



Microsoft Dynamics CRM Customer Launch



How Do We Define CRM?



Customer Facing

Sales, marketing, service and other activities



Business Process Driven

Workflow drives **consistent execution** across business units and systems



Collaborative

Enables teams to **work with others**, inside and outside of your organization to help maximise your business

Customers Drive Business Success



Effectively managing **the customer lifecycle** – from marketing to sales to service – is critical to every company’s **profitability and growth**.

“... companies with **high customer satisfaction scores** have blown the S&P 500 out of the water, especially over the last few years. Not only have they produced **higher stock returns**, but their stock values and cash flows have been less volatile.”

- Harvard Business Review, March 2007

But Traditional CRM Systems Have Failed

“Spending has reached an all-time high, with expectations nearly as lofty. But implementation **failure rates have not improved, nor have ROI metrics.**”

AMR Research, September 2007

“User adoption remains a challenge, with 33% to 47% of customer management applications facing **serious adoption issues.**”

AMR Research, September 2007



What's Caused These Failures?

- Traditional customer management software is **too expensive** and takes **too long** to deploy
- It is **difficult to get business & IT aligned** with a solution that meets the needs of both groups
- After all this time, effort, and expense ... users often **fail to adopt the system.**

Modern Myths About CRM

“If we build it, they (the users) will come!”

Industry Example : SAP

- The reality:
 - No, they won't. End users have lots of ways to passively or actively resist CRM systems that they don't like.
 - Active user adoption is critical to CRM success and ROI.
- The recommendation:
 - Make user adoption & productivity your #1 requirement.
 - Surface ERP business processes and data intelligently through composite CRM applications.

Modern Myths About CRM

“More features = more chances for success!”

Industry Example : Siebel

- The reality:
 - In theory, maybe. In practice, no.
 - Flexibility is more important than packaged features.
- The recommendation:
 - Use feature comparisons as one input into your decision.
 - Select products based on fit for your specific strategy and requirements, and the types of users you need to support.
 - Take a role-tailored approach – don’t put any more CRM capabilities in front of a user than he/she needs.

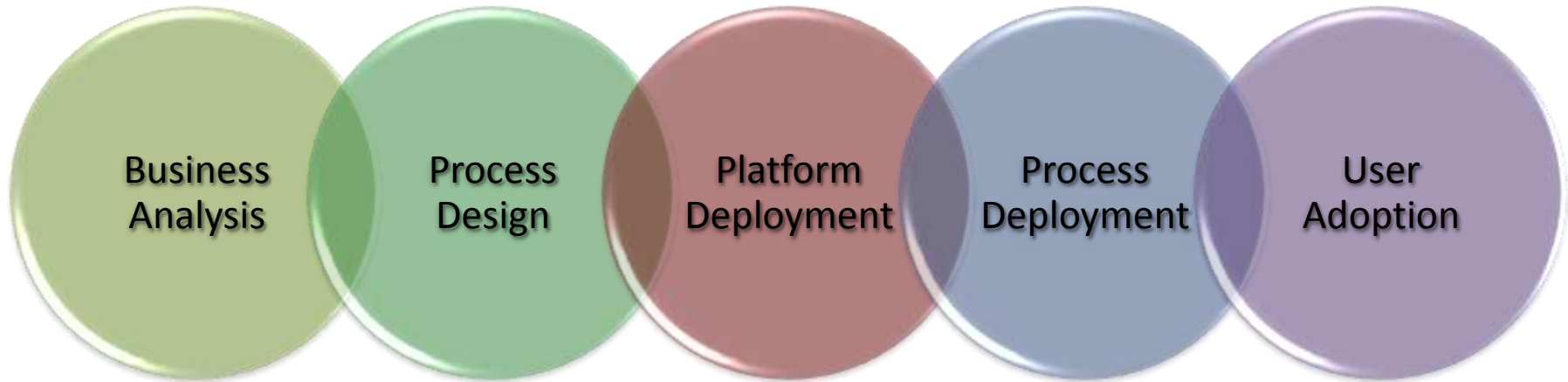
Modern Myths About CRM

“If I buy an on-demand product, I’m done!”

