

# Migrating from SFDC to D365 CE with Capgemini



# Capgemini Overview & Partnership with Microsoft



# Capgemini's Microsoft Dynamics Practice Leadership and Contact Information



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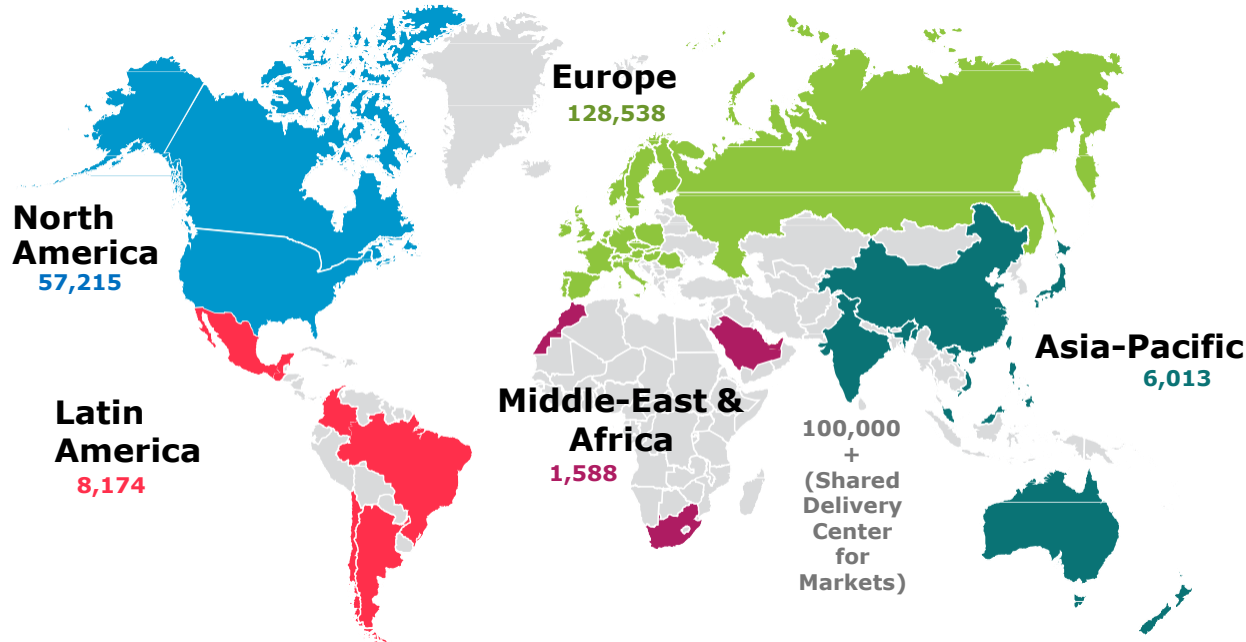
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# Introduction to Capgemini

*A World Leader in Consulting, Implementations, Integrations, and Managed Services*



- 27** of the world's **30 largest** CPG and Retail companies
- 14** of the world's **15 largest** automotive OEMs
- 12** of the **top 15** largest automotive suppliers
- 12** out of the **top 20** utilities companies
- 9** of the **top 15** banks
- 6** of the **top 10** consumer finance companies
- 13** of the **top 15** asset finance companies
- 10** of the **15 largest** investment banks



Over **269,000** Group Headcount

More than **40 countries**

Over **120 nationalities**

**\$15.82 billion USD** revenues in 2019

## SECTORS



Technology, Media and Telecom (TMT)



