

# Cloud migration: The next step in a long partnership between Amigos and HCLTech

Case study





# HCLTech's PowerSuccess support program key to successful online transition for Amigos

Amigos Library Services is a non-profit, member-based organization with a mission to unite libraries in service to their communities. They take pride in being one of the largest consortia of libraries in the nation, providing continuing education, discounted services from leading vendors, courier service, association management and more. With just 23 employees in the entire company, Amigos relied on HCLTech – their trusted technology partner for nearly a decade – to manage their Microsoft Dynamics 365 migration to the cloud. The smooth and timely transition was aided by their PowerSuccess engineer, who has been Amigos' dedicated support person for several years and knows their Dynamics 365 instance like the back of his own hand.



## The challenge: On-premises version of Dynamics 365 no longer sufficient for Amigos

HCLTech has been the CRM technology partner of Amigos since they were using CRM 4.0. The partnership began when the two companies met at one of HCLTech's PowerUp conferences; shortly thereafter, Amigos was upgrading to Dynamics 2013 with HCLTech's help. From the very beginning, Amigos enrolled in PowerSuccess, HCLTech's service-as-a-subscription support program that gives them a dedicated systems engineer who knows their system inside and out. They later upgraded to Dynamics 2015, led once again by their PowerSuccess engineer.

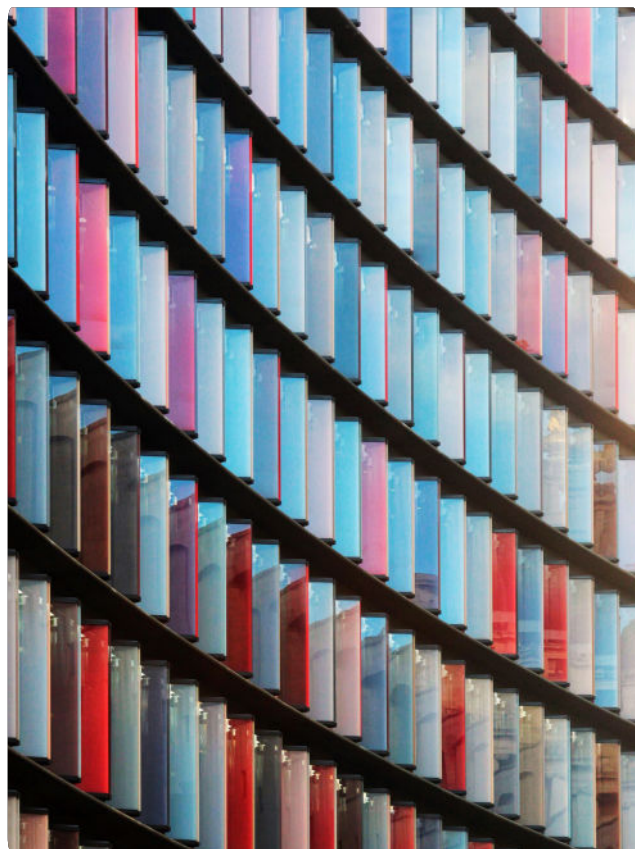
In the ensuing years, a directive from their CEO pushed Amigos to move all of their operations to the Cloud, and in 2019 they made the decision to migrate to the latest online version of Dynamics 365 with the help of HCLTech. Of course, migrating from an on-premises version to an online instance of Dynamics 365 is a far more significant initiative than the routine system upgrades to which the Amigos team had grown accustomed.

## The objective:

### Enjoy a seamless migration to cloud-based Dynamics 365

Many organizations contemplating a move from an on-premises instance of Dynamics 365 to the online version find it intimidating – even more so for smaller businesses who rely on outsourcing partners for their IT functions. The idea of moving a CRM instance – the technology infrastructure of an entire operation – from on-site servers to the “invisible” cloud can be truly frightening. But that simply is not the case for HCLTech’s PowerSuccess customers, who know their dedicated support engineers will guide them every step of the way. That’s because the key to a truly successful migration is a project manager who knows the intricacies of that CRM instance – all the customizations and business-specific nuances, each workaround and extension, every nook and cranny. And when an organization has been working with the same single point of contact for several years, as Amigos has with HCLTech, that’s exactly what they get. And that’s not all...

It had been Microsoft’s plan for a couple of years to deprecate the Dynamics 365 classic web interface and replace it with the new Unified Client Interface (UCI). In fact, by the end of 2020, all Dynamics 365 users would be forced to make the transition. And while the online migration was already a significant undertaking for Amigos, HCLTech convinced them to simultaneously make the transition to the UCI – even though it wasn’t required for another year and a half. Tackling both initiatives at once would be easier on Amigos employees in the short term and would give the company a strategic leg up in the long term.



