

# Overview of Microsoft Dynamics CRM

Date : 17<sup>th</sup> March 2014



# Asif Fattah

Director Business Solution  
MozzoTech  
MCT, MCITP

## Presenter Introduction

# AGENDA

What is CRM



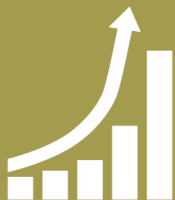
360° Customer View



Dynamics CRM 2013



Features



Extension



Implementation



# DEMO





# What is a CRM?

Customer Relationship Management is a model for managing a company's interactions with current and future customers. It involves using technology to organize, automate, and synchronize **Sales, Marketing, Customer service, and Technical support.**

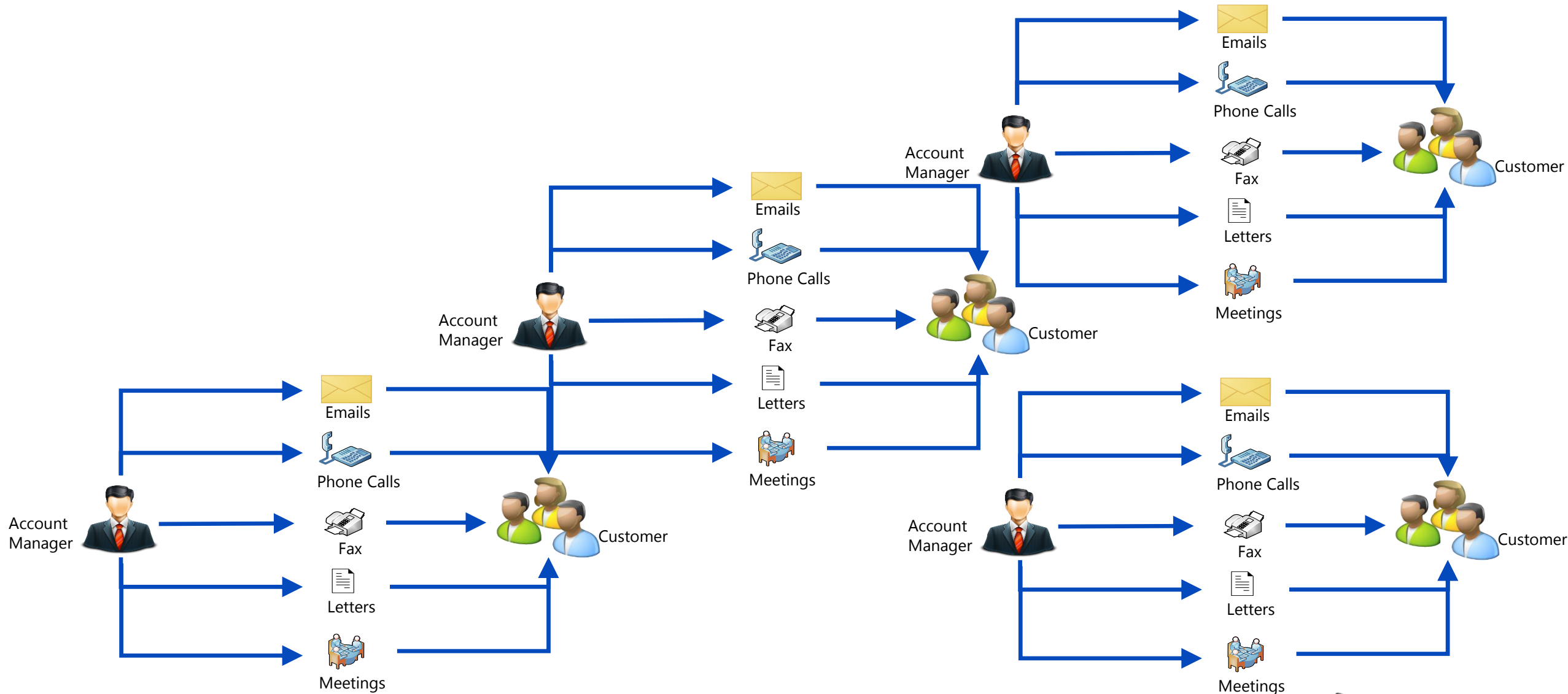






Why Company need CRM ?

# Business Problem



# Business Problem

## Small Size Company Example

10 Account Manager for 500 Customers

Each receives 20 Emails, 10 Phone Calls and 2 Appointments

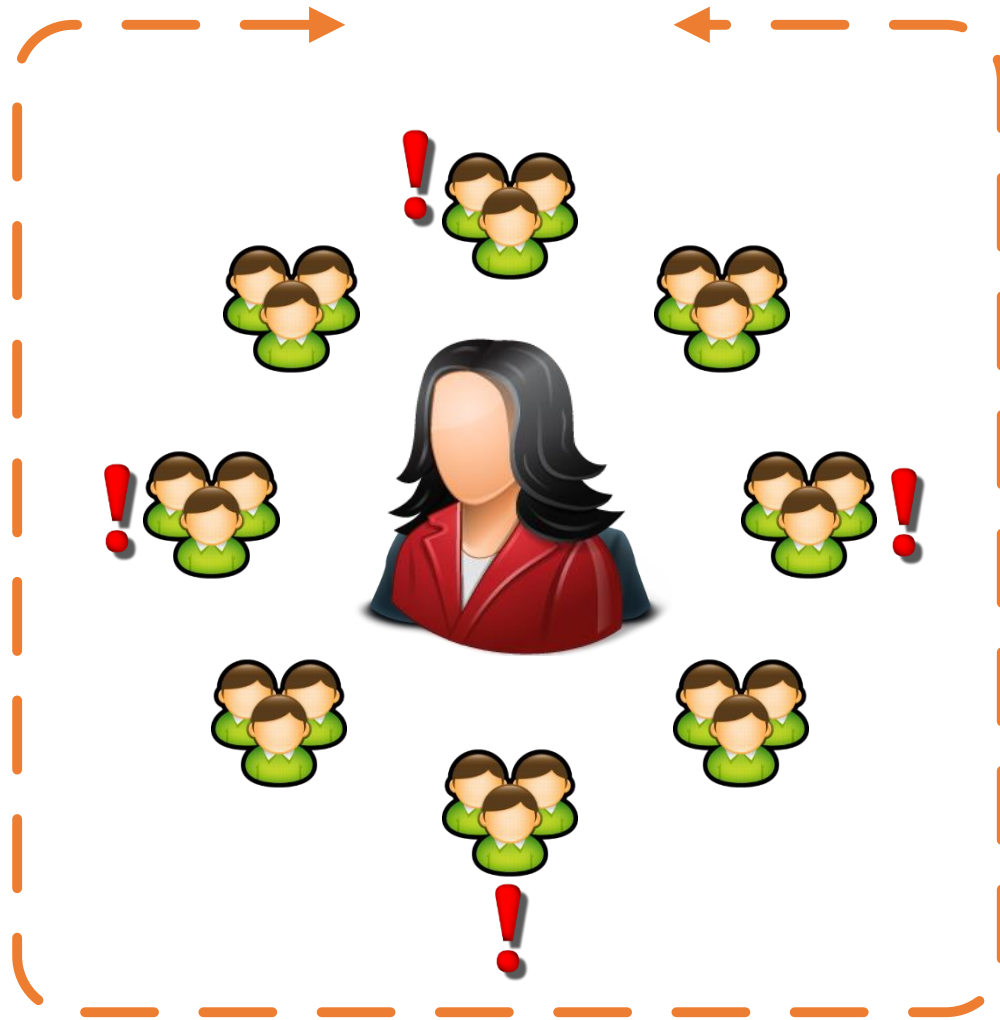
320 Activities in a day for every Account Manager