Industry Example : Salesforce.com

- The reality:
 - On-demand is a “how”, not a “what”.
 - Whether your system runs in the cloud or on-premise, there’s a lot more to CRM than just buying a product/service.
- The recommendation:
 - Focus first on the kinds of CRM capabilities and user roles you need, both in the short term and over time.
 - Select an on-demand or on-premise deployment based on long-run TCO, ROI, flexibility, and organisation fit.

Components of CRM Project Success



- Define **key goals and metrics**
- Analyse **existing processes and capabilities**

- **Design and refine processes** to meet business goals & metrics

- **Deploy CRM platform services** in an on-premise or on-demand model

- Configure **processes and user roles**
- Configure **reports and analytics**

- End user **training and acceptance**
- Iterative design and **refinement**

So Where is the CRM Market Going?

- Businesses **need and demand choice** in CRM.
 - It should always be **strategy first** and technology second.
 - When selecting CRM technology, choose how to buy it, how to deploy it, and how to use it based on your needs
- Technology can deliver **more benefits, and faster**.
 - **Roles-based** user experiences enable better user adoption
 - **Declarative**, model-driven systems enable better agility
 - **Service-oriented** architectures enable better integration

Success Depends On Delivering CRM That Fits



Fits Your People

The *right user experience* for every user role



Fits Your Business

Configures quickly to meet *your specific* needs



Fits Your Environment

Deploys *quickly* and integrates existing assets

Microsoft Dynamics CRM at a Glance

- Over **11,000 customers** from small to enterprise
- Over **500,000 users** in more than 80 countries
- **Global network** of software and services partners
- ***Fast, flexible, and affordable***
- **Full CRM suite** of marketing, sales, and service
- **Native Office** experience for rapid adoption
- **Multi-language** with more than 25 languages
- Advanced **SOA / Web services** architecture



Dynamics CRM: Global Customer Base

Small Businesses



Mid-size Companies



Large Enterprises



Enterprise Momentum Around the World

16,000 seats in Government

6,000 seats in High Technology

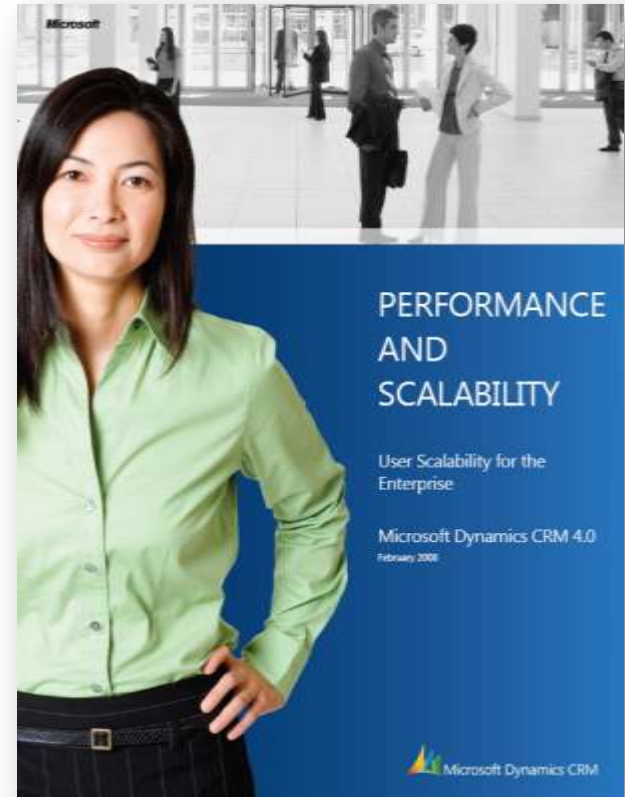
5,000 seats in Hospitality

4,000 seats in Oil and Gas

4,000 seats in Manufacturing

3,000 seats in Financial Services

And many more



- 24,000 Concurrent Users with Sub-Second Response Times
- 169,000 Business Transactions with Over 1 Million Web Requests per Hour

Driving Global Customer Success



Nortel relies on the **enterprise scalability and performance** of Microsoft Dynamics CRM for a global deployment of 3,000+ users.



ING configured Microsoft Dynamics CRM to deliver a **more productive global system** for purchasing and vendor management.



