Microsoft CRM 3.0

How will Microsoft CRM 3.0 integrate with Microsoft Office and other applications to have a single customer record for all applications? Also: On-Demand or On-Premise solutions and pricing. How easy is CRM 3.0 to customise or configure? The impact of operating system and application updates and software packs on CRM 3.0

Small Business Facts

- 1 in 10 companies is having to avoid customer calls due to lack of information on account status.

- 24% of those surveyed admit that they have forgotten or missed an important meeting with a customer or prospect,

- one in five (20%) have actually lost a customer due to inadequate care.

- With the survey indicating an average cost of £500 for each lost order, this poses a significant threat to a small company's revenue.

- (UK YouGov - Microsoft Survey 2005)

- Have complex processes

- Have millions of unique and different business models – don't want to be treated all the same

- Don't want solutions that are targeted at Mid Market / Enterprise Customers

- Are Value driven

- Demand rapid ROI

- Want products that are easy to use and work with their business

- Focus on finding business solutions NOT IT Solutions

- Have strong relationships with trusted partners

What Is CRM?

How does it differ from simple "contact management"?

Customer Facing
- Sales, service, and marketing activities

Process-focused
- Workflow drives consistent execution

Team-oriented
- Collaborate with others inside and outside of the organization

Successful CRM is NOT just dependent on selecting the "best software", it's about getting the right strategy

Functional Differences

"First-Generation" CRM Problems

A 2004 AMR Research study found that
- 28 percent of CRM projects *failed to go live*
- 33 percent had *serious user adoption problems*

A 2005 Forrester Research study found that

» Two-thirds of respondents were *unhappy* with the ease of use of their CRM system

» More than half of respondents were *not satisfied* with their CRM system's return on investment (ROI)

CRM's Fatal Flaw
It just isn't natural

What My Sales, Marketing and Service People Use <u>Every Day</u>

The CRM Thing We Make Them Use

???
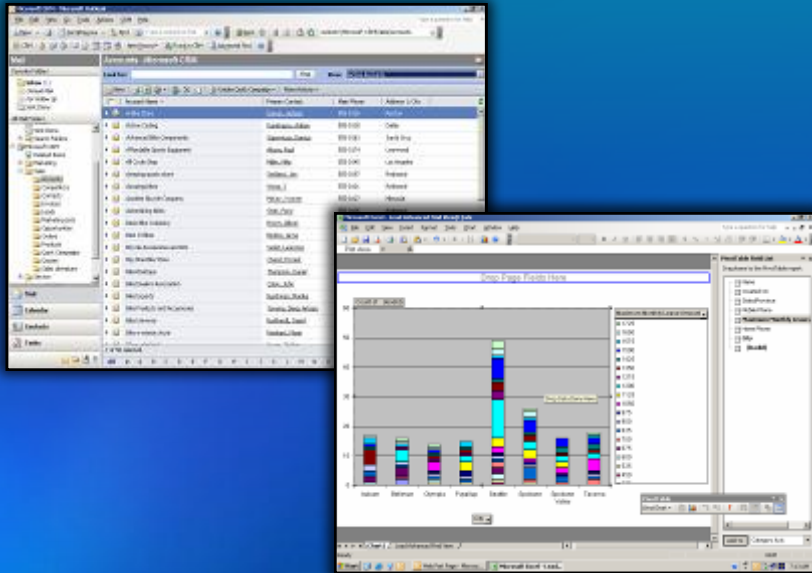
Microsoft Outlook, Excel...

"Why do I need this other thing?"

What Do Small Businesses Need From CRM Systems?

