



# Up in the Cloud - Ensure your future

Dynamics 365

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This document explains how AlfaPeople supports companies in migrating their existing local Dynamics CRM solution to the cloud and Microsoft Dynamics 365. It addresses motivation, and the business goals that can be achieved through migration. It shows the advantages of the new solution compared to on-premise, as well as its uses.

For the initial analysis, we offer a workshop entitled **“Up in the Cloud”**. In it, we focus on your business processes and the added value offered by the cloud. With the help of our tools, services and project approach, we achieve objectives step by step.

## Why the cloud?

In the face of new technology, many companies are asking “Should we migrate to the cloud or not?”. Cloud technology lays the groundwork for other new technologies such as artificial intelligence, and allows you to reap the benefits of using cloud services, such as cost savings on hardware and maintenance.

As a company, it is important that you define objectives, and are aware of your motivation for changing. We provide you with an overview of how to use Microsoft Dynamics 365 and our tools & services to help you master the transformation and achieve your objectives.

*“When the wind of  
change blows, some  
people build walls,  
while others build  
windmills.”*

(Chinese proverb)



### Objectives

- Maximisation of the company's business value
- Improvement of interoperability
- Flexibilisation of the IT infrastructure
- Improvement of market adaptability
- Reduction of hardware costs
- Development of sustainable solutions
- Illustration of new business models
- Security-related upgrade

### Motivation

- Over-and underinvestment in the company
- Information process breaks
- Business growth or necessary staff cuts
- Long response times due to rigid, outdated environments
- High costs due to hardware adjustment spiral (lifecycle software versus hardware)
- Development of erroneous trends
- High competitive pressure
- High security requirements

## Advantages of the cloud

- Continuous expansion to include new features
- Simpler integration with Microsoft Suite (Office 365, PowerBI, OneNote, Yammer)
- Faster and simpler provision of mobile applications
- Cost savings with regards to the purchase and maintenance of hardware
- Cloud versions updated with new features earlier than local installations



## Microsoft Dynamics 365

Cost  
Savings



Integration



New  
Features



Mobility



Competitive  
Advantage



**Further advantages at a glance:**

- Predictability of costs - operating expenses rather than capital expenditures
- Internal IT resources can focus on business development
- Flexibility through scalable licensing model
- Flexible extension of features (e.g. to include Finance and Operations)
- Access to Microsoft AppSource, numerous business applications

We are happy to work with you to develop tailored advantages and uses for your company. Our “Up in the Cloud” workshop is designed with this in mind.



### AlfaPeople tools & services

With the help of our tools & services, we can help your business to transform itself in the cloud environment, and help you to fully achieve your objectives.

No only do you benefit from our extensive industry knowledge and the modern, effective technical solutions developed by AlfaPeople, but also from the knowledge gleaned from customers we have already supported with their migration to the cloud.

**We will support you from the first meeting** until your cloud project is ready to go live. Naturally we will also be on hand afterwards to provide post-project support.

### The three phases of migration

The migration process consists of three phases:



## 1. Preparation

The prerequisite for the success of any project is thorough, well thought-out preparation, because **“well begun is half done”**.

The preparation phase consists of three steps:

### Willingness - project team

In the first step, the project team should learn about **the motivation** behind the cloud project as well as **its objectives**, and be willing to implement it. They must have an awareness of change, as all interactions will have an impact on the organisation and its day-to-day operations. The project team's resources must be realistically planned and taken into account. Our willingness to understand your requirements and support them during the transformation is self-evident. AlfaPeople is on hand throughout the project phase and also afterwards.

### Initial analysis - access to the solution

In the second step, we require access to your current solution in order to **evaluate the options and advantages available** to you. We will look at the size of your database, your system usage and utilisation, as well as customised features. Customised features are often replaced by standard features, but customisation may also be necessary in the new environment. We will require access to the source code for your customised solutions to determine the effort and costs involved. The initial analysis will take the form of a workshop.

