



Cloud Migration Services Help a Waste Management Company Seamlessly Move From Dynamics 365 Customer Engagement On-premises to Online

CASE STUDY

Customer: Biosolids and Organic Waste Management

Size: 800+ employees

Location: MD, USA

Industry: Waste Management

Profile: The company offers transportation, treatment, site monitoring, land application, and environmental regulatory compliance services, as well as dredging, dewatering, and cleaning services for municipal and industrial lagoons.

Services: Cloud Migration

Business Need

The biosolids organization acquired [Dynamics 365 Customer Engagement](#) as a [digital transformation](#) application for its growing business, to enable both business development activities and revenue-generating field transactions. Moreover, the client hoped to improve sales productivity as well as marketing efforts through customer insights, sales insights, and customer service insights.

While the Dynamics CRM system helped in meeting sales objectives for a short period, the client's existing on-premises system was outdated and presented several limitations that came in the way of achieving scalability and enterprise agility requirements. Customizing the solution to meet new demands as well as maintaining and supporting the solution was becoming extremely cumbersome. Despite all efforts, the biosolids client was experiencing mounting support and maintenance costs – which added substantially to operating expenditure.

To avoid the overhead of maintaining dedicated servers, enable faster access to resources, and enjoy unmatched scalability, the client wanted to migrate their on-premises Dynamics 365 Customer Engagement data along with customizations – to the cloud. The client was, therefore, looking for a partner who could help them in seamlessly

migrating their Dynamics 365 Customer Engagement system from on-premises to online.

Given the capabilities of Synoptek as a [Managed Services Provider](#), the client reached out to us for the CRM migration project.

Solution and Approach

To carry out the cloud migration project, Synoptek implemented the following two approaches:

1. *Customizations Migration*
2. *Data Migration using KWS Toolkit*

Customizations Migration

As part of customizations migration, Synoptek migrated the following entities and components:

- **Entities**
Account, contacts, leads, opportunities, proposal requirements, sales stage audit, notes, and Activities
- **Entity Components**
Forms, views, business rules, and reports
- **Solution Components**
Dashboards, workflows, and plugins

Data Migration

For migrating data from Dynamics 365 Customer Engagement on-premises to Cloud to the Cloud, Synoptek adopted the KWS SSIS tool.

- Migrated Data of Accounts, Contacts, Leads, Opportunities, and related entities
- Phone Calls, Appointments, Tasks, and Emails related to above entities were then migrated
- Notes and attachments were migrated at the end as there were several thousand notes with attachments in on-premises CRM

Business Results

With Synoptek's cloud migration services, the waste management company was able to efficiently migrate all on-premises Dynamics 365 Customer Engagement data and customizations to the cloud – in a quick and efficient manner. With Dynamics 365 Customer Engagement Online, the client has been able to enable seamless access to resources needed to carry out sales, leverage the latest and most updated features, and enjoy a predictable monthly subscription bill.

About Synoptek

Synoptek is a global systems integrator and managed IT services provider, offering comprehensive IT management and consultancy services to organizations worldwide. The company works in partnership with clients of all sizes – from mid-market to Fortune 100, and for over two decades, its focus has been to provide maximum business value to its clients, by enabling them to grow their businesses, manage risk and compliance, and increase their competitive position. Synoptek is committed to delivering improved business results and unmatched service to every client, every time.



19520 Jamboree Road #110 Irvine, CA 92612

888.796.6783

www.synoptek.com

salesinquiries@synoptek.com