7040 Activities in a month for every Account Manager

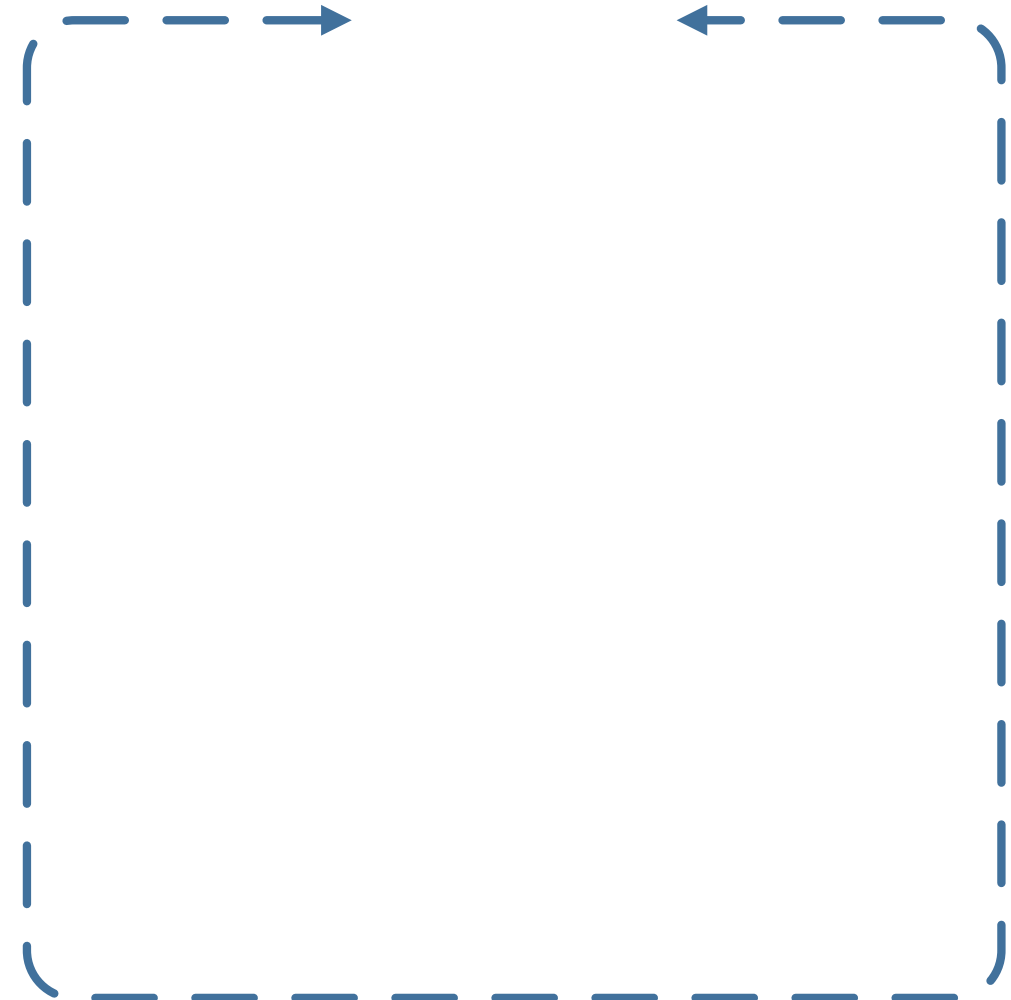
**84,480** Activities in a Year for every Account Manager



# Business Problem



Company A



Company B



# One Window Solution

Solution to the all these type of business problems is an integrated tool that can record a 360° customer view



# Microsoft Dynamics CRM

# Introduction to Dynamics CRM

- Microsoft Dynamics CRM 2011 can effectively managing the **customer lifecycle** from marketing to sales to service is critical to every company's **profitability and growth**

## CRM Industry

- Distribution
- Financial Service
- Asset Management
- Manufacturing
- Professional Services
- Real State
- Academic Sector
- Healthcare
- Public Sector
- Retail Sector
- Support and Services

## Sales



## Marketing



## Services





# Dynamics CRM Modules



Sales

Lead  
Opportunity (Sales Funnel)  
Competitor  
Quotation  
Order  
Invoice  
Goals and Targets  
Reports



Service

Case Management  
Resource Management  
Resource Scheduler  
Queues  
Knowledge Base  
Goal and Targets  
Reports



Marketing

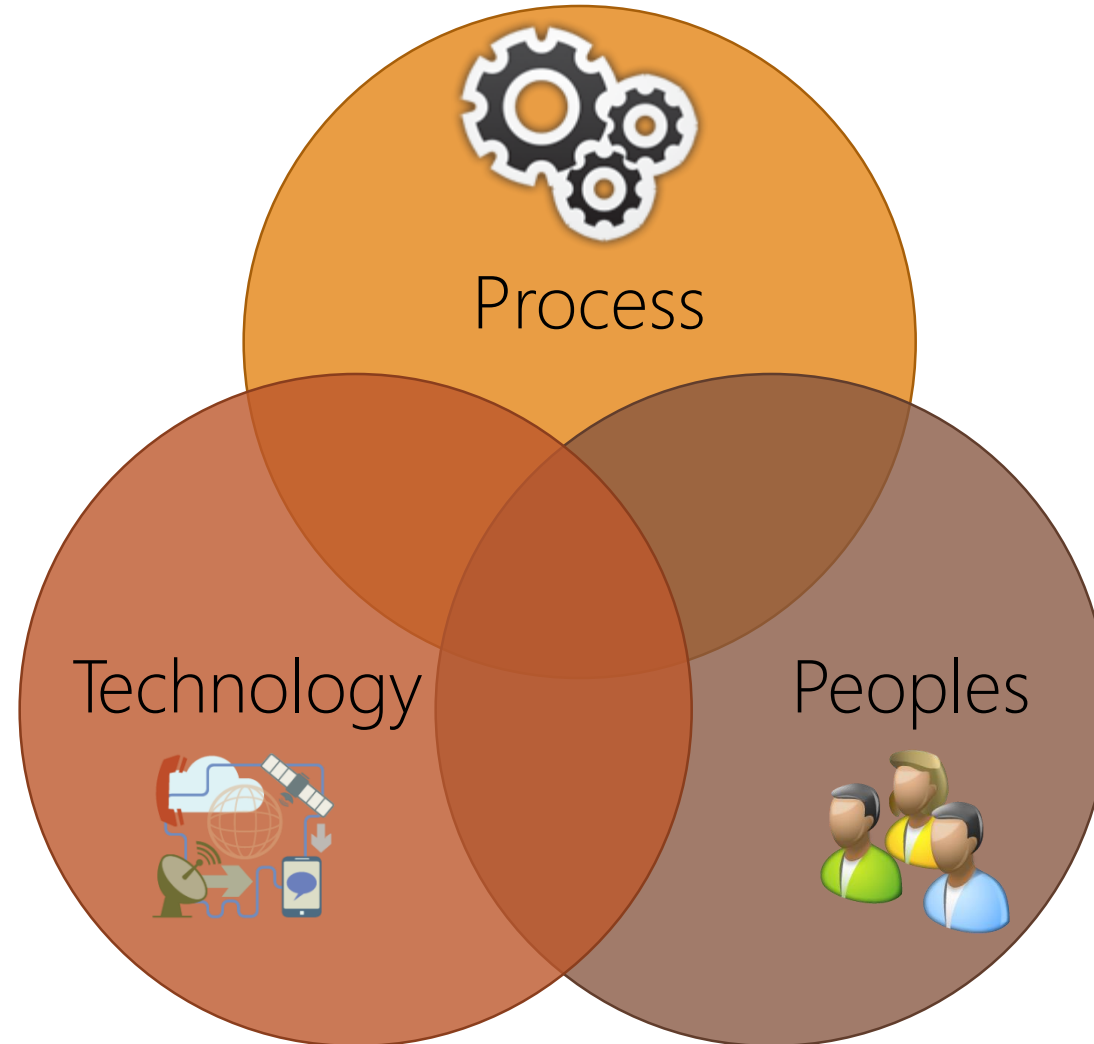
Marketing Campaign  
Quick Campaign  
Marketing Activities  
Budgeting  
Goal and Targets  
Reports



