

# Microsoft Dynamics vs Salesforce Comparison Guide 2024



Customer Relationship Management is a vital aspect in the entire lifecycle of enterprise operations. It reflects brand value, market positioning, reputation, sales, customer satisfaction, and loyalty. Modern times have necessitated a shift from conventional CRM softwares to new suites that integrate the latest technologies such as Artificial Intelligence (AI), Machine Learning (ML), Predictive Analytics, Natural Language Processing (NLP), Cloud Computing, and many more.





**Focus Points:** The focus is on ease of operations, intelligent analytics, automation, flexibility, scalability, industry-grade security, and integration capabilities. While decision-makers look for an integrated and comprehensive **ERP** platform, they also factor in essential aspects such as TCO, faster ROI, minimal disruption during the transition, and easy change management for seamless adoption. Automation is a key factor as there is a need to move from manual-driven tasks to automated processes that save resource engagement, time, and associated costs with increased accuracy. Process automation is enabled by a low-code/no-code model and Generative AI that simplifies the creation of the automation sequence.

Another prominent factor is the need for a **CRM** that seamlessly works across any device, anytime and anywhere. This gives the much-needed mobility advantage that suits a remote workforce.

The move is to provide a holistic customer experience, with tailor-made offerings that suit individual buyer personas and make the entire lifecycle of customer engagement simpler. Such capabilities are achieved with the help of AI, ML, and Predictive Analytics that analyze data patterns and discover hidden insights that enable intelligent customer engagement, reduce operational costs, and ensure streamlined business processes with easy visibility by a self-service model.

While many CRM suites offer such capabilities in varying features, Microsoft Dynamics and Salesforce lead the race, as per a survey conducted by Gartner for its Magic Quadrant Analysis for CRM softwares in 2023<sup>1</sup>.

Gartner positions both Microsoft Dynamics and **Salesforce** as leaders in the CRM segment, after analysis of their essential & distinctive capabilities and user feedback. While potential users might find it difficult to make a choice to revamp their existing CRM infrastructure, we at Korcomptenz present a specially curated Whitepaper that will help you understand each of them better and make an informed decision to transition.

Our endeavor for the past 20 years has been to guide our clients on the path towards **digital transformation** successfully, and we are always here to help you achieve the optimal level of digital maturity required to stay ahead in the competitive race. As a business owner, you cannot afford to lose on leveraging modern technologies that give you the perfect impetus for current sustenance and future growth. Read ahead to know more and do reach us for any queries.





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## Introduction

### Microsoft Dynamics:

Microsoft Dynamics 365 is one of the leading CRM and ERP platform that scores high on performance and integration capabilities. Dynamics 365 includes 15 constituent modules for sales, customer service, field service, automation, marketing, finance and operations, and other business applications. It integrates with native Microsoft products such as Power BI Office 365, and Azure. This provides AI-powered analytics, easy App building, automating marketing campaigns, monitoring customer interactions, and optimizing business operations.

Dynamics 365 is offered on a subscription basis with varying plans, and suits both small and medium market segments to big enterprises with multiple locations, languages and currencies.

The recent introduction of Microsoft Copilot for GPT-based Generative AI makes it simple to use for automatically perform routine and complex business tasks based on natural language inputs, and paves way for an intelligent and comprehensive CRM.

#### Evolution:

Dynamics has a long history, dating back to 1981, when the flagship product Dynamics GP was introduced. Since then, Microsoft had a string of acquisitions such as Dynamics GP, NAV, Solomon, Axapta amongst others, with Dynamics 365 introduced in 2016. The suite has been constantly evolving, bringing in many additional features and modules, and integrating with latest technologies that provide a unified solution for CRM.



### Salesforce:

Salesforce CRM is the world's leading CRM platform. It suits businesses of all sizes and verticals and scores high on its extensive features and ease of usage. It easily connects with other ERP applications and provides extensive options for third-party integrations. The suite comes with Sales, Service, Marketing, E-Commerce, application development and analytics solutions, providing end-to-end CRM capabilities that modern businesses require in an integrated platform.

The recently introduced Einstein Assistant-built on the OpenAI GPT model, offers easy usage with automatically generated tasks based on a natural language input.

#### Evolution:

Salesforce was founded in 1999, and steadily added new features and applications to its flagship product. Salesforce was one of the first to introduce CRM as a Software-as-a-Service (SaaS) model and had a string of acquisitions and partnerships to accentuate its offerings. Notable versions include Force.com, which is now Salesforce Platform, enabling addition of custom applications into the native Salesforce suite. Salesforce AppExchange is an online platform that allows selling of third-party applications and consulting services within the Salesforce domain.



