

Tech Implement Provides Data Migration Services to the Telecom Sector

Summary

An IT company based in Beverly Hills, partnered with Tech Implement to assist a US-based telecom organization. The telecom organization recently acquired licenses for D365 Sales and Customer Service and needed to migrate extensive data from legacy systems (Pipedrive and Zendesk) into D365. The challenge involved not only transferring the data but also ensuring integration and differentiation between the migrated datasets.

Problem Statement

The telecom organization faced multiple challenges in its data migration process:

- Migrating comprehensive data from Pipedrive (legacy CRM) and Zendesk (ticketing system) into D365 Sales and Customer Service.
- Ensuring accurate mapping and linking of data fields during migration.
- Handling data import errors effectively.
- Differentiating data sources post-migration to enable clear identification of data origins.
- Migrating data from D365 Sales and Customer Service Production to the Sandbox instance.

Solution Delivered

To address these challenges, Tech Implement employed a structured approach for data migration, ensuring accuracy and efficiency.

- All data from Pipedrive and Zendesk was exported in CSV format. This included customer records, tickets, and related entities.
- Relevant entity templates were exported in Excel format. Data from the legacy systems was carefully linked to the corresponding fields in the Excel templates. Each template was customized to match D365's data structure for accurate import.
- The prepared Excel templates for Pipedrive data were imported into D365 Sales.
- Similarly, data from Zendesk was linked to its respective fields and imported into D365 Customer Service. Custom views and fields were created in D365 Sales and Customer Service.
- Using the same Excel technique, all data from the D365 Sales and Customer Service Production instance was migrated to the Sandbox instance.

Results

Comprehensive data from Pipedrive and Zendesk was successfully migrated to D365 Sales and Customer Service. The migration facilitated data management processes which enables the client to use D365's advanced features effectively.