



Maximizing Value from CRM Investments

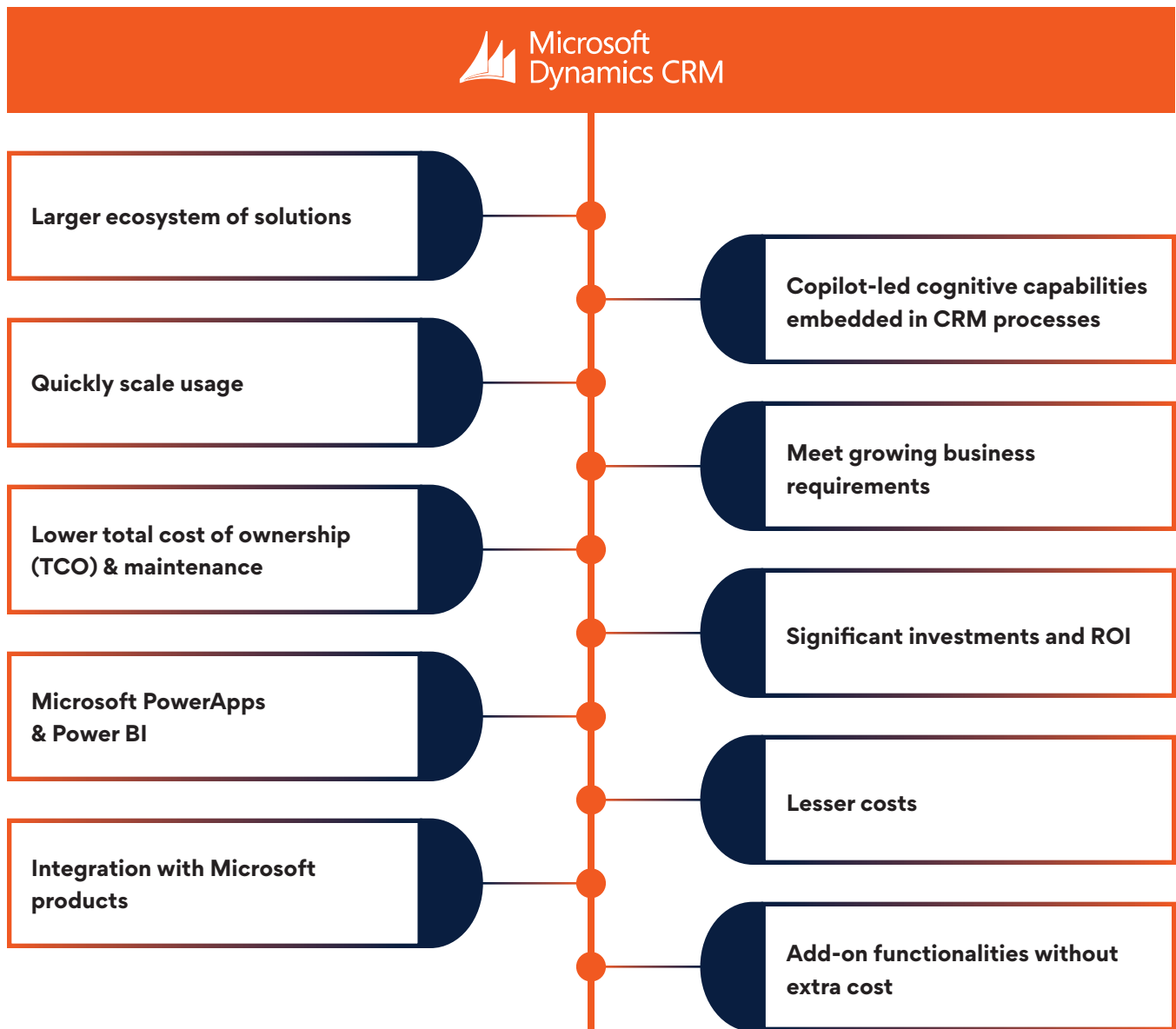
Accelerated Migration to Microsoft Dynamics with Persistent SwiftShift



A Customer Relationship Management (CRM) system is crucial for operational success; however, despite multi-year investments, business leaders are unclear about the value it brings. Two prevalent queries among CIOs and CFOs are: “I bought all these licenses, and they’re sitting on the shelf. How do I get more value out of them?”, and “We bought these CRM licenses, but I’m not sure I’m saving my salespeople time, I’m not sure I’m making my marketing people more effective, I’m not sure I’m connecting marketing and sales data the way I thought I was going to.”*

*<https://www.cio.com/article/1255983/customer-relationship-management-crm-trends.html>

As businesses reassess their CRM strategies to maximize return on investments, Microsoft Dynamics 365 emerges as a compelling solution to address CRM inefficiencies, underutilization, and integration challenges. Dynamics 365 integrates effortlessly with the Microsoft suite such as Office 365, Teams, and SharePoint, enhances user productivity, and reduces onboarding time. Additionally, [43% of businesses report underutilized CRM features](#), leading to wasted resources — a gap that Dynamics 365 addresses through modular, scalable architecture that grows alongside your business needs.



