



Trust. Value. Velocity

G-Cloud 15

Accelerating Salesforce to Dynamics 365
Migration with AI

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1. About Mastek

Mastek has been delivering Critical National Infrastructure programmes in the UK Public Sector for over a decade now. We are trusted with multiple contracts for the UK Government across Central Government, Health, Local Government, Policing, Public Protection and Defence. The majority of our national services are delivered in a context of high uncertainty and complexity while collaborating in multi-supplier environments.

While working for these large and complex public sector organisations, we have continuously refined our management, delivery and underlying processes to reflect key learnings from the sector:

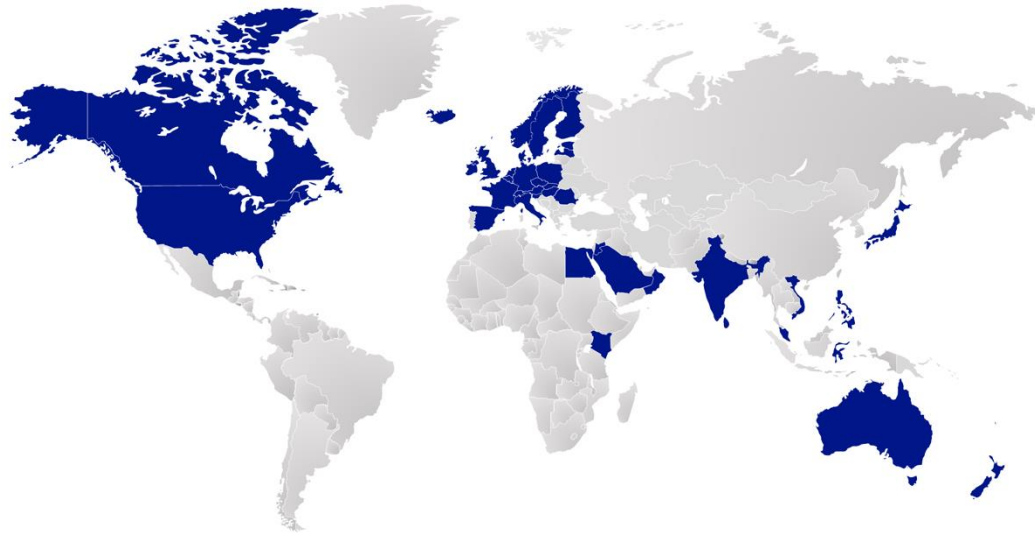
Working through a complex stakeholder landscape: We understand the importance of establishing effective communication channels, building trust and fostering a collaborative working environment that empowers stakeholders to contribute meaningfully to the project's success. Our approach is grounded in a thorough understanding of stakeholder needs and requirements. We leverage our experience and expertise to design governance structures that promote transparency and accountability, utilising data-driven reporting mechanisms to ensure stakeholders have real-time visibility into project status and progress. At the Home Office, GDS, Ministry of Defence and NHS, we have a proven track record of working seamlessly with large stakeholder groups, including civil servants.

Standards and Compliances: We comply with over 20 policies and standards, including the Government Digital Standards and the Government CDDO Service Toolkit, which covers service standards, service manuals, TCoP, API technical, and data standards. Our stringent governance, methods, playbooks and processes (manual and automated) span across service delivery phases, ensuring continuous compliance.

Policy-driven: Policies and procedures primarily drive Public Sector organisations. We need to be Agile and flexible to meet demands for policy/regulatory changes, geopolitical events and ministerial commitments.

Culture: We adhere to the core values of the Civil Service, which include integrity, honesty, objectivity and impartiality. Key behaviours we promote stem from a combination of Civil Service and Mastek values. These include being passionate, accountable, sustaining predictable and repeatable outcomes, not transferring risk, transparent, leading to enable, acting with transparency, practising a no-blame culture and being flexible.

Mastek's global presence



Australia

Austria

Bahrain

Belgium

Brunei

Canada

Denmark

Egypt

Estonia

Finland

France

Germany

Hungary

Iceland

India

Indonesia

Ireland

Italy

Japan

Jordan

Kenya

Kingdom of Saudi Arabia
(KSA)

Kuwait

Latvia

Luxembourg

Malaysia

Netherlands

New Zealand

Norway

Oman

Philippines

Poland

Romania

Singapore

Slovakia

Spain

Sri Lanka

Sweden

Switzerland

United Arab Emirates (UAE)

United Kingdom

USA

Did you know?

