

Business Case Study

Minus Forty Technologies

CLIENT

Minus Forty Technologies

TECHNOLOGY

Dynamics 365 Sales
Enterprise Edition CRM
Salesforce Enterprise
Edition CRM

SERVICES

Customer Relationship
Management:

Evaluation
Data Migration
Configuration
Training

LOCATION

Georgetown, Ontario

PROJECT DATE

December 2020

CHALLENGE

Minus Forty Technologies (MFT) had been using Microsoft Dynamics CRM (Dynamics 365 Sales Enterprise Edition CRM) for 7+ years as a salesforce automation platform for managing their North American customer base and tracking and measuring the successes of their team of business development managers (BDM). Centricity360 (C360) has supported this CRM instance for as many years. In October 2020, a technical problem surfaced that would force MFT to evaluate a new CRM platform that would better integrate with their existing G Suite (Gmail) email server as well as integrate with their existing Microsoft Outlook email application used by the BDMs.

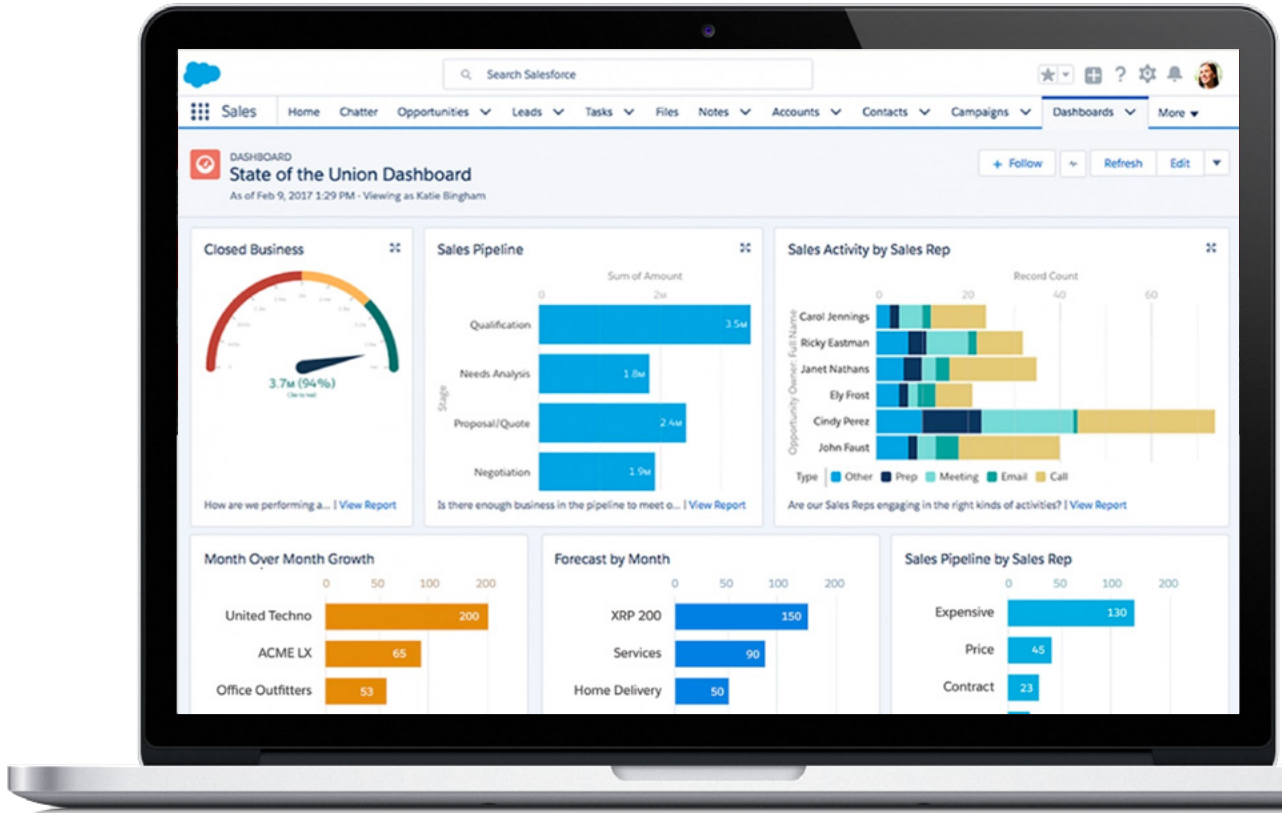
MFT worked with C360 to evaluate several CRM solutions during November and December of 2020. The solutions evaluated were HubSpot CRM, Copper CRM and finally choosing Salesforce CRM as the best fit solution.