Manufacturing



Energy



Consumer Products, Retail & Distribution

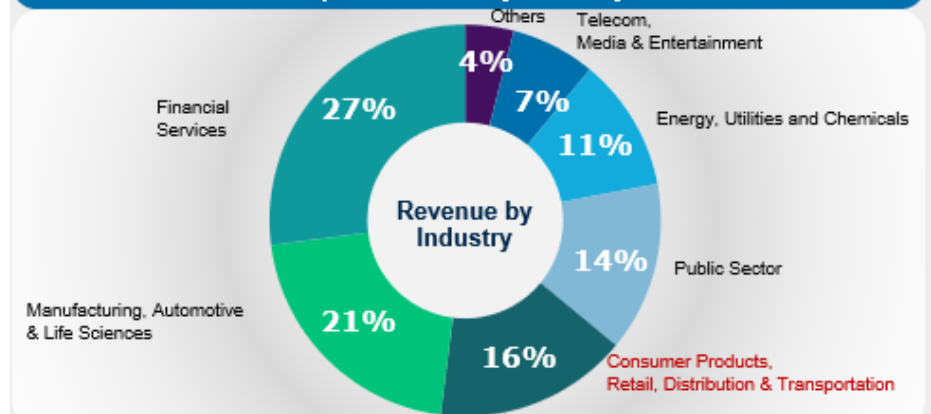


Financial Services

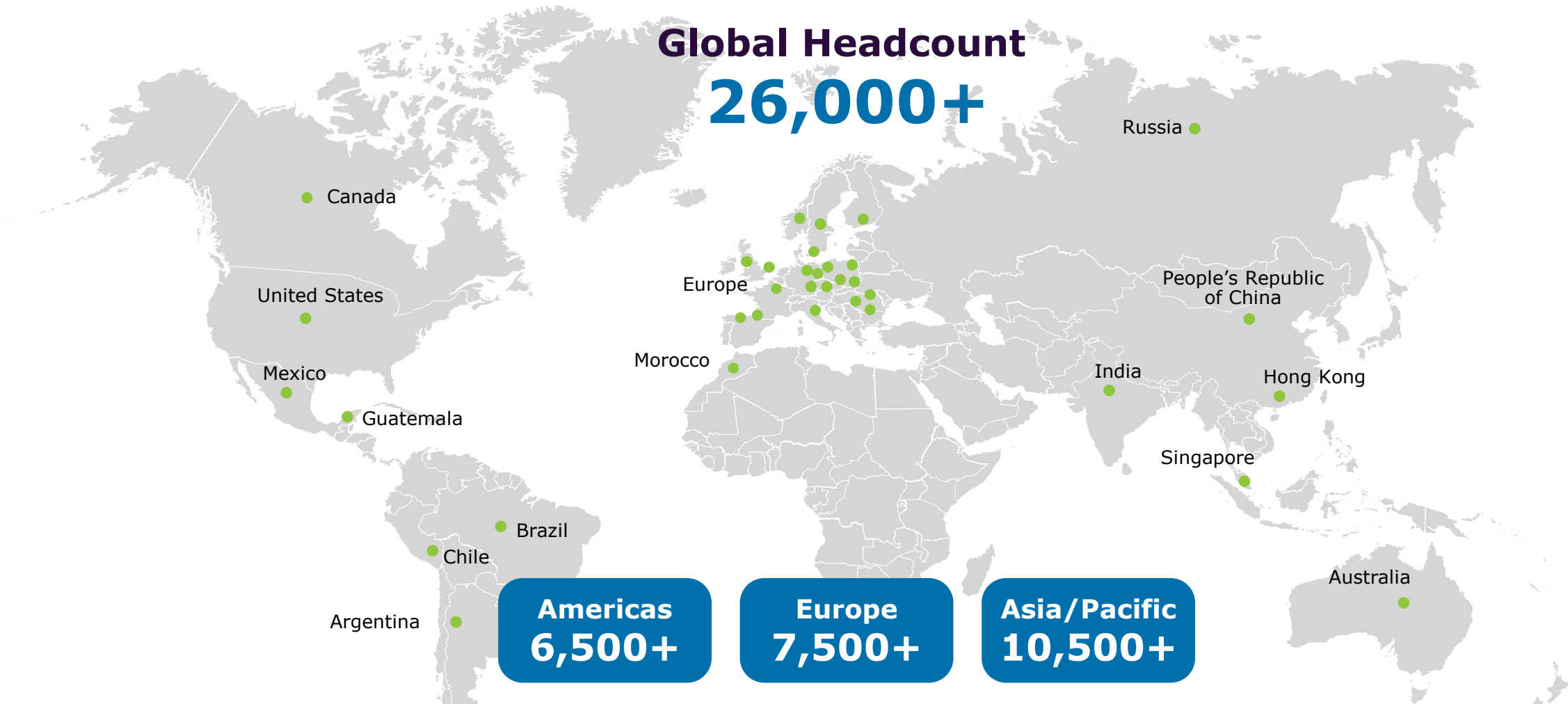


Public Sector

## Broad Experience in Key Industry Sectors



# The Capgemini / Microsoft Alliance has a strong presence across five continents



**The Capgemini Microsoft Alliance has a strong global network which provides consistent, connected capabilities worldwide.**

# Capgemini and Microsoft: Driving transformation for over 20 years

## Top-tier Microsoft strategic alliance partner

- A more than **20-year managed partnership** driving cloud transformation with joint enterprise customers worldwide
- Alliance presence in **five continents** (Asia Pacific, Australia, North America, South America, Western and Eastern Europe)
- Involved in the **Cloud Early Adopter** program and **Azure Advisory Council**
- **Rightshore Delivery model**, industrialization tools for different project phases including Cloud Migration Factory
- Dedicated **Microsoft Azure Solution Architects**

## Our partnership



## 26,000+ Microsoft consultants on 5 continents

- Microsoft Azure architects trained worldwide on full platform of services
- **>2,465 Azure-certified architects and 7,800 MCPs**
- **>5,021 certifications supporting app migration and modernization**
- Center of Excellence with **IaaS, PaaS, and SaaS** expertise
- **Microsoft Managed Service Provider (MSP)** Azure expert
- **Cloud Solution Provider (CSP)** and India Center of Excellence
- Access to premier support and Azure demo environments

## Global capabilities



## Driving value for you

### Competencies

- **Gold** Application Development
- **Gold** Application Integration
- **Gold** Cloud Business Applications
- **Gold** Cloud CRM
- **Gold** Cloud Platform
- **Gold** Cloud Productivity
- **Gold** Collaboration and Content
- **Gold** Communications
- **Gold** Data Analytics
- **Gold** Data Platform
- **Gold** Datacenter
- **Gold** DevOps
- **Gold** Enterprise Mobility Mgmt
- **Gold** ERP
- **Gold** Messaging
- **Gold** Windows and Devices

## Capabilities



## Winner of multiple Microsoft Partner of the Year awards



96% YoY Growth

### Microsoft awards

- **2020 Partner of the Year Finalist – Proactive Customer Service Award**
- **2020 Partner of the Year Finalist – Data Analytics Award**
- **2019 SAP on Azure Partner of the Year**
- **2018 Capgemini France, Microsoft Country Partner of the Year**

## Recent Microsoft partner awards



# Capgemini Microsoft Dynamics Capabilities at a Glance

- **850+** MS Dynamics Professionals across the globe:
  - 425+ Dynamics 365 CE (CRM)
  - 325+ Dynamics F&O (ERP)

- **MSFT Partner of the Year Finalist, Proactive Customer Service, 2020**
- SAP on Azure Partner of the Year, 2019
- Dynamics Inner Circle Membership, 2019
- Dynamics Partner of the Year, 2016

- **SI Partner** with Microsoft, Alliance presence in 40+ countries
- **Cross-geo** presence of skilled MS Dynamics 365 resources



## People

## Recognition

## Alliances

## Engagement Models

## Offers and Accelerators

## Centers of Excellence

-  Application Management
-  Advisory
-  Application Implementation
-  Managed Services

- **Salesforce to D365 Solution Accelerator**
- Intelligent Manufacturing
- CRM Digital Transformation
- Business Application Modernization
- Power Platform CoE
- Customer Data Hub
- Power Platform App in a Day

Serve clients globally from our Centers of Excellence in US, Nordics, France, Portugal and India through Rightshore® Model



# Why Dynamics 365 with Capgemini?



**20+ years of strategic partnership** with Microsoft, **15+ Gold Partner competencies**, **24 000+ Microsoft consultants** worldwide



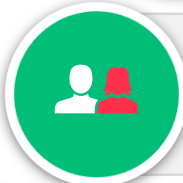
End-to-end **transformation capabilities** with Dynamics 365 at scale



**Global DCX Dynamics 365 Center of Excellence** leveraging strong experience from 100+ enterprise global and national Dynamics 365 projects



**Connected Dynamics 365 community** enabling global experience in local projects across 15+ countries



**Industry experience** combined with know-how **standard out-of-the-box** Dynamics 365



Re-usable **Dynamics 365 assets and accelerators**





# Spotlight Offerings

## SFDC to D365 Migration Solution Accelerator



Offering includes a migration workshop and a migration to D365. Capgemini deploys a proprietary powerful Migration Accelerator that helps customers to;

- Reduce build time by approximately **25%**
- Reduce Data Migration time by approximately **70%**
- Reduce Analysis and Design phase by approximately **75%**

## Intelligent Manufacturing



Capgemini helps manufacturers take full advantage of Microsoft Dynamics for Finance and Operations. Using D365 F&O as the base, Capgemini applies intelligent dashboards, Artificial Intelligence and Intelligent Forecasting to help give customers a competitive edge.