## Salesforce vs Dynamics 365 Comparison Chart<sup>2</sup>

Comparison	Microsoft Dynamics	Salesforce
Ease of Use and Security	2/5	4/5
Customer Support	5/5	4/5
Free Version	0/5	0/5
Product Limitations	2/5	3/5
Knowledge Base & Learning	4/5	3/5
Mobile Versions	4/5	5/5

## Salesforce vs Dynamics: Ease of Use and Security

### Microsoft Dynamics 365

- > Native Integration with Office 365 Apps like Word and Excel gives the ease of data access within the application.
- > Dynamics 365 has an initial learning curve, though not excessively steep.
- > It's more complex than an Excel spreadsheet, but manageable.
- > Integration with Azure enhances overall efficiency and ease of usage.

In Microsoft Dynamics, security is bolstered by role-based access control, data encryption, and adherence to regulatory standards such as GDPR, IAS/IFRS, SOX and HIPAA. Azure's strong security infrastructure provides additional layers of protection.

### Salesforce

- > Designed as an intuitive sales tool for non-tech-savvy sales teams.
- > Initially overwhelming due to the extensive array of CRM tools.
- > Excels in streamlining processes such as marketing automation and sales territory management.

Salesforce ensures robust security through features like data encryption, multi-factor authentication, and frequent security audits. The platform meets various industry standards, including GDPR, HIPAA, and SOC 2, ensuring comprehensive protection of sensitive information.





## Salesforce vs Microsoft Dynamics: Customer Support

### Microsoft Dynamics 365

- Exceptional support, along with integrated Copilot for real-time assistance
- Commitment to exceptional customer service.
- Affordable support plans tailored to diverse needs.
- Multiple options for personalized assistance:
  - ◆ Chat
  - ◆ Phone calls
  - ◆ Email
  - ◆ Teams
  - ◆ Scheduled callback from a dedicated support agent.

### Salesforce

- Emphasis on robust customer service and support.
- Abundant resources for assistance along with the Einstein Generative AI Assistant.
- Guidance through online help tools for self-service.
- Options for direct interaction with a live agent.
- Additional support via:
  - ◆ Phone
  - ◆ Requested callback

## Salesforce vs Microsoft Dynamics: Free Versions

### Microsoft Dynamics 365

- There is a free 1-month trial version available
- Microsoft Teams users can access Dynamics 365 data without a full CRM subscription.

### Salesforce

- No free version is available.
- Free trials are available but not suitable for long-term use.





## MS Dynamics vs Salesforce: Product Limitations

### Microsoft Dynamics 365

- > Dynamics better suits a Microsoft technology landscape, though it offers easy migration and integration capabilities which do not just limit it to the Microsoft ecosystem.
- > High costs for on-prem deployment which necessitate a cost-effective shift to the cloud. [Azure Cloud](#) comes helps manage capacity with varying pricing options above the allowed level. Factors like data storage volume, data transfer, and redundancy help make a choice.
- > Does require customization for scenarios where the operating model and data are not a part of the regular Dynamics features and datasets. However, Dynamics makes it simpler for customizing as per specific requirements.

### Salesforce

- > Salesforce has limitations in usage and scale. Typical limits include the number of database queries and resource consumption. If these limits are exceeded, there might be additional billing charges or affect the performance of the system.
- > There are limitations that are based on the integration with third-party applications, such as with sending messages from an external mobile platform. Salesforce has a way to resolve such limitations, so its better that a preliminary load assessment is carried out to factor the volume.
- > Salesforce's reporting capabilities may not be as robust as the analytics offered by [Microsoft's Power BI](#).
- > The Einstein Generative AI Copilot is slightly limited in its scope and features when compared to Microsoft Copilot.



## MS Dynamics vs Salesforce: Knowledgebase & Learning

### Microsoft Dynamics 365

- > Ready-to-use knowledge base solution.
- > Integrated within the Customer Service Hub module.
- > Seamless integration of articles into the knowledge base and learning resources.
- > Utilizes artificial intelligence for word and topic suggestions.
- > Enhances efficiency and relevance through AI-driven insights.