Legacy-to-Dynamics Migration Challenges



About **30% of CRM migrations exceed budget**, and **41% face time overruns**.

- / **Data migration** is one of the largest hurdles, as transferring large volumes of historical data from legacy systems to a platform such as Dynamics 365 requires precision to avoid data corruption or loss. It is also a challenge to cleanse and optimize data to performance efficiencies in the new CRM system.
- / **Integration with critical systems**, such as ERP or marketing automation platforms, frequently demands intricate configurations to enable smooth data flow. Misalignments in API compatibility and synchronization issues can delay timelines.
- / **Missing technical and functional documentation** in the current CRM systems that affects the integrity and functionality of current data and processes.
- / **Duplicating efforts** by migrating all objects and functionalities, given that Dynamics 365 offers an extensive suite of out-of-the-box functionalities.
- / **Custom code migration** adds complexity; customizations embedded in older CRM systems may not seamlessly transfer, often necessitating redevelopment and leading to unexpected costs.

Get the GenAI-led Advantage to 40% Faster Migration with Persistent SwiftShift

Persistent leverages a GenAI-driven platform, Persistent SwiftShift, to significantly reduce migration risks and offer guaranteed cost savings. With our GenAI accelerators, we help clients navigate migration challenges by:

- 1. Creating comprehensive documentation** of critical components of the existing CRM application, such as existing CRM processes developed using Salesforce Lightning Flow capabilities and Salesforce customization using Apex code. This helps in scenarios in which detailed CRM documentation is not available.
- 2. Identifying the most critical objects and attributes** of the current CRM application based on business needs, advising migration experts to optimize migration efforts, and automating the entire object migration process.
- 3. Auditing the existing CRM data** to evaluate data quality and complexity followed by an automated data mapping & migration harnessing our solution. It also delivers a set of recommendations to optimize the CRM data before migration, reducing data storage cost post-migration.

Data Migration Process Flow (Data Migration Throughput — 2k+ records per minute)



GenAI Benefits

GenAI identifying and suggesting removal of stale records before migrating to Dynamics (decision lies with the engineer).

Exploring other ways of optimization of CRM data storage before migrating to Dynamics.

- 4. Converting existing CRM code to Dynamics plugin** with Azure OpenAI, augmented by prompt engineering. It also recommends strategies to optimize the codebase before migration, further reducing CRM maintenance cost post-migration.

Customization Migration Process Flow



GenAI Benefits





GenAI recommendations on optimizing CRM customization by leveraging Dynamics OOB capabilities before migrating to Dynamics.

Transforming CRM customization to configuration for reduced ongoing Dynamics maintenance cost.

GenAI recommendations on optimizing customization by leveraging Power Platform low code / no code capabilities before migrating to Dynamics.

- 5. Checking access rights** during migration to handle data privacy and security considerations.
- 6. Training users** on the new CRM application, leveraging Persistent University modules, to boost user adoption.

Persistent SwiftShift has demonstrated compelling business outcomes for enterprises migrating to Dynamics.

 <p>Upto 50% Reduction in migration costs with no third-party licenses</p>	 <p>Reduced maintenance cost With GenAI-led optimization of existing codebase</p>
 <p>40% faster Migration by harnessing Azure Open AI</p>	 <p>Stable migration With high accuracy</p>

Re(AI)magingTM the World



To start your Dynamics 365 journey and maximize RoI from CRM investments, get in touch with us.

Contact Us

About Persistent

Persistent Systems (BSE & NSE: PERSISTENT) is a global services and solutions company delivering Digital Engineering and Enterprise Modernization to businesses across industries. With over 23,200 employees located in 19 countries, the Company is committed to innovation and client success. Persistent offers a comprehensive suite of services, including AI-enabled software engineering, product development, data and analytics, CX transformation, cloud computing, and intelligent automation. The Company has been recognized as the “Most Promising Company” of the Year by CNBC-TV18 at the 2023 India Business Leader Awards. Persistent has achieved carbon neutrality, reinforcing its commitment to sustainability and responsible business practices. As a participant of the United Nations Global Compact, the Company is committed to aligning strategies and operations with universal principles on human rights, labor, environment, and anti-corruption, as well as take actions that advance societal goals. With 327% growth in brand value since 2020, Persistent is the fastest-growing IT services brand in the 2024 Brand Finance India 100 Report.

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