

SALESFORCE: THE CLEAR CHOICE OVER MICROSOFT DYNAMICS



Introduction

Why are executives demanding more and more from their CRM systems? Simply put, enterprises can't grow without nurturing customers, and customer expectations have transformed dramatically in the last decade. People expect to use any channel they want - email, phone, web, or social - to make purchases or get issues resolved. They want consistently great service across all channels and if they don't get it, they will take their business elsewhere.

Enterprises have also realized that CRM platforms can be used well beyond sales and customer service teams. The same platform can be used across the enterprise to nurture supplier relationships, retain employees, foster better distributor engagement, and more.

So it is no surprise that executives are diving deep into the pros, cons, costs, and long-term implications of investing in CRM platforms. In their search for alternatives to costly and cumbersome platforms like SAP and Oracle, they are rolling up their sleeves to review platforms like Salesforce and Microsoft Dynamics. Some are searching for the right technology, others are looking for a strategic partner that can align with their growth strategies and help them transform their business.

It is true that Microsoft has made significant investments in the Dynamics platform. However, Microsoft is still playing catch-up in the CRM arena, with the number of Dynamics users comprising of only 10% of the Salesforce user base. They lag behind Salesforce in product specializations for various industries, in AI and predictive analytics, in their relationships with independent integrators, and even in their training systems. Despite these weaknesses, Dynamics often makes the finals in the horse race of selecting a CRM platform and is (incorrectly) seen as an acceptable lower-cost option.

Salesforce is the clear choice for enterprises that see CRM as transformational for their business. Salesforce wins because many executives see it as a critical component to their growth strategy and ability to compete. Working together with its global network of partners, Salesforce helps businesses imagine and deliver amazing experiences for their customers, suppliers, and distributors. It can be integrated faster and customized in ways that improve efficiency. Additionally, Salesforce's Trailhead training program provides accessible, self-paced online training to any customer or partner.

Why do some businesses choose Microsoft Dynamics? Because there is a false perception that the slightly lower license fees equate to a better value. Many also think that because Dynamics is part of the Microsoft family, it is easier to customize.

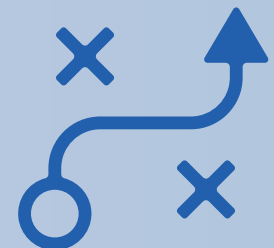
At Acumen Solutions, we have found that enterprises seeking a strategic advantage are choosing Salesforce over Dynamics. They realize that Salesforce offers better deployment speed, training support, and the overall ability to execute on an enterprise's digital transformation vision.

TRANSACTIONAL SOFTWARE OR STRATEGIC ASSET?

Digital transformation within the enterprise is picking up speed, and it is not about simply investing in more technology, but rather thinking strategically and planning for the future. For sales and customer engagement, shifting away from manual tasks such as re-keying information into a CRM is just the beginning. High-growth companies are reimagining how value is delivered and they need a CRM platform that can be quickly configured to meet ever-changing business needs. Gartner's latest study on enterprise CRM systems uncovered that "Salesforce customers — particularly large enterprises — see the vendor as not just a CRM software provider, but a strategic advisor on how to innovate and grow their business overall." Many "consider the Salesforce application platform to be a strategic asset." Here's why:

- 1 Salesforce has built an ecosystem of developers and integrators that drive innovation and efficiency.
- 2 Salesforce was built from the ground up with the customer in mind.
- 3 The cloud-only deployment of Salesforce makes it more flexible and cost-effective for growing businesses.
- 4 Industry-specific solutions available within Salesforce mean that companies can deploy faster and get more out of their investment.
- 5 Salesforce Einstein, the platform's AI offering, leads the market and makes employees more efficient and customers happier.
- 6 Trailhead, the Salesforce online training program, gives anyone the ability to learn, configure, and extend the platform.
- 7 Salesforce tools empower knowledge sharing and collaboration across the enterprise.

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THE SALESFORCE ECOSYSTEM

From the beginning, Salesforce realized that their customers didn't need software, they needed solutions tailored to their unique needs. Even ten years ago, custom software development was beginning to be seen as a costly way to paint your business into a corner. To combat this, Salesforce built their business model on partnership. First, the company has thousands of independent software vendors (ISVs) and consultants and system integrators (SIs). These are companies and individuals who help drive innovation for all of Salesforce's customers. Acumen Solutions is one of a handful of Salesforce Global Strategic Consulting Partners, the top tier of companies that work extensively with the Salesforce platform.

