CASE STUDY

Company Profile

SparkleTeam is the Leader in Green and Sustainable Business Cleaning Services for Palm Beach, Broward and Northern Miami Dade Counties.

SparkleTeam Service Providers and crew members are trained by specialized LEED consultants to **implement USGBC LEED-based cleaning practices to every account serviced.** Some of these cleaning practices include use of green certified products, use of micro-fibre tools, and CRI labelled vacuums with HEPA filters for improved indoor air quality. By utilizing a LEED-based green cleaning program in your office or building, the indoor air quality will improve along with a healthier, safer and more enjoyable place to work and visit.

For over 15 years SparkleTeam has been providing unprecedented business cleaning services to commercial properties all throughout South Florida. Some of the commercial properties include LEED Certified buildings and TOBY Award Winning buildings. **With the help and support of the SparkleTeam LEED-based Green Cleaning Program, each of the buildings excelled in categories regarding maintenance and care.**

Business Situation

SparkleTeam were using On-premise MS CRM 2011 with fully patched updates and their current install had no customizations other than that supported natively OOB, i.e., added with few custom entities for business activities. Also, the On-premise CRM server was running on 2008 R2 Hyper-V VM with total database of about 18 GB. Such a setup was draining their performance, restricting their capabilities, adding up operational costs and posing hardware maintenance issues.

CRM Customizations Include:

1. SparkleTeam have only 5 custom entities

2. SparkleTeam have about 200 or so active workflows, many of them with WAIT statements. They do not use Dialogs.
3. SparkleTeam have installed two Plug-in Assemblies:
    a. Manipulation Library: It is a library adding some enhanced functionality to Workflows and came from CodePlex.

    b.   Close Order: MTC developed it and it does a few simple things when an Order is closed.

4. SparkleTeam use DocumentsCorePack (A word document merge utility)
5. Telephone Integration (a utility that resolves incoming phone calls to be resolved in CRM and pops-up a browser window on the user's desk).
6. SparkleTeam is using SmartBar, a third party add-on for navigating through related CRM records.
7. Both of these utilities continue to be supported in CRM 2016 and are easily installed from the MS Apps Store. In fact, SparkleTeam current CRM instance on CRM Online have them already.
8. Beside the CloseOrder script(s), see above, MTC developed some custom code for the LEAD and PROMISSORY NOTE entity. Essentially, both entities have a financial calculator on the main form that calculates annuities (payments, given interest rate, principal amount and duration).

SparkleTeam wanted to migrate to Online CRM without affecting their business continuity in the least time possible.


Solution

With over a decade's experience into Data Migration of various On Premise CRM versions to Online CRM, Management Technology Consulting LLP was quick to propose the best possible strategy taking into account various factors such as:

-   No data loss
-   No loss of functionality
-   Minimal user impact during migration process
-   Shorter migration period

MTC has spread out a clear project plan with timelines, milestones and bill generation for this migration project. MTC has assigned a dedicated project manager for overseeing the end-to-end data migration process and update SparkleTeam on a timely basis. MTC has lived up to the expectations of SparkleTeam by delivering the project within allotted timelines and budgetary limits without affecting its business continuity.

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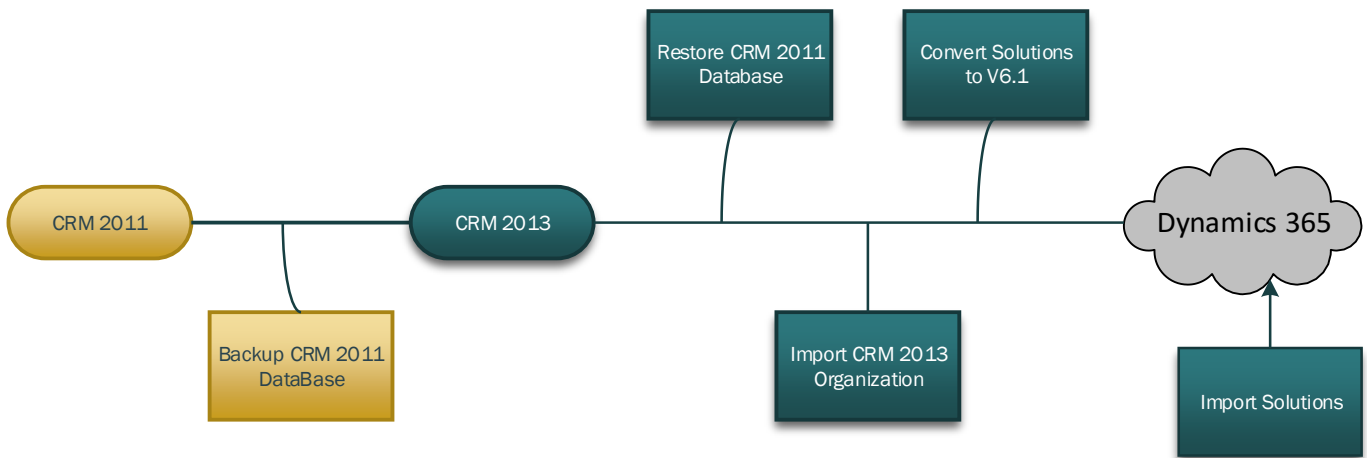
Conclusion

Data Migration from On Premise 2011 CRM to Online CRM has helped SparkleTeam to experience a new, fast CRM accessibility along with Azure Ad User Management and Office 365 features setup. Also, with CRM online patched with latest version updates, they are able to keep their infrastructure up to date. MTC's adroitness in handling this high risk project has helped SparkleTeam reduce their maintenance cost heavily and conduct their business activities seamlessly.

Benefits

- No Server Costs
- Disaster Recovery
- Easy Updates
- Fast Deployment
- Enhanced Security
- Flexible and Scalable on demand