We also couple our strong industry and product knowledge together to deploy a manufacturing accelerator that reduces speed to market and implementation times.

## CRM Digital Transformation



A holistic CRM Digital Transformation offering that takes full advantage of the Microsoft Dynamics 365 for Customer Engagement. Our process focused on the following areas:

- Digital Transformation Envisioning and Roadmap
- Organizational Change Management
- Migration, Upgrade and/or Implementation Services
- Industry level expertise

## AX to D365 Migration & Modernization



Offering includes two options:

- 1. Upgrade Assessment** - This 3-week assessment helps customers confidently understand how to make the move.
- 2. Upgrade to D365** - Capgemini harnesses several accelerators and the team's expertise to upgrade AX customers to D365. Clients may elect to do a like-for-like upgrade, or embark on a complete digital transformation journey.

## Power Platform Center of Excellence



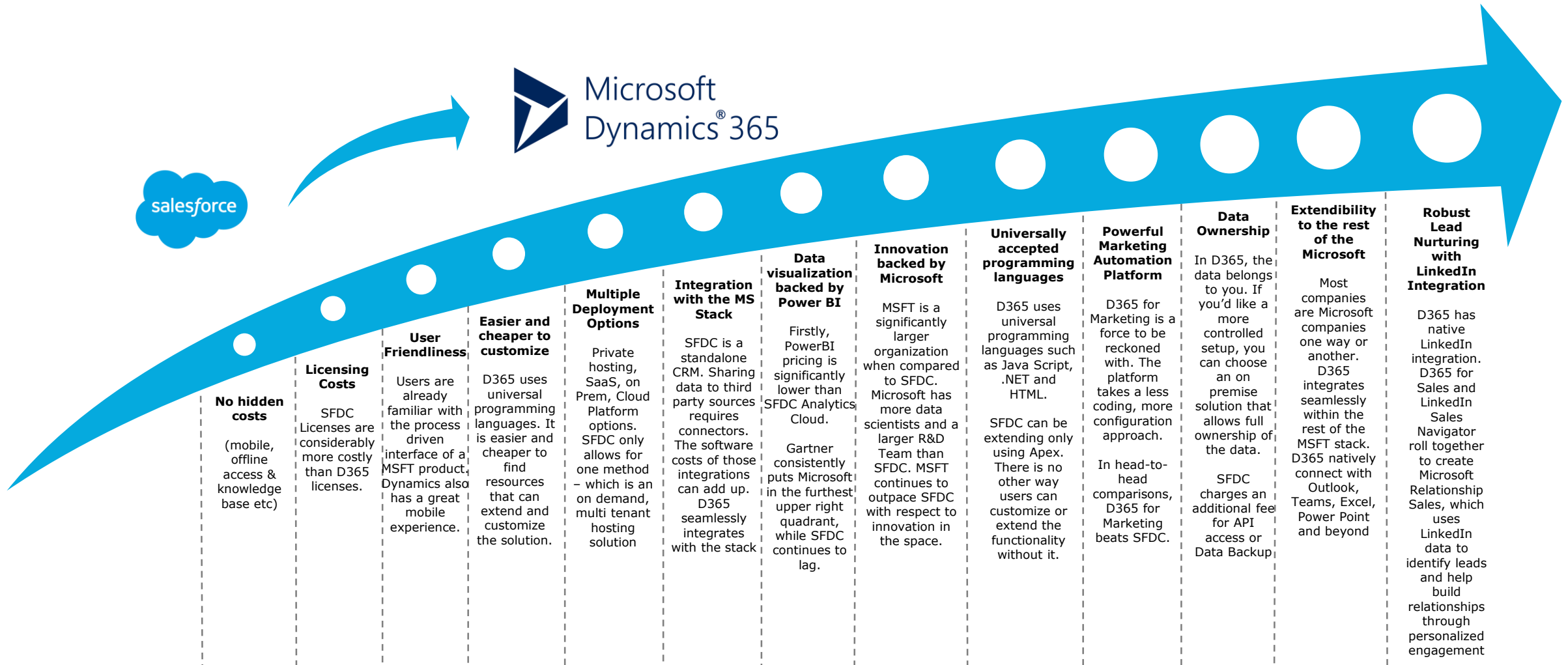
Capgemini will work to help establish a Power Platform CoE in order to realize the full benefits of Power Apps. Offering includes 3 phases:

1. CoE toolkit installation and configuration. Establish governance Model.
2. Place current and planned projects under CoE umbrella. Produce 1-2 POCs
3. Continuous Power App Development and ongoing governance

# Why make the move from Salesforce to Microsoft Dynamics 365?



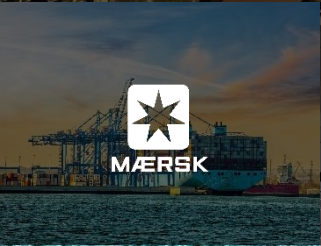
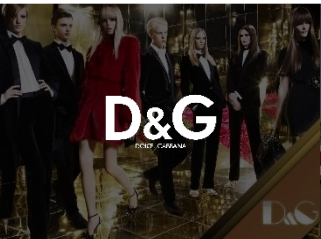
# Summary: Benefits of Microsoft Dynamics 365 for Customer Engagement when compared to Salesforce





**97%** of Fortune 500 companies use the Power Platform

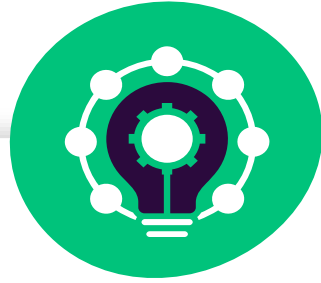
**54%** of Fortune 500 companies use Microsoft Dynamics 365



