pragilis
SOLUTIONS

A SIMPLE CHEAT SHEET

Microsoft Dynamics 365 CE or Salesforce?

A few comparisons to include in your *business case* for implementing your next CRM.

Show your reasoning

Get others onboard

Make the right choice

As the leader of your business...

Are you (more than) ready to build a new CRM for your organization? **Sold on the idea** of using Microsoft Dynamics to build it? **Do some others feel Salesforce** is the way to go? **Need to make a pitch** to convince them otherwise? **Wondering what to include in your business case** so everyone understands what you want them to?

This brief guide will help.

A lot goes into a business case.

Including, expressing **measures & metrics.** Don't. Leave. These out. Otherwise, it's hard to clearly…

- **Identify the pains** your business is currently experiencing
- **Express the success** your business should expect
- **Describe the strategy & plan** to achieve that success

About that last item… More than just 'turning on a new system', your strategy & plan should express the **people side of any change**. New technology? We're absolute believers. **How new technology affects employees?** Even more so.

Tech allows you to create experiences to bring customers back for more. **Change** is how your employees adapt, adopt & adore that change.

So together, your business can…

Help customers —get your best

Help employees —do their best

Help your business —be its best

You want to make it clear to your boss & peers...

why Dynamics 365 will work better than Salesforce to accomplish that.

We want to save you time (and frustration) doing research. We created this chart **to include in your business case**. Incorporate the items that pertain to your business (probably all of them).

Hell, just **copy & paste the entire table** below into your business case document!

salesforce

Dynamics 365
vs
Salesforce

Dynamics 365	Features	Salesforce
Works & plays nicely with Microsoft apps. Which also allows people & teams to work better together within the MS suite.	**Microsoft apps**	Works well with Microsoft apps. And, Salesforce does have solid APIs. But you **need to configure settings & perhaps write code** to create the integration you want & need.
One Microsoft user account—access all the apps they have to offer. **Including MS Dynamics.** Easy, too, for IT to manage one, not multiple accounts.	**Single sign-in**	Single sign-on can be enabled between Salesforce and Microsoft. But, it's a **hassle for IT & less secure to manage multiple user accounts.**
Power BI, Excel & Dynamics all share a common data model. This makes it easy for users **to create visual, interactive dashboards & reports**. And, to analyze what's going on with your customers.	**Data Analytics**	Salesforce has powerful tools to create dashboards & reports. **But, it's often harder to do and to review results.** Yes, you can use Excel too, to perform analysis.
.NET & HTML—all universal web standards supported by MS Dynamics. **So it's easy to build & add new features**. No need to rely on another proprietary programming language.	**Software Development**	Salesforce has its own proprietary programming language—Apex. **Thus, it requires specialized skills to customize Salesforce**. And, Salesforce developers are fewer & more expensive.
Manage core business functions like Human Resources, Supply Chain, Accounting and Finance —**right out of the box.**	**ERP Applications**	Salesforce **does not have off-the-shelf applications** to support these core business operations.
Treat your sensitive data as carefully as needed. Use MS Dynamics in the cloud, on-premise or as a hybrid. You've got choices.	**On-premise, cloud or both**	**All your data travels across the Internet—period.** Often a deal breaker for government & other companies with sensitive data.

So then...

Salesforce

For sure, a great solution, but...

- Takes effort to integrate with other platforms
- Can be less secure & more difficult to manage multiple users accounts
- Harder to create & review reporting results
- Fewer & more expensive developers to create custom features
- Lack apps to support core business operations
- All data is in the cloud. Period.

Dynamics 365

The best solution because...

- Works & plays nicely with Microsoft apps
- One Microsoft user account to access everything
- Easily create visual, interactive dashboards & reports
- Easily find developers to build & add new features
- Supports supply-chain operations
- Cloud, on-premise or hybrid for sensitive data

We use Dynamics 365 with our clients for all the reasons above. And...

Unlike Salesforce, Microsoft is a Cloud expert—with Azure as their own hardware-software-cloud solution.

Such tight integration means...

Easy to administer

Less costly to maintain

Fewer IT headaches

Like what you see?

Want more tips for making a business case to use Microsoft Dynamics 365 in your workplace? Call, write or book us. Really. It's what we do. We love talking shop.