

Give Microsoft Dynamics® CRM Users What They Want: Their Data

**LEARN HOW TO GET THE RIGHT INFORMATION, IN THE RIGHT PLACE,
AT THE RIGHT TIME**



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WHITE PAPER

CRM applications are only as useful as the data they contain. So, it stands to reason that when implementing a new Microsoft CRM system, the first step to success is getting your customer data into CRM. You have to arm your key sales users with the right information, in the right place, at the right time; giving them the tools they need to sell.

As you move users to your new Microsoft CRM system, your customer data exists in multiple systems and applications, such as contact managers like ACT! and Goldmine, packaged CRM applications that are being replaced, legacy systems, Outlook, and random spreadsheets. The goal with any CRM implementation is to make the CRM system the place that salespeople will go for customer information. It is essential that you get this step right if you intend to make your CRM investment worthwhile.

There are various ways to get data into Microsoft CRM. Included in Microsoft CRM is the Data Migration Framework (the "Framework"). The Framework is a data loading utility that requires that you to prepare your data before bringing it into Microsoft CRM so that it conforms to a specified file format. This approach is adequate for straightforward migrations where the data has already been consolidated and scrubbed outside of Microsoft CRM. What many people fail to realize is that it's the quality, not quantity, of your customer data that results in a successful migration to Microsoft CRM.

Since customer data lives in so many different places inside your company, and it's usually not perfectly formatted to be migrated into a new CRM system, a large percentage of data migrations will be more sophisticated than what is supported by the Framework.

Do you need to consolidate customer data from a number of data sources, including individual contact managers, legacy systems, and/or first generation CRM applications?

Are you bringing data over from a system with a dramatically different data structure than Microsoft CRM?

Are there a large number of business rules you want applied to the data as you load it into Microsoft CRM?

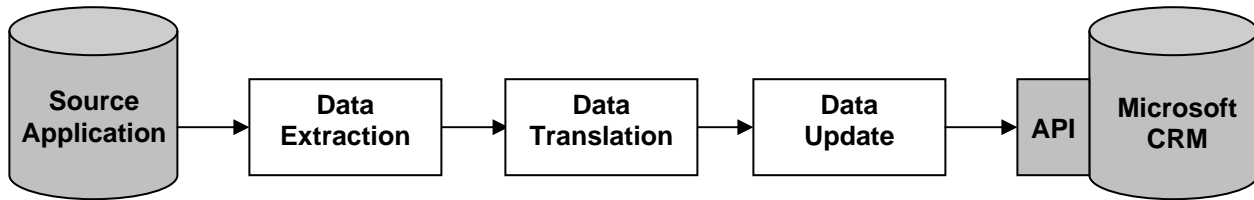
Does your data have a large number of duplicate records across all of your data sources?

Are you migrating data from a packaged CRM application or contact manager such as Siebel, SalesLogix, ACT!, Goldmine, or Outlook?

Do you need to load contracts, sales teams, or attachments into Microsoft CRM?

If you answered "yes" to any of these questions, you may want to consider a tool with functionality that extends beyond the capabilities of the Framework. If that is the case, you are going to require a data migration approach that has the sophisticated capabilities to transform and merge your source data into a format that is highly usable for users of Microsoft CRM.

The following diagram summarizes the key capabilities required to support the sophisticated, yet typical, migration requirements outlined above:



As depicted in this diagram, there are three major capabilities that you will require to perform these complex migrations as follows:

- **Data Extraction** – You will require direct access to your source applications via a database or a proprietary application programming interface (“API”,) such as those provided for ACT!, Goldmine, and Outlook. The ability to filter data from the source can be helpful in isolating the key data you want to load.
- **Data Translation** – It is likely that the semantics and format of many fields in your source data will be differently than those in Microsoft CRM. Important capabilities include parsing and concatenating text fields, performing date and numeric calculations, executing conditional logic, and performing lookups to resolve synonym values.
- **Data Update** – This capability is the most crucial, yet complex area of your migration task. Capabilities you should look for include (i.) merging duplicates using fuzzy logic (like comparing elements of the company name and zip code to look for an Account match) for record lookup, (ii.) performing insert and update operations against multiple objects within Microsoft CRM when processing a single source record, and (iii.) performing all target processing against the Microsoft CRM integration API to ensure that all data imported has been validated by Microsoft CRM’s application rules.

Many companies have attempted to use a combination of tools and technologies, such as SQL scripting, Microsoft Excel, and Microsoft Access to perform these tasks. This approach is an extremely inefficient workaround and does not deliver ideal results. It involves multiple steps with multiple points of failure using tools that are not completely up to the task.

The ideal solution will address all of these needs within one graphical design environment that enables you to configure the migration to your specific needs. It will perform all of its processing in one step, directly from the source to Microsoft CRM, thereby eliminating additional points of failure and simplifying error handling. It will also enable you to utilize templates (or starting points) that can be quickly extended and modified. This template approach is extremely helpful when you are aggregating data from a number of like sources, such as each of your salesperson’s individual ACT! system.

Scribe Insight is a CRM data migration and integration solution that has been purpose-built to make easier work of these sophisticated data migrations. www.scribesoftware.com/microsoft-dynamics-crm.asp.

About Scribe Software Corporation

Scribe Software Corporation provides cost-effective, no-coding solutions that can be used as the only tool businesses need to integrate virtually any application, data source or Software as a Service (SaaS) platform. Scribe solutions are simple to configure and provide ease of modification as business processes change. They are especially popular among organizations running Microsoft Dynamics CRM, Dynamics GP, Dynamics NAV and Sage SalesLogix applications as well as Salesforce.com and Microsoft Dynamics CRM Online. Scribe Software is led by experienced technology executives from Microsoft, Oracle, AutoDesk, i2, Vitria, Dun and Bradstreet, and WebTrends. For more information about Scribe, please visit www.scribesoft.com

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