- Reliable user adoption

- Great business fit

- Fast, flexible, and affordable technology

Small business: faster growth

- We also know that the growth rate in CRM is greater in small business then Mid-Market or Enterprise

"…2006, Small & MSBs that have yet to invest in CRM software will be at a competitive disadvantage, compared with those that have already implemented CRM. Buyers will be driven not only by the competition, but also by average payback periods of 13 months"
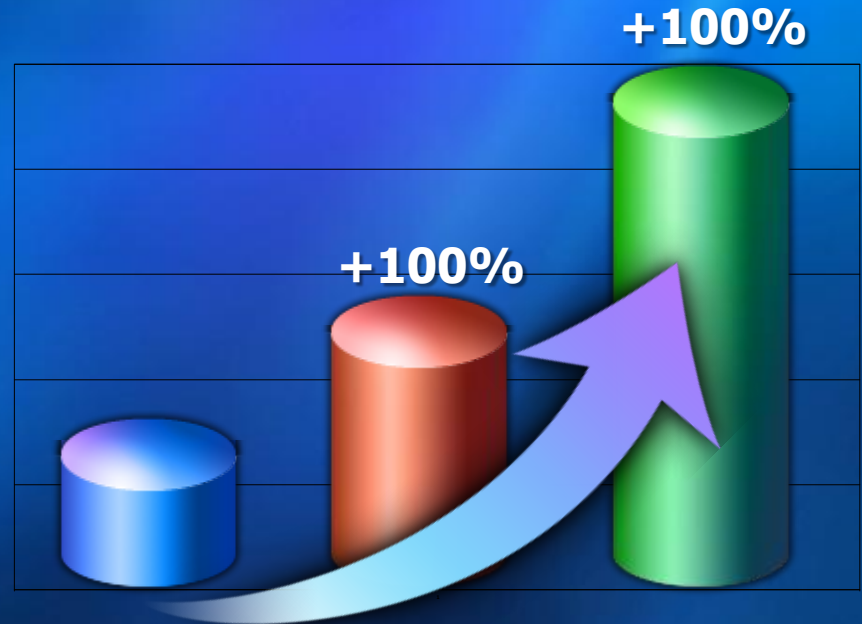
Gartner - CRM Predicts: SMBs' Spending on CRM Will Grow (14 December 2005)

Microsoft CRM | Impressive Growth

- Over **6,000 customers**

- Over **150,000 users**

- **Full suite** of marketing, sales, and service

- **Native Office** experience

- **Web services** architecture

- Fast, flexible, and **affordable**

- Available in **22 languages**

**Microsoft CRM
Customer Growth Worldwide**

+100%

+100%

Why Microsoft Dynamics?

Fits with your systems

Fuels your business productivity

New Choices For CRM Systems Today

Yesterday's Choice

Complicated CRM Systems That You Own

Generic Hosted CRM That You Rent

Heavy, complex, and expensive

Basic but "easy to get"

Today's Choice
Microsoft CRM

Powerful configuration & customization
Easy to deploy, use, and manage -- on-premise or hosted

Microsoft Dynamics CRM

- Works the way you do
  - It's the **easiest and most natural way** to get CRM

- Works the way your business does
  - It can be tailored to **exactly fit** each business

- Works the way technology should
  - It's **fast, flexible, and affordable**

Microsoft Dynamics CRM 3.0

A complete CRM solution

- Sales
  - Create demand and generate new business

- Marketing
  - Better decision-making and a clearer view of customers

- Customer Service
  - Provide more value to customers

Microsoft CRM Modules

Sales Management

Marketing Automation

Customer Service
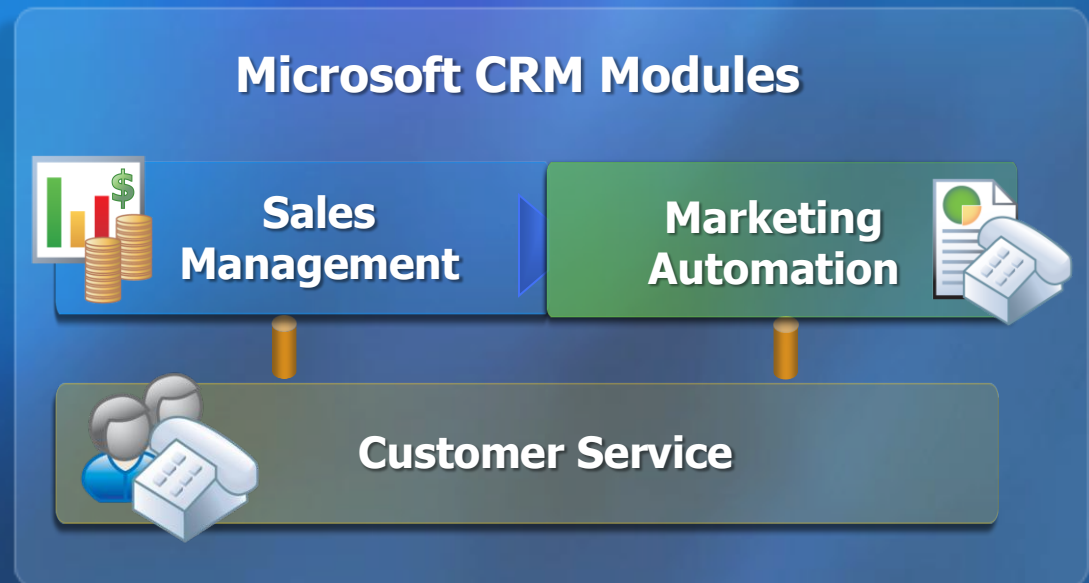
Microsoft Dynamics CRM 3.0

