



Demystify your migration with Insight Migrate

Simplifying Salesforce Migration



De-risk your data migration to Dynamics 365 and unlock the value of your data by combining with Teams, Outlook, and Copilot.

Business challenge

If you are considering migrating to D365 Sales, but unsure of the risk of migrating all your critical customer, lead, pipeline, and forecast data to a new platform, Insight Migrate can help you.

Migrations can be complex, and the risk of losing data can impact the ability of your sales team to close deals, and the confidence in your IT team to deliver new and robust IT systems that can enable the business.

So, why utilise Insight Migrate?

- Insight Migrate is a proven systematic accelerator to migrating your business data from Salesforce to Dynamics 365 Sales. The process starts with Insight demonstrating its predefined templates and Migrate Accelerator which extracts your out-of-the-box Salesforce data, transforms it to the equivalent Dynamics 365 data model, and seamlessly creates the data in Dynamics 365. The Insight Migrate Accelerator covers all native Salesforce entities, ensuring none of your valuable business data is left behind.
- We create a detailed mapping from Salesforce to Dynamics 365 for your custom data by accelerating your use of Dynamics 365, using a collaborative approach, and taking a look at custom fields and entities within your Salesforce solution.

- Within 4 weeks, Insight's approach will help you to de-risk the migration of your critical business data from Salesforce to Dynamics 365 Sales, empowering you to unlock the value of your Microsoft investment with D365 Sales. Additionally, when combined with Copilot, Teams, and Outlook, it has the potential to turbo-charge your business.

What we do:

Over the course of just 4 weeks, we will work with you to:

1. **Migrate** all out-of-the-box Salesforce sales entities and fields from Salesforce to Dynamics 365.
2. **Analyse** any custom fields and entities within Salesforce, configure the equivalent entities and fields within Dynamics 365, and create a mapping from source to destination.
3. **Extend** the Insight Migrate accelerator to migrate the custom entities and fields from Salesforce to Dynamics 365.
4. **Provide** a data mapping, migration report, and analysis with a tailored Dynamics 365 Sales demo using your custom data.

How Insight Migrate de-risks the path to more deals across four stages.

Demonstrate - Week 1:

During the demonstration phase, we connect our Insight Migrate accelerator to your Salesforce instance and create a trial D365 Sales instance attached to your tenant. Entity by entity, field by field, we walk you through our predefined mappings between each out of the sales entity and field and complete a trial migration from Salesforce into D365 Sales.

Assess and Map – Week 2:

During the Assess and Map phase, we create a curated list of all custom entities and fields within your Salesforce instance and provide suggested mappings to either existing or customer entities and fields within D365. Using our pre-defined templates, we work with you to map these custom entities and fields to the D365 data model.

Migrate and Manage – Week 3:

During the migration phase, utilising Insights' predefined templates, and our newly created mappings between the remaining custom entities and fields, Insight extends the Migrate accelerator to migrate the out-of-the-box and custom Salesforce data to D365, ensuring your critical business data is retained and available.

Report and Playback – Week 4:

During the final Report and Playback phase, the team walk you through a detailed summary of the mappings, extracts, transformation, and load statistics from Salesforce and Dynamics 365 and provide a tailored demo, within your tenant, utilising your migrated data, of how to leverage the best of the Microsoft eco-system together, using D365 Sales, Teams, Outlook, and Copilot.

Duration: 4 Weeks

Benefits:

- Predefined Mappings for seamless migration
- Easily extendable to all your custom fields and data
- Improved Data Quality by migrating only the most critical data



Dynamics 365 Sales



Microsoft Dataverse

About Insight

Insight Enterprises, Inc. is a Fortune 500 solutions integrator with more than 11,500 teammates worldwide helping organisations accelerate their digital journey to modernise their business and maximise the value of technology. We enable secure, end-to-end transformation and meet the needs of our clients through a comprehensive portfolio of solutions, far-reaching partnerships and 33+ years of broad IT expertise. Rated as a Forbes World's Best Employer and certified as a Great Place to Work, we amplify our solutions and services with global scale, local expertise and a world-class e-commerce experience, realising the digital ambitions of our clients at every opportunity.

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