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# Microsoft Dynamics 365 vs Salesforce

Two leading CRM providers  
Exploring the difference



## Introduction

Our businesses are awash with data. Thanks to digitisation, we collect and store data on nearly every activity in our working day. However, just like a traditional filing cabinet full of physical files, this data is only relevant if you know how to make use of it.

Geoffrey Moore, an author and consultant, said: "Without big data analytics, companies are blind and deaf, wandering out onto the web like deer on a freeway."

Customer Relationship Management software could be seen like the digital version of the filing clerk – organising and storing all the data from your organisation ready to access at the click of a button. But it is also so much more than just data storage and organisation. With the right CRM platform, a business can not only access all their data, but make those

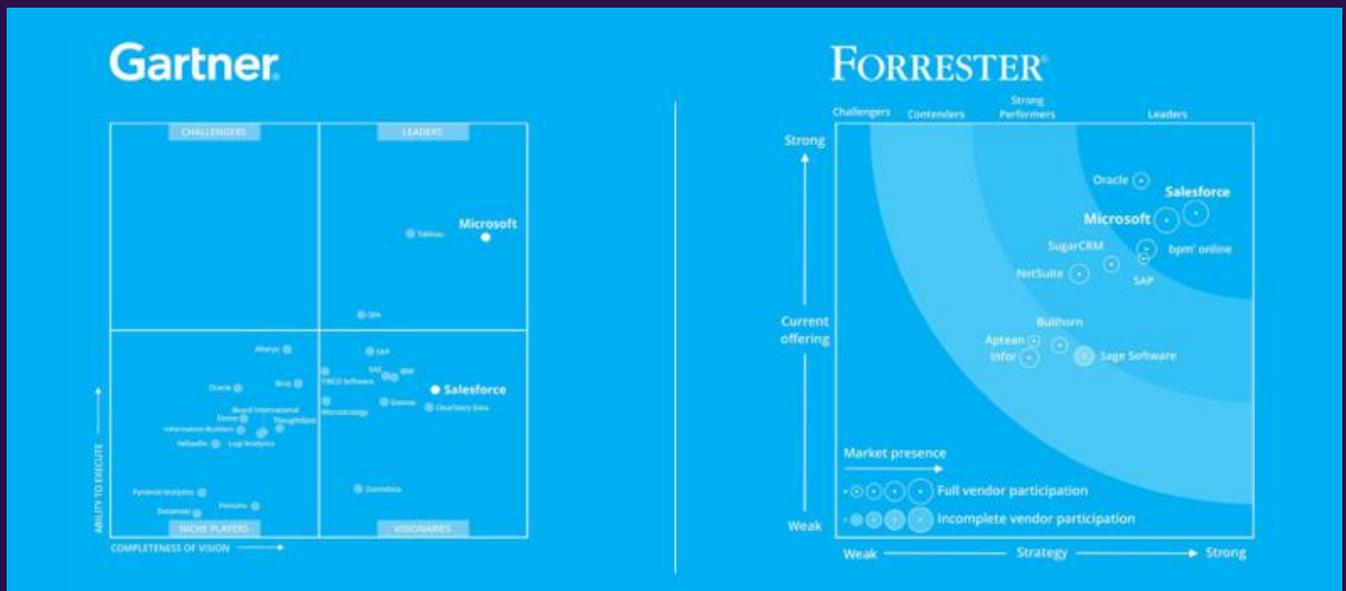
important connections and analyse the data to enable the organisation to improve customer service, boost sales pipelines and grow revenue. It can give you the evidence to forecast and make more-informed business decisions.

## Two leaders in the CRM field

According to analysis by Gartner and Forrester, the two leading CRM platforms are Salesforce and Microsoft Dynamics 365.

Both solutions lead the field for sales force automation, customer engagement, business analytics and business intelligence. When you look at the features, functionality and processes, they are very equally matched.

## So how do we choose between them?





## Two very different organisations

Let's take a look at the organisations themselves.

