



Korcomptenz



Digital transformation fueled by moving to the Cloud from on-prem

See how Korcomptenz helped with deployment to ensure a smooth cut-over from the current system and worry-free adoption of the new Microsoft Dynamics 365 platform



Client Overview

Industry	: Non-Profit (Education)
HQ Location	: Ontario, Canada
Size of the Company	: Mid-size
Systems + Devices Addressed	: Microsoft Dynamics Marketing Hub, Microsoft Power BI, Microsoft Dynamics Sales Hub, Microsoft Teams, Microsoft Dynamics 365 CE

Company Overview

The client is a non-profit organization that represents universities in Canada, connecting their interests and objectives with members of government and media. The organization supports the needs of almost 100 universities, maintaining contact with every member of parliament and most major media organizations and journalists.

The Backstory

The company had been operating an on-premises installation of **Microsoft Dynamics CRM 2016 using SQL Server Reporting Services and a custom event application**. Overtime, the existing system had become large and unwieldy with 2,197 accounts and 8,148 contacts scattered across close to 50 entities and a separate event management system. Given the wide variety of stakeholders involved, the solution was heavily customized and yet users still reported a variety of pain points concerning the interface, the number of clicks required to access information, and the disparate event application. This was in addition to the hassle and expense of supporting costly hardware, plus a large amount of legacy data that was no longer relevant.

- Legacy on-premises version required internal servers and additional maintenance
- Pain points throughout the user interface and the user experience working in the system
- Heavily customized installation had a large number of unused entities and redundant data
- No event management or marketing automation features and no customer portal capabilities
- Legacy data that was no longer required

Key Objectives

The customer was looking to take advantage of the **benefits of Microsoft's modern, cloud-based CRM offering including integrated event management and Power BI.**

1

Migration of MSCRM 2016 to Microsoft Dynamics 365 Customer Engagement.

2

Move older customizations to the newer application

3

Make Enterprise system accessible and improve User Interface with standardization of their entities.

4

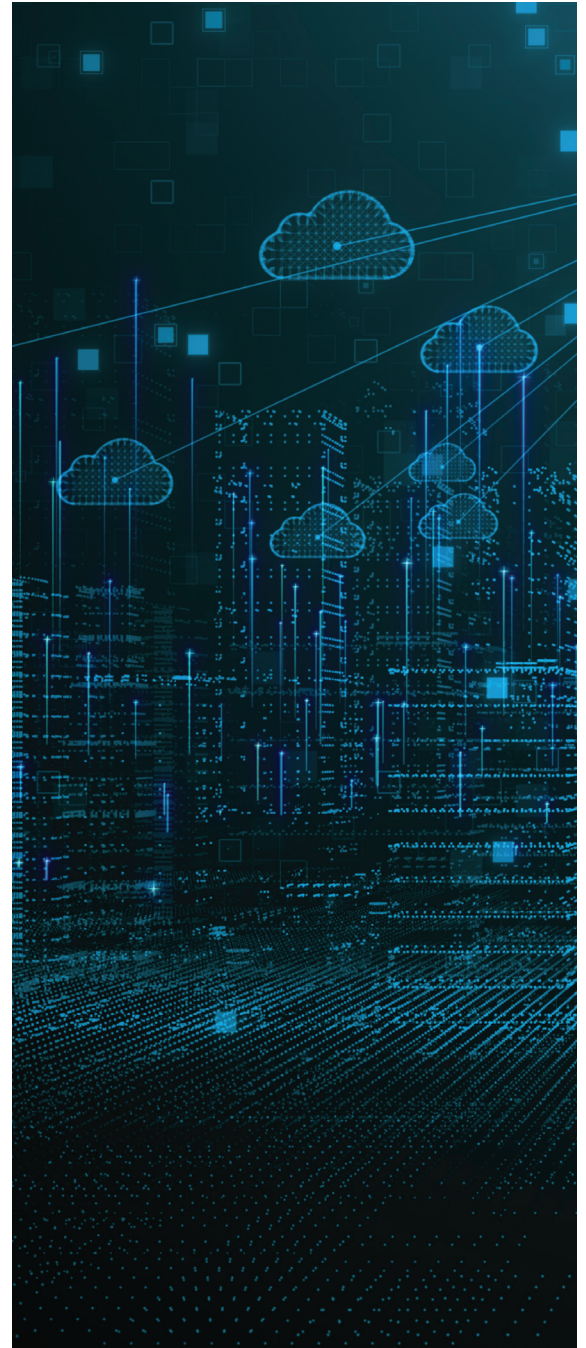
Develop Reports on Power BI

5

Implement Event Management

6

Train and support the IT staff



Korcomptenz was selected as the partner of choice to **migrate their on-premises installation to Microsoft's latest Dynamics 365 CE cloud-version**, clean data, improve the user interface, and deploy new marketing and even management features. During the proposal and planning stages, we collaborated with the customer to identify their short- and long-term needs for the new installation including how to resolve their pain points, deploy new features, and improve reporting.