Extended  
CRM

Out of Box Customization Tool  
Workflows  
Web Services  
SDK for Programmers

# Implementation Challenge

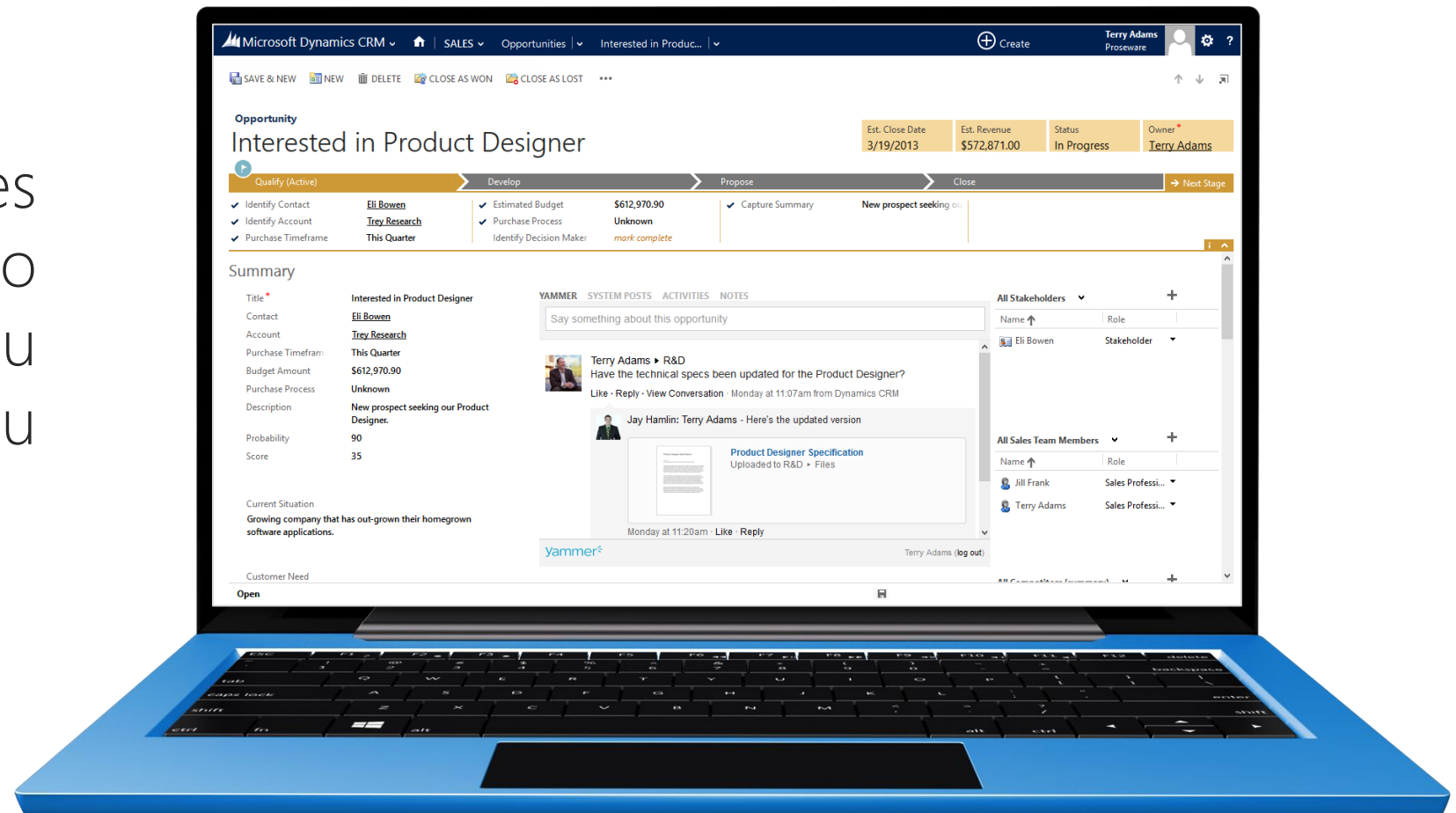




# Process



Business processes make it easy to identify where you are and what you need to do next



# People

## COMPANY



**Charlie** • President

## FINANCE



**Sara** • CFO

## OPERATIONS



**Vince**  
Operations Manager

## SALES & MARKETING



**Julia**  
Marketing Executive

## HUMAN RESOURCES



**Claire** • HR Manager

## IT & PARTNERS



**Tim** • IT Manager



**LOGISTICS**

**Phyllis**  
Account Manager

**Ken**  
Controller

**April**  
Accounts Payable Coordinator

**Arnie**  
Accounts Receivable Administrator

**Annie**  
Bookkeeper

**Connie**  
Credit and Collections Manager

**Mia**  
Payroll Administrator

**Cassie**  
Accountant

**LOGISTICS**

**Ricardo**  
Quality Controller

**Karl**  
Materials Manager

**Ellen**  
Warehouse Manager

**John**  
Warehouse Manager

**Sammy**  
Shipping and Receiving

**Inga**  
Purchasing Manager

**Alicia**  
Purchasing Agent

**Ted**  
Transportation Coordinator

**PRODUCTION**

**Tony**  
Product Manager

**Emil**  
Product Designer

**Oscar**  
Process Engineer

**Eduardo**  
Production Planner

**Lars**  
Shop Supervisor

**Shannon**  
Machine Operator

**SALES**

**Kevin**  
Sales Manager

**Nancy**  
Super Sales Rep

**David**  
Dedicated Sales Rep

**Michael**  
Account Manager

**Susan**  
Order Process

**MARKETING**

**Benjamin**  
Marketing Manager

**Nicole**  
Marketing Staffer

**HUMAN RESOURCES**

**Brooke**  
HR Assistant

**Jodi**  
Compensation and Benefits Manager

**Grace**  
Training/Development Manager

**Jacob**  
Staff Recruitment Manager

**Erik**  
Training Specialist

**Justin**  
Compensation and Benefits Specialist

**Kendra**  
Staffing Specialist

**Luke**  
HR Generalist

**IT**

**Chris**  
IT Engineer

**Sean**  
Technical End User Power User

**PARTNERS**

**Simon**  
Systems Implementer Consultant

**Mort**  
IT Systems Developer

**Isaac**  
Business Application Developer

**PROFESSIONAL SERVICES**

**June**  
Product Division Manager

**CUSTOMER SERVICE**

**Marie**  
Customer Service Manager

**Daniel**  
Dispatcher

**Terrence**  
Outbound Technician

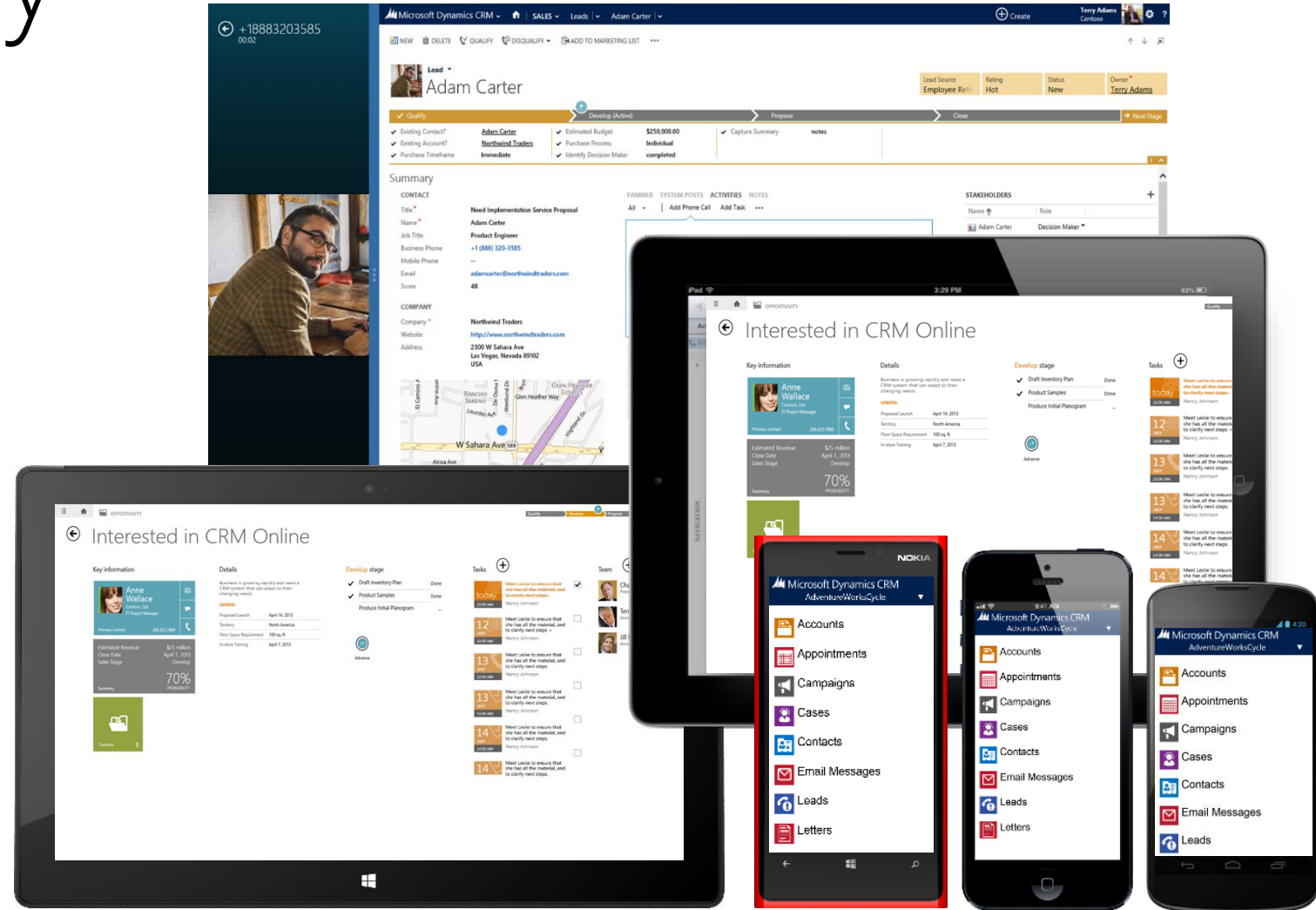
**Lisa**



# Technology

CRM on devices that you want to use, at no additional license fee, so you stay connected no matter where you are