Microsoft is a multinational technology company with a revenue of \$110.4 billion in 2018. Some 80 per cent of the Fortune 500 companies are on the Microsoft Cloud and more than 400,000 businesses use Dynamics every day. It has 669,000 apps in the Dynamics marketplace.

Salesforce is a cloud-based software company with a revenue of £10.48 billion in 2018. It specialises in customer and sales automation software and was listed by Forbes as the world's second most innovative company. It has 2,700 AppExchange apps and 16,000 employees.

	Dynamics	Salesforce
Accounts & contacts	✓	✓
Lead management	✓	✓
Sales forecasting	✓	✓
Sales performance management	✓	✓
Marketing automation	Plugin	Plugin
social CRM	✓	✓
Reporting & analytics	✓	✓
Case management	✓	✓
Territory management	✓	✓
Customer self-service	✓	✓
App marketplace	✓	✓
Custom workflows	✓	✓

## Familiarity and ease of adoption

The main difference between the two organisations is size and scope. Microsoft Dynamics 365 is part of the Microsoft platform, which is used by 1.5 billion people every day.

Many businesses already use Microsoft Office, which includes Outlook, Word, Excel, PowerPoint and OneNote. Many employees are familiar with Microsoft software. Microsoft Dynamics 365 is a part of a family of software that is familiar to millions of people. Dynamics CRM can be accessed through a single Microsoft login.

Salesforce is a cloud-based software company, specialising in CRM software. More than 150,000 companies use Salesforce's CRM platform.



We chose Microsoft Dynamics because, as an organisation, we've started to migrate a lot of our portfolio to Microsoft as a platform. As that journey has happened, we have realised that legacy systems like the Salesforce system that we used for sales reporting historically, no longer met the needs of either our IT strategy moving forward but also the needs of the users. So, the decision for us was really taken with those two things in mind, both the technology and the future road map of that technology, but also to ensure that we met the needs of the customer base in terms of sales.

**Katy Bassett, Sales Operations and Enablement Director for UK and Europe Serco Microsoft Dynamics CRM customer.**

## Integration

A lot of people think Dynamics 365 is easier to use because it's already integrated with Office 365. This means data from both applications is automatically synchronised.

Your employees can do business deals right from Outlook, they can make sales calls and hold online meetings with Skype for Business. Dynamics 365 also includes the business apps you need all in one place.

Salesforce is more limited. You can access it directly from Outlook, but there's no data synchronisation. You also need a lot of third-party applications for Salesforce and they're not free. For example, if you want to do accounting tasks using Salesforce, you'll have to connect to QuickBooks for more functions. If you work in customer service, you'll need another third-party product such as Zendesk.

Which brings us to another point. Adding third-party

software isn't that simple. Some business owners have complained that they needed help from an IT professional to do it.

