

A computer monitor displaying the Salesforce logo, which consists of a blue cloud shape with the word "salesforce" in white lowercase letters inside it.

salesforce

A computer monitor displaying the Microsoft Dynamics 365 logo, which features a dark blue stylized envelope icon to the left of the text "Microsoft Dynamics 365" in a dark blue sans-serif font.

Microsoft
Dynamics 365

The Datix logo, featuring the word "DATIX" in a stylized, metallic, 3D font. The letters are silver with a brushed metal texture and a slight shadow. The 'X' is particularly large and has a long, thin tail extending to the right.

DATIX

**SALESFORCE VS. MICROSOFT
DYNAMICS CRM:**
A Neutral Comparative Analysis

Copyright Datix Inc. 2021. All rights reserved.

TABLE OF CONTENTS

PAGE

Introduction	3
Reporting	4
Mobility	5
Microsoft Integration	6
Cloud Computing	7
Affordability Considerations	7
Conclusion	8
Why Datix	8



SALESFORCE VS. MICROSOFT DYNAMICS CRM:

A Neutral Comparative Analysis

INTRODUCTION

WHY CRM SOFTWARE?

Customer Relationship Management (CRM) software is a solution that will transform your manufacturing or distribution organization into a customer-centric enterprise. CRM software is no longer just a sales and marketing tool. Modern CRM solutions enable system-wide improvements and provide your team with real-time data that streamlines your business's management, sales, marketing, and customer service departments.

CHOOSING THE BEST CRM SOFTWARE FOR YOUR BUSINESS

CRM software selection is a critical first step in implementing a solution that dramatically improves your business; however, many businesses choose CRM solutions that lead to unclear intentions, confusion, lost time, and ill-defined goals and system criteria. Both Microsoft Dynamics 365 and Salesforce are robust CRM solutions; however, each solution has its pros and cons.

The evaluations curated in this Neutral Comparative Analysis are based on Datix's extensive experience with a myriad of businesses in the manufacturing and distribution industries. Datix is a certified partner of both Microsoft Dynamics 365 and Salesforce with over 20 years of in-depth experience transforming businesses through software.

THE RIGHT TOOL FOR THE RIGHT JOB

In evaluating Microsoft Dynamics 365 and Salesforce, we will examine five core matchups: reporting, mobility, Microsoft products integration, cloud computing, and affordability.

It is also important to note that both Salesforce and Dynamics are constantly evolving in a "best CRM" competition. Neither Dynamics nor Salesforce offers an overall best solution; however, by examining your unique business requirements, you will likely find one solution is a better fit than the other.

The goal of this guide is to leverage key functionality considered by most users to help you determine which solution is best for your business.



Salesforce provides users with an award-winning, streamlined user experience that has become the industry standard for modern software design.

For large, data-driven businesses, the cutting-edge technical user design that builds and modifies custom reports in Salesforce is flexible and easier to use than its MS Dynamics counterpart. Salesforce CRM doesn't require the technical user to have an expert-level understanding to operate the software; in the user-friendly design, the user can build and create specialized reports without modifying code.

For example, if you choose to view a report that demonstrates total sales per quarter, but underneath, you'd like to see all the deals each sales representative has in place, you can access this grouping and viewing in Salesforce.



Microsoft
Dynamics 365

Alternatively, Dynamics offers the familiar Microsoft product look and feel that many users already know how to use. Plus, Dynamics features some beautiful drill-down functionality that delivers not only ease-of-use but also aesthetically pleasing reports; for example, you can depict graphical displays to filter through data in grids.

That being said, Dynamics isn't as user-friendly as Salesforce —when generating specialized reports. Dynamics can be rigid in its ability to allow technical users to generate these types of reports. Where Salesforce can deliver reports in grouping and viewing formats, Dynamics provides this same data in the form of dashboards.

