

# Migration Success Secrets, Strategies and Advice from a Microsoft MVP



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A self-described technology evangelist and veteran of more than 250 system upgrades worldwide, Chris has been consulting as well as performing system upgrades and installations for more than 20 years. His background includes extensive experience in data warehousing, reporting, development, business analysis and enterprise architecture.

Whether it's volunteering at the User Group Medic booth or presenting sessions at Community Summit, Chris is well-known and widely respected for sharing his expertise with the Microsoft Dynamics community. Join us for a wide-ranging, no-holds-barred discussion about why you should consider migrating CRM to the cloud, how to choose the right migration partner, migration obstacles and much more.



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## Q: What are the driving forces behind migrating CRM to the cloud?

A: The biggest challenge for every single organization today is, "How can we do more with less? How do we reduce our bills in the data center?" Think about it. You've got servers being used only 40% of the time or only processing heavily at the end of the month. Then you've got a SQL guy, a database guy, a network guy, all these different people running your system – and what value are you getting?

The other force is the evolving security threat. You read about data breaches practically every day. For the smaller companies that don't have the dollars or the security team to protect their infrastructure, knowing that your system is secure is a pretty compelling reason to migrate to the cloud.

What's made all this come together over the last few years is Microsoft Office 365. People need Word, Excel and PowerPoint. So Microsoft said, "Let's build a cloud-based service and offer Office online." The beauty is that they included Azure Active Directory with the Office 365 subscription.

That allows you to have an identity provider in the cloud and Microsoft to tie all their services – SharePoint, Exchange, Power Platform, Power BI and tons of others – together under SSO – single sign-on. As soon as you make the decision as a company to move to the Office 365 cloud, you have access to everything including Dynamics! Once your security is approved and you're using that model, you have no more security hurdles; it's a true, complete, connected solution.

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## Q: When it comes to CRM, what does cloud offer versus on premises?

A: What you can do online now vs. on premises is ridiculous; it's like night and day. The technologies you see in Dynamics 365 online vs. on premises are ones that only billion-dollar companies like Amazon used to be able to afford. Now these tools are available for mom-and-pop-size organizations. They can use that same toolset to do the same incredible things at a very inexpensive price.

It's the difference between a customer calling and you say, "Hi, how can I help you?" versus "We saw that you visited our website two days ago and that you ordered this product yesterday, is that what you're calling about?" It's a huge difference.

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### **Q: How does an organization realize the full value of moving to the cloud?**

A: A lot of companies take their SQL Server and Windows Server and throw them up in the cloud and say “Hey, we’re cloud-based.” And that’s true – sort of. But to truly be a cloud-based organization is to take it to the next step and move those into services like SaaS and PaaS.

That SQL Server that was running all the time, and you’re paying pennies per minute to run it, now only runs when it needs to process. And those evenings where no one’s using it, there’s no bill. That allows you to reduce overhead and resources, which is really what cloud is all about.

### **Q: What are the biggest obstacles to a successful migration?**

A: Poor planning, for starters. If you don’t train your team on the changes that are upcoming, you’re going to have a very bad Monday morning. When people don’t know where their data is anymore, they get very upset. The business loses time and spends big dollars retraining people. Worst case, you have to revert back to the original system, and then you’re in real trouble.

Another huge obstacle is data migration. A lot of companies are still using a CRM data-migration method that went out a dozen years ago: Basically, manual, row-by-row data movement. The scary part is that you may not see the problems on Day 1. You may not see them for 45 or 90 days, or until you go to run a specific report and say, “Wait, this field has been changed. All the data we have no longer matches. Our reports are off year over year.” When that happens, you’ve got an adoption killer. When people lose faith in your system, adoption dies almost overnight.

That manual data-migration method is done. The new methods do not involve migration from a copy/rewrite record now; they provide import facilities to bring in those databases, just as they were on premises. Microsoft has a way to bring your SQL data the exact way it’s running on your SQL Server into that new cloud. And that’s really helped speed adoption to the cloud.

### **Q: How can organizations prepare their data in advance for a move online?**

A: I can’t stress this enough: Every company needs a data-strategy approach, and it needs to happen all the time, not just when you’re migrating your data. It doesn’t matter if you’re in the cloud or on premises, it’s an organizational challenge to make sure you don’t just let money burn away. Think about it: You’re paying to use storage online, and online storage right now is about \$40 a gig. Last time I checked at Office Depot, I could buy a 1 terabyte drive for \$99. So look at everything and ask yourself: “Do we still need 24 months of data online? Do we still need seven years of email online or are we OK having IT pull it out of our Exchange Server if we need it?”

We did a trade show and some marketing in 2005, can we get rid of the data associated with that yet?” Always be looking at how you can reduce storage needs and make things cheaper for the business. Then you can use all kinds of out-of-the-box Dynamics tools to clean that up.