Key Benefits

Works the Way You Do

Native Outlook Experience
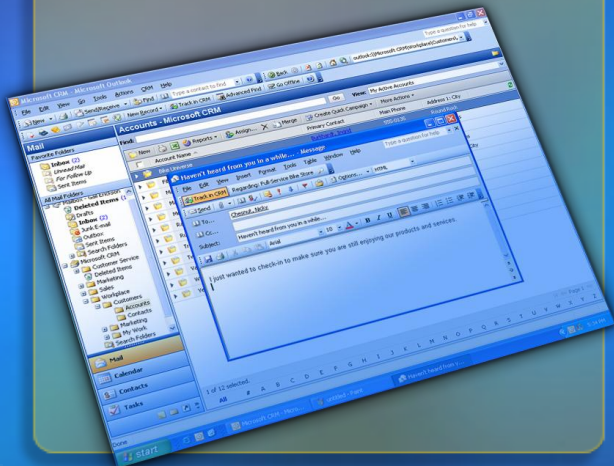
Works the Way Your Business Does

Easy Adaptability

Works the Way Technology Should

Build, Deploy & Extend

Microsoft Dynamics CRM 3.0

Empowering end-users through familiar tools & technology

Works the Way You Do

"The 3.0 version of Microsoft Dynamics CRM *tightly marries* Office and CRM functionality... it's *virtually impossible* to separate one from the other."
- Bruce Richardson, AMR Research
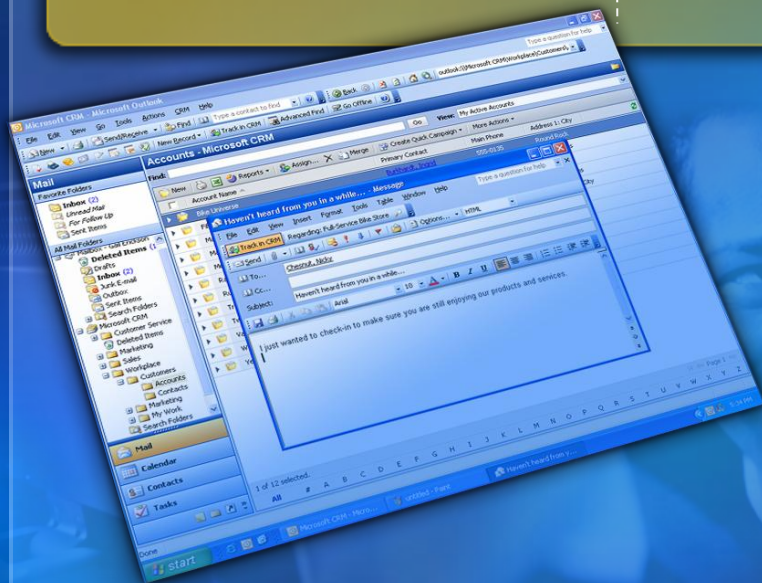
☑ **Work within everyday applications**

☑ **Reduce user learning curve**

☑ **Increase adoption and usage**

Microsoft® **Office** **+** Microsoft® **CRM**

Microsoft Dynamics CRM 3.0

Adapt to meet the needs of your business

Works the Way Your Business Does

"Microsoft CRM 3.0 gives us the flexibility to create exactly the business processes and data fields we need in our system on a real-time basis."