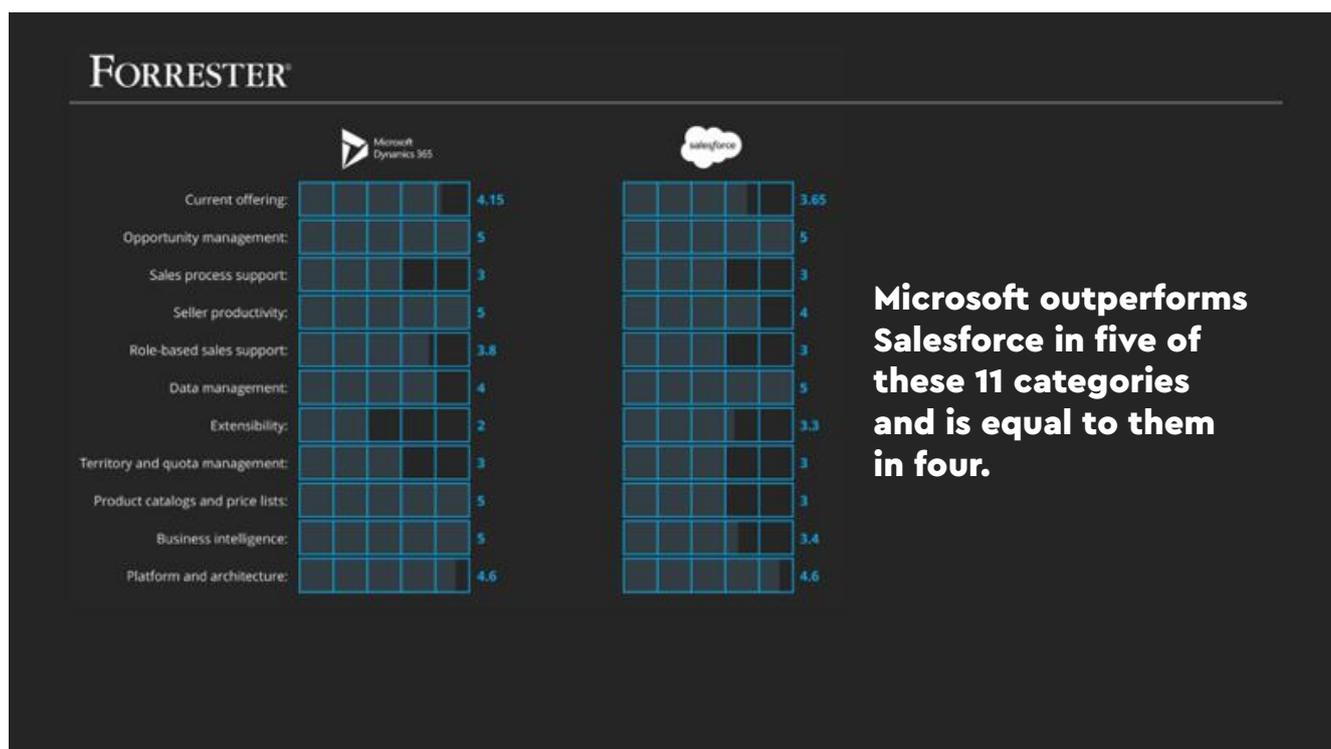
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Dynamics 365's integration with Outlook and the familiar Office style played a big part in our decision (to move to Dynamics 365). With Salesforce, we had too many systems that weren't integrated. Users would have to log on to their machines and then log into Salesforce.com, making people reluctant to use it. With Dynamics 365, people just launch email and they have CRM right there.

**Paul Williams**  
**Head of Group IM**  
**Element Six - Microsoft Dynamics CRM customer**

## Forrester Wave

When analysing the CRM market, technology market research company Forrester considered 11 categories and rated each CRM vendor out of five.





We used to work for weeks to produce the quarterly sales forecasts. Whereas now you just look at the dashboards inside CRM and you can already see all the data right there. All the conversations have shifted. It is now less about struggling to get to the numbers and it is more about interpreting the numbers and making some actionable decisions. We can cross-sell and upsell and we can nicely streamline that whole effort and be much more effective as a team and as a company. Sales have definitely grown.

**Dr Jürgen Harter**  
**VP of Information Systems**  
**Horizon Discovery Group – Microsoft Dynamics CRM customer**

## Business Intelligence

The business intelligence category, where Microsoft scores 5 compared to Salesforce's 3.4, is of particular importance. AI and machine learning are transforming the way that businesses work these days.

Research by Microsoft itself shows that organisations that are "already on the AI journey are outperforming other organisations by 5 per cent on factors like productivity, performance and business outcomes". Organisations that invest in establishing the right approach, "specifically by developing underlying values, ethics and processes, outperform those that are not by 9 per cent."

Forrester says: "Microsoft delivers on intelligent seller productivity. Microsoft delivers very strong analytics capabilities, including its machine learning and AI offerings, as well as Power BI. Microsoft shows considerable maturity in both its execution and vision for how advanced analytics will transform selling."

The business intelligence contained within Dynamics

365 could help you to make the most of your data and ensure your organisation outperforms your competition.