### **Q: How do you deal with pushback from IT when it comes to migrating to the cloud?**

A: When you start talking about a move to the cloud, there’s a natural instinct for IT to get worried and say, “You’re taking away our jobs.”

But nothing could be further from the truth. Explain that your job doesn’t go away when you head to the cloud; it just changes – for the better. Instead of having to do backups all the time, instead of worrying about disaster recovery strategies, those things are done automatically, which gives you more uptime.

It’s a different mindset. In the onprem world, it’s all about keeping the system up and running. In the online world, it’s not about keeping the system up, it’s about tuning and doing what’s best for the business.

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### **Q: How do you recommend preparing employees and organization for this type of change?**

A: The bottom line is that adoption is key. Getting people to use these systems and get benefit out of them is the only way they add value to the business. Use the migration as an opportunity to address system challenges and drive adoption.

Talk to people who are at the front lines – the ones taking the calls, working in the cases every day, processing the orders. They are the ones who know everything about the system – where it's slow and where the glitches are. They'll be the first to say, "Wouldn't it be great if the system could do this?" Make a note of that and figure out how to address some of those issues so you can clean up those adoption challenges.

### **Q: So how does a company drive adoption?**

A: Use the upgrade itself as inspiration to drive new adoption to your system. Maybe start a hallway conversation by having employees help come up with a name for the new system you're upgrading. Have everyone submit a name and whoever comes up with the best name, their department gets a pizza party or something. When you get the name, post it around on billboards, "System X or whatever you call it, is coming." Driving that inspired awareness of what's happening with the project really drives adoption.

### **Q: What should an organization look for in a migration partner?**

A: Ultimately, you want a partner that is interested in clients, not projects. You want someone who is looking out for you all the time, not just one who says, "here's 400 hours," and at the end of 400 hours, they're gone. You want a partner that's going to be proactively honest with

you and say, "Here are the things we're probably going to run into, and this is how we are going to mitigate them if we do."

If you're looking at partners and they're talking about upgrades, are they also asking about your business and any challenges in your data today?

Are they asking about things that can be corrected? It's easy to move your problems to the cloud. But it will come back to bite you.

Find out who's going to be doing your upgrade. Some partners take their junior-level people – the ones not out on the road and meeting clients face-to-face – and put them on your upgrade. That's great for them from a cost perspective, but you likely end up with people who don't understand data quality and what it means for adoption.

Also, and lot of people may laugh at this, but ask for references. If a partner's told you they've done a process over and over again, ask them to produce a reference. Make sure you talk to a company that came off an on premises system with that partner. Find out what successes and challenges they had. Finally, Dynamic Communities has subject matter expert groups, industry focus groups, all kinds of great resources.

Use those to find companies that have done upgrades and ask a lot of questions. Leverage that relationship and find out what worked for them and what didn't.

### **Q: When migrating, how much change is too much?**

A: You've got to remember this isn't just a migration, it's an organizational change. With your migration, you may get a whole huge list of stuff that needs to get done, but you only have the resources to get a month's worth done. That's OK. Do your one month's worth of stuff, prioritize the rest, tackle it over time and when the upgrade is done, don't stop talking about your CRM system; start talking about the next phase to keep the changes going. Keep driving that adoption with training, release after release.

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### **Q: How do you decide whether it's better to migrate or start over?**

A: Let's say you've been on Dynamics CRM since Version 3 or 4, you've done a little customization and maybe you're at the point where you're just using it as a Rolodex. In that case, you should start fresh. Go back to out-of-the-box and take advantage of the new processes in the system. You can do that in a sandbox environment. There's no sense in taking things that work in 4.0 and stuffing them into a new process. Go out-of-the-box, import your accounts and clean everything up. You'll end up with a brand-new interface, system, layout, everything. Most of all, you'll have erased the legacy past. All those errors and challenges you had before are gone and you're on a brand-new platform that's up-to-date all the time.

### **Q: How do you drive that decision?**

A: That's a tough conversation to have. Really, who wants to go to the CIO and say, "Hey, we need to start fresh"? It's a hard decision.

But there are some things that can clue you in: The system doesn't do what you need it to do; you have database problems; it takes forever to pull up a record; you don't know why a certain process is in place anymore; Bob built the system but he hasn't been here for six years. All those things are clues that you need to go out-of-the-box.

### **Q: Any final thoughts on how to achieve a successful migration?**

A: Never think a migration is going to be 100% smooth. It will not be. What will make you successful is, first, the ability to adapt on the fly, and second, making sure all your team members – security, IT, usability, user training, everyone – are willing to participate and work toward the goal you need to accomplish.

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