About the Project

Korcomptenz conducted a turnkey project using our proprietary version of Microsoft's Sure Step methodology. The project was divided into two separate workstreams at first:

- **Upgrade existing application to Dynamics 365 CE** using Microsoft's proven methodology
- **Conduct an analysis and diagnosis phase to understand pain points,** potential improvements including the user interface, event management, and the removal of legacy data

Microsoft Sure Step Methodology



Decision Accelerators	Analysis and Diagnosis	Migration	Implementation
Requirements + Process Review Fit Gap + Solution Blueprint Proof of Concept Architecture Assessment Scoping Assessment Business Case	Understand pain points Potential improvements Event management Removal of legacy data	Setting up a development Environment - 2015 Upgrade 2015 environment to 2016 Environment Preparation D365 Environment Preparation D365 Online	Event Hub Email Merge

Evaluation

Analyze, Upgrade and Implement



Optimization



Architecture



Design



Code



Performance

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graph TD; Start([CRM On Premise]) --> D1{2011}; D1 -- No --> D2{2013}; D1 -- Yes --> P1[CRM 2011 Provisioning]; P1 --> V1[/CRM 2011 Validation Service/]; V1 --> P2[CRM 2013 Provisioning]; P2 --> P3[CRM 2015 Provisioning]; P3 --> P4[CRM 2016 Provisioning]; D2 -- No --> D3{2015}; D2 -- Yes --> P5[CRM 2013 Provisioning]; P5 --> V2[/CRM Validation Service/]; V2 --> P6[CRM 2015 Provisioning]; P6 --> P7[CRM 2016 Provisioning]; D3 -- Yes --> P8[CRM 2015 Provisioning]; P8 --> P9[CRM 2016 Provisioning]; P4 --> P10[(CRM 2016 Onpremise Upgradeable Org)]; P10 --> V3[/Database Validation/]; V3 --> End([D365 Online]);
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The flowchart illustrates the CRM Upgrade Path for On-Premise Orgs. It starts with a pink rounded rectangle labeled "CRM On Premise". This leads to a green diamond decision node "2011". If "No", it proceeds to a green diamond decision node "2013". If "Yes", it proceeds to a blue rounded rectangle "CRM 2011 Provisioning", then a yellow parallelogram "CRM 2011 Validation Service", then a blue rounded rectangle "CRM 2013 Provisioning", then a blue rounded rectangle "CRM 2015 Provisioning", and finally a blue rounded rectangle "CRM 2016 Provisioning". From "CRM 2016 Provisioning", an arrow points to a pink cylinder labeled "CRM 2016 Onpremise Upgradeable Org". From this cylinder, an arrow points to a purple parallelogram labeled "Database Validation". From "Database Validation", an arrow points to a dark blue cloud labeled "D365 Online".

2011

CRM 2011 Provisioning

CRM 2011 Validation Service

CRM 2013 Provisioning

CRM 2015 Provisioning

CRM 2016 Provisioning

CRM 2016 Onpremise Upgradeable Org

Database Validation

D365 Online

In addition, a **custom mail merge application** was designed and implemented to address **functionality not available in any Customer Relationship Management platform.**

We #FocusOnYou

The new final Microsoft Dynamics 365 CE deployment included the following features:

All new installation with unused entities and redundant data removed

New user interface and changes to the hierarchy of the entities to improve efficiency

Complete, end-to-end event management features, replacing an out-dated custom solution

Power BI based reporting that improves data visualization and performance

Custom mail merge feature to eliminate manual tasks and improve reporting

Key Benefits

The completed project fulfilled all the objectives identified at the outset. During the project post-mortem, the customer stakeholders noted that Korcomptenz helped make the upgrade process smoother and easier than they had expected. They also reported that their end-users were adapting rapidly to the new system, able to perform their tasks more quickly and without the pain points of the older application. Overall, the project delivered the following real-world benefits to the customer.

- The new user interface and changes to the relationships in the entities **enabled users to access information faster and more effectively** than ever before
- The **elimination of costly, hard to maintain internal infrastructure** freed up IT staff to focus on pushing the organization forward rather than remaining in place
- **Comprehensive event management** including promotions and reporting on attendance directly from the CRM system and an integrated mail merge application
- Unified system to manage all aspects of the relationship with **comprehensive reporting available in Power BI**



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