Mitsubishi Caterpillar

MCF deployed Microsoft Dynamics CRM to **reduce service call times by 80% per call** and **order entry time by 90%**.



Equinox uses Microsoft Dynamics CRM to drive its sales processes, with **staff productivity** up 8% and **manager productivity** up 5%.



Cold Stone Creamery runs their membership club on Microsoft Dynamics CRM, **saving millions of dollars** over three years.



MICROSOFT DYNAMICS CRM

Product Overview

Microsoft Dynamics CRM Suite



What's New in Microsoft Dynamics CRM

User Experience

- Customisable **SmartNav** navigation
- New **Reporting Wizard** for fast analysis
- **Presence integration** for instant visibility
- **Offline reporting** capabilities

Marketing

- Integrated **data migration** capabilities
- Real-time and batch **data de-duplication**
- Improved **email** merge and management

Sales

- Complex **many-to-many relationship** support
- Enhanced **sales process management**
- Continuous background **data synchronisation**

Service & Support

- World-class **contact center platform**
- **Auto-resolution** of problems w/SmartFind
- Improved **email handling** for CSS

Platform Capabilities

- **Multi-tenancy** with advanced data privacy
- **Windows Workflow** for process orchestration
- User-selectable **multi-language** support
- Pervasive **multi-currency** support

Performance & Management

- Network/database **performance optimisation**
- Advanced **clustering and mirroring** support
- Tighter **System Center** integration
- **Internet-facing deployments** (no VPN)

Fast, Productive Sales Management

- **Familiar interface** drives user adoption and increased productivity
- **Workflow-driven** sales processes ensure consistency and efficiency
- Full spectrum of **sales intelligence** capabilities provides insight and accurate forecasts

The screenshot displays the Microsoft Dynamics CRM interface. The top window shows the 'Account: Active Cycling' details, including fields for Account Name, Number, Parent Account, Primary Contact, Relationship Type, Currency, Address, and ZIP/Postal Code. The bottom window shows the 'Dashboard - Microsoft Dynamics CRM' with several charts:

- Sales Pipeline:** A stacked bar chart showing the number of leads at different stages: Quality, Assess, Presentation, Contract, and Close. The stages are categorized by time to close: < 1 Week (green), 1 to 2 Weeks (red), and > 2 Weeks (blue).
- Lead Conversion Rates:** A horizontal stacked bar chart showing conversion rates for various events: Spring Summit, Wine Tasting, Annual Conference, Golf Tournament, and Charity Event. The x-axis represents the percentage of conversion from 0% to 100%.
- Revenue by Sales Person by Quarter:** A line chart showing revenue for five salespersons (Vassar Stern, Oliver Cox, Herbert Dorner, Darren Parker, Raman Iyer) across four quarters (Q1, Q2, Q3, Q4). The y-axis ranges from \$0 to \$5,000,000.
- Customers by Industry:** A bar chart showing the number of customers in various industries: Financial Services, Manufacturing, Healthcare, Professional Services, Software, and Transportation.

Fast, Effective Marketing Management

The screenshot displays the Microsoft Dynamics CRM interface. At the top, a window titled "Select the Activity Type and Owners" is open, showing a list of activity types: Phone Call, Appointment, Letter, Letter via Mail Merge, and Fax. Below this, the main CRM dashboard is visible, featuring a navigation pane on the left with folders like "Marketing" and "Campaigns". The central area contains two charts: "Campaign Effectiveness" and "Campaign Activities".