No Technology Barrier

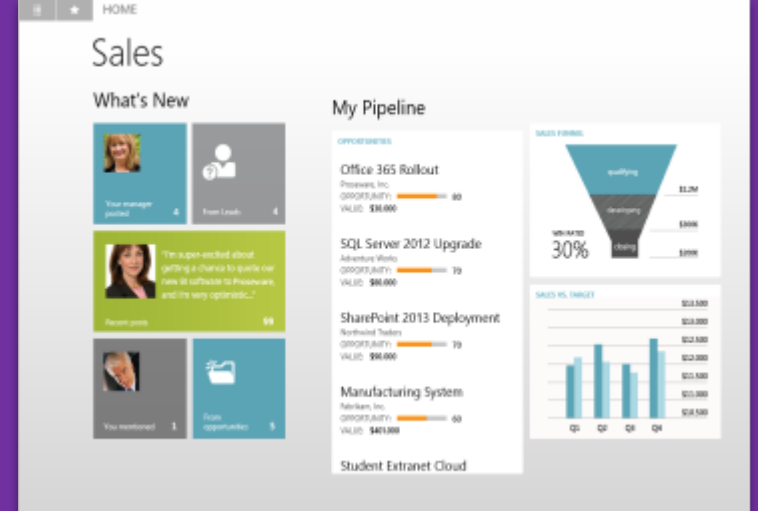
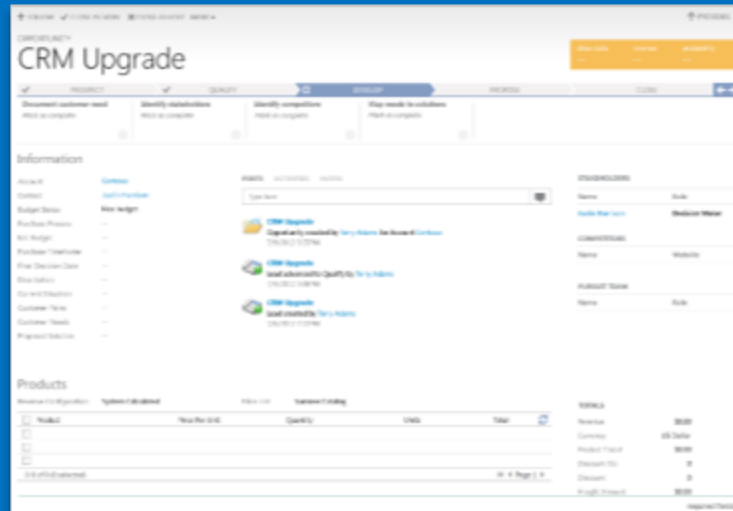
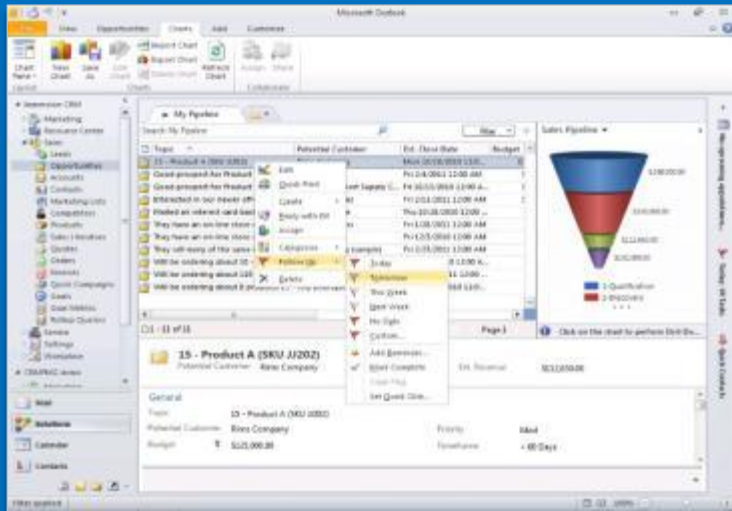


# Delighting Users Across the CRM experience

Outlook

Browser

Mobile



PC

Phone & Tablet

“Work with customer data and business processes on a device and in the location of your choice”