### “Up in the Cloud” workshop

In this workshop, you explain your objectives and motivations to us. We present our approach to achieving your objectives, and use **our industry knowledge to advise you**. With the help of our migration checklists, we will work together to develop an interim objective. We will submit this to you in the form of a tender, with recommendations for the migration process. We will discuss the schedule with you, as your employees will be critical to the success of the project. As a rule, full migration takes six to eight weeks, depending on additional customisations.

## 2. Implementation

### Test migration

In this step, we perform a test migration. We migrate all your data into an online version of the CRM solution. Preferably, you will already have a development or test environment in your on-premise environment that can be used for this purpose. Alternatively, we can work together to create a copy of your CRM production environment. As the customer, you can then test the migration to verify that all your data is available and all features are running smoothly as per our agreement.

In detail, the test migration proceeds as follows:

- Creation of the target environment (**test and production** or more). The online platform makes it easy to set up production and non-production environments for development and testing.
- The test migration is completed using a standard migration tool. **We transfer all data to the cloud**, including any custom fields and entities.
- **Unsupported modifications/adjustments** (code, forms, etc.) are logged and the migration solution for them is described. We develop an alternative solution together with you.



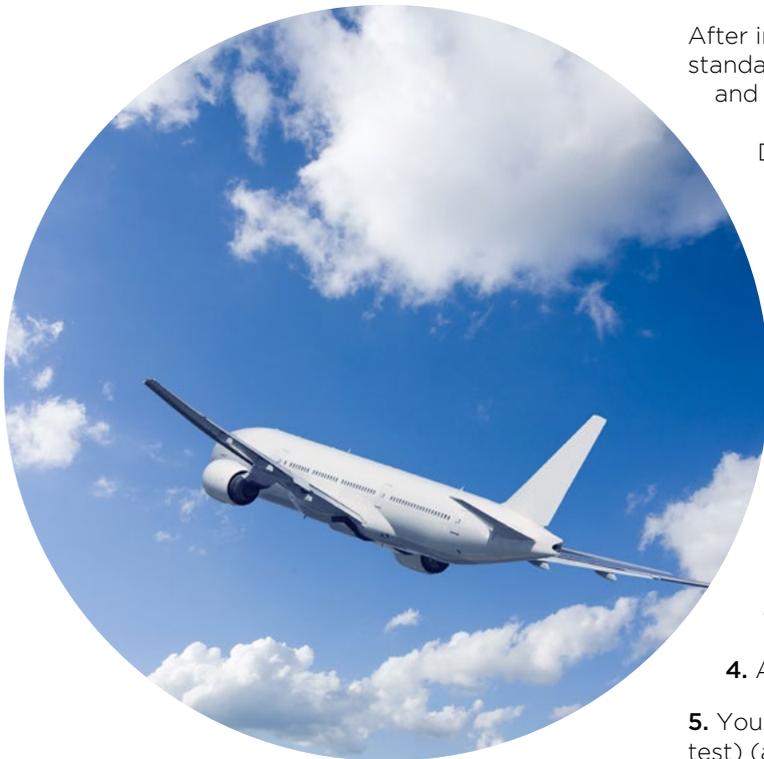
## Implementation

Based on the results of the test migration, we will begin the implementation process. This phase **starts with a workshop** where we explore the migrated solution and activate CRM Online's new features. For example, the old version of a distribution solution may have displayed sales opportunities. In the new layout of the cloud version, these may be displayed graphically in different ways. As part of the workshop, we will demonstrate the new features for you, and you can decide if you want to use them.

During the workshop, we will document any necessary changes and/or ideas that arise in relation to certain standard features you would like to implement. We will agree which features are to be implemented in the following project phases. All changes agreed as part of the migration are included. This also applies to replacement code. In most cases, user-specific code can be replaced with standard features.