Campaign Effectiveness

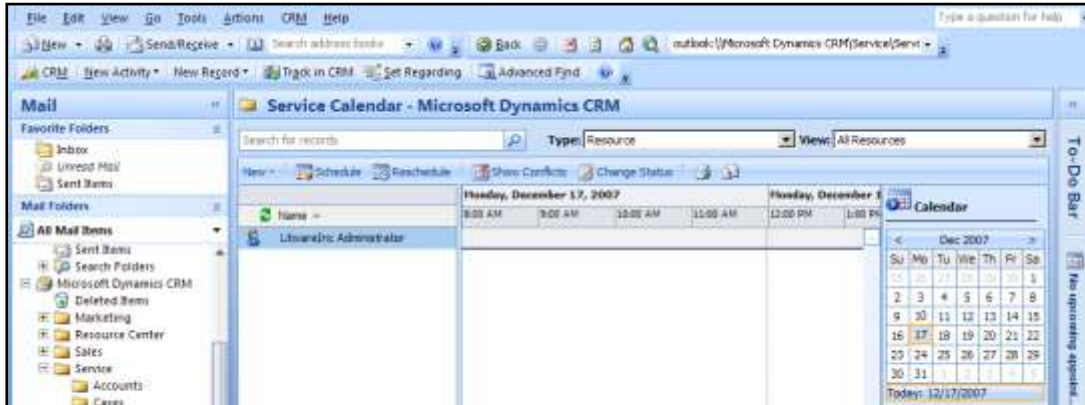
Activity	Revenue Generated	Campaign Cost
Charity Event	\$500,000	\$100,000
Golf Tournament	\$100,000	\$50,000
Karting Night	\$250,000	\$100,000
Open House	\$650,000	\$100,000
Annual Conference	\$800,000	\$100,000
Wine Tasting	\$450,000	\$100,000
Spring Summit	\$150,000	\$50,000

Campaign Activities

Month	Emails Sent	Calls Made	Brochures Distributed	Web Cast Attendees	Event Attendees
Jan	800,000	15,000	5,000	2,000	1,000
Feb	750,000	20,000	6,000	2,000	1,000
Mar	850,000	18,000	5,000	2,000	1,000
Apr	900,000	22,000	6,000	2,000	1,000
May	1,000,000	20,000	5,000	2,000	1,000
Jun	850,000	18,000	5,000	2,000	1,000
Jul	950,000	20,000	5,000	2,000	1,000
Aug	800,000	18,000	5,000	2,000	1,000
Sep	900,000	22,000	6,000	2,000	1,000
Oct	850,000	20,000	5,000	2,000	1,000
Nov	900,000	18,000	5,000	2,000	1,000
Dec	800,000	15,000	5,000	2,000	1,000

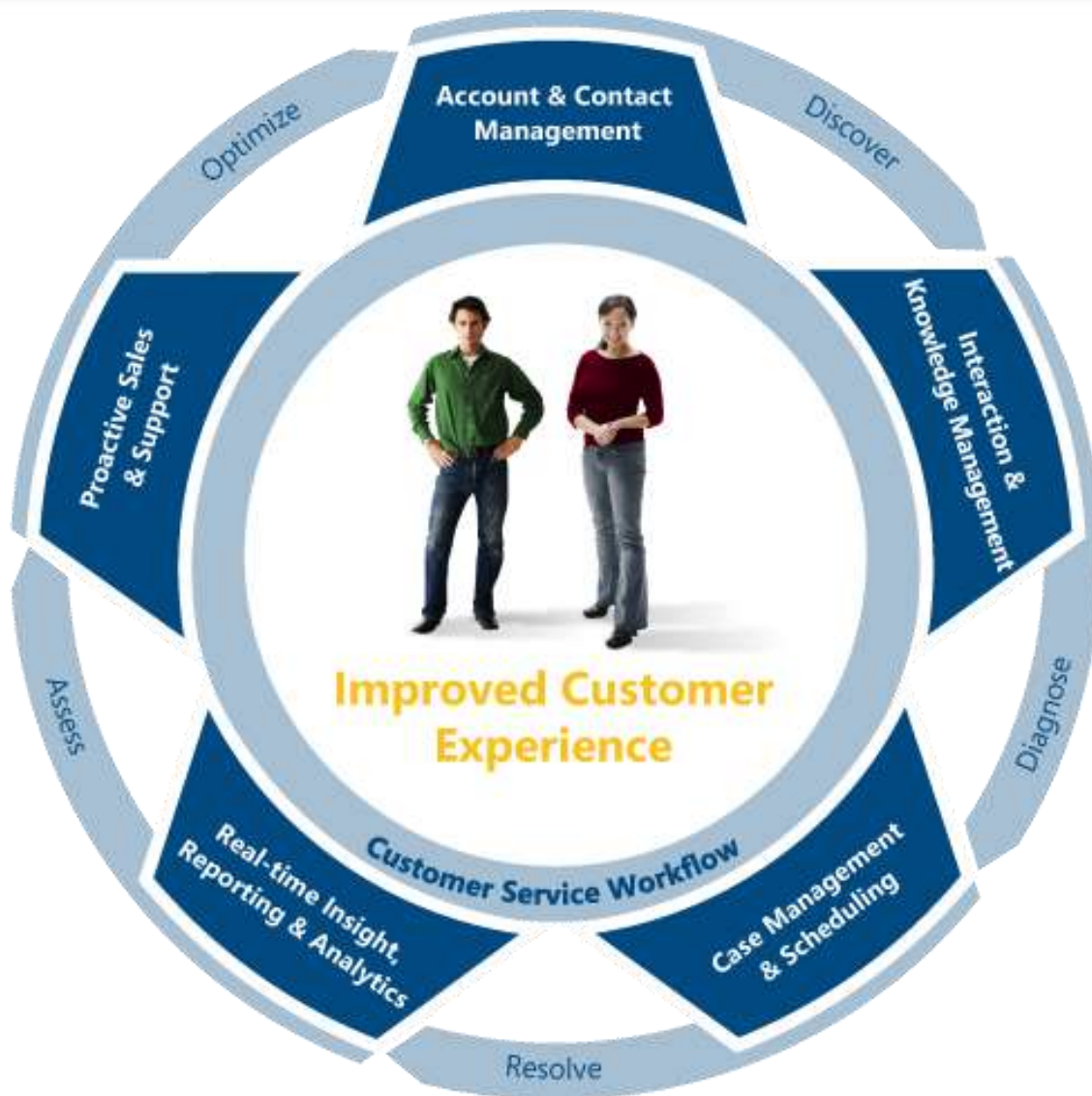
- **Intuitive segmentation tools** drive superior target selection
- **Workflow-driven processes** increase reach and relevancy
- Seamless tracking of **cross-channel communications** saves time and money