75%

Around three quarters of Local Authorities in the UK who run Oracle have worked with Mastek on their digital transformation journey.

300,000 Users

Supported managing up to 750,000 logins per month to MOD through Identity and Access Management

Crime reduction

We designed, built and manage the UK's Strategic National DNA Database that helps Forensics and Law Enforcement Authorities investigate & stop crime

90% faster

We enabled the National Health Service (NHS) to drive 90% faster response times with a billion pharmacy prescriptions a year.

Technical Service Desk

We provide level 2 and ITSM support for the One Login service at Government Digital Service

22k

Our systems enable 22,000 schools to function efficiently every day of the year.

Healthcare and manufacturing

We delivered Finance, HCM & Supply Chain transformations for clients across health and manufacturing globally powered by Oracle Cloud

Transformation of trade

Transforming UK's trade with the EU and rest of the World by supporting Customs Declarations Services and its trade users.

99.99% Availability

We support the Home Office Biometrics (HOB) Platform, Having migrated it to an AWS platform.

Our digital and cloud services portfolio

Powered by Glide 4.0 and value-based delivery

Industry-aligned approach with business outcomes

Digital engineering and experience	- Cloud engineering & migration - Legacy modernisation - Low code / no code App Dev - DevSecOps - Enterprise integration	- MACH - Digital commerce - UX & CX - Platform engineering - Gen AI software development.
Oracle Cloud and enterprise apps	- Oracle Cloud applications - Oracle consulting - Oracle Cloud infrastructure	- Value-based delivery - Glide 4.0.
Data, automation and AI	- Cloud data modernisation - Business Intelligence & Analytics	- Data management - Intelligent automation - Data Governance.
Salesforce	- Sales Cloud - Service Cloud - Marketing Cloud - Industry Cloud	- Experience Cloud - Mulesoft.
Innovation labs and platforms	- Enterprise workforce scheduler - Connected enterprise - icx-Pro – intelligent part assistant	iLeaseFinPro.
Cloud enhancement managed services	- Oracle managed services - Digital managed services - Commerce managed services	Salesforce managed services.

Home Office Biometrics (HOB)

Public sector platform modelled 24x7 with 99.99% availability

Problem

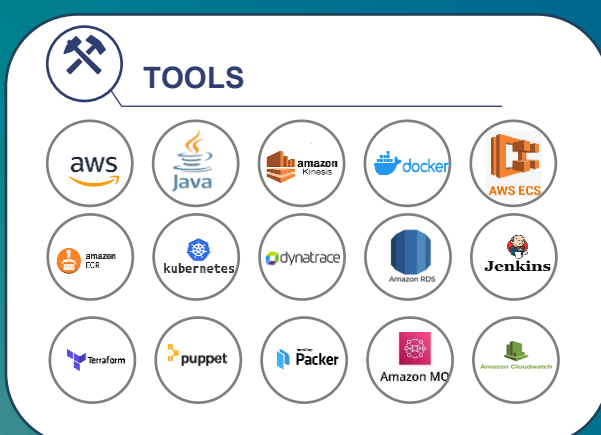
- Transition business-critical Platform services from incumbent supplier with minimal risk
- Migration from private cloud to AWS Cloud.

Solution

- Migrated the infrastructure from private cloud to AWS
- Embedding Kubernetes Containerisation
- Introduced Docker and fully-baked AMIs
- Supporting the platform's self-service functionality using Jenkins Jobs
- Applying security updates to the OS base images through pipelines
- Instituting automated patching and testing for infrastructure images
- Support of configuration, test and releasable artefacts through the pipeline.

Outcome

- **Zero impact** on live service
- **80% automation** of SIT
- Environment Provision **2 days to 1 hour**
- **5x scalability** in handling student BRPs
- Cost saving the authority circa **£9.5m/year.**
- Won the '**Best Use of Cloud Services**' award
- **35%** Incident Volume Reduction.



