

Shoes for the Shoemaker

Dyn365Pros Upgrades Project Insight to Microsoft Dynamics CRM Online

Project Insight, headquartered in Irvine, California, is a leading cloud-based project and portfolio management software solutions provider. Fortune 500 companies such as Cisco, Lexmark and Western Digital use its powerful software to centralize and manage their projects. Project Insight is a leader within the tech industry, having been named a Champion from Info-Tech in 2015, a Best of SaaS Showplace BoSS Award winner, a 2015 SIIA Codie Award Finalist and is currently ranked Top Ten Online Project Management by TopTen Reviews.

The Cobbler's Son Challenge

Since 2008, Project Insight had been using Microsoft Dynamics CRM 4.0 on-premise and was long overdue for an upgrade. The Development and IT departments were spending all of their time on enhancements to the company's own software product and couldn't allocate the time or resources for the upgrade. Project Insight's marketing automation software didn't integrate with its outdated version of Dynamics CRM, which elevated the issue even further.

Project Insight resolved to upgrade from Microsoft Dynamics CRM 4.0 to Dynamics CRM Online, but after looking closely at the two versions it became clear that they were vastly different. They chose to outsource the upgrade project. On a referral, Project Insight reached out to Dyn365Pros to provision Dynamics CRM Online and configure CRM Online to align to Project Insight's unique business processes.

"We are an IT software company so busy working on our customers' projects that the upgrades to our CRM were never done...It was a little bit like the cobbler's son who doesn't have any shoes."

CYNTHIA WEST

Vice President, Sales & Marketing
Project Insight

Making Shoes for the Shoemaker

Dyn365Pros lead in-depth Discovery sessions exploring how Project Insight was currently using CRM 4.0 and how they could introduce efficiencies with CRM Online, and evaluating which workflows should be replicated versus those that were no longer relevant. Dyn365Pros designed and implemented a new method for managing data in the updated environment utilizing:

- CRM Business Process Flows
- Custom CRM workflows
- Custom dashboards and charts
- Custom reports and outputs
- Customized CRM forms



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With twelve years' worth of CRM records approaching the 1 million mark, Dyn365Pros walked Project Insight through a multi-step migration process to ensure data integrity:

- **Data modeling:** Many new fields in Dynamics CRM Online didn't exist in version 4.0. Dyn365Pros relabeled many of the new fields to make them practical for Project Insight to use.
- **Data translation:** Dyn365Pros took data that was formerly in a drop-down list and imported it as a text field or vice-versa in order to improve the ability of Project Insight to search and query data.
- **Data filtering:** To minimize the need for additional storage in the online environment, Dyn365Pros filtered out and left behind obsolete or irrelevant data.
- **Data migration:** Dyn365Pros carefully migrated data to the new environment in batches, allowing for adequate testing before deploying the new Dynamics CRM Online environment.

After the go-live, Dyn365Pros guided Project Insight through Dynamics CRM to Outlook integration, provided user and admin training for Project Insight staff, making sure users could consume and enter data properly and consistently.

"Dyn365Pros' style is very much like our own. We deliberately schedule successive steps and have the communication planned out, so they were easy to work with and very professional. It went very, very well!"

CYNTHIA WEST

Vice President, Sales & Marketing
Project Insight

The Outcome

Project Insight was excited about the added value of an upgraded Dynamics CRM system. By eliminating unnecessary custom fields and making better use of out-of-the-box features, enhancing reporting functionality, providing sales a snapshot of the customer's financial status and media presence, the company is reaping the benefit of an even tighter, more streamlined way of managing its data.

West says, "For us, outsourcing was the answer. Why not hire the experts to do this—people that do this day in and day out?" Coming from the 'expert shoemakers,' Dyn365Pros takes this as the ultimate compliment.



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