Fast, Consistent Customer Service



- **Comprehensive customisation and core platform capabilities** ensures business agility
- **Advanced workflow** ensures consistency or service experience
- **Complete range of service analytics** from basic reporting to sophisticated OLAP and predictive modeling

Microsoft Dynamics CRM Customer Service Solution



Service Capabilities

- Full feature set
- Service Workflow
- Designed for
 - Users
 - Managers
 - Executives

Microsoft Dynamics CRM in the Contact Centre

Interaction Channels



Phone



Wireless



Web Self-Service
Email
Chat



Branches

Retail Stores & Dealers
Government Offices



CC Apps



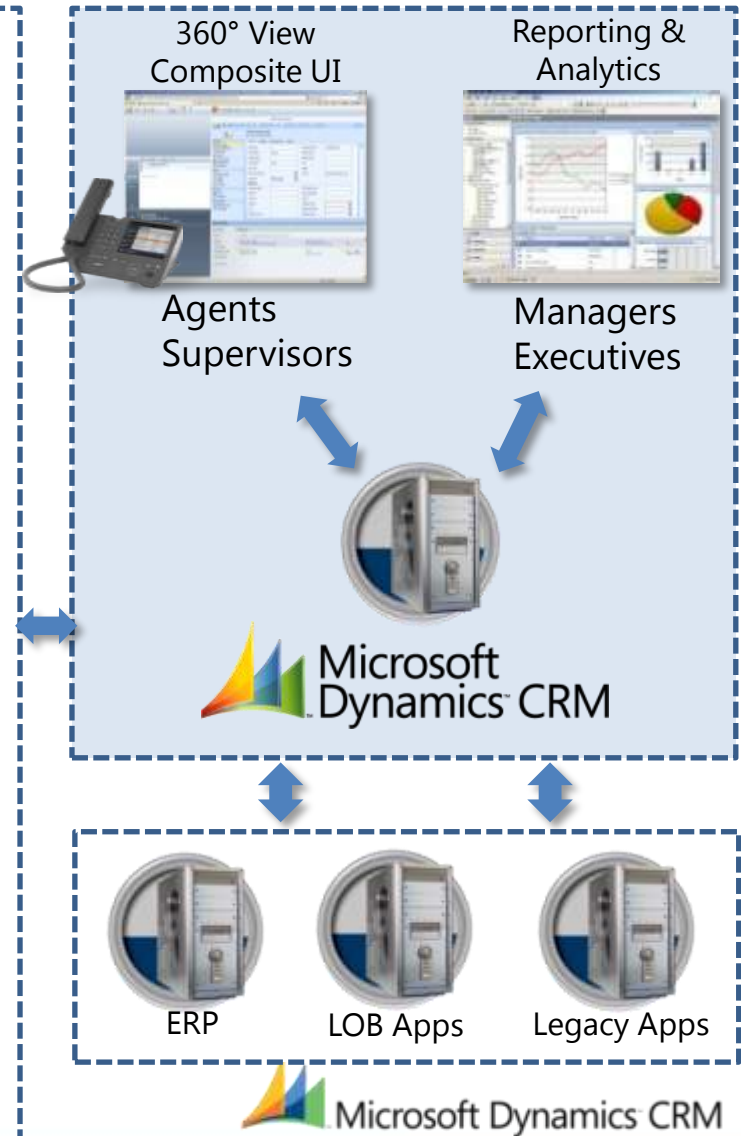
CTI



PBX/ACD



IVR





Customer Service Scenarios

Follow-
the-Sun
Global
Support

Enable management of cases to be handed off across teams in **multiple time zones**

World-Class
Contact
Centre

Deploy world-class contact centres that support **multiple shifts and remote agents**

Closed-Loop
Service
Processes

Use workflow to drive consistency and **real-time visibility** into every stage of service processes

Quick Service
Campaigns

Manage product support issues **simply and easily** from contact to resolution

Total Quality
Management

Allow all service metrics to be easily tracked and analysed to drive **process improvement**

What is “xRM”?

- Microsoft Dynamics CRM offers a **flexible business management platform** that can be used to build applications far beyond “CRM”
- Examples:
 - The US Air Force uses Microsoft Dynamics CRM as a platform to manage deployment of personnel
 - A leading US financial services firm is building out an HR staffing system on Microsoft Dynamics CRM