# 360° Customer View



# Microsoft Dynamics CRM

Statistics



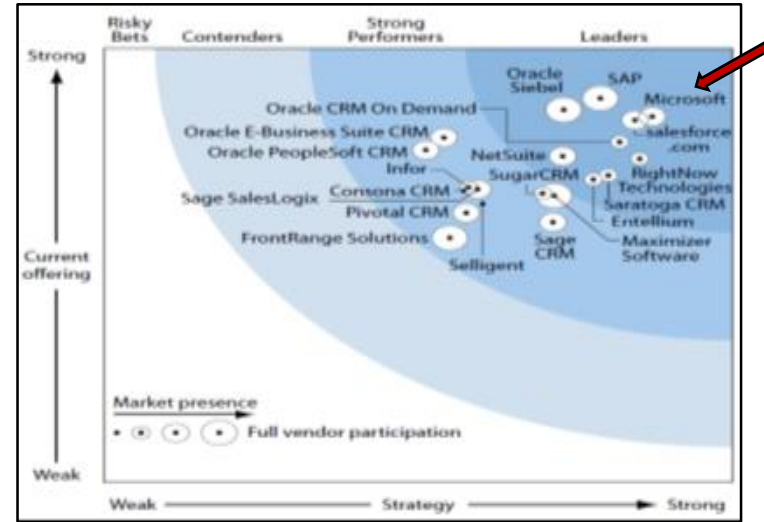
# Dynamics CRM 2011 Statistic

Users  
**2,250,000**

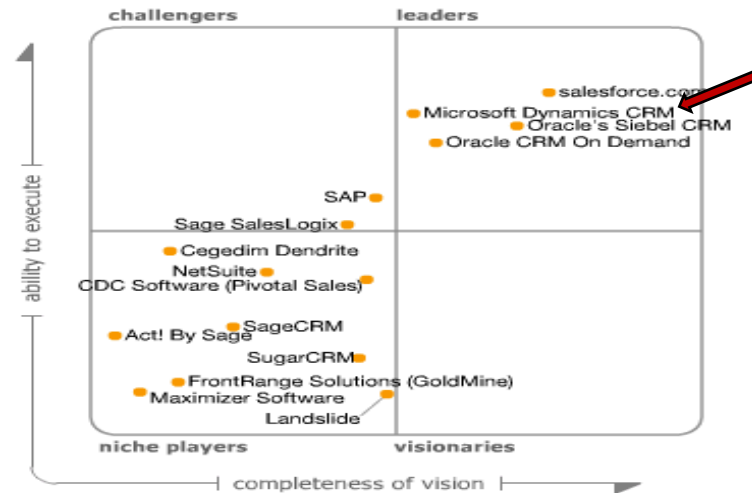
Customers  
**33,000**

Double-digit growth quarters  
**31**

Cloud choice  
**60%**



Forrester CRM Wave Report



Gartner SFA Magic Quadrant

As of July 2010

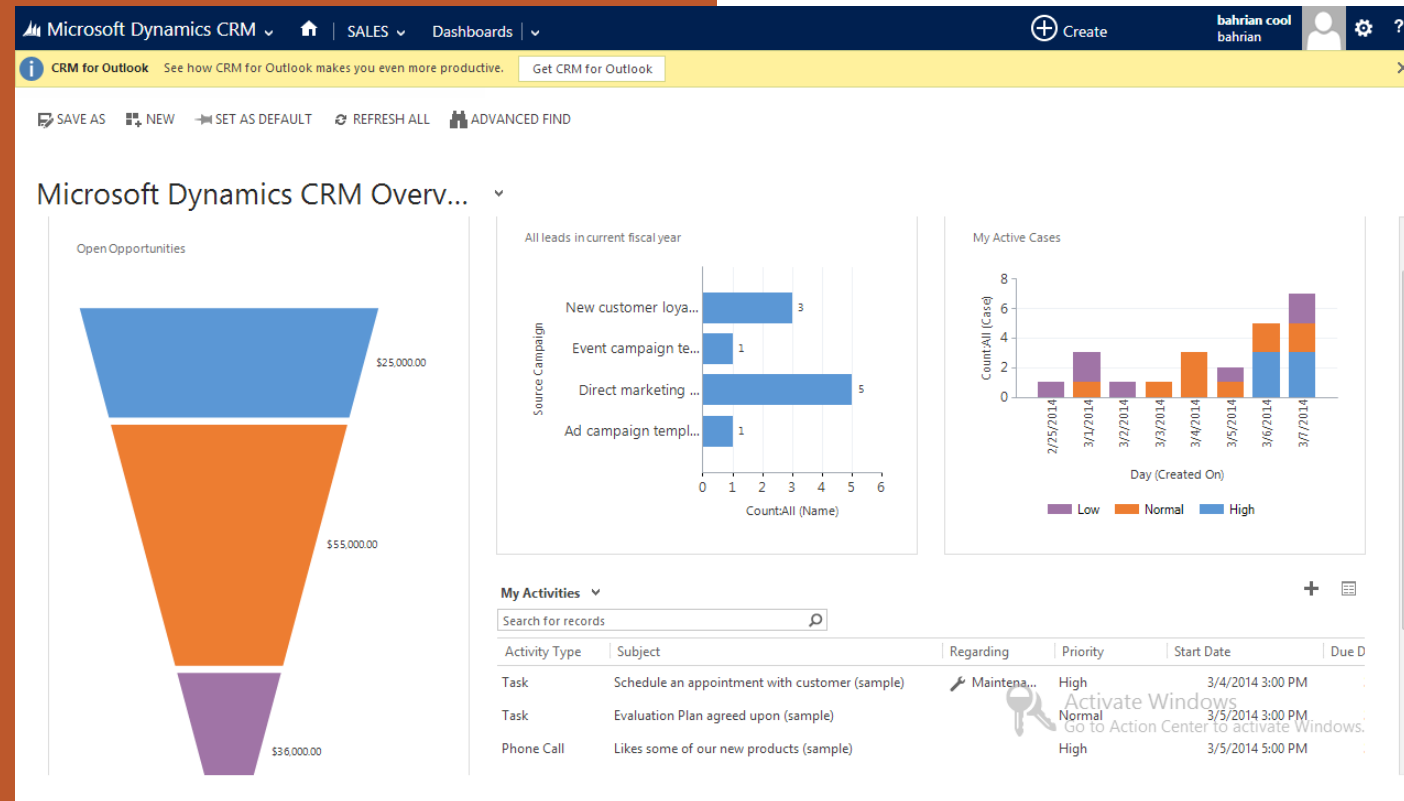


# Features



# Microsoft Dynamics CRM

# Dashboard

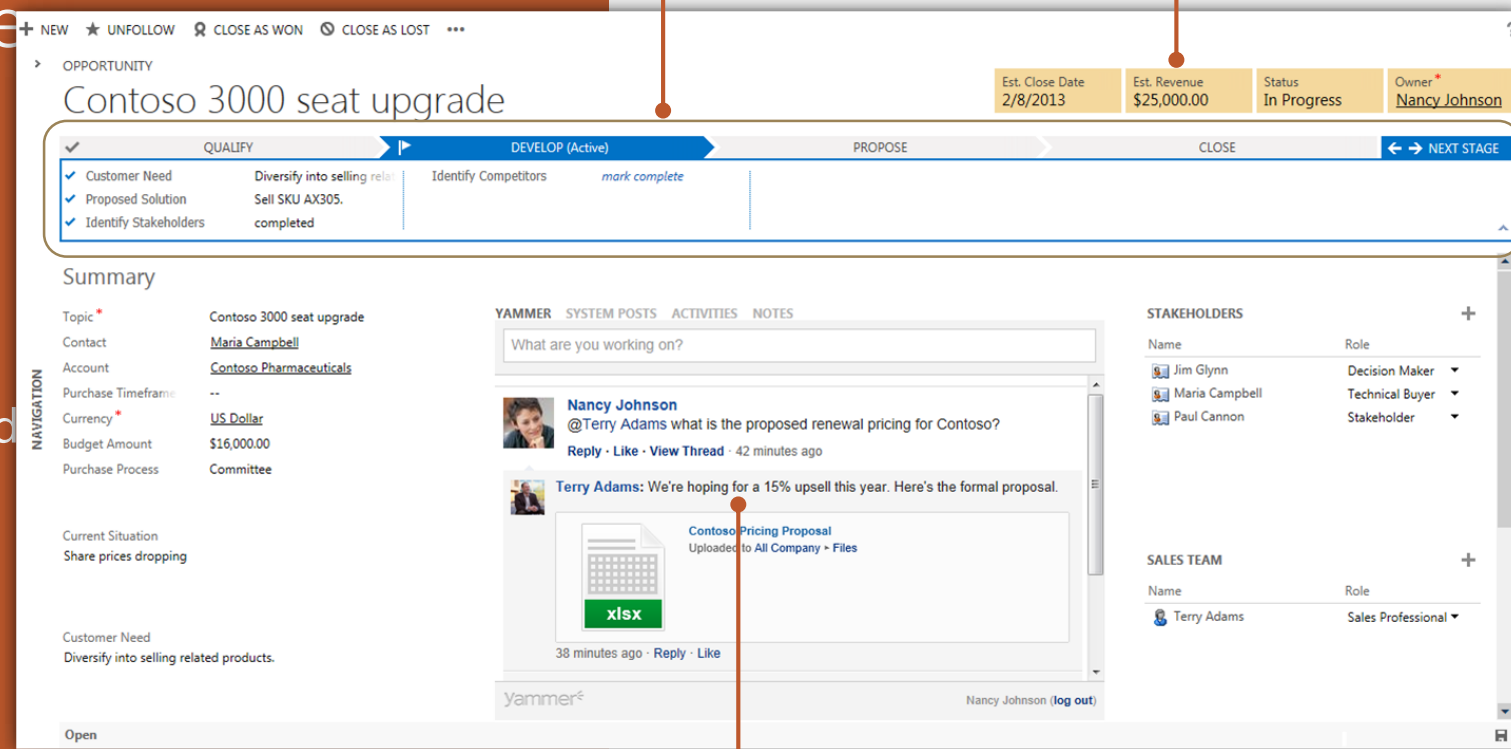


Flow User  
Experience

Process Driven  
People Centric  
Results Oriented

Pre-defined process  
best practices

Easy access to  
important data



The screenshot shows a CRM interface for an opportunity titled "Contoso 3000 seat upgrade". At the top, there are navigation options: "+ NEW", "★ UNFOLLOW", "🔒 CLOSE AS WON", "🔒 CLOSE AS LOST", and "⋮". Below this, the opportunity name is displayed, along with key metrics: "Est. Close Date: 2/8/2013", "Est. Revenue: \$25,000.00", "Status: In Progress", and "Owner: Nancy Johnson".

The main section features a process flow with stages: QUALIFY, DEVELOP (Active), PROPOSE, and CLOSE. Under the DEVELOP stage, there are three tasks: "Customer Need" (Diversify into selling related products, status: mark complete), "Proposed Solution" (Sell SKU AX305, status: completed), and "Identify Stakeholders" (status: completed).

Below the process flow is a "Summary" section with a "NAVIGATION" sidebar. The summary includes:
 

- Topic: Contoso 3000 seat upgrade
- Contact: Maria Campbell
- Account: Contoso Pharmaceuticals
- Purchase Timeframe: --
- Currency: US Dollar
- Budget Amount: \$16,000.00
- Purchase Process: Committee
- Current Situation: Share prices dropping
- Customer Need: Diversify into selling related products.

The central part of the interface is a "YAMMER" social collaboration feed. It shows a post from Nancy Johnson asking Terry Adams about renewal pricing for Contoso. Terry Adams replies with a 15% upsell target and shares a file named "Contoso Pricing Proposal.xlsx". The feed also includes a "STAKEHOLDERS" list (Jim Glynn, Maria Campbell, Paul Cannon) and a "SALES TEAM" list (Terry Adams).