# Capgemini's D365 CE Solution Accelerator Offering at a Glance



# Evaluate, plan, and implement: Capgemini offers an end-to-end solution and accelerators for migrating from SFDC to D365



## One-day workshop

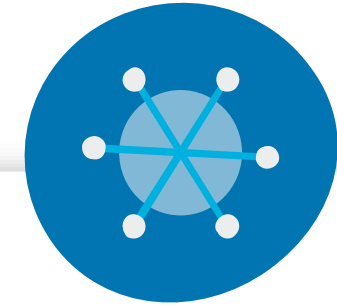
Goal-oriented workshop and questionnaire to:

- Understand current functionalities
- Estimate migration effort



## Migration

- Migrate functionality and data
- Reduce time with accelerators
- Manipulate look and feel
- Add customizations and integrations



## Change Management

- Effortless transition
- Improved usability
- User adoption via training

## Capgemini accelerators:

- **Reduce build time by approximately 25%**
- **Reduce Data Migration time by approximately 70%**
- **Reduce Analysis and Design phase by approximately 75%**
- **Integration work can begin earlier on in the engagement**
- **Reporting and Dashboard work can start at the beginning of the engagement**
- **Security work can start at the beginning of the engagement**

# Salesforce to Microsoft Dynamics 365 One Day Migration Workshop



# One Day Migration Workshop Deliverables and Process



- Introduction to Capgemini team
- Goal setting
- Provide overview of the workshop process and deliverables

Kick Off



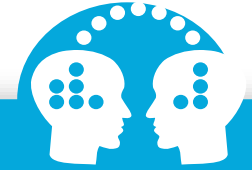
- Capgemini team interviews a series of predetermined IT and Business Stakeholders
- (Questionnaire areas on the following slide)

Questionnaire walk-through



- Capgemini team internally reviews technical artifacts and outcomes of the questionnaire walk through

Solution Analysis



- Proposed Scope and Solution
- Estimated pricing
- Proposed Project Team
- Proposed Methodology
- Degree of fit analysis

Deliver Proposal



# Questionnaire Areas

## General Elements

- Company specific information
- System specific information
- Sales objects
- Marketing objects
- Service objects
- Custom Objects
- Integrations
- Pain points and desired future state

## Specific Elements

- Forms
- Custom Fields
- Custom Views
- Workflows
- JavaScript
- Code
- Number of Records
- Number of Documents



# Migration from Salesforce to Microsoft Dynamics 365



# Migration of Functionality



- Entities / Objects
- Fields
- Views
- Dashboards
- Simple Reports
- Workflows



Functional



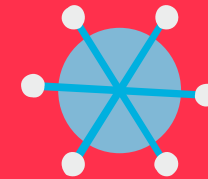
- Integrations
- JavaScript
- .NET Plugins
- MS Power Automate
- Complex Reporting



Technical



- Transactional Data
- Metadata



Data

# Our Approach to Migrating to D365 from SFDC

## Field Migration Accelerator

- Automatic field migrations
- Automated Option set value migrations

## Data Migration Accelerator

- Completed Data Mapping of Existing Fields
- Automated Data Mapping of Custom Fields
- Data scripts of Custom Fields accelerator
- Automatic Data Migration Scripts

## Functional Areas

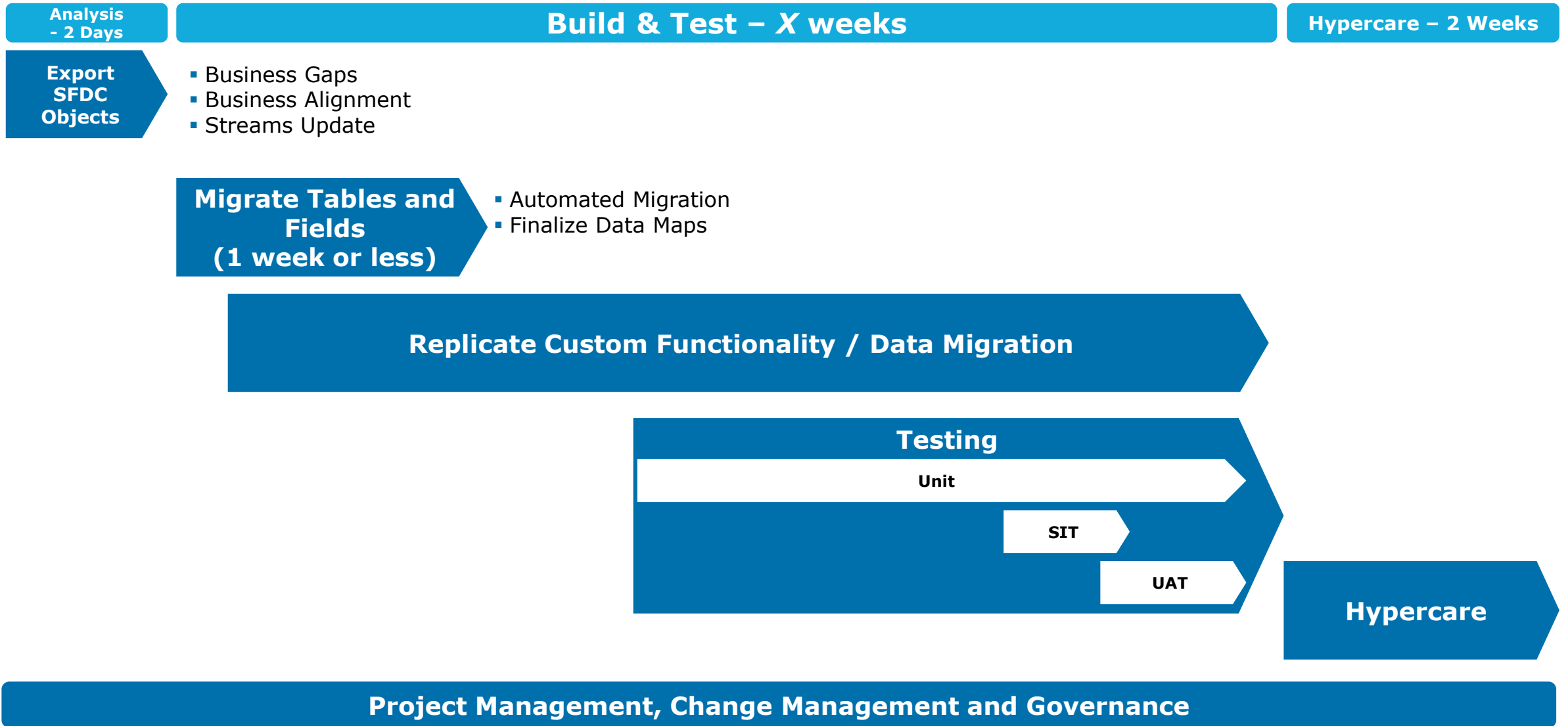
- Workflows
- Views
- Forms
- Process Flows
- JavaScript
- Code
- Integrations
- Reports
- Dashboards
- Portals

