

# Cloud Migration Overview



## Why Modernize?

Organizations running on-premises versions like Microsoft Dynamics CRM or Dynamics 365 Customer Engagement are facing:

- Infrastructure maintenance burden
- Limited scalability
- Increasing security & compliance requirements
- Delayed access to innovation
- Customization debt that slows change

Moving to the cloud isn't just a version upgrade, it's a business transformation opportunity.

## Our Cloud Modernization Approach

We guide organizations through a structured, low-risk journey into Microsoft Dynamics 365 and the Microsoft Power Platform.

### Phase 1: Strategic Assessment and Readiness

We start with clarity, not migration. This phase ensures we don't "lift and shift" problems into the cloud.

#### What We Evaluate

- Current CRM architecture
- Customizations & technical debt
- JavaScript & plugin footprint
- Integrations
- Reporting approach
- Security model
- Data quality & volume
- Business process alignment

#### Deliverables

- Cloud Readiness Scorecard
- Modernization Roadmap
- Effort & Risk Analysis
- Rework Reduction Plan
- Licensing & Cost Model

### Phase 2: Microsoft FastTrack Guided Migration

We leverage Microsoft FastTrack to reduce risk and accelerate deployment. We coordinate directly with Microsoft to ensure alignment and support.

#### What FastTrack Provides

- Migration best practices
- Architecture validation
- Data migration guidance
- Performance review
- Security & compliance validation

#### Our Role

- Solution redesign & modernization
- Code remediation (Xrm.Page → formContext, etc.)
- Integration re-architecture
- Data cleansing & mapping
- Environment strategy (Dev/Test/Prod/ALM)
- Cutover planning & rollback strategy

### Phase 3: Modernization, Not Just Migration

This is where real value is unlocked. From Custom Code → Modern Platform Capabilities. Instead of recreating legacy customizations, we modernize using:

#### Power Platform Enablement

##### Automation with Power Automate

- Replace legacy workflows & plugins
- Cloud-based integrations
- Real-time notifications
- Approvals & orchestration

##### Analytics with Power BI

- Replace SSRS reports
- Executive dashboards
- Embedded CRM analytics
- Predictive modeling
- Data lake integration

#### Modern Experiences with Power Apps

- Canvas apps for task-specific use cases
- Mobile-first experiences
- Rapid innovation outside core CRM forms
- Replacing complex form scripts with UI-driven apps

#### AI and Intelligent Agents

Through Microsoft Copilot for Dynamics 365 and Azure AI capabilities:

- Email drafting assistance
- Case summarization
- Opportunity insights
- Forecasting improvements
- AI-powered agents for service scenarios
- Conversational automation

AI becomes embedded in business processes, not bolted on.

#### Phase 4: Governance and ALM Maturity

Cloud modernization includes operational discipline:

- Managed solutions strategy
- Environment governance
- DevOps & pipelines
- Role-based security redesign
- Data Loss Prevention (DLP) policies
- Ongoing release management strategy

This ensures continuous innovation without disruption.