

CASE STUDY



Dan Madden, Kylie Kiser and Monica Stehr are members of the internal CRM team at Ascensus.

In 2018, the organization began making the move to Microsoft Dynamics 365 for Customer Engagement online. Dan, Kylie and Monica shared their migration journey with Dynamic Communities.



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Move to Cloud Aims to Put Sales in the Fast Lane

“We wanted to drive faster on the CRM superhighway to lower acquisition cost, drive process efficiencies and increase sales velocity.”

That’s how Dan Madden, CRM Program Manager at Ascensus, describes why his organization moved to cloud-based Microsoft Dynamics 365 for Customer Engagement.

Ascensus helps millions of people save for what matters – retirement, education, and healthcare – and is the largest independent recordkeeping services provider, third-party administrator and government savings facilitator in the United States. It boasts more than 115,000 retirement plans, 6.2 million 529 education savings accounts and \$327 billion in assets under management.

For a better view of the 12 million savers on its platform, Ascensus had originally implemented Microsoft Dynamics CRM 4.0 on premises in 2010, and later upgraded to the 2016 version. Nearly 1,000 of Ascensus’ approximately 4,000 associates use CRM. The biggest users are the company’s external and internal sales associates, who rely on it to track accounts, contacts, opportunities, and activities.

Ascensus’ Cloud-Migration Tips:

- Think big, but start small
- Find the right partner
- Migrate only the good data
- Engage internal evangelists
- Always be willing to learn
- Develop a network and nurture it

Within a few years of upgrading to Dynamics CRM 2016, the company’s internal CRM team could see the technology road ahead leading to the cloud. “For us in IT, our user base and executive management, there was a lot of pent up need to get more through CRM,” Dan says. “We recognized that CRM in the cloud could offer faster access to new features and functionality to give users time back in their day so they can focus on what they do best.”

GOING MOBILE – AND BEYOND

One feature in particular Ascensus sought was better mobile functionality for its sales teams. “Our sales associates are on the road a lot, and they need access to information at their fingertips, which is difficult to accomplish with an on-premises

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solution,” Dan says. “The cloud has better enabled us to keep sellers in their source of truth – CRM – regardless if they are working remotely due to the pandemic or while on the road.”

The move to the cloud also made good business sense, considering the organization was also transitioning to other Microsoft cloud-based applications, including Microsoft 365 and Power Platform. “We could see people having a more seamless experience working in different Microsoft products,” says Kylie Kiser, Product Owner and Microsoft MVP on the Ascensus CRM team.

The team recognized that the cloud-based application would offer substantial cost savings in the long run by eliminating the need for ongoing development, maintenance and upgrades. This, in turn, could free up resources and enable the team to play a more strategic role in the organization.

In 2018, the CRM team secured approval to move to Microsoft Dynamics 365 for Customer Engagement, beginning with its sales teams.

MAPPING THE ROAD AHEAD

In planning the migration, the Ascensus CRM team set an informal guiding principle of “Don’t move all data or unnecessary customization to the cloud,” and worked to live up to it. “We looked at everything we’d built in the past – forms, fields, JavaScript, Business Rules, plugins, you name it – and asked, ‘Do we need this in the cloud, or is this out-of-the-box functionality?’ If it was the latter, we put it on the deprecate list,” says Monica Stehr, Product Owner on the Ascensus CRM team.

The team also spent considerable time determining which data needed to be migrated and which didn’t. They ultimately set a specific cutoff date, and any data older than that date was simply not migrated.

During the migration process, the organization quickly realized another important benefit. While Ascensus had worked with various implementation partners in deploying Dynamics CRM 4.0 a decade earlier, it required only one partner for the move to Microsoft Dynamics 365 CE. Hitachi Solutions performed the initial data migration while Ascensus’ internal CRM team built the cloud components and handled system configuration. Hitachi Solutions also performed an extensive knowledge transfer on the nuances of data migration, which would enable

the Ascensus CRM team to perform subsequent data migrations on its own.

Accelerating the Power of a Network

When Ascensus began expanding its internal CRM team, it knew right where to look for outstanding talent: the CRM network, primarily Dynamic Communities. Largely through contacts within the community, Ascensus was able to fill five positions with qualified CRM experts.

Ascensus has had a long association with the community. Kylie is a Microsoft MVP, while other CRM team members are similarly active, leading local user groups, participating in webinars, becoming involved in conferences, and cultivating partnerships.

