



HSO Win Wire: DUCA Financial Services Credit Union Limited is a member-owned Canadian credit union, and its deposits are insured through the Financial services Regulatory Authority of Ontario.

Geo:	Canada
Industry:	Financial Services
Vertical:	Credit Union
Solution:	Cloud migration of Dynamics 365 sales
Sales Play:	Connected Sales & Marketing
Date Closed:	August 2022
MSFT Deal Size:	\$209000
Replaced:	On-premise SPLA

Customer Situation & Goals

- DUCA Financial Services Credit Union Limited is a member-owned institution, driven by cooperative philosophy providing Ontarians with member-centric financial services since the 1950s.
- Previously DUCA was hosted by HSO, but due to the new functionality available in the cloud and DUCA's need to embrace the general direction provided by Microsoft, DUCA made the decision to be migrated over to the Microsoft cloud.

Solution

- A new Dynamics 365 CRM instance in the DUCA Microsoft tenant was created; migrated functionality and data to this new instance. The users were mapped to the existing DUCA Cloud AD.
- The integration was kept as close to the current version as possible; All DUCA CRM reports were migrated successfully. Dashboards, business flow were also re-created on the Cloud.

Co-Sell & Field Insights

- An SMB Level account managed by Microsoft
- HSO has a long successful history with DUCA Credit Union, when it came time for DUCA upgrade and new integration, HSO was number one on their list of partners to work with.

Why We Won

- DUCA is a long-standing customer who entrusted HSO to deliver another initiative due to the trusting relationship developed over multiple years.
- HSO's experience, deep understanding of cloud migrations, and existing customizations at DUCA landed the deal.
- Alongside this, it was HSO's long collaborative approach and key reason DUCA chose HSO to continue to upgrade and implement another solution.

HSO Team



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