- Sandy Clifford, IT Director, United Way
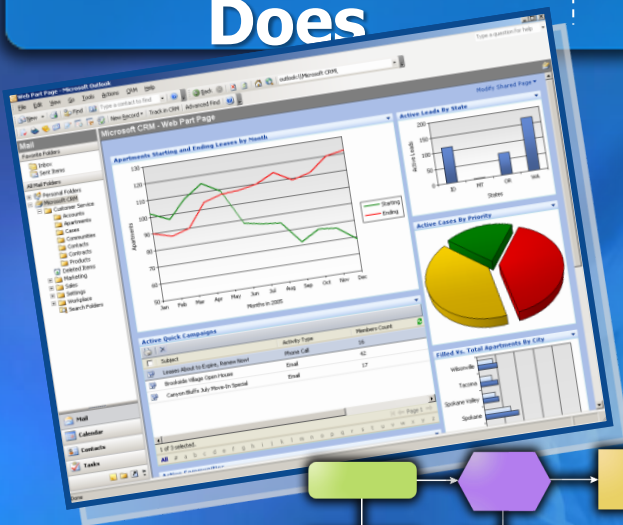
☑ **Adapts to each unique business**

☑ **Easy configuration and customization**

☑ **Rapid implementation**
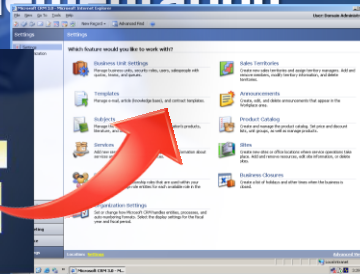
Microsoft Dynamics CRM 3.0

Easy to deploy, manage and maintain

Works the Way Technology Should

"Microsoft CRM runs on Windows Server 2003 and SQL Server· platforms and applications we're already familiar with and use in our business today."

- Greg Hughes, Director, Security & IT, Corillian Corporation

- Roles-Based User Experience
- Business Workflow and Visibility
- Integration and Extensibility

☑ **Familiar business platform**

☑ **Safe and secure**

☑ **Powerful extensibility**

partner solutions

Microsoft Office

Microsoft Windows

Microsoft Dynamics

Microsoft Windows Server System

Microsoft Visual Studio
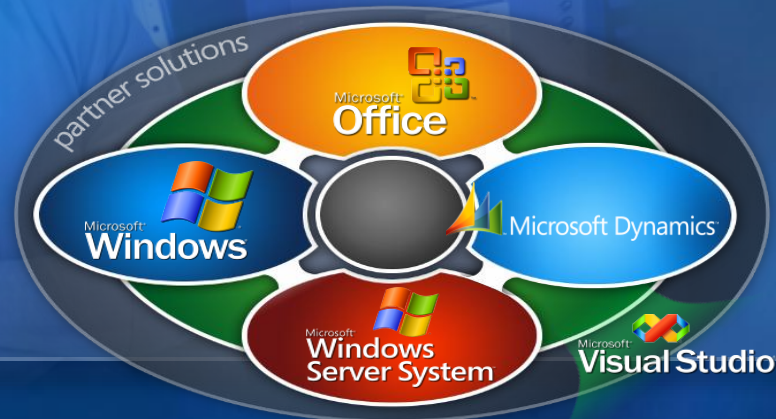
Strategy: The Power of Choice

DEPLOYMENT OPTIONS	LICENSING OPTIONS	
	Perpetual	**Subscribe**
On-premise	On-premise Customer Server	On-premise Managed Server
Hosted	**Hosted Perpetual**	**Hosted Subscription**

User Experience

Outlook

Internet Explorer

Flexible Deployment Scenarios

1. Hosted CRM w/ On-premise Exchange services
2. Hosted CRM w/ Hosted Exchange
3. Complete Hosting Solution
   – Microsoft CRM
   – Exchange Server
   – Windows SharePoint Services
   – Live Communications Server

Small Business Edition

- Designed for Small Business Server (SBS) Premium
  - Required to install on SBS
  - Follows SBS limits of 1 server and up to 75 users maximum
  - Software Assurance at 25%/year of license is included with CRM in customer facing Volume Licensing programs

