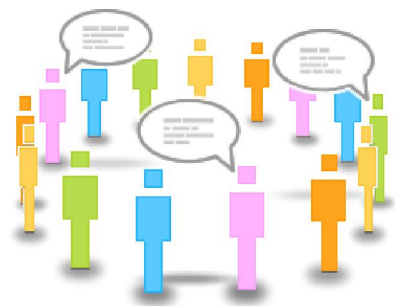



Real value from Microsoft Dynamics CRM



"Having accurate, long term forecasts has completely changed the way I work; particularly in contributing to board decisions for investment and allowing a much more proactive approach to resourcing for my team."

 The Sales Director

"Having CRM linked in with Microsoft Outlook and Office has been an excellent help in managing my day to day workload. Seeing everything that is going on through contact management within any of my accounts or sales processes has saved a lot of time enabling me to be more effective."

 The Sales Executive

CRM in Microsoft Dynamics gathers all your customer related business information in one place and keeps it structured and readily available, so you can gain insight to identify your customers' needs and make the best sales and marketing decisions. The solution lets you effectively share information on all aspects of your business relationships throughout your company, helping make every one of your employees a customer expert.

This white paper summary is based on a series of interviews with functional managers and key stakeholders across a range of industry sectors and outlines the real operational value of Microsoft CRM.

Having a real time view of information across the business enables a proactive approach to strategic planning for sales directors. The ability to categorise customers against business defined criteria and report on purchase histories enables the identification of opportunities within current clients based on trends. The Business Intelligence function within CRM which draws data from financial applications, provides accurate forecasts, profitability information and productivity reports. These support budgeting, planning and resource allocation. A single source of CRM information reduces the reliance on the knowledge of individuals and minimises the impact of staff changes by allowing work to be quickly picked up by other people- hence a low impact on the client. CRM as an enabler of best practice processes reduces the cost of sales and makes better working practices easy to implement.



Having a CRM application that integrates with Microsoft Outlook and Microsoft Office makes task management and communicating with prospects much easier for the sales executive. Being able to track all communications in a single location ensures that there is a clear audit trail. This supports the management of client expectations and reduces misinterpretation of information. All communication, documentation and financial information being tracked in the same place allows an individual sales person and their team to co-ordinate their activity and be fully informed of all actions around a single customer. Accessing CRM through the web or offline with automatic synchronisation has allows staff to work 'on the road' and off-site with minimal impact on productivity.





"One of the most important things for any marketing department is to be able to show tangible results and return on investment. CRM allows me to show that my team is having a direct impact on our business. A must if marketing is to remain a credible and central part of the organisation."

 The Marketing Manager

"The ability to link customers to contracts and service level agreements has considerably improved our support offering to clients. The information available to our support engineers ensures that SLA's are adhered to and customers outside of warranty can be advised at first contact point."

 Service Delivery Manager

CRM provides factual information to justify budgets and marketing spend. It allows accurate reporting on the success of each campaign against a set of measurable criteria. The ability to attribute /categorise companies and contacts against unique business criteria provides the foundation to generate, deliver and measure finely tuned and targeted marketing campaigns. In addition marketing is able to search large quantities of sales and marketing collateral. This allows better control of branding on external documentation and more effective support of the business.



Automated workflows ensure that service level agreements are adhered to, including escalation notification to managers where appropriate based on agreed terms. Support contract renewal dates can be brought to account managers attention in a proactive manner enabling easier management of service reviews and contract renewals. In addition, using the same dataset as the rest of the business ensures consistent communication inside the organisation. A sales executive or account manager will be immediately aware of a support issue prior to contacting the client.





Taking CRM further - Integrating with Microsoft technologies

"Critical business decisions are often dependent upon accurate and timely information. It is imperative that the core products used are intuitive and integrated to enable joined up data flow. Using Microsoft Dynamics CRM ensures the data input into systems is accurate, timely and complete. The workflow and integration with Microsoft Office, Outlook and the Dynamics ERP operation ensures that all information required is fully incorporated across the organisation, whether operational, sales or financial.

Dynamics CRM is based upon the look and feel of Outlook and other Microsoft Office products. Microsoft CRM sits on a SQL database allowing additional reporting as well as integration with Dynamics NAV, SharePoint and Performance Point Server. By leveraging Microsoft technology, organisations can bring the unstructured data of the office into the structured world required."

 Richard Baxter, Trinity Expert Systems

Key areas of impact from enhanced CRM functionality

Customer information

By integrating your CRM system and your ERP solution you can provide your sales force with a 360° view of the company relationship with customers across the finance, sales and marketing functions. This ensures that you always know that the touch points you check have value within the organisation.

Performance management

KPI dashboards from CEO level with drill down to the transactional through the sales allowing real time identification of issues and easy identification of the route cause.

Collaboration (internal)

Reports from CRM can be integrated with and displayed on the company intranet. Also the ability to create document libraries against clients, prospects, bid processes or individual meetings allows easy access to sales literature and knowledge base articles, therefore delivering better customer service.

Collaboration (external)

Extranet capabilities to enable the management of third parties through the ability to push information into CRM directly through online forms, collateral repositories for broker sales models or management of personal information for web shops.

Workflow and Business Process Management

RSS feeds can alert staff on their desk top to pre-defined events in CRM (e.g. New Opportunity set up). Also CRM enables the set up of authorisation hierarchies for proposal documents, automatic task generation against scenarios in the sales, marketing or service process.

Communication

Integration with Microsoft technologies such as Microsoft Office SharePoint Server 2007 enables greater communication within organisations. It provides the tools to see when colleagues and stakeholders are online and communicate with them via instant message, email or integrated phone systems.