Understanding your business processes, CRM requirements, and data structure to define a tailored migration roadmap.

- Conduct stakeholder workshops to align objectives.
- Identify key Salesforce workflows, custom objects, and integrations.
- Map out how Dynamics 365 CE will enhance your operations.

3. Migration Execution

Using best-in-class migration tools, we securely transfer your Salesforce data into Dynamics 365 CE.

- Leverage Microsoft's Data Migration Framework for efficiency.
- Ensure integrity by running real-time validation checks.
- Maintain continuity with phased rollouts.

5. User Adoption & Training

Successful migration isn't just about data, it's about empowering users. Nexer delivers comprehensive training to ensure a smooth transition.

- Develop tailored training sessions for end-users.
- Provide interactive workshops for best practices.
- Offer ongoing support to drive long-term CRM success.

2. Data Assessment & Preparation

Salesforce data varies by organisation, so we conduct a deep data audit to ensure a smooth migration.

- Assess data quality and structure (contacts, accounts, activities).
- Clean and standardise records to eliminate duplicates.
- Define a data mapping strategy to align fields between platforms.

4. Customisation & Integration

Your CRM should align with your business workflows. Nexer ensures full customisation to meet your needs.

- Configure security roles, automation rules, and business workflows.
- Implement integrations with Microsoft Teams, Outlook, and Power BI.
- Optimise AI-driven capabilities with Copilot and Power Platform solutions.

Why Choose Nexer as Your Implementation Partner?

With our expertise in Microsoft technologies, Nexer helps organisations migrate with confidence.

Partnering with us ensures:

- ✓ **Minimal Downtime:** A structured approach for a swift, disruption-free transition.
- ✓ **Future-Ready CRM:** Strategic AI & automation integration.
- ✓ **End-to-End Support:** From planning to post-go-live optimisation.
- ✓ **Proven Success:** A track record of delivering high-impact CRM solutions.

Ready to make the move?

Switching from Salesforce to Dynamics 365 CE unlocks seamless Microsoft integration, AI-driven automation, and cost savings, giving your business a smarter, more connected future. Let Nexer guide your transition with a free assessment, providing a clear migration plan and cost analysis.

Book your assessment today by emailing us at Martinb@nexergroup.com and take the first step toward effortless transformation.