



## **A financial services company boosts performance and productivity by upgrading legacy CRM to Microsoft Dynamics 365**

### **Overview**

In 2018, a leading financial services company needed to upgrade its legacy CRM software to the most current functionality available with Microsoft Dynamics 365. The upgrade was imperative – not only for the enhanced features, functionality, and productivity that Microsoft Dynamics 365 offered, but also because mainstream support had ended for Microsoft CRM 2013.

Furthermore, additional software development on deprecated functionality would increase risk and cost to the company, even with an interim upgrade to Microsoft CRM 2015, as it would be phased out soon as well. A multi-step upgrade was a complex endeavor that required the seasoned technical expertise of Corterra Solutions.

### **Solution**

Within 12 months, Corterra executed a four-phased plan that entailed upgrading all necessary infrastructure, hardware, and software to support the client's system functionality and scalability requirements. In addition, this phased migration and upgrade was a coordinated effort across four environments (Dev, Test, Stage and Prod). The following applications were upgraded:

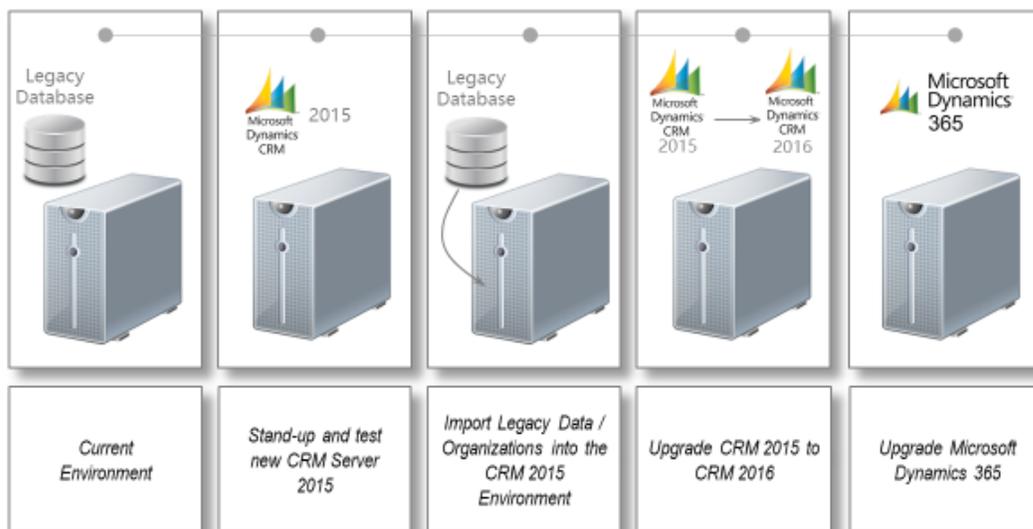
1. Microsoft Dynamics CRM 2013 to Microsoft Dynamics 365 v8.2
2. Microsoft SQL Server 2012 to SQL Server 2016, including:
  1. SQL Server Integration Services
  2. SQL Server Reporting Services
3. Microsoft SharePoint 2013 to SharePoint 2016
4. Custom Excel Add-In for Microsoft Dynamics CRM

Corterra accomplished the upgrade in incremental steps, first moving business application data to Microsoft CRM 2015 and 2016 before a final upgrade to Microsoft Dynamics 365. Five primary test and training methods (functional, quality assurance, user acceptance, and end user) were implemented to ensure all applications were ready for production.

Upgrade timing was of critical importance to avoid the company's busy budget season, year-end, and quarter-end close months. A spring month was chosen for go-live to minimize disruption during peak periods, which also provided time for user stabilization after the rollout.

## Path to Dynamics 365 (on-premises)

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## Outcomes

Microsoft Dynamics 365 brought new levels of process automation and insight to support the company's operational and growth initiatives. Business users benefitted from faster, more intuitive navigation with enhanced productivity features. Developers now used a similar technical platform to Dynamics 365 in the cloud that enabled rapid development, increasing efficiency and productivity, and overall system performance improved, particularly during peak hours.

With minimal disruption to the client's business, Corterra Solutions' experienced practitioners successfully upgraded their aging CRM platform to the most sophisticated platform currently available. The result is significant system performance improvements and team productivity, with decreased risk and ongoing costs for maintenance.