### Salesforce

- > Knowledge base creation typically requires Essentials or Unlimited plans within [Salesforce Service Cloud](#).
- > Alternatively available for an extra fee within other modules.
- > Simplifies the process for support representatives to author and distribute articles.
- > Aims to streamline article distribution throughout the organization



## MS Dynamics vs Salesforce: Mobile Versions

### Microsoft Dynamics 365

- The mobile version has a user-friendly UI, requires minimal training, and works both offline and online.
- Ideal for customer engagement and field service when off-premises.
- Offers a wide range of tools that give the perfect mobility advantage for a remote workforce.

### Salesforce

- Sleek design with intuitive functionalities.
- Leverages [Einstein AI](#) for robust business intelligence capabilities.
- Supports various business needs including email marketing, lead, and case management.
- Highly customizable for added flexibility.

## MS Dynamics vs Salesforce: Integrations

### Microsoft Dynamics 365

- Focuses on leveraging Microsoft's own suite of products, along with easy options for third-party integration.
- Offers comprehensive CRM and [ERP solutions](#) with minimal functionality gaps.
- Power Automate supports over 200 connectors for third-party integrations and allows the creation of custom connectors for external systems.
- Microsoft PowerApps provides a low-code platform for building internal add-ons.
- Reduces reliance on external integrations.
- Provides a curated database of third-party apps for additional integrations.

### Salesforce

- Facilitates easy connection with professionals to help select suitable integrations.
- Straightforward and hassle-free integration with a wide range of associated platforms.
- Offers a wide range of APIs for developers to explore and utilize in projects.





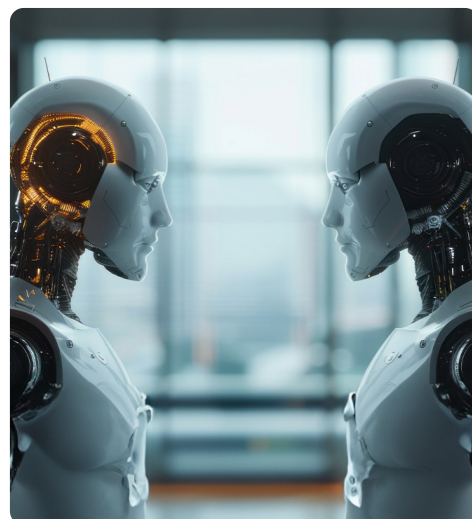


## Generative AI: Salesforce Einstein GPT vs Microsoft Copilot

**Salesforce and Microsoft's Dynamics 365 have partnered with OpenAI to incorporate AI into their CRM systems.**

Microsoft has a built-in GPT tool called Microsoft Copilot which works across all its applications. It interprets natural language prompts, translating them into actions and tasks that are automatically performed. For example, users get the ability to define a task to create a presentation by defining source material, and it is generated automatically.

The scope of Generative AI extends to writing code, providing suggestions, interpreting vast volumes of data, deriving insights, and many more. New users can use the Copilot capabilities to easily adapt to the new platform, doing away with the need for extensive training.



**You can benefit from Generative AI in other Microsoft Dynamics 365 products:**

◆ Dynamics 365 Sales

◆ Dynamics 365 Customer Service

◆ Dynamics 365 Customer Insights

◆ Dynamics 365 Supply Chain Management



**Salesforce collaborated with OpenAI on March 7th, introducing the new GPT-Einstein.**

GPT utilizes data from Salesforce clouds generates customized content for marketing campaigns, automates sales tasks, and provides customer insights in Slack (sales opportunities and smart summaries). Einstein Copilot, built on Einstein GPT, includes features such as:

Task Automation

Customizations

Prompt Builder

Model Builder





# How Korcomptenz can help implement Salesforce or Microsoft Dynamics?

As a certified partner for both Salesforce and Microsoft Dynamics, Korcomptenz offers tailored implementation services to align with your business needs. Leveraging deep expertise in both platforms, we analyse your requirements comprehensively and design customized solutions.

Whether it's Salesforce for robust CRM or Microsoft Dynamics for integrated business management, we ensure seamless deployment, optimization, and support to maximize your system's efficiency and drive growth.



## Bottom Line

When comparing Salesforce and Microsoft Dynamics, both platforms offer robust features for managing customer relationships and business operations. Salesforce is renowned for its user-friendly interface and extensive third-party integrations, while Microsoft Dynamics excels in seamless integration with other Microsoft products and strong analytics capabilities.

Ultimately, the choice between the two depends on specific business needs, budget constraints, and existing technology infrastructure. Evaluating factors such as scalability, customization options, and customer support will help businesses make an informed decision.



## References

1 Gartner



2 CRM.org



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