- All CRM features plus unique small business only features
  - Wizard driven install <10 clicks
  - Configuration "Consultant in a Box"
  - Business Contact Manager Migration
  - SBS Management Tools integration
  - SBS Fax Service integration

S
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Small Business Edition (SBE) Server £400*

SBE User CAL £350 per user*

* Prices shown are estimated retail pricing ranges in UK via Open

SBE Product Feature: Customization Wizard

- Our Consultant in a Box
- Wizard for applying some light weight customizations to CRM
- Launches post setup
- Has a VAR mode for saving customizations for later application
- Customizations include:
  - Name formats
  - Creation of territories
  - Allowing rename of Account, Contact and Case entities
  - Creation of several default relationship roles
  - More…
- Tool does not:
  - Create products
  - Create users
  - Create multiple BUs

Microsoft CRM 3.0 SBE Configuration Wizard

Progress

- Introduction
- Organization
- Subjects
- Sales
- Territories
- Competitors
- Service
- Sites
- Queues
- Configure
- Summary
- Server
- Import

Introduction

Welcome to the Microsoft CRM SBE Configuration Wizard

This wizard will collect business information about your sales and service operations, and then partially configure Microsoft® CRM 3.0 Small Business Edition (SBE) for you.

To complete this wizard, you need to have an understanding of the structure of your sales and service operations. If there is any information you don't know, you can change configuration information in Microsoft CRM after running this wizard.

After completing the wizard, you can save your entries in an XML file to use later, or use the wizard to directly configure your Microsoft CRM server.

To continue, click Next.

Next >   Cancel

Microsoft CRM 3.0 SBE Configuration Wizard

Define Organization Details

Progress

- Introduction
- Organization
- Subjects
- Sales
- Territories
- Competitors
- Service
- Sites
- Queues
- Configure
- Summary
- Server
- Import

Select your industry. Industry information will be used to define the subject hierarchy that is used within Microsoft CRM to categorize many types of information, such as cases and knowledge base articles.

On the next page of the wizard, you'll have an opportunity to customize the industry-specific subject hierarchy to match your organization.

Primary Industry Served:

Financial Services

Does your company use more than one location for providing service?

⦿ Yes   ○ No

Why is this important?

Information exists in many forms in an organization, including product catalogs, sales literature, and frequently asked questions (FAQs). Organizations often struggle to locate the right information in response to customer inquiries and complaints, and risk losing a relationship due to a poor customer experience.

< Back   Next >   Cancel

Microsoft CRM 3.0 SBE Configuration Wizard

Edit Subjects

Edit the provided subject hierarchy to match your organization. This subject hierarchy will be set up in Microsoft CRM.

- Subjects
  - Banking Services
  - Brokerage Services
  - Credit Services
  - Financial Planning
  - Foreign Exchange
  - Insurance
  - Investment Services
  - Securities
  - Speculation Services
  - Trust Services
  - Underwriting Services

[Add] [Remove] [Edit]

Why is this important?

By organizing your subject hierarchy before your staff enters data, you can keep your cases, knowledge base articles, and sales literature organized. If you make this hierarchy match how your business is structured, it will be easier for your staff to start using Microsoft CRM, as well as to keep the data organized.

[< Back] [Next >] [Cancel]

Microsoft CRM 3.0 SBE Configuration Wizard

Define Sales Operations

Specify information about your sales operation.

How would you like to display full names in Microsoft CRM?

| Last Name, First Name | ▼ |

What do you call the companies that you do business with?

Singular | Company | ▼ |

Plural | Accounts | ▼ |

What do you call the individuals that you work with?

Singular | Client | ▼ |

Plural | Contacts | ▼ |

Do you use sales territories to manage your sales force?

⦿ Yes   ○ No

Why is this important?

Using terminology and formats in Microsoft CRM that match the way you do business will make it easier for your staff to use Microsoft CRM. By default, in Microsoft CRM the companies that you do business with are labeled Accounts and individuals are labeled Contacts.

[< Back] [Next >] [Cancel]

Microsoft CRM 3.0 SBE Configuration Wizard

Define Territories

Enter territories based on geographical regions, products, or other criteria.