REPORTING OVERVIEW

If you're a large organization with a sophisticated sales department, Salesforce might offer better reporting options for your business; however, if you don't have a rigid sales process that is dramatically driven by data, Dynamics may be the better choice.

User reporting capabilities extend far beyond user-friendliness and are the foundation for the CRM software's overall consummation. Both Dynamics and Salesforce offer robust reporting capabilities, so the interface comes down to personal preference. In this way, we recommend your key decision-makers demo each solution to help understand which systems' reporting functionality is a better fit.



Salesforce is an obvious standout in mobility in the CRM software industry. You'd be hard-pressed to find the functionality, reporting, interface, and ease-of-use on a mobile device in any CRM system other than Salesforce. Salesforce is the only CRM solution to offer the full user experience—including dashboards and reporting—on a mobile device. Regardless of whether you use Salesforce for customer service, management, sales, marketing, or something else, you'll receive a complete mobile experience. For instance, if you're a sales user, you can travel between clients all day long while creating contacts, managing activities, drawing reports, and reviewing dashboards, all while using voice data-entry along the way.

Additionally, Salesforce provides an easy-to-navigate desktop experience for the remote or traveling employee. Salesforce enhances its CRM mobility experience by augmenting it with the power of its app store. The app store is a robust network of applications and integrations that can be added to a company's CRM set up to sync with other systems or prove additional features (like Datix's Unity application for automatically integrating data between ERP and Salesforce).



Microsoft
Dynamics 365

Moreover, until recently, Dynamics was drastically behind Salesforce in mobility, but it has completely revamped its mobile experience. Users can do almost everything they can do from a desktop on-the-go from a mobile device.

From your Dynamics mobile app, you can customize lists and data features, track KPIs, easily access important CRM data (activities, leads, contacts, accounts, etc.), and enter data. Plus, Dynamics allows its users to work offline; if you're working in places with limited connectivity, you can continue to work from the mobile app, and your offline data will be saved locally and synced with your online database once you reconnect to the network.

MOBILITY OVERVIEW

The need for mobile solutions has transformed the way businesses operate and use CRM. Mobile CRM is necessary for any organization with a traveling sales force, remote employees, and a flexible, fast-paced environment.

That being said, every business has specific mobility needs, so we recommend choosing a mobile CRM system that fits your business' unique requirements. By carefully gauging Salesforce and Dynamics mobile capabilities, you will be able to adequately choose the best fit for your business.



Despite the constructional differences between Salesforce and Microsoft products, Salesforce adequately integrates with Microsoft Outlook. If your office currently uses Microsoft Office Suite, your Salesforce CRM will sufficiently integrate with those systems. The Salesforce user experience is not cumbersome, and it's intuitive enough that most users are generally pleased with how well Salesforce integrates with their existing Microsoft solutions.

It is worth mentioning, if your organization is heavily involved in the utilization of other Microsoft products, like SharePoint, product integration may need to be a stronger part of your consideration due to the additional features offered by Dynamics.



Microsoft
Dynamics 365

When it comes to Microsoft integration, it's a no-brainer that Dynamics is a standout. Anyone who has used the modern Microsoft suite is familiar with the tiled navigation and display at the top of the software. Dynamics becomes an additional tile once added to the organization, making flipping between programs seamless. Further, almost every program has features from the Microsoft software embedded into each application. So, when users operate inside Dynamics, merging calendars, dates, times, contact info, etc. occurs in a single program.

Microsoft created synergy across each of their programs and put Dynamics right in the middle. It truly does feel as though you're using a single Microsoft suite instead of three when navigating between CRM, SharePoint, and Outlook.

MICROSOFT INTEGRATION OVERVIEW

It's obvious that Dynamics is the standout in Microsoft integration. Although Salesforce is not overly cumbersome integrating with these products, Dynamics provides a slick integration that enhances the quality of all the products.