With regard to the **the actual migration of the solution and data**, the most important aspects are:

- Testing the compatibility of the migration and the cloud
- Testing the migrated solution
- Implementation:
  - Form adjustments
  - ISV solution upgrades
  - Replacement/upgrading of code



After implementation is completed and code is replaced with standard features, you will carry out a final user acceptance test and confirm that all tasks have been completed correctly.

During this phase, you will have access to a new online version with all your data. At the same time you will still have access to the old version which is to be closed and replaced by the new cloud version.

### Steps in the implementation phase:

1. As soon as the test results are available, we will begin the implementation process.
2. AlfaPeople will hold a workshop to introduce the migrated solution and its new features.
3. Change requests will be logged and discussed with you.
4. Agreed changes will be implemented.
5. You will test and approve the final solution (user acceptance test) (all features, configuration and data validation).

### 3. Use

#### This phase consists of two steps:

The going-live phase includes the final data migration. This is followed by a going-live period, which usually takes one to two days. During this phase, we make sure that all information on the new solution is transferred to you via the agreed setup and maintenance system. Support and maintenance tasks can either be handled by your own organisation, an external partner, or AlfaPeople's support and maintenance framework.

#### *Going live in production*

All changes made in the test version are applied to the production environment. Optionally, we can also carry out any required training as per our agreement. Typically, we train everyone involved in the upgrade and migration phase so that they can support the training of end users.

In some cases, a few final adjustments may be required at this stage. We agree on a "handover" from the old solution to the new solution. This means that we agree on a date when the old solution will become "read-only" or even be locked for end users. Subsequently, the final data migration is performed. Depending on the volume of data, the migration usually takes a few hours; for very large databases, it can take a whole day. However, in most cases, the migration is complete in a few hours and the solution is ready for use. The old solution can now be closed, and the support and maintenance team can begin their work.

#### **AlfaPeople - Microsoft Dynamics 365**

Typically, we also evaluate the operational impact of the solution. If necessary, feedback can be discussed as part of the going live support. On this day, we are usually on-site and can take immediate action with regard to any end-user feedback.

Steps in the going-live phase:

1. The solution is made available in the production environment.
2. Optionally, end-user training and materials can be provided.
3. The final production configuration is completed.
4. "Handover" from the previous solution to the new cloud solution, final data migration and going live.
5. The previous environment is closed.
6. Going-live support is carried out as per our agreement.
7. Company feedback is evaluated.



#### **Support and maintenance**

During this phase we strive to continuously improve your solution, as well as providing assistance to the support and maintenance team. This is an important aspect for us. When end users move to a new version, there are often questions, problems and requests for changes. Therefore it is important that you provide internal

resources for us to take over this support function. In some organisations the IT department is well placed to provide support and maintenance, but in many companies this is not the case. This must be discussed in order to ensure the correct use of the new solution, as well as your ability to implement new updates from Microsoft.



We focus on making the most of future updates. One of the special advantages of the cloud platform is that Microsoft often provides updates with new features.

If you were previously using an old local version, you may be unfamiliar with the Microsoft update phase. We typically create a roadmap of any new features we believe will be included in future Microsoft updates, as well as any end-user change requests.

### *After going live*

- Are you able to perform support and maintenance tasks?
- How well can your IT department support the CRM solution?

### How can you get the most out of future updates?

1. Present new requirements as a roadmap.
2. Prepare for frequent updates with new features.
3. Present new features in relation to business needs.

### **AlfaPeople - Microsoft Dynamics 365**

By carrying out an upgrade and migration, we try to limit the number of changes made during the upgrade. We prefer to introduce further changes as part of the release cycles.

Microsoft has two release cycles per year, and in most cases it makes sense to apply these cycles to internal change requests as well.



*With Microsoft Dynamics 365, you are building the foundation for future technologies such as Artificial Intelligence and the Internet of Things. Secure your future. With AlfaPeople and Microsoft Dynamics 365, you will achieve your objectives, create more transparency and react more quickly to market changes.*

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