Government Digital Service

Problem

GDS initiated the One Login programme to create a single front door for identity verification and authentication, which could be adopted and scaled across all government departments. This would improve the user experience by providing the public with a single identification and verification service for the government, reduce costs as each department no longer requires its own identity service and reduce identity fraud and identity-enabled crime.

GDS released a tender in June 2023 to provide a Technical Service Desk (TSD) managed service for the One Login service. This service would provide a single point of contact for level 1 and 2 service support as part of the wider support ecosystem. It would be provided in the UK and replace the incumbent's scaled-down non-ITIL-aligned break-fix service.

Solution

In September 2023, Mastek were successfully awarded the TSD contract to deliver TSD on behalf of GDS. GDS had an extremely aggressive programme driven by the onboarding of HMRC as a user, which was a major milestone planned for February 2024, migrating new and existing HMRC users to the One Login platform. The TSD service was expected to go live in November 2023. This was an extremely complex programme which, within this timescale, would deliver:

- The contact centre provider for level 0 directly facing the public
- The TSD supplier in place, directly facing all government departments
- The TSD supplier in place providing L1 and L2 engineering support and monitoring
- Continued delivery on the One Login backlog of features
- Continued migration of smaller government departments to the platform.
- Delivery of a new ITSM toolset to be configured for use by GDS and the One Login programme, integrating level 0 to level 3 support
- Working as one team, Mastek quickly integrated into the programme, appointing the leadership team early in the engagement. We collaborated with GDS from the outset, ensuring we tailored the service to their expectations rather than delivering what was written in the contract.

Our leadership team consisted of:

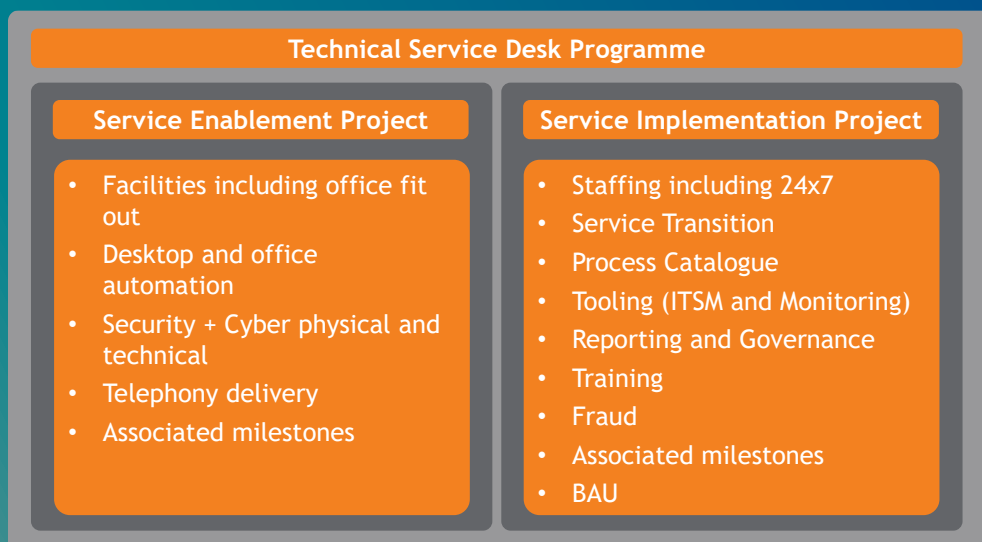
- Service Management Vice President
- Programme Director
- Chief Technology Officer
- Programme Management Office lead.

Outcome

At its height, the programme team was approximately 15 strong, covering programme/project delivery, PMO, architecture, fraud, security, support, omnichannel and quality assurance. The service team is currently in place, providing circa 21 resources now covering end-to-end service management, service delivery and L1 and 2 engineering roles.