## The solution:

### A surprisingly simple migration

“It was very easy,” says Christopher Brown, Engagement and Emerging Technologies Analyst and CRM Admin, Amigos Library Services. “Before, we had upgraded from on-prem to on-prem, and that wasn’t too big of a change. But for this online migration, there was a concern in my head, like, ‘hey, this is a completely different environment that we’re moving our data into, and working with it is a little bit different.’ But it was really easy, and we haven’t had a single problem.”

Even when there were small hiccups, HCLTech made sure they didn’t cause any problems. For example, Amigos decided at the last moment to delay the migration until the beginning of their fiscal year for reporting purposes.



Even then, it was very smooth. I always knew exactly what was happening and when. And we had enough communication on a weekly basis to know what’s happening next, what I needed to do and what HCLTech was doing. So, it was really great.”

#### Christopher Brown

Engagement and Emerging Technologies Analyst and CRM Admin, Amigos Library Services



#### An added bonus of the migration

As for the UCI change, Amigos is thrilled they agreed to it, and not just because it means they can avoid another significant project later this year. No, the real reason is that the new UCI is simply a huge upgrade from the classic version. As Brown says, “The interface is way better than what we had before. We had the old tiles still – remember those? With the UCI, it’s so much easier to customize – I was able to customize it for staff to specifically bring out what they needed to see and take away what they weren’t using. So, that’s the biggest takeaway, just that that interface is so much better.”



## The power of PowerSuccess

Brown's excellent working relationship with the HCLTech support engineer dedicated to Amigos played a significant role in the smooth, efficient and problem-free migration and UCI transition. But the partnership transcends just one-time projects.

"What's really great about having one engineer is just having that relationship," says Brown. "Them learning over time what we do and how we do it makes it a lot easier when we have something that we need to fix, or we have questions about implementing something." It's all about gaining a level of comfort with the support engineer. "I can ask anything, and he's never like, 'oh, that's a dumb question.' Instead, it's like, 'great question, here's the answer.' I appreciate that so much," adds Brown.

Importantly, HCLTech's dedicated support engineers don't get to know *only* their clients' systems – they get to know their businesses well. It's not unusual, in fact, for support engineers to proactively suggest a Dynamics 365-related process improvement to a client based on their knowledge of the business, as well as its goals and objectives. "Our PowerSuccess engineer is like an extension of me," says Brown. "Together, we help the staff in our organization



## An added bonus of PowerSuccess

An additional benefit of the PowerSuccess program is that subscribers enjoy free and unlimited access to the full suite of PowerPack add-ons. HCLTech designed and built these 25 tools to extend the capabilities of Dynamics 365, especially with respect to automating marketing functions and increasing user productivity. Amigos uses, among others, PowerEmail, PowerMailChimp, PowerMerge and PowerOneView.

"PowerEmail is something that our staff really likes," says Brown. "With doing a lot of sales and renewals via email, sometimes it's hard to tell if people actually get it or not. Of course, you run into spam filters and that sort of thing. So, our staff appreciates that feature where you can say, 'oh yeah, they did open it here, and they did get it so I know that they're still there.' It helps them when they need to follow up and things like that."

PowerMailChimp is another tool the Marketing staff at Amigos truly appreciates. "Not having to manually sync our lists all the time is a blessing. It always just keeps up to date, and if they unsubscribe, it just takes care of all of that for us. Scheduling it and all of that in the system is really nice, too." From a productivity standpoint, Brown relies on PowerMerge when cleaning up duplicate records and PowerOneView when trying to look at all related records in one place. Brown adds, "The biggest thing is being able to preview items without actually opening them."

## The impact: Operating in the cloud has far-reaching benefits

Brown says that the benefits have been immediate and extensive.

- **Performance:** "Being online is so much faster than on-prem, which has led to greater productivity."
- **Interface:** "The interface is way better than what we had before."
- **Customizability:** "It's so much easier to customize – I was able to customize it for staff to specifically bring out what they needed to see and take away what they weren't using."

Now that they are in the cloud and using the new UCI, Amigos is turning their attention to what more they can gain from the Microsoft technology stack and their partnership with HCLTech. Of course, they will continue their PowerSuccess relationship and have no plans to stop using the PowerPack add-ons – but there's more potential they want to tap into as they look to the future.

For one thing, they would like to get their accounting operation integrated with Dynamics 365. While there are powerful options within the Microsoft stack for accounting and Finance & Operations, Amigos will – for now – continue using their existing accounting software. But that doesn't mean full integration isn't doable, especially considering the capabilities of Power Platform. Power Apps and Power Automate, for example, offer low-code connections to more than 350 unique apps and services.

And speaking of Power Platform, during the online migration process, Amigos purchased several Power BI licenses, and they are looking forward to unleashing the potential this tool offers. "I'm very interested in learning more about Power BI and how to utilize that to visualize our data and build really nice-looking reports," says Brown. "Over the years, we've collected a lot of data, but we haven't spent a lot of time on using that data. I'm really excited about bringing that out more to our staff and hopefully being able to make business decisions based on that data."

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