The next steps presented certain challenges. Specifically, how to migrate well over one hundred thousand existing leads, opportunities, accounts, contacts, and activities from Dynamics 365 to Salesforce CRM under a tight timeline. MFT needed to launch the new Salesforce CRM on January 4th, 2021.

SOLUTION

C360 and its partners agreed to take on the challenge of this migration to Salesforce CRM.

After creating an action plan, working with our team of developers and data architects, the first challenge was to extract all the entities and data objects from Dynamics 365. All users were to finish outstanding work in Dynamics 365 for 2020 before leaving on holidays and they would start fresh in Salesforce upon returning to work. Once the extraction was completed the data alignment process was initiated to ensure the data fields matched up with the Salesforce data structure. The final step of this data management project was to upload the data to Salesforce. Using third-party tools and the Salesforce API we were able to upload most of all the data. Once the triage of errors was reviewed all final data uploads were completed.



While the data was being extracted and aligned, we worked concurrently to procure the new Salesforce licenses, setup users and configure the system to include any custom fields to match the existing data that was extracted. These processes were completed on time and the new Salesforce CRM solution was launched in the first week of January 2021.

Several hours of training were completed that included designing specific reports for tracking BDM activities and customizing the Salesforce solution to meet the needs of MFT's unique business processes.

RESULT

We understand that no data migration ever goes perfectly to plan, there are so many variables at play when these types of projects are undertaken, especially ones where tight timelines exist. In this case, most of the data was transferred, and the application was launched on time. Subsequently, we worked with the MFT leadership team to ensure all the remaining data was transferred into the new system and we worked together to ensure it was correct.

MFT now has a new Salesforce CRM solution with features and functionality that will allow them to meet their current salesforce automation requirements and, in the future, expand on the Salesforce platform to meet the growth opportunities that exist in their industry.

ACKNOWLEDGEMENTS

A special thank you for the contributions from the following partners:

Chuck Tomlinson | CRT Technologies Inc.

Gerrit Twynstra | Vertical Lift Business Solutions Inc.

TESTIMONIALS



As a medium-sized Canadian manufacturer, Minus Forty Technologies relies on our technology partners to act as advisors as well as facilitate the execution of any IT program rollouts. Centricity360 has been an excellent IT partner over the years, and they demonstrated their ability to manage a large project with short timelines. Richard and his team were organized and thorough in their process to transition Minus Forty from Microsoft Dynamics to Salesforce. They delivered the project on time and after a few cleanup issues, the integrity of our data was flawless. Thank you, Centricity 360, for your commitment to delivering reliable solutions.

Randy Skyba
VP of Sales & Marketing
Minus Forty Technologies

ABOUT MINUS FORTY TECHNOLOGIES

For almost 30 years, the Minus Forty® brand has been synonymous with reliability and superior performance, manufacturing high-quality commercial refrigerated merchandising solutions that surpass industry standards. Recognized for its contribution to advancements in refrigeration technology, Minus Forty prides itself on its reputation for manufacturing reliable, stable products that outperform other brands, giving you peace of mind and a lower total cost of ownership. Minus Forty goes above and beyond, partnering with customers to create the best merchandising solutions for their needs.

ABOUT CENTRICITY360

Centricity360 is a forward-thinking consulting company delivering strategic marketing, business development and related technology services helping business leaders drive revenue growth through innovation and digital transformation.

Centricity360 - Innovative Ideas in Action.