# Learn Why a Multi-National Professional Services Firm Switched from Salesforce to Microsoft Dynamics

Professional services firms face unique challenges when it comes to CRM. These businesses don't sell a good or product, they sell their knowledge, experience and creativity. The often-abstract nature of selling a service makes it important to track every detail of the firm's relationships, experience, internal resources and capabilities. Without this history, demonstrating expertise and winning business becomes increasingly difficult.

Many professional services firms turn to Salesforce to manage their sales and marketing processes. Unfortunately, while an incredibly capable platform, Salesforce lacks many of the features necessary to meet the unique demands of professional services firms.

This proved to be true for a multi-national professional services firm. After implementing and launching Salesforce, the firm ran into some challenges.

## A lack of industry-specific features limited its usefulness

We've already noted that professional services firms have unique CRM requirements. In this firm's experience, Salesforce lacked the features necessary to meet these requirements, often in some mission critical areas, including:

- **Project history:** In order to sell their services, the firm required the ability to maintain detailed project history – and to be able to share specific details of previously completed projects with their prospects. Lacking the ability to track this history left the firm scrambling to prove their expertise and develop accurate project proposals and plans.
- **Employee experience and qualification tracking:** To develop accurate proposals and project plans, a professional services firm must maintain a detailed repository of its people, their skills and qualifications, and their project experience. For this firm, Salesforce lacked the capability to maintain and analyze this critical internal information.
- **Sales pursuit details:** The sales process for professional services firms is unique, and often requires several touchpoints and interactions with prospective clients. Managing the ongoing pursuit of prospective projects using Salesforce proved to be difficult for this firm due to its inflexibility.

The lack of demonstrable experience and internal awareness made it difficult for the firm to identify, bid on and win projects.

## Poor user experience resulted in low adoption and visibility

For a CRM platform to be beneficial for an enterprise, users across the business must make regular use of it. Unfortunately, this professional services firm experienced low user adoption rates of their Salesforce instance due to several factors, including:

- **Manual data entry requirements:** Users across the business were required to manually enter data related to past projects and current pursuits. This took too much time and led to too many inaccuracies to be a feasible solution for the firm's needs.
- **Limited integration:** Salesforce lacked the native integrations necessary to communicate with the firm's other enterprise platforms. This meant that everything they did in Salesforce had to be redone manually in their ERP system and other platforms.

These factors led to limited visibility of projects and client relationships. Users in different areas of the business were unable to gain a clear view of client touchpoints, relationships and the current state of a pursuit or project. This resulted in redundant outreach to clients and ineffective pursuit of prospects and made it difficult to understand the firm's project pipeline and plan accordingly.

## Dynamics 365 and projects360 proved to be the answer

After struggling to realize the necessary value in their CRM software, the firm made the switch to Microsoft Dynamics 365 and projects360. This new platform provides the firm with a centralized repository of their project history, employee experience and touchpoints with their clients and prospects. In addition, by leveraging the integration with Outlook and Exchange, this firm has automated the contribution of key data about their contacts, sales activities, and potential leads. This automation, combined with a more seamless user experience, has driven higher levels of user adoption, leading to a more complete view of their client relationships and sales pipeline.