Next, Salesforce operates the #1 enterprise app marketplace, the Salesforce AppExchange. With more than 3 million downloads, over 70% of Salesforce customers have installed at least one app from the AppExchange. These apps are peer-reviewed, security-tested, and vetted to work with all Salesforce products. Lastly, 1.8 million customers contribute to the Salesforce Success Community. In the Success Community, customers can give product feedback, suggest new features, and answer each others' questions. This drives much of the innovation in the three Salesforce product releases per year. Altogether, the ecosystem of partners, customers, and consultants help Salesforce execute on its vision: to be the #1 Customer Success Platform in the world.

In contrast, Microsoft reference clients reported to Gartner that the company has a "poor track record for attracting and educating ISV partners" and "have expressed frustration with external professional services partners' level of knowledge of Microsoft's latest product versions, and understanding of how a modern, best-in-class customer service center should be designed and built for their industry clients."

The implications of this should be concerning, even for companies that predominantly use Microsoft for their database applications. What if a company implements Dynamics, and then determines that integration with their telephony system will be too costly? What if the company plans to implement e-commerce or a lead-to-cash system, or would like to have an automated configure-price-quote system as part of their CRM? What happens when a company grows through acquisitions and goes from one call center in the U.S. to four across the globe?

The complexity of enterprise systems means that a company needs strategists and technologists who are fully versed in a platform that is designed to meet those challenges.

BUILT WITH CUSTOMER RELATIONSHIPS IN MIND

The fact that Salesforce is built with the complexity of the enterprise in mind is what attracts enterprise customers and partners. With CRM at the core, the platform shares a common database to track and manage sales, customer service, marketing, and other custom-built applications. It can receive data from external apps and through various APIs and extensions, and feed information to other enterprise systems. It is a truly unified system, where all customer interactions are accessible and can be used in various ways. Management can see and analyze the sales pipeline, the time needed to solve customer issues, or forecast demand and beyond.

Technology is only part of the solution, which is why Salesforce partners like Acumen Solutions employ hundreds of people with backgrounds and expertise in various industries and roles. From the director who spent over twenty years running global call centers to the data scientist who specializes in business forecasting, these are people who have seen technology, business operations, and customer engagement change drastically within their industries. They understand the business challenges their customers face and can build a solution that combines the best of strategy, organizational change, and technology. They also have a complete understanding of the Salesforce platform and product roadmap. This is why enterprise customers see Salesforce as a strategic asset - they aren't just buying technology, they are also getting the benefits of the entire ecosystem.



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IN THE CLOUD, EXPAND ON-DEMAND

For organizations that are growing rapidly in size or complexity, Salesforce's unified approach has other benefits.

The cloud-only deployment of Salesforce means that scalability is available from day one, without hardware or other infrastructure upgrades. This gives large companies the ability to bypass the headaches of managing data center operations and use the platform to provide best-in-class sales, support, and business intelligence.

Dynamics is available both in the Microsoft Cloud or via a private cloud with only small differences in functionality. Still, deploying and maintaining a private cloud for Dynamics has tremendous cost implications and investing in equipment and data center space is just the beginning. Within a private cloud, hardware and software need to be set up for development, testing, and production environments. A company needs 24/7 support for that environment, provided either by internal staff or outside vendors. Disaster recovery, data and physical security, redundant power, and more all become part of the mix when a company chooses to deploy a CRM in a private cloud. The costs add up to a much larger up-front investment and 30-40% higher costs over time. These costs can be even higher because of how Dynamics is designed. Because it is delivered both in the cloud and on-premise, updates and development can be more costly to integrate and support can be more complicated. In choosing Microsoft Dynamics, organizations often sacrifice innovation and agility for compatibility with previous versions.

The advantages of deploying Salesforce extend beyond ongoing costs and support. The industry-specific functionalities available from Salesforce can be game-changers and go far beyond what Microsoft and its ISVs have developed within Dynamics.

SOLUTIONS ACROSS THE ENTERPRISE

Back to our previous example, what if a company starts with getting their fifty salespeople up to speed on a CRM system, then wants to expand to e-commerce, customer service, integrated telephony, and more? Or, what if a company is looking for either an industry-specific or function-specific solution? For years, Salesforce has led the charge on extending the platform with specific functionalities for various industries.

For consumer goods and retail, Salesforce can be integrated with existing retail systems to show real-time inventory updates, e-commerce sites with flexible purchase, shipping, and self-service capabilities, and any-channel customer service. Public sector users can get a handle on complex correspondence management while manufacturers can streamline parts distribution, make tracking and reordering simple, and grow revenue with intelligent automation that pinpoints the best sales leads. And this is only scratching the surface of what Salesforce has built into the platform without the need for custom development.