If your business is heavily invested in Microsoft products –and uses them well, –you may want to consider how all these products can work together with CRM. It may just be a helpful blend that can greatly benefit your organization. However, you will have to weigh the benefits against mobility, reporting, and other necessary qualifications to make a final decision.



Salesforce has doubled down from the very beginning on being a cloud-based software offering. Salesforce renders their entire system portable, easy to access, and agile enough for multiple upgrades and compatibilities. The catch? Salesforce is only available in a cloud format. That means, if you want to have on-premises CRM software or a variation of cloud/on-prem, this is unavailable through Salesforce.



Microsoft
Dynamics 365

Some organizations are reluctant to move their entire CRM architecture. That's why Dynamics offers cloud hosting as well as native hosting, allowing your business the opportunity to choose your preferred platform.

CLOUD COMPUTING OVERVIEW

Trends in the marketplace suggest that cloud-hosted software is the direction developers and businesses are ultimately headed. For businesses that are ready for their CRM to be hosted in the cloud, Salesforce delivers cutting-edge cloud technology. For those businesses who are unsure about making the jump to cloud technology, you have the choice between an on-prem or cloud-hosted platform through Dynamics.

AFFORDABILITY CONSIDERATIONS

SALESFORCE VS. MICROSOFT DYNAMICS 365

While Salesforce is a CRM industry leader, it is also more expensive from a licensing perspective. Without going into exact licensing costs, Salesforce generally costs 30-40% more than Dynamics. In addition to this higher price, Salesforce charges for API calls as well (although it's rumored that Dynamics may start to charge for API call overages in the future).

We might also mention, Salesforce provides an entire app store with their product. Users can download and purchase custom apps that provide limitless potential for integration and compatibility.

Further, if your business plans to make a large volume of calls to your database, this would certainly be something that could add to your bottom-line cost with Salesforce. Microsoft Dynamics 365 does not charge for these database calls.

Comparing costs isn't apples to apples, but it's worth noting Dynamics is less expensive than Salesforce from a licensing perspective. That being said we don't recommend basing your CRM decision solely on the price of the software.

CONCLUSION

WHAT SHOULD YOU DO?

Determining which CRM solution is best for your business should not be taken lightly—it is a huge determiner of the long-term success of your software. And using the above evaluation criterium, you should be on the right track to finding the best software for your unique business.

Based on the above evaluations, if you operate a large, data-driven enterprise with a sophisticated sales team, Salesforce may be a good investment; your business may greatly benefit from the added features of Salesforce. Alternatively, if you're a small-to-midsized business, Microsoft Dynamics 365 might be the right choice for you as it offers flexibility while cutting licensing costs.

Nevertheless, deciphering which CRM solution is best for your business is about using the right tools and evaluation methods; each CRM system has clear advantages and shortcomings. And finding the best fit is all about evaluating your business needs and choosing accordingly. In other words, each system's functionality should be evaluated per your business processes and practices.

WHY DATIX

Datix is passionate about helping manufacturers and distributors transform their business to exceed today's business challenges. That's why we have been helping our clients grow and prosper by implementing cutting-edge software and streamlining business processes for over 20 years.

We aim to be the best with the best, meaning we only employ the highest-caliber expert consults, and we only partner with vendors that deliver top-notch software. At Datix, we provide well-rounded professional services, meaning we are a one-stop-shop for enterprise software. Whether our clients need ERP, CRM, cloud hosting and disaster recovery, integration, business intelligence (BI), eCommerce software, or something else, we've got them covered!

Not to mention, we always make sure our clients' software supports their business process—otherwise, it would be impossible to achieve a full business transformation. Through this business-first approach, you'll see increases in productivity, information timeliness and accuracy, customer satisfaction, business performance, and more. Lastly, we render our services from the very beginning of your project to the go-live date, providing solutions that meet the longevity of your organizational goals. This start-to-finish support is unmatched.

Choose Datix to be your trusted technology consultant. Together, we will transform your business through software!



info@datixinc.com



800.259.6675



datixinc.com