Social collaboration  
at the forefront



# Configurable Business Processes

Process Control Customization Tool - sales

LEAD OPPORTUNITY

STAGES + STEPS + Fields

STAGES	STEPS	Fields
QUALIFY	sales stage	Sales Stage
	Identify Contact	Contact
	Identify Account	Account
	Purchase Timeframe	Purchase Timeframe
	Estimated Budget	Budget Amount
	Purchase Process	Purchase Process
	Identify Decision Maker	Decision Maker?
	Capture Summary	Description
DEVELOP	Customer Need	Customer Need
	Proposed Solution	Proposed Solution
	Identify Stakeholders	Identify Customer Contacts
	Identify Competitors	Identify Competitors
PROPOSE	Identify Pursuit Team	Identify Pursuit Team
	Develop Proposal	Develop Proposal
	Complete Internal Review	Complete Internal Review
	Present Proposal	Presented Proposal
CLOSE	Complete Final Proposal	Final Proposal Ready

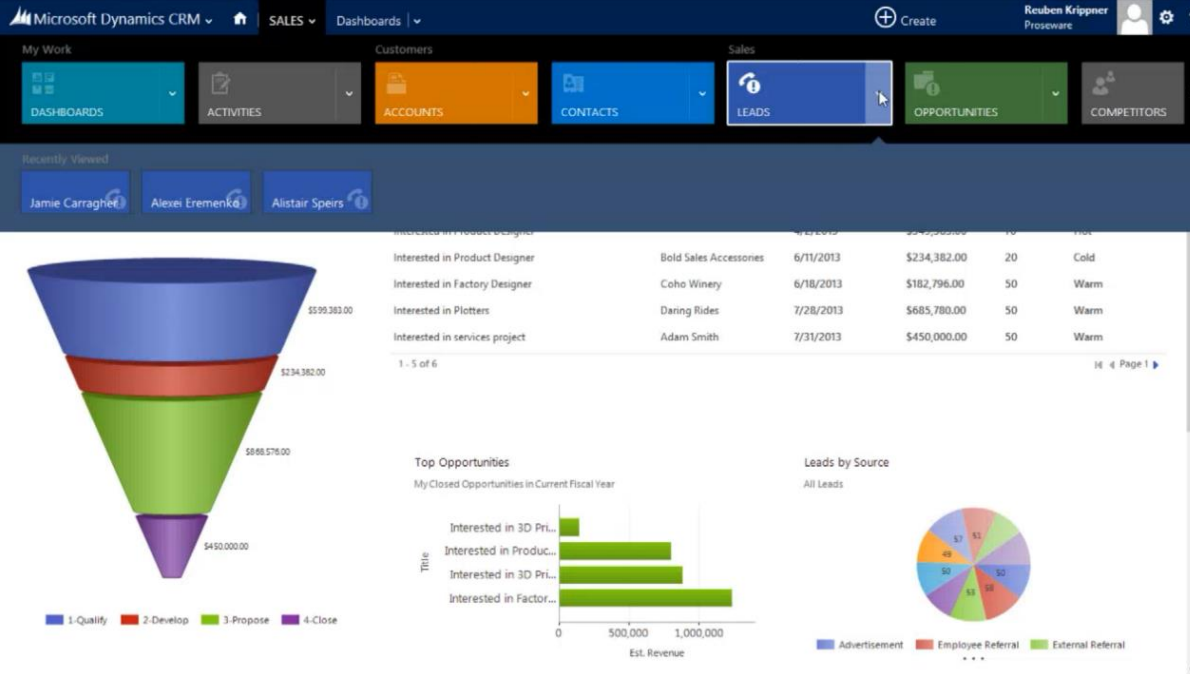
↑ ↓ MOVE

OK Cancel

Modify stages to suit your business

Define actionable guidelines

# Navigation Bar



The screenshot shows the Microsoft Dynamics CRM interface. At the top, there is a navigation bar with the following elements:

- Microsoft Dynamics CRM logo and home icon
- SALES dropdown menu
- Dashboards dropdown menu
- Create button
- User profile: Ruben Krippner, Proseware
- Settings and help icons

Below the navigation bar, there are several tabs for navigation:

- My Work: DASHBOARDS, ACTIVITIES
- Customers: ACCOUNTS, CONTACTS
- Sales: LEADS (highlighted), OPPORTUNITIES, COMPETITORS

A "Recently Viewed" section shows three items: Jamie Carraghee, Alexei Eremenko, and Alistair Speirs.

The main content area features a funnel chart on the left, a table of leads in the center, and two smaller charts on the right.

**Funnel Chart Data:**

Stage	Estimated Revenue
1-Qualify	\$599,363.00
2-Develop	\$234,382.00
3-Propose	\$685,780.00
4-Close	\$450,000.00

**Leads Table:**

Title	Account	Date	Est. Revenue	Count	Rating
Interested in Product Designer	Bold Sales Accessories	6/11/2013	\$234,382.00	20	Cold
Interested in Factory Designer	Coho Winery	6/18/2013	\$182,796.00	50	Warm
Interested in Plotters	Daring Rides	7/28/2013	\$685,780.00	50	Warm
Interested in services project	Adam Smith	7/31/2013	\$450,000.00	50	Warm

**Top Opportunities Chart:** My Closed Opportunities in Current Fiscal Year. Shows bars for "Interested in 3D Pri...", "Interested in Produc...", "Interested in 3D Pri...", and "Interested in Factor...".

**Leads by Source Chart:** All Leads. Pie chart showing sources: Advertisement, Employee Referral, External Referral, etc.

# Advance Personalization

Microsoft Dynamics CRM | SALES | Opportunities

CRM for Outlook See how CRM for Outlook makes you even more productive. Get CRM for Outlook

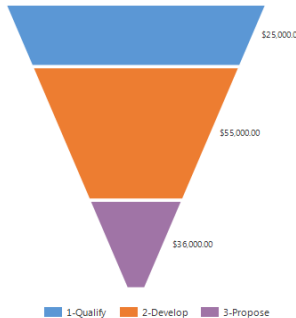
NEW DELETE EMAIL A LINK RUN REPORT EXPORT TO EXCEL

### My Open Opportunities

Search for records

Topic	Est. Close Date	Est. Revenue	Contact	Account	Prob:
6 orders of Product SKU JJ202 (sample)	4/9/2014	\$10,000.00	Maria Campbel...	Fabrikam, Inc. (...)	
Needs to restock their supply of Product SKU AX305; w...	6/6/2014	\$25,000.00	Sidney Higa (sa...	Blue Yonder Air...	
Very likely will order 18 Product SKU JJ202 this year (sa...	7/9/2014	\$30,000.00	Paul Cannon (sa...	Alpine Ski Hou...	
They sell many of the same items that we do - need to ...	8/12/2014	\$26,000.00	Robert Lyon (sa...	Contoso Pharm...	
Will be ordering about 110 items of all types (sample)	9/10/2014	\$25,000.00	Jim Glynn (sam...	Coho Winery (s...	