Progress

- Introduction
- Organization
- Subjects
- Sales
- **Territories**
- Competitors
- Service
- Sites
- Queues
- Configure
- Summary
- Server
- Import

Name
North America
Europe
South America
(New Territory)

[Remove]

Why is this important?

Categorizing your sales force into territories can help increase productivity and make it easier to manage your sales force. You can create territories based on products or geographical regions.

[< Back] [Next >] [Cancel]

Microsoft CRM 3.0 SBE Configuration Wizard

Define Top Competitors

Enter your company's top competitors. In Microsoft CRM, opportunities can be associated with specific competitors.

Who are your top 5 competitors?

Competitor 1 | Acme Corp.

Competitor 2 | ABC Company

Competitor 3 | Looney Tunes

Competitor 4 |

Competitor 5 |

Why is this important?

Monitoring the competition is important so that you can provide coaching for your sales representatives on how to win sales in contested opportunities. The Microsoft CRM Competitor Win Loss Report can be used to monitor your success against each competitor.

< Back   Next >   Cancel

Define Service Options

Specify information about your service operation.

Do you provide customer support using e-mail?

(•) Yes   ( ) No

If Yes, what is the e-mail address for e-mail support?

support@yourcompany.com

What do you call the incidents that you track for customers?

Singular | Case |

Plural | Cases |

Do you use teams of service representatives, with each team having a specialty?

(•) Yes   ( ) No

Progress

Introduction
Organization
Subjects
Sales
Territories
Competitors
Service
Sites
Queues
Configure
Summary
Server
Import

Why is this important?

When customers experience trouble with your products or services, ensuring a positive customer service experience can be the difference between keeping a customer and causing them to take their business elsewhere. Microsoft CRM provides your service representatives with the information they need to resolve customer complaints quickly and with the right information.

< Back   Next >   Cancel

Microsoft CRM 3.0 SBE Configuration Wizard

Define Your Service Queues

Each of your service teams can be grouped as a queue within Microsoft CRM. You can assign service representatives to each queue, and incoming requests and planned service activities can be assigned to specific queues.

Progress

- Introduction
- Organization
- Subjects
- Sales
- Territories
- Competitors
- Service
- Sites
- Queues
- Configure
- Summary
- Server
- Import

Name
Customer Care
Corporate Care
Management

Remove

Why is this important?

Any customer service request or complaint that is ignored can cause a customer to take their business elsewhere. Queues help you organize and balance the load on service representatives, and help you avoid assigning activities and service requests to an employee who is out of the office. When you publish knowledge base articles, you can use queues instead of individuals for the approval cycle.

< Back   Next >   Cancel

SBE Product Feature:
Fax Server Integration

- Integrates Windows Fax server with CRM

- Creates a Fax Activity record in CRM upon receipt of a fax on the server

- Routes faxes to users automatically

- Non routable faxes are placed in a Fax Queue

- Outbound faxes are also supported – including the sending of attached Office documents

- Management integrated with SBS Fax Server management

File　New　Go To　Tools　Help

User: **Mike Lu**

New Record ▾　　Advanced Find

Workplace

Activities

My Work
- Activities
- Calendar
- Queues
- Articles
- Reports
- Announcements

Customers
- Accounts
- Contacts

Look for: |　　　| Find　　Date: | All ▾ |　　Type: | All ▾ |　　View: | All Activities ▾ |

New | | | |✕

		Subject	Regarding	Activity Type	Activity Status	Owner ▲	Priority	Start Date
☐								
▶	📠	1C5C45B62A92F.tif		Fax	Open	Andy Mendoza	Normal	
▶	📠	1C5C48554ADFB.tif		Fax	Open	Andy Mendoza	Normal	
▶	📠	1C5C4857B818F.tif		Fax	Open	Andy Mendoza	Normal	
▶	📠	1C5C53B5C74FB.tif		Fax	Open	Lisa Dittmar	Normal	
▶	📠	MSFaxConsoleTempPreview-#0...		Fax	Open	Lisa Dittmar	Normal	
▶	📠	1C5C4859A318C.tif		Fax	Open	Lisa Dittmar	Normal	
▶	📠	1C5C53C21413B.tif		Fax	Open	Mike Lu	Normal	
▶	📠	1C5C45DB2DC45.tif		Fax	Open	Mike Lu	Normal	
▶	📠	S-1-5-20$201c5c45e3051bc.tif		Fax	Open	Mike Lu	Normal	

Personalize Workplace ...

