

The logo for datAvail, with 'dat' in green and 'Avail' in blue.


BI/Analytics • Applications • Databases

A man in a dark suit, white shirt, and black tie, wearing glasses, stands in an office. He is smiling and gesturing with his hands towards a computer monitor. The monitor displays a dashboard with various charts and data. A desk lamp is visible next to the monitor.

Case Study

# Financial Services Company Modernizes their CRM with Azure Cloud

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The client in this case study is a wealth management and services company that offers a comprehensive suite of financial plans and solutions to customers across Canada. In this case study, we'll discuss how Datavail helped the client improve the speed, performance, and efficiency of its Microsoft Dynamics CRM software by migrating to the Microsoft Azure cloud.

## The Challenge

Before working with Datavail, the client was using Microsoft Dynamics 2013 on-premises for its customer relationship management (CRM) needs. However, with Microsoft announcing that the software would reach its end of support date in January 2019, the client needed to act fast to upgrade to a newer version of the application. In addition, the client's on-premises Dynamics CRM software had become "clunky" and slow, harming productivity, efficiency and stability, and hindered adoption by internal users.

## The Solution

As a long-standing partner of the client for several years and a Microsoft Gold Partner, Datavail was the natural choice for this upgrade. Datavail and the client agreed that the best path forward was to migrate from on-premises Dynamics CRM 2013 to Microsoft Dynamics CRM 365 in the Azure cloud.

### The elements of the client's Azure cloud migration included:

- Switching to Azure's [Unified Interface](#) for responsive and mobile-friendly applications.
- Moving the client's on-premises CRM data into the Azure cloud.
- Replacing many on-premises workflows with Microsoft's [Power Automate](#), which automatically connects different applications and services.
- Building a new CRM data intake form by refactoring the previous form, dramatically improving load times and performance.
- Enabling third-party integrations with Office 365, SharePoint, the client's data warehouse, Twilio, Marketo, and more.

# The Results

By working with Datavail, the client has seen advantages such as:

- Increased software performance, stability, and consistency.
- New features and functionality thanks to third-party integrations.
- Greater flexibility, ease of use, and user-friendliness with a new responsive design.
- Less time and effort required in-house to maintain the solution.

Datavail is a Microsoft Gold Partner, and our team of Azure consultants has already helped hundreds of clients successfully migrate their applications and database workloads to Azure Cloud. Many of our clients have been with us for 10 years or more, speaking volumes about our commitment to customer satisfaction and success.

## The list of Datavail's Microsoft Azure services includes:

- Moving from on-premises to Microsoft Azure and hybrid environments.
- Software development on, and integration with, Azure.
- Fully managed services for applications on Azure, hybrid, and on-premises.
- 24/7 support and managed services, including cloud management and monitoring, database administration support with high availability, disaster recovery, incident response, patching, and performance tuning.

Need assistance with your own Microsoft Azure migration or application development project? Datavail can help. [Get in touch with our skilled team of experts today](#) to chat about your business needs and objectives.



Datavail is a company of over 1,000 professionals helping clients build and manage applications and data via a world-class tech-enabled delivery platform and software solutions across all leading technologies.