Sales Pipeline

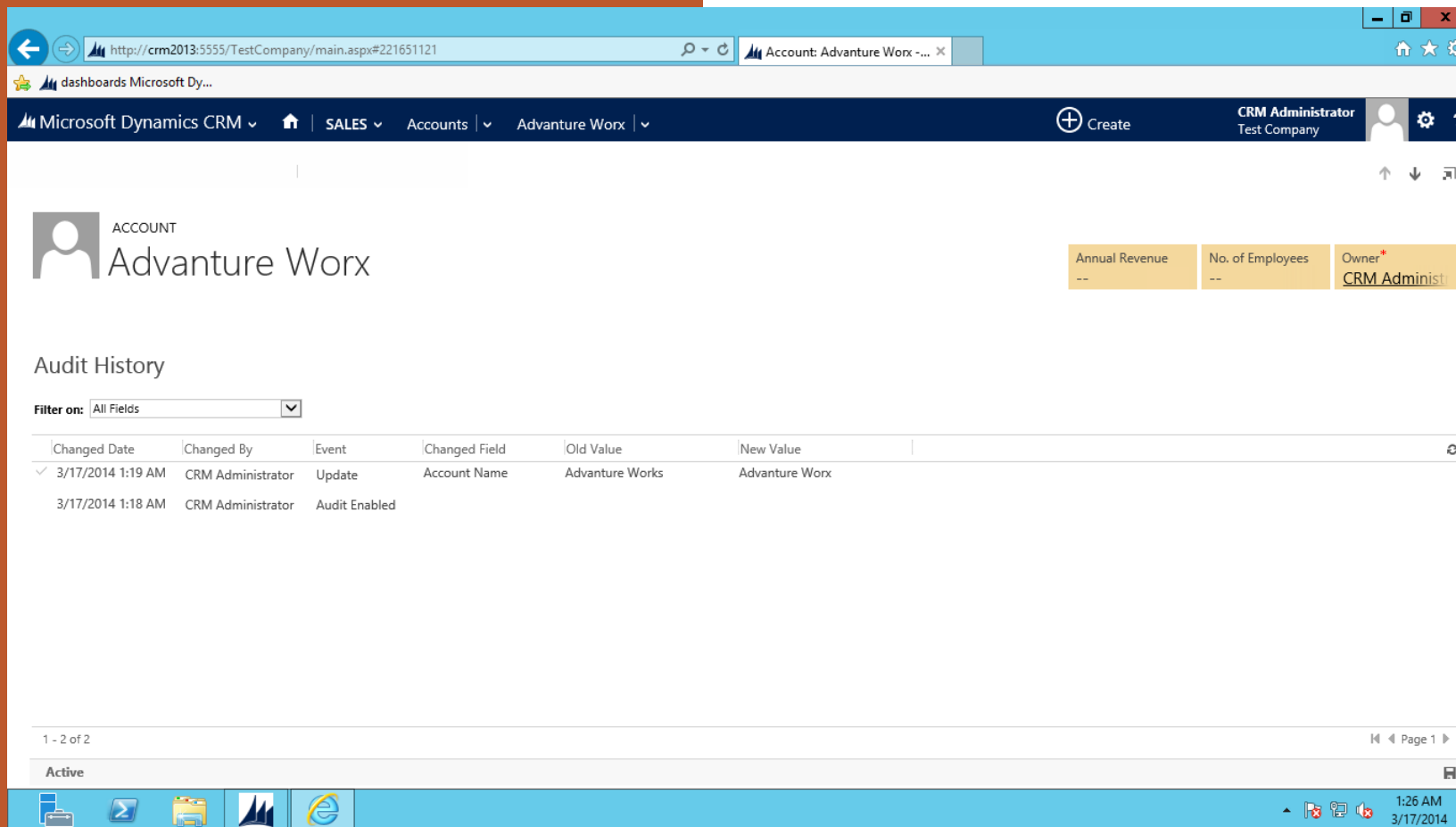


1 - 5 of 5 (0 selected) | Page 1

Click on the chart to perform Drill Down



# Auditing



The screenshot shows the Microsoft Dynamics CRM interface for the account 'Adventure Worx'. The 'Audit History' section is active, displaying a table of changes. The table has columns for 'Changed Date', 'Changed By', 'Event', 'Changed Field', 'Old Value', and 'New Value'. Two entries are visible: one for an update of the account name and another for enabling the audit feature.

Account: Adventure Worx

Annual Revenue: --

No. of Employees: --

Owner: CRM Administrator

**Audit History**

Filter on: All Fields

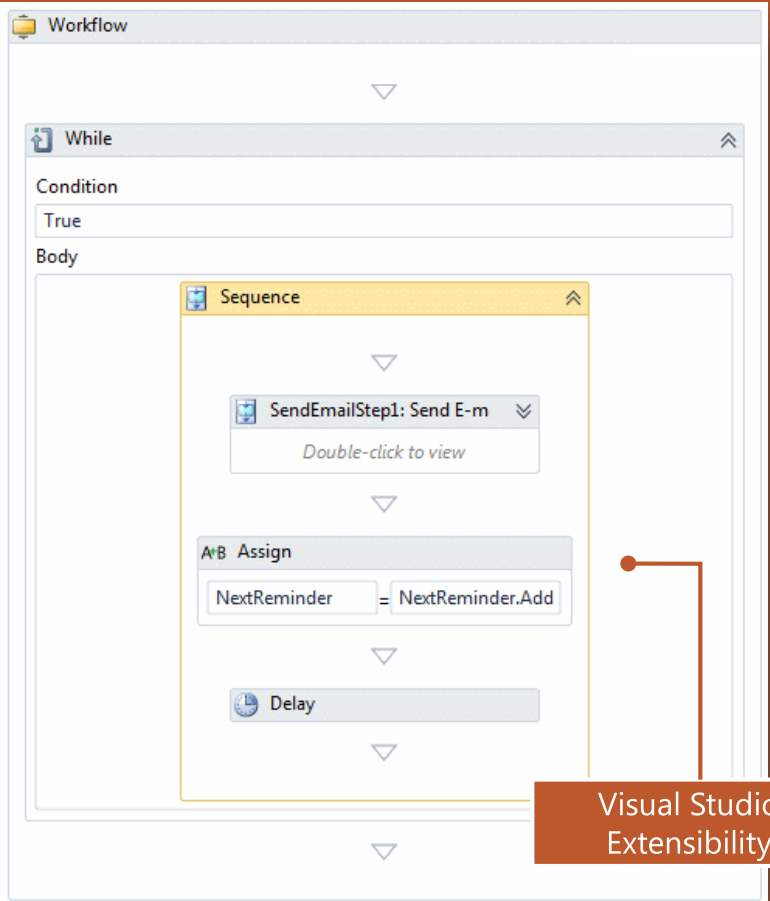
Changed Date	Changed By	Event	Changed Field	Old Value	New Value
3/17/2014 1:19 AM	CRM Administrator	Update	Account Name	Adventure Works	Adventure Worx
3/17/2014 1:18 AM	CRM Administrator	Audit Enabled			

1 - 2 of 2

Active

1:26 AM 3/17/2014

# Process Extensibility



Workflow

While

Condition  
True

Body

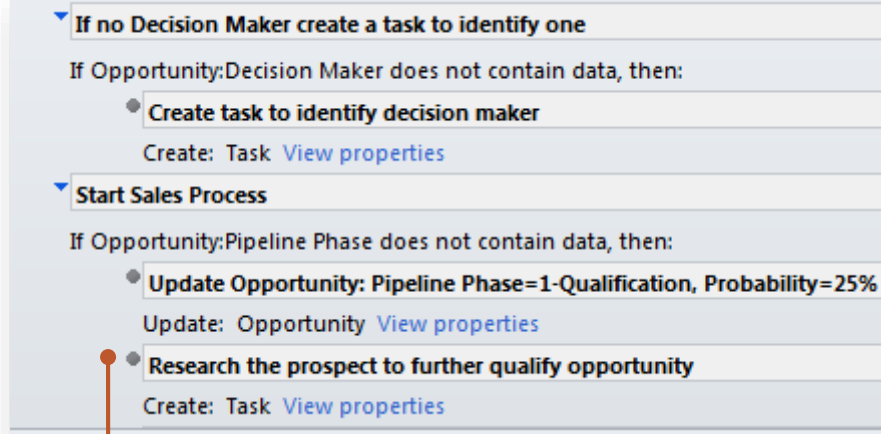
Sequence

SendEmailStep1: Send E-m  
Double-click to view

Assign  
NextReminder = NextReminder.Add

Delay

Visual Studio Extensibility



If no Decision Maker create a task to identify one

If Opportunity:Decision Maker does not contain data, then:

- Create task to identify decision maker  
Create: Task [View properties](#)

