Charter Global

CASE STUDY — Migrating Hubspot to Microsoft Dynamics CRM

About the Client

The client, an Atlanta based strategic technology services partner, transitioned from HubSpot to Dynamics CRM for a more customizable, secure, and integrated solution within the Microsoft Ecosystem. Dynamics CRM seamlessly integrates with Teams calling and Outlook, consolidating communication functions. It also integrates with Power BI for insightful dashboards and offers automation features for enhanced efficiency.

Security roles within Dynamics CRM ensured precise access control based on company hierarchy, safeguarding data confidentiality and integrity. Additionally, the client implemented automated email campaigns within Dynamics CRM to facilitate the distribution of bulk emails to contacts daily. This automated process streamlines communication efforts and enhances outreach effectiveness, further boosting productivity.

Project Goals

With the modernization of CRM tools, Dynamics CRM provides businesses with a scalable, integrated CRM solution built on a security-rich platform. It helps meet the ever-changing needs of business and the marketplace. CGI migrated its sales processes from HubSpot to Dynamics CRM to get a more customizable, secure, and connected solution that lies completely in the Microsoft Ecosystem.

Dynamics CRM offers seamless integrations with Teams calling and Outlook, consolidating essential communication functionalities within a single platform. Through Teams calling, teams can conveniently initiate, monitor, and document their calls, including transcripts and recordings, directly within the CRM environment. The integration with Outlook streamlines email management by enabling users to efficiently track both outgoing and incoming emails.

Moreover, Dynamics CRM seamlessly integrates with Power BI, facilitating the creation of insightful dashboards for effective management oversight of team activities. Leveraging tools such as workflows, plugins, and Power Automate, numerous tasks within Dynamics can be automated, enhancing operational efficiency and user experience.

The implementation of security roles in Dynamics allows for precise access control based on company hierarchy, ensuring data confidentiality and integrity. These comprehensive features and integrations empower organizations to optimize their processes and maximize productivity.

In addition, we implemented automated email campaigns to facilitate the distribution of bulk emails to contacts daily. This automated process is triggered when users select the contacts to whom they wish to send emails, streamlining communication efforts and enhancing outreach effectiveness.

Key Challenges

• One of the main challenges we faced was to import the data from HubSpot to Dynamics. HubSpot had many custom fields that were created for users, and we needed to map all this information to Dynamics which led us to create multiple custom fields to store data. We also used an excel import in Dynamics to get the data from HubSpot.

• Another challenge was to create dashboards in Dynamics that were like HubSpot, as Dynamics has a different interface and does not provide options for universal filters and thus, we had to go with Power BI to complete this requirement.

• While Dynamics offers email tracking capabilities, we found it necessary to enhance tracking by implementing functionality to monitor clicks and email opens within Dynamics. To achieve this, we utilized the Email Engagement tool provided through Dynamics enterprise licensing.

Project Description

Deployment

To deploy Dynamics CRM for Charter Global, we first obtained licenses for the Sales Module. Following that, we established three separate environments: one for development, one for unit testing, and one designated as the production environment for end users.

• The initial phase of the implementation involved creating custom fields, views, and forms in Dynamics to align with the existing setup in HubSpot. This step was crucial for seamless data migration from HubSpot to Dynamics.

- Data migration was executed using the "Excel import" feature, importing Contacts, Accounts (companies in HubSpot), Opportunities (Deals in HubSpot), and All activities (Phone calls, emails, tasks, meetings) into Dynamics from HubSpot.

- We replicated the dashboards from HubSpot in the CRM, utilizing "Interactive Dashboards" to enhance user experience and provide improved data visibility.

- To ensure better access control, security roles were created based on company hierarchy.

- Automations were implemented using Power Automate and Workflows for tasks such as contact creation, email assignments, and follow-up tasks.

- For email tracking, click and read receipt functionality was implemented using the email engagement tool for Dynamics.

- Dynamics Teams calling functionality was integrated, enabling users to make calls to contacts from within Dynamics and store call transcripts and recordings.

- Integration with Teams was established to enable users to access Teams directly from within Dynamics.

- Outlook integration was set up to track incoming and outgoing emails within Dynamics.

- Power BI Dashboards were developed to provide managers with better visibility into their team's daily activities, offering universal filters and report downloads tailored to their needs.

- We introduced the capability for users to conduct email campaigns, enabling them to send bulk emails to contacts daily.

Problem Resolution

- We addressed duplicate record issues in HubSpot contacts and accounts by implementing duplicate detection rules in Dynamics. These rules prevent users from creating new contacts or accounts if they match the name and email exactly.

- To streamline communication processes, we integrated Teams calling directly into Dynamics, eliminating the need for third-party tools.

- To automate the creation of follow-up tasks and reduce manual efforts, we implemented workflows in Dynamics. These workflows automatically generate follow-up tasks based on triggers in different fields within the system.

Results

- During the implementation of Dynamics, it became evident that Dynamics offered superior integrations with Teams and enhanced calling capabilities, eliminating the need for third-party tools in this regard. Users transitioning to Dynamics also reported improved ease of use when navigating contacts and activities within the Dynamics environment, along with utilizing the calling functionality seamlessly.

- However, challenges arose during data migration from HubSpot to Dynamics, as the integration tool provided by HubSpot proved to be inadequate. It failed to map complete records accurately to Dynamics, particularly for phone calls, emails, and tasks, resulting in one-way mapping only.

- Moreover, the discovery of numerous duplicate records in HubSpot caused confusion, compounded by the presence of redundant custom fields that served no apparent purpose for data storage.

- The implementation of Dynamics brought about significant improvements in security and access management. Users were restricted to accessing and interacting only with records assigned to them, while managers gained access to their team's data with deletion capabilities.

- Yet, Dynamics had its limitations, particularly regarding dashboard functionalities. The inability to utilize universal filters and limited capabilities within interactive dashboards necessitated the use of Power BI for enhanced dashboard functionalities.

- Furthermore, email tracking for clicks and read receipts required the use of the Dynamics email engagement tool, which was only available with the Enterprise license, prompting the transition from the professional license.

- While the Outlook app for Dynamics facilitated efficient tracking of incoming emails, manual steps were required within the app to track outgoing emails. Additionally, Power Automate was employed to ensure the automatic creation of new contacts when outgoing emails were sent to new recipients from Outlook.

Why Charter Global

Charter Global drives innovation in IT projects and business operations by defining strategy and providing consulting, digital solutions, custom development, and skilled resources. With an established customer base of Fortune 1000 industry leaders and over 100 successful project implementations, our experience, and proven methodologies enable our professionals to deliver industry-leading solutions in cloud technologies, open source, DevOps, mobility, CRM, AI/ML, AWS, SAP, Microsoft & Pega BPM.

About Charter Global

Founded in 1994, Charter Global is an Atlanta-based Strategic Technology Services Partner. Our engagements are locally managed and globally executed. Our expert teams evolve technology vision to realize business outcomes. We have grown to be a team of nearly 1000 consulting professionals dedicated to mid-market business and enterprise success in an ever-evolving digital economy.

Over the past 28 years, we have developed a portfolio of over 100 project implementations. Our client experience spans a wide range of industries including pharma, manufacturing, telecom, finance, healthcare, media/entertainment, airline, energy, retail, and hospitality.