



# MOVING *to the* CLOUD

The Ultimate Guide for Migrating  
to Dynamics 365 Online



# IS IT TIME TO LEAVE YOUR ON-PREMISES CRM BEHIND?



Your Microsoft Dynamics CRM system is the heartbeat of your sales, customer service, and/or marketing efforts, and you've invested substantially in the infrastructure needed to keep it functioning properly. However, your team says they could do more with a move to Microsoft

Dynamics 365 online, which means migrating all that valuable data from your on-premises system to the cloud. You certainly don't want to miss out on the added efficiency and capabilities that could come from the upgrade, but you know the move will require substantial effort.



How do you know  
when it's time to  
make the move to  
the cloud?



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## Signs You Should Consider Dynamics 365 Online



You're tired of the cost and hassle associated with maintaining your on-premises environment.



Your staff would benefit from the seamless integration with Microsoft 365, including Outlook, SharePoint, and Teams.



You want access to new features as soon as they are released and make upgrades a thing of the past.



You are eager to leverage the rest of the Power Platform to take your business applications to the next level.



Microsoft | Dynamics 365



If you're facing any of these challenges or are looking to take advantage of any of these opportunities, it's time to make the move to Dynamics 365 online. Not only will you gain the tools you need and reduce your pain points, you'll be able to stay on the leading edge.

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# THE CHALLENGES OF MIGRATING *to* DYNAMICS 365 ONLINE



You've determined it's time to move to the cloud. Your customers, staff, and organization will reap the rewards of Dynamics 365 online with a better mobile experience, full integration with Microsoft 365, Azure, and other tools, as well as robust reporting and business intelligence. However, you need to determine how you will migrate data. **It's an important project, and you can't afford a botched effort.**



The best way to prepare for migrating to Dynamics 365 online is to know what to expect. Migrating seems like it should be a straightforward process but that isn't always the case. **Dynamics 365 depends on an intricate underlying data structure in order to deliver the powerful functions that make it such an effective system.**



# Four Hidden Pitfalls of Migrating to Dynamics 365

The data structure of Dynamics CRM/365 is extremely robust, and therefore complex. If you don't have extensive experience migrating Dynamics CRM data, it can be a daunting task. There are some common pitfalls organizations encounter when they try to migrate to Dynamics 365 without the proper experience, tools, or preparation.

1

## Downtime

Attempting to do this yourself or hiring a partner that doesn't specialize in migrations will likely require you to freeze out CRM users for a period of time. Going this route could lead to long periods of downtime, lost productivity, and frustration from staff and customers.

2

## Lack of Documentation

One of the major benefits for Dynamics CRM/365 is that it allows business users to customize the system quickly and easily. This flexibility often leads to ad hoc modifications to the system, so there is no documentation of data relationships or even a complete list of entities and fields.

3

## Complex Relationships

Dynamics 365 does a great job of hiding the complexity under the hood from the end user, but there are some extremely complex relationships when you look closer. If you've ever looked at all the records that make up an email record, you'll understand. If you do not have experience handling this complexity, it will be frustrating and could result in lost data.

4

## Online Storage Costs

Yes, in general moving your CRM to the cloud is going to result in cost savings over time. But that doesn't mean that there aren't costs associated with Dynamics 365 online. If you don't understand the new storage cost structure you could be hit with a pretty large bill from Microsoft. An experienced partner can help with this and prevent any surprises after the migration.

# Evaluating Migration Options

There are a number of ways you can approach a migration to Dynamics 365 online. Discerning the best option for your company may feel overwhelming. Here is a quick overview of the options you will find on the market.

## Ask Microsoft

If you are a larger Microsoft Dynamics CRM customer and will require more than \$100K per year in Dynamics 365 licenses, this might be your best route. Microsoft's FastTrack migration program provides a turnkey option for migrating to the cloud. Unfortunately, we've found that the minimum spend requirements eliminate a lot of Dynamics customers.

## Your Current Partner

If you're lucky, you already have a partner or MSP (managed services provider) that provides you with great ongoing support. If your partner also has migration experience, that's even better. But, if they don't, you might be paying for their learning curve and their quote might put a strain on your budget and timeline.

## Do It Yourself

You might feel that you understand your CRM system better than anyone else and that you have the technical resources to complete the migration without outside assistance. This is definitely possible, but the cost in staff resources and lost productivity from downtime during the migrations could be more than hiring the right partner.



## Migration Dynamics from Cobalt

Migration Dynamics from Cobalt is a tool built specifically for migrating data from previous versions of Dynamics CRM (2011, 2013, 2015, 2016) or the on-premises version of Dynamics 365 to Dynamics 365 online. It's a proven product that's been used to complete **100+ Dynamics CRM migrations** and we use it as the foundation for all of our migration projects.



# COBALT TAKES THE HASSLE OUT OF MOVING TO DYNAMICS 365 ONLINE

The combination of Cobalt's experience and Migration Dynamics will allow you to avoid the pitfalls of migrating to Dynamics 365 online. Cobalt has 16+ years of experience with Microsoft Dynamics CRM/365, and you can tap into that expertise by choosing us to migrate you to the cloud.

Our proven migration process will make your migration simple, safe, and smooth.



## Free Evaluation

Our process starts with a free but thorough evaluation of your current CRM system and data. We want to make sure we understand as much as possible before starting the migration so we can ensure that it is a success. We can also loop in Microsoft as necessary to assist.

## Iterative Process

We understand that it is difficult to know everything upfront, so we include several opportunities for feedback along the way. From data mapping upfront to data review during the migration to included support after the migration, we've got you covered.

## Fixed Cost

All of our migration projects are fixed cost so you know exactly what you are getting into from the start. This is one of the reasons we spend so much time with you upfront. Surprises are not good for either of us, but if something does come up, we'll make sure you don't feel the pain.



# A Clear Return on Investment

Cobalt stands beside customers from start to finish with every migration. And, you have options for how you'd like to engage with us. If you already have a partner (or if you are a partner), we can work with your team surgically to assist with the migration. If you don't have a partner (or are looking for a new one), Cobalt is able to manage the entire migration and provide training and support for use of Dynamics 365 online. Of course, we can also offer ongoing support and consulting services once you are settled into your new home in the Microsoft cloud.



Cobalt has proven its expertise to 200+ customers over 16+ years working with Dynamics CRM/365 and our team is ready to help you move to the cloud.

[Get a Quote](#)

If you would like a quote, contact [sales@cobalt.net](mailto:sales@cobalt.net). We'll be happy to discuss your specific migration needs.