As the One Login migrations continue, Mastek is supporting Government departments onboarding to the platform as they transition into the new service and provide One Login a secure Technical Service Desk managed service with:

- Omni-channel access for other government departments via telephony, email and web form
- Provision of L1 and L2 engineering support
- 24x7, 365 days a week cover
- 24x7x365 eyes on monitoring service
- Fraud detection and security, GDPR compliant
- End-to-end (L0-3) incident and problem management
- End-to-end 24x7 Major incident management (MIM)
- On-call/call-out engineering support, incident and MI management
- Adherence to stringent SLAs on incident response, call handling and fix times
- End-to-end monthly service reporting alongside TSD KPI and SLA reporting.
- A shift left culture and mindset, reducing the impact of service on product teams (L3)
- Support with service maturity in the programme, preparing GDS to run critical national infrastructure.



Internet-facing platform and applications for Army Digital Services

Developed mobile app & web app
with 24*7 high availability

Problem

- New Defence Gateway Portal
- Combine all internet-facing applications into one
- Easy to use
- Enable easier access to the MySeries portfolio of products.

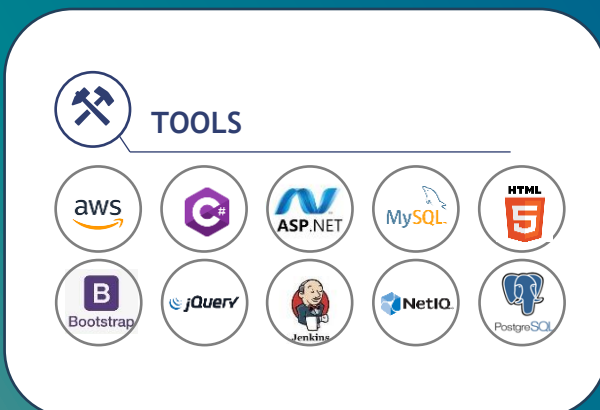
Solution

Designed and developed the following easy-use Progressive Web Apps:

- Defence Gateway Landing Page
- My Leave App
- My Expenses App
- My Health App
- My Details App
- My Appraisal App
- My Admin App
- COVID-19 Reporting Tool
- Commanders' COVID-19 Tool.

Outcome

- Delivered 20+ successful projects
- Deployment Automation
- £7.5m in savings annually
- Zero Downtime
- Environment creation in hours.



Delivered a platform for the Department for Health and Social Care

Delivered capability supporting 200k+ tests in a day,
traced millions of COVID-19 infections

Problem

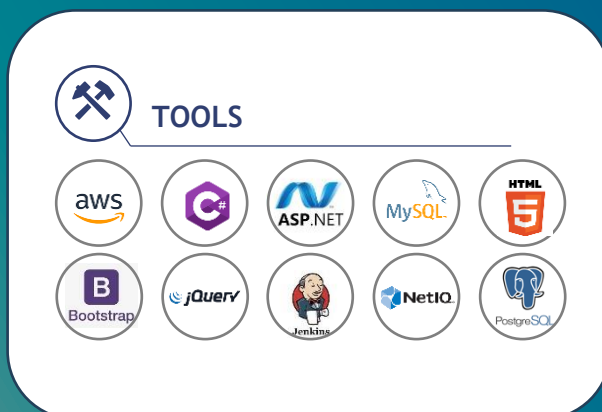
- Leveraging DevOps platform based on reusable GitHub, AWS and Azure DevOps Pipelines
- Introduce more flexible, scalable and reusable IaC capabilities
- Implement CI/CD pipelines.

Solution

- Uplifted from Cloud Formation into Terraform (IaC)
- Pre-built the AMIs using Packer, with automated security checks
- Immutable infrastructure, thus eliminating the risks of partial upgrades and patches
- Continual Cost Optimisation processes and other service functions, such as Change and Risk management
- Migrated into an organisation-wide collaboration toolset. This included Jira, Confluence, Trello, Miro, Teams, SharePoint, O365, Slack, etc.

Outcome

- 75% reduction in lead time due to pre-built AMIs
- Zero Downtime Deployments
- Delivered a Platform - Secured, multi-tenanted, hosted on Azure and AWS in 5 weeks
- Cost reduction achieved through close monitoring of resource utilisation.