- We call this “xRM” – using Microsoft Dynamics CRM’s strengths in managing **entities, relationships, and activities** to build a wide range of applications



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Customer Success on
Microsoft Dynamics CRM 4.0

Cambridge and Hosted Microsoft Dynamics CRM

Much Faster Lead-Proposal Conversion and Delivered Advanced Analytics for Management

“Management of our sales process along with analysis of lead conversion rates was imperative to the success of our CRM deployment. Now with the fully integrated business analytics tool, we not only have this data centrally stored but also quickly accessible for detailed analysis”.

Clifton Warren, Manager - Business Development, Cambridge

SITUATION

CAMBRIDGE



- Required a centralised and quick-to-deploy but extendable CRM solution
- Improved processes around sales management was key

SOLUTION



- Cambridge’s sales process was embedded into Microsoft Dynamics CRM
- JayThom’s Hosted Microsoft Dynamics CRM
- JayThom’s Hosted Windows SharePoint Services
- Zap Technology’s Business Analytics for Microsoft Dynamics CRM

BENEFIT



- Fast to deploy and easily adopted by users
- Analytics assists Cambridge sales/marketing planning
- CRM data can be used to measure performance, such as conversion rates for leads and opportunities
- Reporting is automated, flexible and always available, without requiring IT support





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Fits Your Environment

Better Together with Microsoft Technologies

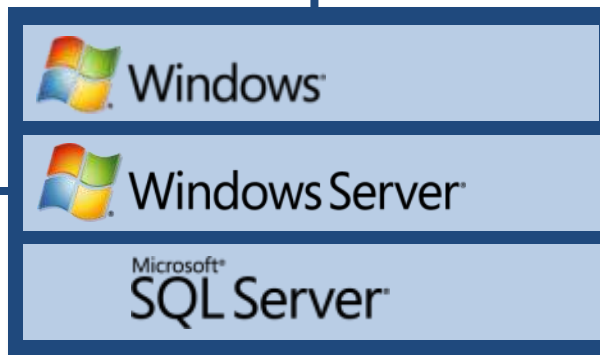
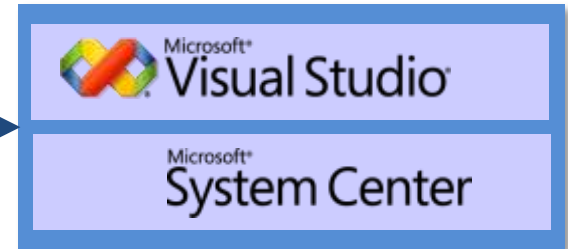
Leverage standard user and team productivity tools
for improved user adoption and productivity