Workplace

Sales

Marketing

Service

Settings

1 of 9 selected.

Page 1

All　#　A　B　C　D　E　F　G　H　I　J　K　L　M　N　O　P　Q　R　S　T　U　V　W　X　Y　Z

Done

Local intranet

SBE Product Feature: SBS Management Tools

- Server Management console is highly used by SBS administrators

- CRM admin tools are integrated into the SBS Server Management console

- CRM tools accessible from here include:
  - Workflow manager
  - Link to CRM configuration (in Web app)
  - Exchange rules deployment

File   Action   View   Favorites   Window   Help

Manage Microsoft CRM

- Home Page
- Standard Management
  - To Do List
  - Information Center
  - Internal Web Site
  - Fax (Local)
  - Monitoring and Reporting
  - Internet and E-mail
  - Shares (Local)
  - Backup
  - Licensing
  - Users
  - Client Computers
  - Server Computers
  - Printers
  - Distribution Groups
  - Security Groups
  - User Templates
- Advanced Management
  - Active Directory Users and Computers
  - Group Policy Management
  - Computer Management (Local)
  - First Organization (Exchange)
  - POP3 Connector Manager
  - Terminal Services Configuration
  - Internet Information Services
  - Migrate Server Settings
  - Microsoft CRM
    - Users

Home   Add Users   Rule Deployment

Customization   Settings   Workflow Monitor

Workflow Manager   Workflow Export   Workflow Import

Environment Diagnostics   Deployment Manager   More Information

Start   Server Management   EN   9:52 AM

File   Action   View   Window   Help

Health Monitor
All Monitored Computers
  CRMFAXTEST2
    Actions
    Small Business Server Alerts
      Microsoft CRM
        Bulk E-mail Service
        Exchange Router Service
        Fax Router Service
        Web Site
        Workflow Service

Details

Details of Microsoft CRM

Name	Status	Type
Bulk E-mail Service	Ok	Service Monitor
Exchange Router Service	Ok	Service Monitor
Fax Router Service	Ok	Service Monitor
Web Site	Ok	HTTP Monitor
Workflow Service	Ok	Service Monitor

5 Items

Alerts for Microsoft CRM and all its children

Severity	Date/Time	Data Collector	Computer	Alert
Ok	9/30/2005 9:59:07 AM	Workflow Service	CRMFAXT...	Workflow Service monitor is Ok.
Ok	9/30/2005 9:59:02 AM	Web Site	CRMFAXT...	http://CRMFAXTEST2:5555/MSC...
Ok	9/30/2005 9:58:56 AM	Bulk E-mail Service	CRMFAXT...	Bulk E-mail Service monitor is Ok.
Ok	9/30/2005 9:58:55 AM	Fax Router Service	CRMFAXT...	Fax Router Service monitor is Ok.
Ok	9/30/2005 9:58:49 AM	Exchange Router Service	CRMFAXT...	Exchange Router Service monitor...

5 Items

Start   Server Management   Health_Monitor - [He...   untitled - Paint   Win2003 SBS Server CR...   EN   9:59 AM

Microsoft CRM | 600+ UK Customers including.....

Small Businesses

Chamber online

MWP Recruitment

Ministry of Sound

JustGoodBusiness
DEVELOPING COMPANIES

Essex Medical

West Yorkshire
Enterprise Agency Limited

The University of Reading

Midsized Companies

Enterprise

HOUSING CORPORATION

TOSHIBA

GROSVENOR
PROPERTY & PARTNERSHIP

computeach

LONDON DEVELOPMENT AGENCY

Kent County Council

COBRA
PREMIUM BEER

Large Enterprises

logicaCMG

RR

Microsoft

PRICEWATERHOUSECOOPERS

Nestle

ENDSLEIGH

Legal & General

Sunlight

centrica

BBC

RAC

Summary

- MS CRM works the way people like to work

- It can be hosted or on-premise delivered

- Work with a CRM partner for best exprience

Break and Refreshment