Mastek and Technology in the Public Sector

Technical Capabilities	Relevant Technology Capability	Mastek Scale
Software Development Continuous Integration, Platform - Other Products, Cloud Collaboration Tools		Software Engineering 2354 FTE
QA and Test; API, Automated Functional and Compatibility, Accessibility & Performance		QA and Testing 774 FTE
Cloud Platforms Amazon Web Services AWS Microsoft Azure		Cloud Platforms 1046 FTE
Data BI/MI Components, Integration		BI and Visualisation 725 FTE
User-Centered Design		UCD 25 FTE
Office Automation Tools		Collaboration 4565 FTE

2. Summary

We utilise AI to expedite the conversion of Salesforce applications to Dynamics 365, encompassing data models, code, workflows, and UI components. Our autonomous conversion engine significantly reduces manual effort and migration time, enabling a faster and smoother transition.

Our Salesforce to Dynamics 365 Migration Services, leveraging AI, include:

a) End-to-end migration from Salesforce to Dynamics 365 using AI

We provide a comprehensive migration service utilising AI, encompassing planning, execution, and validation.

The process ensures minimal downtime and business continuity. Our experts handle data extraction, transformation and loading seamlessly. This approach guarantees a smooth transition from Salesforce to Dynamics 365.

b) Data mapping and transformation for Sales, Service and Marketing modules

We leverage AI to connect with Salesforce and Dynamics 365 instances, accurately mapping Salesforce data structures to Dynamics 365 entities. This includes Accounts, Contacts, Opportunities and related entities. We are able to get the list of attributes and entities that need to be created in Dynamics 365.

c) Integration with Microsoft ecosystem (Power Platform, Teams, Outlook)

Post-migration, we integrate Dynamics 365 with Microsoft tools for collaboration and analytics. Power Platform enables automation and insights, while Teams supports communication. Outlook integration ensures seamless synchronisation of email and calendar. These integrations enhance productivity and user experience.

d) Migration of custom objects, workflows and automation rules

We migrate custom Salesforce objects and fields to Dynamics 365 equivalents. Business workflows and automation rules are replicated to maintain operational logic. This ensures continuity of processes without manual intervention. Our approach preserves customisations critical to your business.

e) Secure data transfer, ensuring compliance and governance standards

Data migration is performed using encrypted channels and secure protocols. We adhere to compliance standards, including GDPR and industry regulations. Governance policies are implemented throughout the migration process. This guarantees confidentiality and integrity of sensitive business data.

f) Post-migration validation and performance optimisation

After migration, we validate the accuracy of the data and the system's functionality. Performance tuning ensures optimal speed and responsiveness of Dynamics 365. Any discrepancies are promptly resolved to prevent operational issues. Our goal is a stable, high-performing CRM environment.

g) Customisation of Dynamics 365 to match business processes

We configure Dynamics 365 to align with your workflows and reporting needs. Dashboards, forms and automation are tailored for efficiency. Customisation ensures the system supports your unique business model. This maximises ROI and user adoption.

h) User training and adoption support for seamless transition

We provide comprehensive training sessions for end-users and administrators. Adoption strategies are implemented to encourage a smooth transition. Documentation and hands-on workshops help users gain confidence and proficiency. Our support ensures minimal resistance and high productivity post-migration.

i) Ongoing maintenance and support for migrated environments

Our team offers continuous monitoring and troubleshooting services. Regular updates and patches keep your system secure and efficient. We provide helpdesk support for resolving user issues quickly. This ensures long-term stability and reliability of Dynamics 365.

j) Industry-specific migration strategies for tailored solutions

We design migration plans based on your industry's unique requirements. Domain expertise ensures compliance and best practices are followed. Custom templates and configurations accelerate deployment for your sector. This approach delivers a solution optimised for your business context.

3. Masteks Service

Detailed Services Offered

a) Comprehensive Migration Planning

We assess your Salesforce environment, define the migration scope and create a detailed roadmap to ensure minimal disruption to business operations.

b) Data Mapping and Transformation

Our team leverages AI to map Salesforce data structures to Dynamics 365 entities, transforming data formats and ensuring consistency across modules such as Sales, Service and Marketing.

c) Custom Object and Workflow Migration

We migrate custom objects, automation rules and workflows from Salesforce to Dynamics 365, preserving business logic and operational continuity.

d) Integration with Microsoft Ecosystem

Post-migration, we integrate Dynamics 365 with Microsoft tools, including Power Platform, Teams, Outlook and Azure services, to enhance productivity.