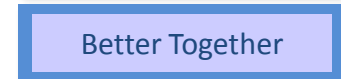
Leverage business intelligence
tools to gain additional insight



Leverage standardised development
and management tools to maximise
existing resources



Leverage common platform and integration tools
to reduce workload and ensure consistency




The Power of Choice for Software + Services



- Choose how you **USE IT** - Outlook, browser, mobile
- Choose how you **GET IT** - Software or service
- Choose how you **BUY IT** - Own it or rent it
- **CHANGE** it as your business needs change

Licensing Microsoft Dynamics CRM

Deployment Options	Licensing Models	Sample SKUs
On-Premise	<ul style="list-style-type: none">• Volume Licensing• Business Ready Licensing	<ul style="list-style-type: none">• Client Access Licenses<ul style="list-style-type: none">• User CALs• Device CALs• Full CALs• Limited Use CALs• Server Licenses<ul style="list-style-type: none">• Workgroup Server• Professional Server• Enterprise Server• Connectors<ul style="list-style-type: none">• External Connector• Limited External Connector
On Demand Partner-Hosted 	Services Provider Licensing (SPLA)	Enterprise Server Subscriber Access Licenses

Because “one size fits all” doesn’t apply to your business...
Choice in licensing frameworks helps you get started with your CRM project

Partner Hosted Microsoft Dynamics CRM 4.0

- Quality Australian CRM partners are offering Microsoft Dynamics CRM 4.0 as an on-demand service today:



- And others, with more service providers coming online through 2008...
- Choose to have a standard implementation up and running in hours or have a phased development
- Choose to pay by the month, on contract, or purchase via Microsoft Volume Licensing and outsource to the service provider

Independent Software Vendors Extending CRM

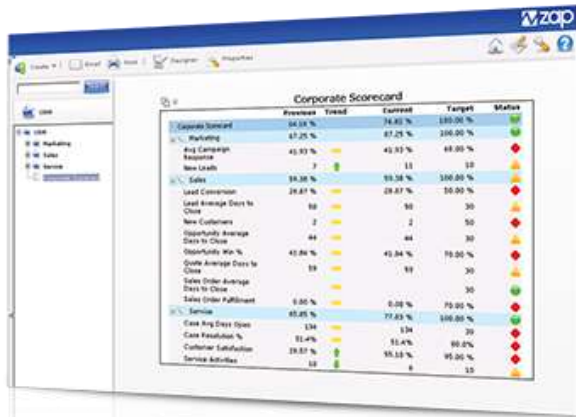
- **Hundreds of ISVs**

- ✓ *Extensions*
- ✓ *Integrations*
- ✓ *Verticals*
- ✓ *Platform offerings*



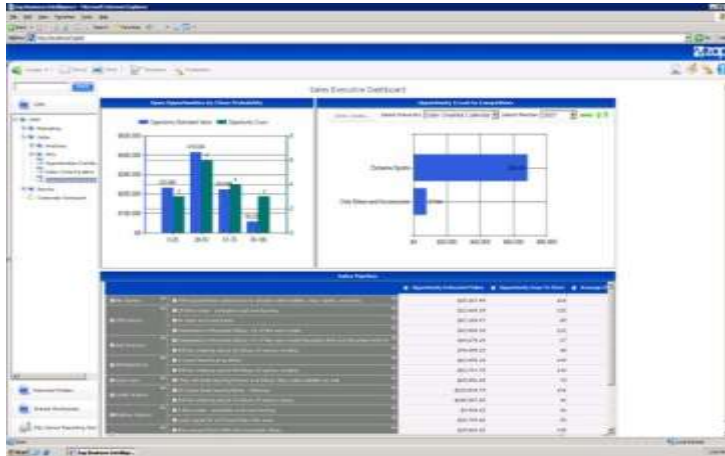
Business Analytics for Microsoft Dynamics CRM

A web-based analytics solution from Zap Technology to create web-based dashboards, KPIs, scorecards, reports and ad-hoc analysis on your Microsoft CRM data.