## Extra Areas

- Change Management
- User Training
- Testing
- Navigation
- Security



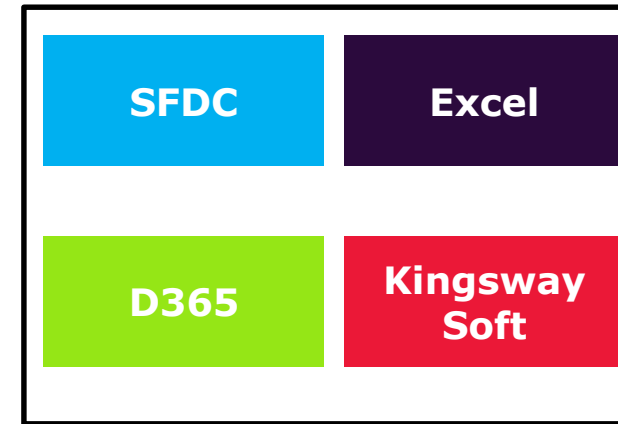
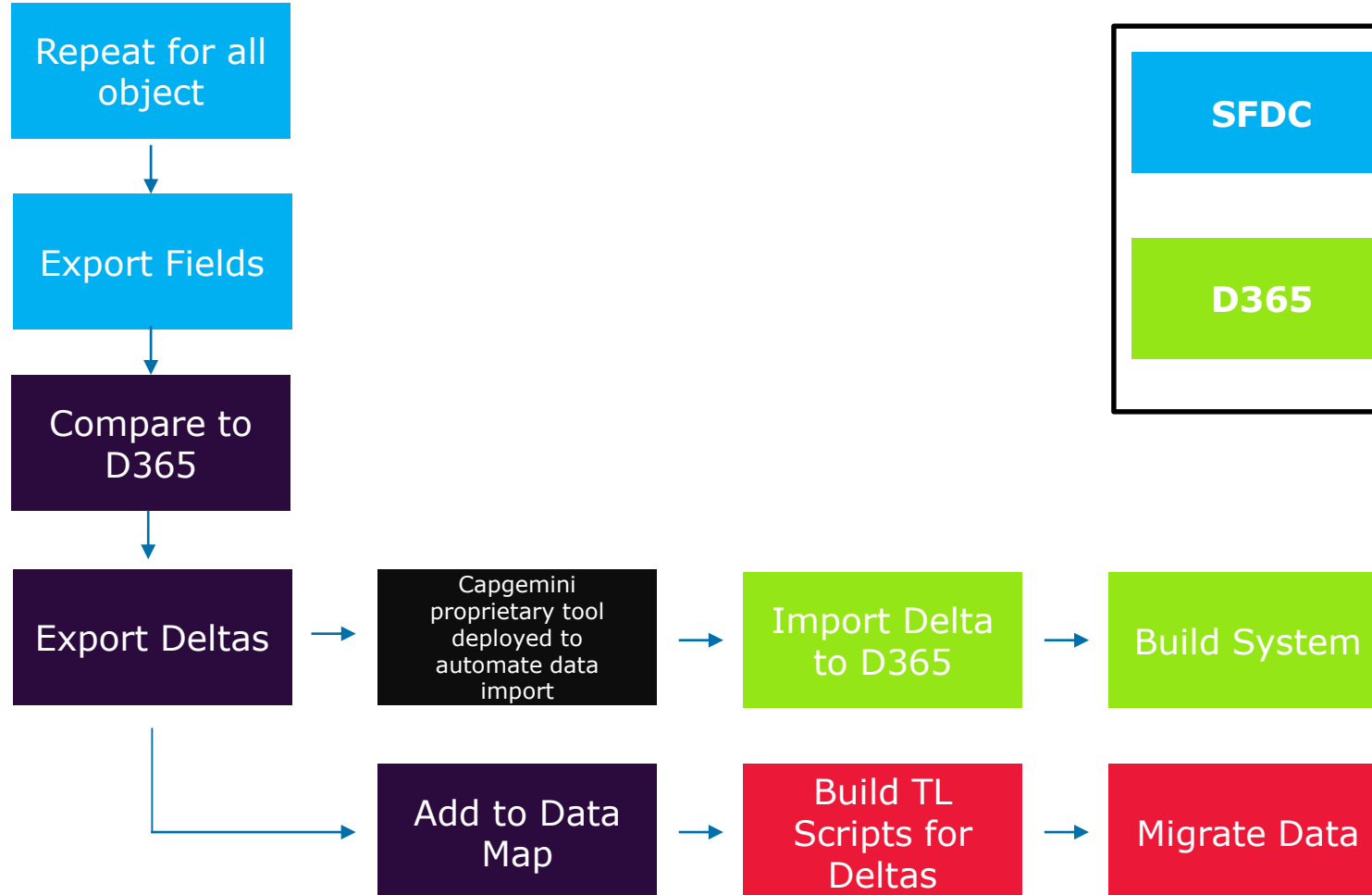
# Representative Timeline



# SFDC to D365 Solution Accelerator

# High Level Accelerator Process Flow


Accelerators applied during analysis and build phases



← → ↻ 🏠 [na111.lightning.force.com/lightning/n/p0pFD\\_\\_Field\\_Dump](https://na111.lightning.force.com/lightning/n/p0pFD__Field_Dump)

☁️ All 🔍 Search...