e) Secure Data Transfer and Compliance

We ensure secure migration, adhering to compliance standards like GDPR and industry-specific regulations.

f) Performance Optimisation and Validation

After migration, we validate data integrity, optimise system performance and conduct rigorous testing to ensure a seamless experience.

g) Customisation of Dynamics 365

We tailor Dynamics 365 to meet your business needs, configuring modules, dashboards and workflows to maximise efficiency.

h) User Training and Adoption Support

Our experts provide training sessions and adoption strategies to help users transition smoothly to Dynamics 365.

i) Post-Migration Support and Maintenance

We provide ongoing support, troubleshooting and system updates to ensure your Dynamics 365 environment operates optimally.

j) Industry-Specific Migration Solutions

Leveraging domain expertise, we design migration strategies tailored to your industry's unique requirements.

4. Key Features

4.1 Some of the key features provided are:

- a) **Auto-maps Salesforce schema to D365 entities:**
 - Matches data structures between platforms with minimal manual effort.
- b) **Converts Apex code to C# logic**
 - Translates backend logic into compatible Dynamics 365 components.
- c) **Translates validation rules to D365 JavaScript**
 - Converts field-level rules into executable client-side scripts.
- d) **Converts Salesforce workflows into D365 flows**
 - Generates a JSON file from Salesforce logic.
- e) **Migrates LWC UI components to D365 web resources**
 - Transforms Lightning components into HTML-based D365 interfaces.
- f) **Outputs structured CSVs for data migration**
 - Prepares clean, batch-ready files for ingestion into the Azure pipeline.

4.2 How can Mastek help customers?

- a) **End-to-end migration expertise**
 - We manage the entire migration process, from planning to execution, ensuring minimal disruption and maximum efficiency.
- b) **Data integrity and accuracy**
 - Our team ensures accurate data mapping and transformation, preserving relationships and business logic during migration.
- c) **Customisation and configuration**
 - We tailor Dynamics 365 to match your unique business processes, workflows and reporting needs.
- d) **Integration with the Microsoft ecosystem**
 - We enable seamless integration with Microsoft tools like Power Platform, Teams and Outlook for enhanced collaboration.
- e) **Compliance and security**
 - We guarantee secure data transfer, adhering to industry standards and regulatory requirements such as GDPR.
- f) **Performance optimisation**
 - Post-migration, we validate data, optimise system performance and resolve discrepancies for a smooth go-live.

g) User Training and adoption

- We provide training and change management support to ensure users adapt quickly and effectively.

h) Industry-specific solutions

- Our migration strategies are customised for your industry, leveraging domain expertise for better outcomes.

i) Ongoing support and maintenance

- We offer continuous support, troubleshooting and updates to keep your Dynamics 365 environment running optimally.

j) Scalable and future-ready approach

- Our solutions are designed to scale with your business and support future upgrades.

By choosing Mastek, you get a reliable partner with the expertise and experience to help you achieve your CRM goals.

5. Business Benefits

Migrating from Salesforce to Dynamics 365 using AI delivers significant operational and financial advantages. By leveraging AI-driven automation and proven frameworks, organisations can accelerate timelines, reduce costs and ensure data integrity. This approach minimises disruption, preserves business logic and creates a scalable foundation for future growth.

- a) **Accelerated migration timeline (30–50% faster)**
 - Speeds up delivery with AI-led automation and transformation.
- b) **Automates up to 60% of tasks, reducing manual effort**
 - Reduces workload by automating repetitive migration activities.
- c) **Lower migration costs (less labour and downtime)**
 - Cuts expenses through reduced effort and faster execution.
- d) **Reduced errors and rework (AI-generated outputs ensure high consistency)**
 - Improves accuracy with consistent, validated AI-generated components.
- e) **Preserves business logic integrity (converted components work as expected in D365)**
 - Ensures functional parity between Salesforce and Dynamics 365.
- f) **Minimal business disruption during transition**
 - Maintains continuity with phased, low-impact migration approach.
- g) **Scalable, repeatable process for future migrations**
 - Enables reuse across projects with a consistent migration framework.

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