Microsoft supporters argue that Dynamics can be customized by .NET and C# development. They claim that the proprietary nature of the Salesforce platform makes it more difficult to customize or integrate. Here, as demonstrated by industry-specific solutions and the availability of integration APIs, Salesforce takes an approach that might leave some Microsoft fans out in the cold. The Salesforce platform is meant to be configured first, then customized based on the various tools and extensions as needed. This is a complete departure from how some Microsoft consultants and internal IT departments approach extending applications. The results mean that systems can become difficult to manage, challenging to upgrade, and much more costly in the long term. This points back to why enterprises see Salesforce as a strategic asset instead of a cost center.

AI THAT DRIVES SUCCESS

Salesforce has developed one of the most sophisticated and easy to use AI engines available today. Aptly named Einstein, it is deployed so that it can be used throughout the entire Salesforce platform. For example, salespeople can focus their efforts by using Einstein to identify the opportunities that are most likely to close. Customer service can be automated to give people a better experience, regardless of the contact channel they use. Einstein can make shopping more predictive and personal by providing product recommendations based on past purchases, sales incentives, and more. Salesforce is a pioneer in voice-activated AI, giving users the ability to get briefings, make record updates, and even open dashboards via Einstein Voice. AI has been embedded into analytics, providing business intelligence, a complete view of enterprise data, and predictive analytics. Lastly, Einstein can be integrated into any Salesforce platform extension, allowing developers to embed AI customized for their business without a data scientist. In short, the Salesforce AI was built with CRM in mind and helps employees work more efficiently without complex development or customization. The analytics tools in Dynamics often require substantial and costly customization by experts on internal teams to drive results.

SELF-SERVICE TRAINING

One of the core strengths of Salesforce is their approach to educating end-users and administrators about how to configure and extend the platform. Trailhead, the Salesforce learning program, takes self-service to a whole new level. People from all backgrounds can learn Salesforce online at their own pace and develop the knowledge they need to configure workflow automation, data imports or exports, data modeling, and more. Gartner states that this helps “lower the barrier to entry and helps Salesforce differentiate beyond features/functions.” Trailhead users often marvel at how they can go from being a novice user to being a Salesforce expert through this program.

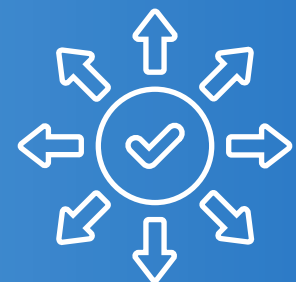
FASTER IMPLEMENTATION, BETTER CUSTOMIZATION

It is no surprise that Salesforce deployments are 33% faster than Dynamics deployments. How can this be when both are deployed in the cloud? The answer is that Salesforce has built a framework for a rapid configuration that is available for any customer called Lightning. Lightning provides a drag and drop interface for end-users to make changes to the system. Developers can use pre-built blocks of code, roll out AI-based lead scoring, set up collaboration tools, and more. Lightning also makes common tasks like activity logging or searching for customer data easier, meaning salespeople can spend more time selling and keeping customers happy.

Conversely, organizations that prefer Microsoft Dynamics typically have large internal development teams. Their natural inclination is to use their .NET and C# engineers to integrate Dynamics into their environment and customize it in the future. The challenge with this approach is that custom software development often leads to fragile systems that are not easily maintained. Developers who are less experienced with Dynamics often deploy customizations that make upgrades to future versions either very difficult or nearly impossible.

FASTER DEPLOYMENTS

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Rather than taking an approach that emphasizes custom development, enterprises that use Salesforce can configure Salesforce using Lightning, extend it with fully tested and compatible extensions from the AppExchange, or use highly trained Salesforce partners who can perform development that keeps them on the Salesforce upgrade path. Salesforce upgrades its software three times a year and every customer is always on the latest release.

COMMUNITIES AND CHATTER

Salesforce also makes knowledge sharing and collaboration more efficient through Chatter, a secure social network that can be deployed for employees, partners, and customers. Regardless of an employee's role or location, he or she can collaborate on service issues, sales opportunities, projects, or campaigns from right within Salesforce. Forums can also be set up so that product teams and customers can share insights or propose innovative new ideas.

SALESFORCE: THE BEST CHOICE FOR ENTERPRISE CRM

Why are enterprises demanding more from their CRM systems? Because growth requires customer relationships to be prioritized above all else. They know that technology alone won't help them maintain a competitive advantage. They need a platform and partners who give their employees everything they need to attract new customers and improve existing customer relationships. It is clear that Salesforce leads the global CRM industry in providing the right platform, partner relationships, and enterprise value and is the best choice for enterprises that want to grow quickly and strategically.



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