☰ Sales Console Accounts ▾ 📄 ▾



**Like this App? You'll love the Pro version!**  
More Meta Data Exported including Description Fields, Object Summary Tab, Single Tab Mode, Export to PDF, Layout Info, Improved Navigation and Performance and More...  
Try free for 15 days.  
[Visit 'Field Dump Pro' on the AppExchange](#)

[Add All Objects >](#) [< Remove All Objects](#)

Available Objects		Selected Objects
Account (account)		custom__c
Asset (asset)		custom_types__c
Campaign (campaign)		
Campaign Member (campaignmember)		
Case (case)		
Contact (contact)		
Contract (contract)		
Event (event)		
Lead (lead)		
Opportunity (opportunity)		
Order (order)		
Product (product2)		
Task (task)		
User (user)		
look_types__c		
lookuptypes__c		
pOpfd__objectstodump__c		
types__c		

[Add>](#) [<Remove](#)

[Dump Objects to Excel](#)

Please select the custom and standard objects that you wish to extract to excel.

Include picklist values in extract?



File Home Insert Page Layout Formulas Data Review View Help Search Share Comments

Clipboard Font Alignment Number Styles Cells Ideas Sensitivity

A1 OBJECT API NAME


1	OBJECT API NAME	OBJECT LABEL	OBJECT PREFIX	ORG	No. Fields	Report Gen					
2	custom__c	Custom	a01	https://p0	27	2020-08-25					
3	API Name	Label	Type	Is Custom	Is External	Is Unique	Is Formula	Is Required	Dependent	Length	Formula
4	Account__c	Account	REFERENCE (Accou	TRUE	FALSE	FALSE	FALSE	FALSE	FALSE	18	
5	Checkbox__c	Checkbox	BOOLEAN	TRUE	FALSE	FALSE	FALSE	TRUE	FALSE	0	
6	CreatedById	Created By ID	REFERENCE (User)	FALSE	FALSE	FALSE	FALSE	TRUE	FALSE	18	
7	CreatedDate	Created Date	DATETIME	FALSE	FALSE	FALSE	FALSE	TRUE	FALSE	0	
8	Currency__c	Currency	CURRENCY	TRUE	FALSE	FALSE	FALSE	FALSE	FALSE	0	
9	Custom_List__c	Custom List	PICKLIST	TRUE	FALSE	FALSE	FALSE	FALSE	FALSE	255	
10	Date__c	Date	DATE	TRUE	FALSE	FALSE	FALSE	FALSE	FALSE	0	
11	Date_Time__c	Date Time	DATETIME	TRUE	FALSE	FALSE	FALSE	FALSE	FALSE	0	
12	Email__c	Email	EMAIL	TRUE	FALSE	FALSE	FALSE	FALSE	FALSE	80	
13	Id	Record ID	ID	FALSE	FALSE	FALSE	FALSE	TRUE	FALSE	18	
14	IsDeleted	Deleted	BOOLEAN	FALSE	FALSE	FALSE	FALSE	TRUE	FALSE	0	
15	LastModifiedById	Last Modified By ID	REFERENCE (User)	FALSE	FALSE	FALSE	FALSE	TRUE	FALSE	18	

Field Dumper Custom\_\_c Custom\_types\_\_c

100%

# Step 1 – Select a File

The screenshot shows a web application window titled "Capgemini SFDC to D365". The interface is split into a dark blue sidebar on the left and a light blue main content area. The sidebar contains four menu items: "File", "Connect", "Review", and "Results". The "Connect" item is highlighted with a white bar. The main content area is titled "Step 2. Connect to Dynamics" and contains several input fields and buttons. The "Url" field contains "https://capmunich3.crm.dynamics.com/" and has a "Test" button next to it. The "User" field contains "admin@capmunich3.onmicrosoft.com". The "Password" field is masked with "\*\*\*\*\*". The "Prefix" field contains "new\_". A "Next" button is located at the bottom right of the main content area.

Capgemini  SFDC to D365

File

Connect

Review

Results

## Step 2. Connect to Dynamics

Url

User

Password

Prefix

# Step 2 – Connect to Dynamics

Capgemini **SFDC to D365**

Step 2. Connect to Dynamics

File

Connect

Review

Results

Url  
 **Test**

User

Password

Prefix

**Next**

# Step 3 – Review Information

Capgemini **SFDC to D365**

## Step 3. Review Information

Entity  
Custom

Fields

	Schema	Label	Type	Dynamics Type	IsCustom	IsRequired	Length
▶	new_Account	Account	REFERENCE (Ac...	Lookup	TRUE	FALSE	18
	new_Checkbox	Checkbox	BOOLEAN	Two options	TRUE	TRUE	0
	new_Currency	Currency	CURRENCY	Money	TRUE	FALSE	0
	new_CustomList	Custom List	PICKLIST	OptionSet	TRUE	FALSE	255
	new_Date	Date	DATE	Date and time	TRUE	FALSE	0
	new_DateTime	Date Time	DATETIME	Date and time	TRUE	FALSE	0

Import

# Step 4 – Complete Process

The screenshot shows the Capgemini SFDC to D365 interface. The top left features the Capgemini logo and the title "SFDC to D365". A sidebar on the left contains navigation options: File, Connect, Review, and Results (which is highlighted). The main content area is titled "Step 4. Results". Below this title, there is a dropdown menu for "Entity" set to "Custom". Underneath, a "Fields" section contains a table with the following data:

	Result	Schema	Label	Type	Dynamics Type	IsCustom	IsRequired
▶	Success	new_Account	Account	REFERENCE (Ac...	Lookup	TRUE	FALSE
	Success	new_Checkbox	Checkbox	BOOLEAN	Two options	TRUE	TRUE
	Success	new_Currency	Currency	CURRENCY	Money	TRUE	FALSE
	Success	new_CustomList	Custom List	PICKLIST	OptionSet	TRUE	FALSE
	Success	new_Date	Date	DATE	Date and time	TRUE	FALSE
	Success	new_DateTime	Date Time	DATETIME	Date and time	TRUE	FALSE