Again, both Dynamics 365 and Salesforce make it easy for you to generate and analyse reports. Both systems have drag and drop reporting tools that include real-time charts and graphs.

Both give you a bird's-eye view of how your business is doing plus the ability to focus on specific details in your sales pipeline. And both tools will display your reports in interactive dashboards that can be customised to display your quotas, key opportunities and sales numbers.

But, Dynamics has the edge here. You can integrate it with Power BI to do more detailed analytics, it is a deep drill into your business data. For 12 consecutive years, Gartner has recognised Microsoft as a Leader in analytics and business intelligence with Power BI.

## Cost

In the CRM Market Leader Awards 2018, Microsoft was crowned the winner for Enterprise CRM and Small Business CRM.

Microsoft scores well in all areas, as does Salesforce when it comes to reputation for depth of functionality, company direction and customer satisfaction. Where

Microsoft really outshines Salesforce is on price. And CRM Magazine, which runs the awards, emphasised not just the cost benefits of Dynamics 365, but also the integration with other Microsoft products and its depth of functionality. Microsoft Dynamics 365 will give you all the incredible benefits of a leading CRM platform, without breaking the budget.



Microsoft Dynamics CRM took the crown this year after scoring well in depth of functionality. The tight integration across the Microsoft product family creates a compelling case for companies to switch from more expensive cloud offering.

### Enterprise CRM

## ENTERPRISE CRM



## SMALL BUSINESS CRM



For the 5th year running, Microsoft ran away with the category. It continues to impress analysts with the depth of functionality, company direction, customer satisfaction and costs. It is an attractive choice for small businesses living in the Microsoft 365 ecosystem.

### Small business CRM

## Conclusion

There are many organisations that offer CRM software and technology. The leading CRM businesses may offer very similar functionality and processes, so it is important to consider what makes them different. Most businesses will want a CRM platform that is easy to integrate, that is fully adopted and used by their employees and that does not use up all of the budget just to keep it going. Microsoft Dynamics 365 is the leading CRM platform that offers your business all of these things.

Are you any closer to making a decision? As we've shown you, there's not much difference between Salesforce and Dynamics 365. Both of them offer great features and both of them can be customised to suit your needs. You can also get add-ons from their online stores to make your CRM even more productive for your business. Take a hard look at what systems you already have in place, what features your teams need to boost their performance and how much you're willing to spend and most importantly the future road map and R&D spend.

If you would like to learn more about how other businesses have benefited by working with ANS to implement Microsoft Dynamics 365 into their organisations, or if you would like more information about how ANS can help your organisation, visit:

<https://www.ans.co.uk/what-we-do/microsoft-dynamics-365/>

## Why ANS?

Choosing a CRM platform is one thing. But it is also important to consider who you will get to help you to implement it. ANS has been successful in delivering Microsoft technology to businesses for more than 15 years.

We have a unique methodology that should ease and speed implementation and adoption. Before you look at the technology, process or budget, you first need to look at what will make the biggest difference to your organisation in the shortest amount of time.

You may have heard of CRM projects that take between 12 and 18 months to complete. The ROI may take even longer. This really does not have to be the case. By looking first at what your organisation wants to achieve, by considering the business objectives, you get a better understanding of what you want your CRM software to help you with. When we partner with an organisation, we discuss with them a range of possible business outcomes and ask them to focus on two or three that they most want to achieve. There are three fundamental reasons why we focus on outcomes:

- 1.** It offers an agreed business justification for the project.
- 2.** It allows us to keep the project focussed so that a rapid rollout is possible.
- 3.** It gives us agreed metrics for short and long-term success.



We've absolutely loved the ANS methodology. It has empowered us so that we actually feel that we own the system. I think a little bit of research to understand what it can do helps you really think about what you would like to be doing, so that you can really push your business forward.

**Mark Sykes**  
**Partner and National Head**  
**BDO Drive UK – Microsoft Dynamics CRM customer**