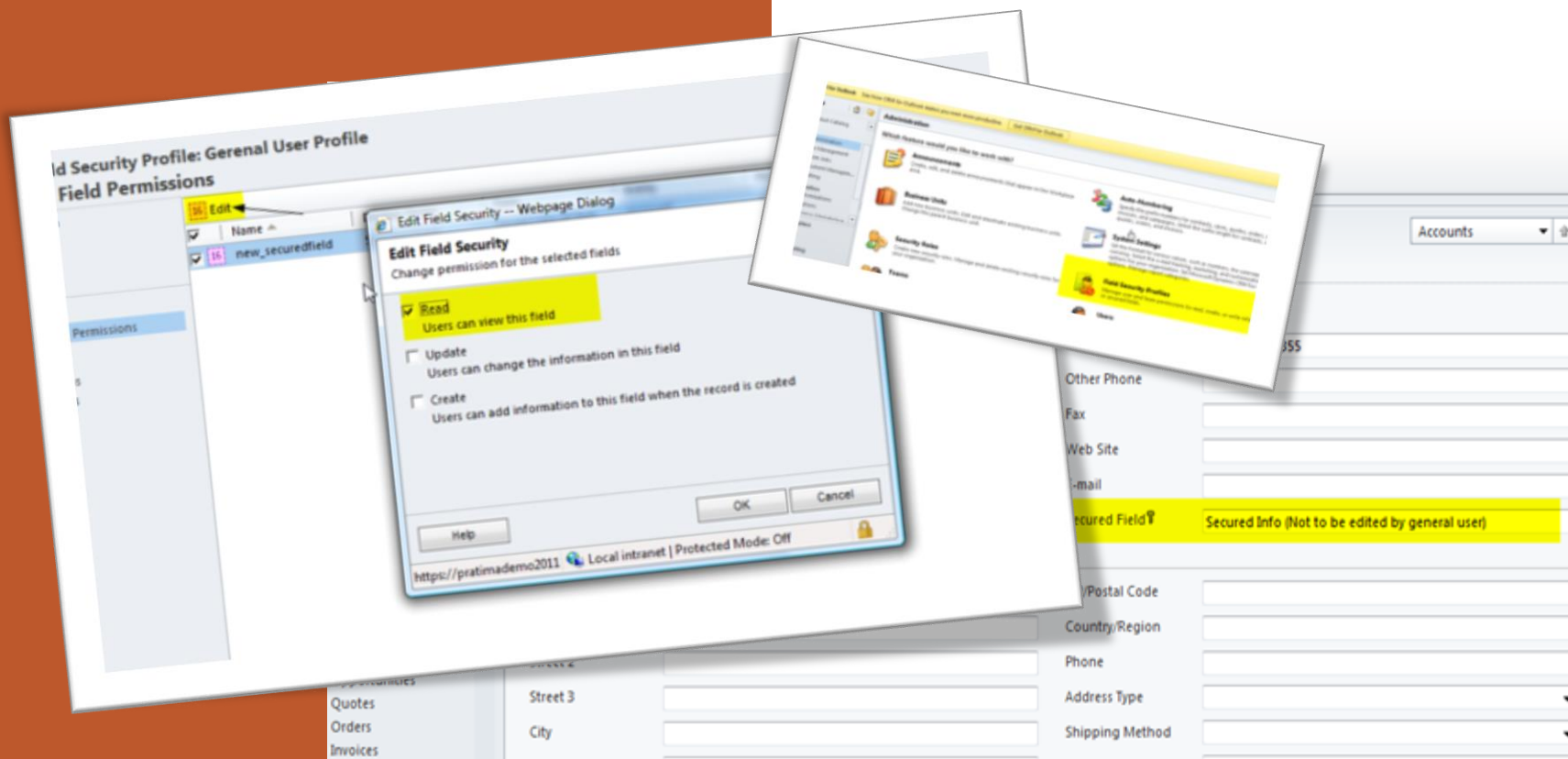
Start Sales Process

If Opportunity:Pipeline Phase does not contain data, then:

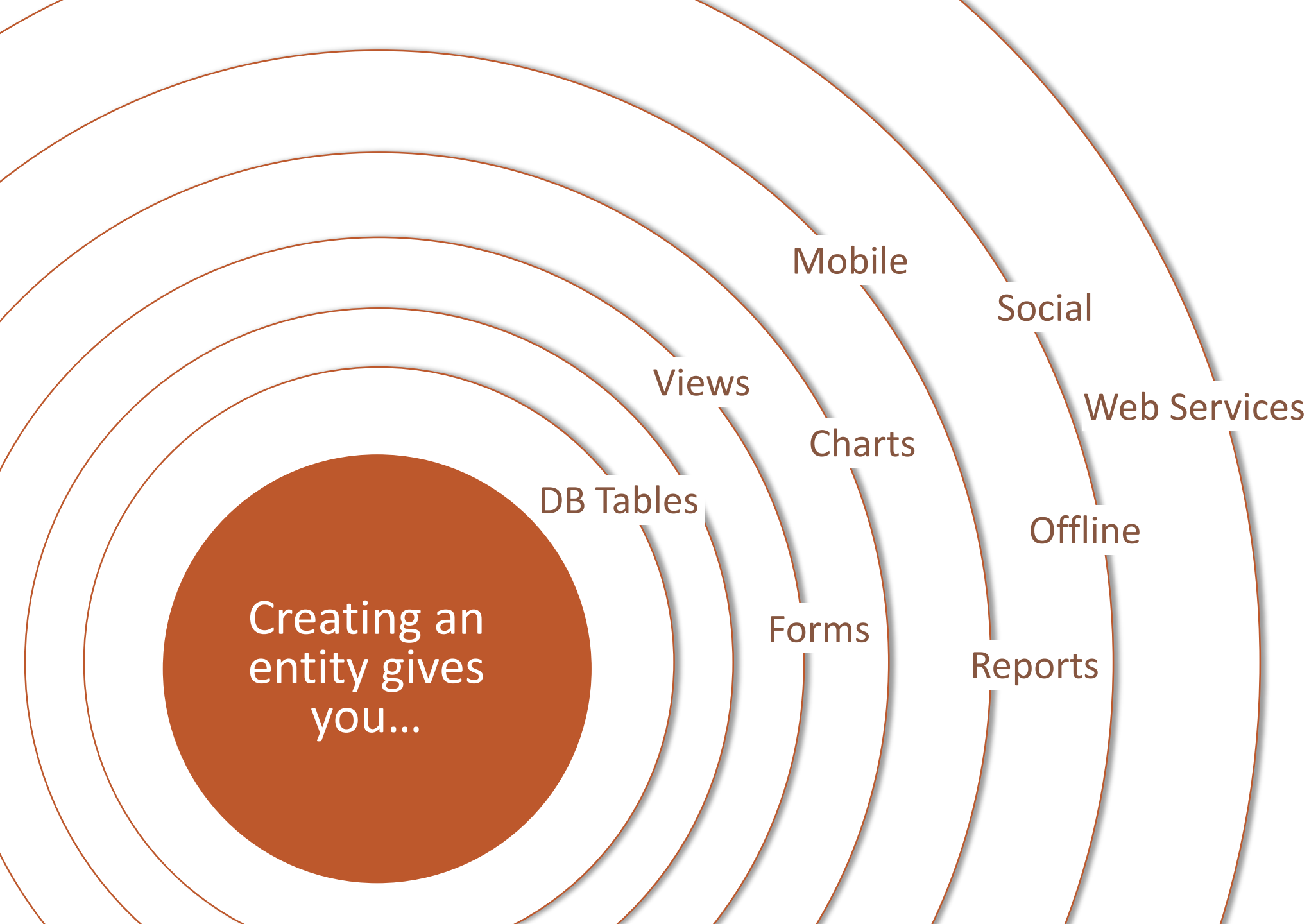
- Update Opportunity: Pipeline Phase=1-Qualification, Probability=25%  
Update: Opportunity [View properties](#)
- Research the prospect to further qualify opportunity  
Create: Task [View properties](#)

Conditional branching with required activities

# Field Level Security









# Extension

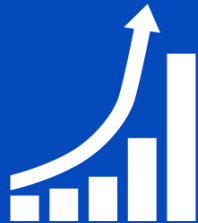
# Microsoft Dynamics CRM

# Why Extended CRM?

Reduce Costs



Roll Out  
Faster



Mitigate  
Risks



Stay Relevant





x CRM

---

**x** can be any thing

# Extended CRM = “Any” Relationship Management



Proven by Various Industry and Vertical Leaders





# Microsoft Dynamics CRM Demo



## Topic

## Date

Overview of Microsoft Dynamics CRM	17 <sup>th</sup> March 2014
What's new in Microsoft Dynamics CRM 2013	7 <sup>th</sup> April 2014
Personalization in Microsoft Dynamics CRM 2013	28 <sup>th</sup> April 2014
Modules in Microsoft Dynamics CRM	16 <sup>th</sup> May 2014
Installation and Configuration of CRM 2013	30 <sup>th</sup> May 2014
Customization Overview	30 <sup>th</sup> June 2014
SSRS and its Integration with CRM 2013	28 <sup>th</sup> July 2014

# Dynamics CRM Session Schedule



# What is MozzoTech?

MozzoTech is US based software developing firm providing services across the software development life cycle whether it is product development, custom application development, mobile phone application development or e-Commerce solutions; and offering IT support and maintenance services, search engine optimization and social media optimization services.

## Application Development

- Custom Application Development
- Mobile Application Development
- Web Application Development
- Application Support and Maintenance
- Application Migration and Testing
- Portal and E-Commerce Development

## Professional Service and Consultancy

- Microsoft Dynamics CRM, Ax and GP Deployment and Consultancy
- Microsoft SharePoint Deployment and Consultancy
- Long Term Contract Staffing
- Recourse outsourcing

## Business Process Outsourcing

- Customer Support and Services
- Data Entry/Data Processing
- Document/Form Management

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Thank you