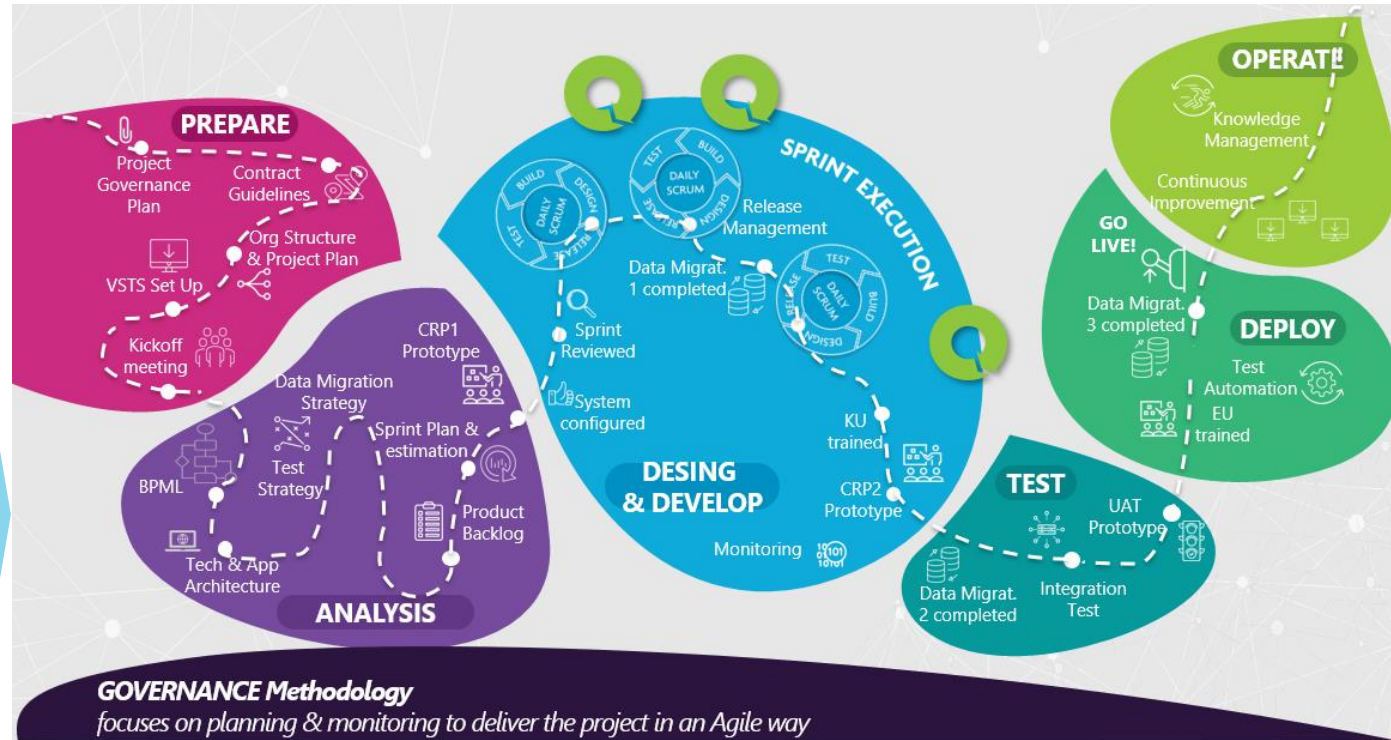
# Capgemini's SFDC to D365 Migration Methodology

# I365 Key components

## Roles

- Account Manager
- Delivery Executive
- Engagement Manager
- Project Team Lead
- Project Team Member:
  - Technical Team M.
  - Functional Team M.
- Solution Architect
- Product Owner
- Subject Matter Experts
- Symmetrical Customer roles

## Project Lifecycle



from Goal to Deliverable	Project Organisation	Solution Architect	E2E process analysis
Delivery driven by Prototyping	Anticipated data migration	Agile software development	Test Automation
Milestone based Planning	Deliverable based Project Control	Meeting Framework	KPI & Dashboard

## Tools

- BPML with LCS
- Planning with MS Azure DevOps
- Collaboration with Azure Boards / DevOps
- Testing – Manual and Automatic with Test Suite Azure DevOps
- Continuous Deployment with LCS
- Monitoring with KPI
- Reporting with Query Azure DevOps