“If there’s a Summit event, there’s a great chance you will see representation from our team – to learn how we can work more efficiently, find someone to partner with or to build our network,” Dan says. So it’s no surprise that Ascensus sent seven CRM team members to Community Summit 2018 and 10 to Community Summit 2019.

While browsing the Expo at the 2018 Phoenix event, the CRM team discovered ClickLearn – and used it to customize training for its migration to CE. Ascensus has been so impressed with the application that the company’s internal training team is now also adopting the solution to quickly create high-quality, customized training materials.

OVERCOMING SPEED BUMPS

The CRM team knew that training on the application would be critical to realizing the value of it, but immediately ran into a speed bump – namely, capacity. While the CRM team knew the product well, it lacked the time and expertise to create a formal training program.

While browsing the Expo Hall at Community Summit 2018 in Phoenix, the Ascensus team came across the ideal solution: ClickLearn, an add-on and training solution that enables organizations to rapidly create customized training materials.

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Working closely with ClickLearn over three months, the CRM team developed and rolled out more than 50 custom resources to train various user groups on the new system.

To further rev up adoption, the CRM team identified key players in each business group who understood the value of CRM and asked them to become evangelists to drive engagement and excitement about the application.

Ascensus' sales-team migration to CE was conducted in phases over about six months. Among the biggest challenges was prioritizing which sales team would be the first to receive the new solution. "We wanted to think big, but start small," Dan says. "We did one of our smallest groups first, which gave the team a fresh slate to work with CE and Azure, so we could get comfortable and go from there."

NAVIGATING THE ROAD AHEAD

Along with the move to Dynamics 365 CE, Ascensus is adopting additional Microsoft Azure-based cloud technologies, including Microsoft 365 and Microsoft Teams. In addition, the CRM team has adopted Microsoft Power Platform tools, such as Power Automate and Power Apps.

All of Ascensus' sales teams, plus several other business groups, are now using Microsoft Dynamics 365 CE, while various other areas of the organization currently remain on Dynamics 365 on-premises due to complex customizations. The CRM team plans to eliminate the hybrid environment and ultimately move all CRM users to the cloud.

While Ascensus' sales migration is barely in the rear-view mirror, the company is already realizing several of the benefits it had expected.

Ascensus' internal and external sales associates now have access to nearly unlimited information about clients and prospects right at their fingertips. Using their smartphones and an add-on application, InsideView, which integrates with CE and is accessed directly through it, they can gather news, glean

insights and see relationships derived from more than 40,000 sources of information.

"Assuming normal, non-pandemic working conditions, most of our user base is on the road for the majority of their day, week, month and year," Dan says. "Their #1 need is, 'I'm heading to a meeting and I need some information.' Being able to deliver that, along with mobile functionality, is a huge win."

PUTTING THE CRM TEAM IN THE DRIVER'S SEAT

The migration to CE has also enabled Ascensus' internal CRM team to take on a bigger role within the organization.

"The biannual Microsoft upgrades to CE have been a large stress reliever to our team," Monica says. "With CE in the cloud, Microsoft updates it twice a year, we test the updates with automated tests and perform regression prior to Microsoft rolling it out. It's now become a repeatable process where we know what to do," Monica says.

By learning from Hitachi Solutions how to migrate data into CE, Ascensus has taken funds from its professional fees budget and used it to hire additional Dynamics experts for its internal CRM team. That has helped the team grow from 8 to 13 dedicated resources plus four shared with other areas of IT. Ascensus' CRM team members are scattered across the U.S. in all time zones. When the COVID-19 pandemic hit, the team, which had already been working remotely, didn't miss a beat.

With a larger internal CRM team, every activity related to CRM – from developing and maintaining the on-premises version of Dynamics 365 to planning future migrations into the cloud-based CE – is handled internally. "Our internal team now runs our whole online strategy, which is pretty unique in the industry," Dan says.

Equally important, the team is better able to identify and solve user needs. "A lot of our user base, especially on the sales side, are very tenured sellers. They wanted a dynamic solution that would ultimately help them do their jobs faster," Dan says. "That's what we're delivering with the cloud."

Take the first step toward cloud success by migrating your on-premises solution with expert guidance from Microsoft through the Dynamics 365 Migration Program.

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