- Measure performance across sales, marketing & service.
- Supports CRM v3 and 4, on-premise & multi-tenanted.
- Automated, wizard driven support for CRM customisations & security.
- Comes with 60 packaged analytics or easily create your own.

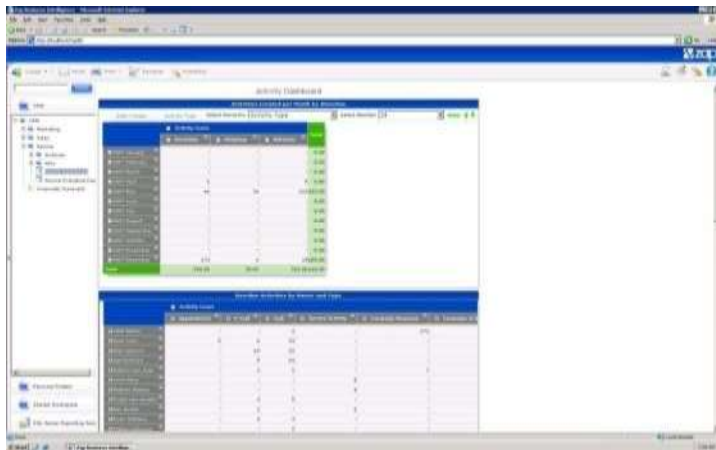
Business Analytics for Microsoft Dynamics CRM



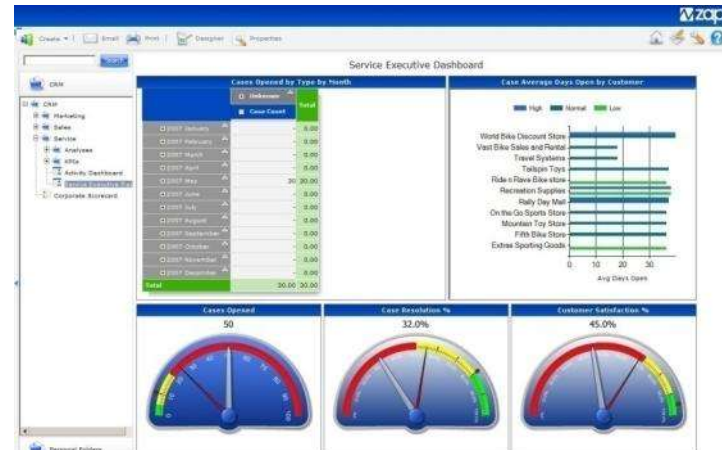
Sales Dashboard



Marketing Dashboard



Activity Reporting



Service Dashboard

QAS an Experian Company



QAS for Microsoft Dynamics CRM 4.0

Captures and validates customer addresses quickly and consistently at the point of entry ensuring high quality customer records are maintained -- essential for any business.

Benefits:

1

Save time and money

Less typing, more customer service

2

Better customer communication

Reach your customer first time, *every* time

3

Consistent data

Get your data right, and keep it right

4

Improved reporting

Better accuracy from your Microsoft CRM reports

5

International address data



www.qas.com/au



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The Road Ahead

What's Ahead for Microsoft Dynamics CRM?

- Continued investment in **user experience**
- Continued investment on **new capabilities**
- Continued investment in **platform flexibility**

Continued investment in our
global customer and partner community

Steps to Success in CRM

- Define a **complete CRM solution and plan** that includes people, process, and technology
 - Take an iterative, multi-phased approach
 - Drive quick wins and build on it
 - Microsoft and its global network of partners are *committed to your success*
- Deploy It Your Way
 - On Premise – traditional licensing
 - Hosted – per user, per month licensing
 - Switch between models



Why Choose Microsoft Dynamics CRM?



“If you know how to use any of Microsoft’s desktop tools, **you know how to use Microsoft’s CRM product.**”

- AMR Research, November 2007



“Buyers also like **Microsoft Dynamics CRM’s usability and its quick time-to-value** compared with traditional CRM applications.”

- Forrester Research, February 2007



Q & A



Thank you!