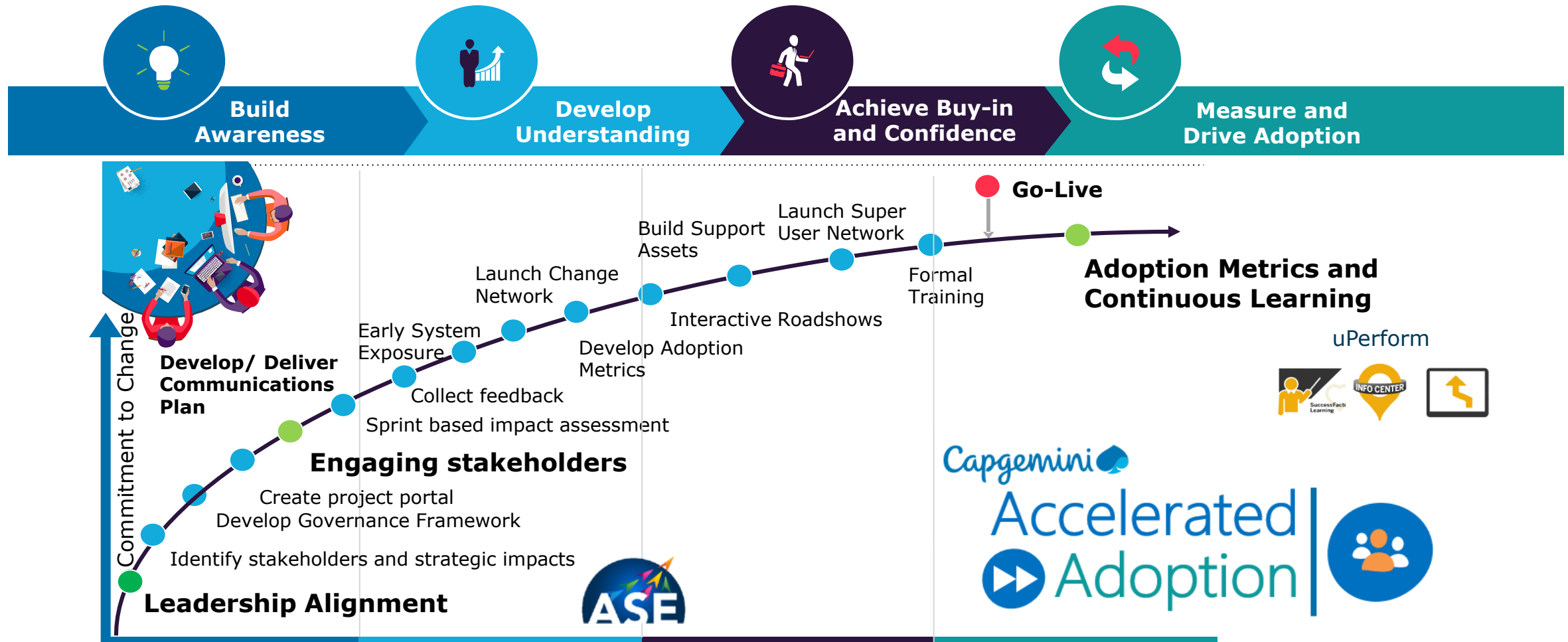
## Methods & Guidelines

# Change Management



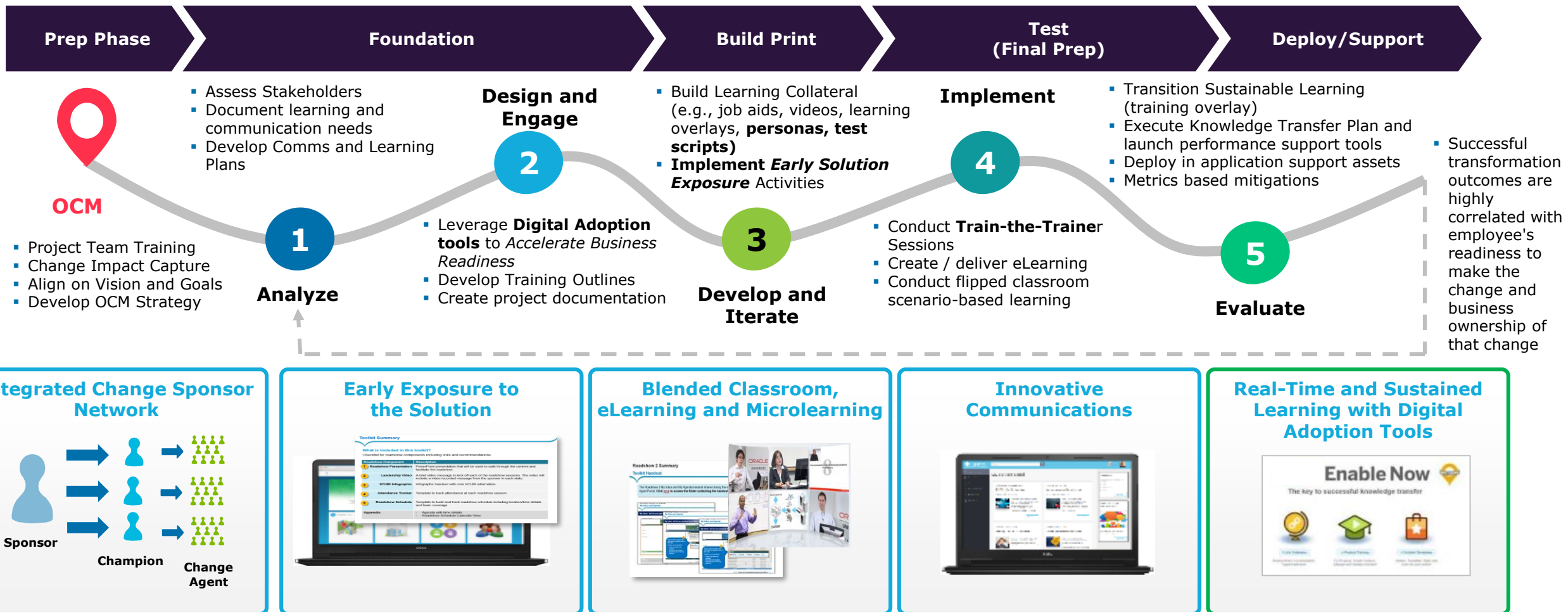
# Change Management: Strategy and Communication

SFDC to D365 Migrations will require people to adopt new ways of working. A detailed Change Management strategy is incorporated in our methodology and the framework is based on demonstrated and effective enablers.



# Training Plan: iterative and layered organizational learning aligned to the implementation plan

Transformation outcomes are highly correlated with employees' readiness to make the change and business ownership of that change. We incorporate Early Learning Experiences with Innovative Communications, Full Lifecycle Training to promote a Fast Track to business transformation.



# Case Study: Ecolab



# Ecolab Food & Beverage Migration

## About the Project



Ecolab Food & Beverage (“Ecolab”), a Fortune 500 company, is building Microsoft Dynamics CRM as a platform to replace the Salesforce CRM system to cover US requirements and well as World Class Service (“WCS”) requirements.

Ecolab Food & Beverage moved to MS Dynamics CRM to deliver the best outcome at the lowest total system cost to their customers. Ecolab also enhanced the level of service provided to their clients using the CRM solution and extended some of the features of the solution to their international offices.

Key challenge for success of the project was ensuring adequate Change management processes for users moving from SFDC to Dynamics were put in place and followed diligently.

## Approach, Benefits, Learnings



- Capgemini took an iterative approach, based on milestones, showing key business stakeholders the build as development was carried out to pre-empt any surprises or miscommunication. This showed business stakeholders how the system was to be used relative to the legacy SFDC system.
- Key business stakeholders and the legacy SFDC SMEs from Ecolab worked alongside the Capgemini team on the project. This ensured an understanding of the legacy system and process-level inputs to design, re-engineer and develop functionality that was truly relevant and useful for business users.



**People matter, results count.**



## About Capgemini

A global leader in consulting, technology services and digital transformation, Capgemini is at the forefront of innovation to address the entire breadth of clients' opportunities in the evolving world of cloud, digital and platforms. Building on its strong 50-year heritage and deep industry-specific expertise, Capgemini enables organizations to realize their business ambitions through an array of services from strategy to operations. Capgemini is driven by the conviction that the business value of technology comes from and through people. It is a multicultural company of 200,000 team members in over 40 countries. The Group reported 2016 global revenues of EUR 12.5 billion (about \$13.8 billion USD at 2016 average rate).

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