It's about customers.

Microsoft

Microsoft® Customer Relationship Management

PUT YOUR CUSTOMERS AT THE CENTER OF YOUR BUSINESS

THE GOAL:

Provide a CRM solution that meets the resources and needs of mid-market businesses, helping them build more profitable customer relationships.

THE NEED:

An easy-to-use, flexible, and integrated solution that empowers you and your employees to make informed decisions, increase sales success, and provide superior customer service.

THE SOLUTION:

Microsoft® Business Solutions
Customer Relationship Management

Microsoft® Customer Relationship Management

MICROSOFT HAS A VISION OF A CONNECTED WORKPLACE: connecting employees to information, connecting your business to your customers, and connecting the systems that make your business run– regardless of platform or programming language. That's the .NET vision.

With Microsoft Customer Relationship Management, that vision extends to mid-market businesses. Built from the ground up using Microsoft .NET technologies and designed for low total cost of ownership, Microsoft CRM will transform the way your company improves sales and service profitability, creating an interconnected workplace that extends across business systems and Web services.

But customer relationship management is about more than technology – it's about customers. Microsoft CRM frees managers, salespeople, and customer service employees from time-consuming processes and empowers them with the information they need to focus on selling effectively and delivering quality service – the business of building profitable customer relationships.

PUT YOUR CUSTOMERS AT THE CENTER OF YOUR BUSINESS

CUSTOMER RELATIONSHIPS ARE THE BACKBONE OF YOUR BUSINESS–but the tools to effectively manage these relationships have, until now, been geared toward large companies with the resources to support prolonged implementation processes and high costs for training, customization, and maintenance. Microsoft Customer Relationship Management offers powerful CRM functionality from the start–and makes it easy for you to customize, integrate, and maintain your solution efficiently and affordably.

Increase sales success

Shorten the sales cycle and improve close rates with leads and opportunity management, automated sales processes, quote creation, and order management. Maintain contact with customers via targeted e-mail; use Microsoft Word to create print communications.

Deliver consistent, efficient customer service

Customer service representatives can manage cases from initial contact through resolution, access a searchable knowledge base of support information, and respond quickly and accurately to customer needs with automated routing and queuing of support requests.

Make informed, agile decisions

Microsoft CRM provides detailed reports and a complete view of sales and support activity and history, so you can identify the opportunities, trends, and problems that guide your decisions.

Share information

Integrated Sales and Customer Service functionality gives employees a comprehensive, updated view of key customer information across the business. Employees can also share ad hoc information to help ensure rapid response to sales opportunities and service requests.

Automate business processes

A built-in workflow engine helps management establish consistent business processes, frees employees from time-consuming tasks, and equips them with the information and tools they need to sell effectively and deliver superior service

Integrate across your business

Microsoft CRM offers tight integration with Microsoft Business Solutions Financials and Microsoft Office, and also extends to integrations with third-party applications and Web services.

Ensure a rapid return on investment

Simple configuration and ease of use help employees become productive fast, with little or no training.

Work from Outlook or the Web

With Microsoft CRM, salespeople can access full sales functionality from Microsoft Outlook® – whether they're online or offline – or work from any location using a Web browser.

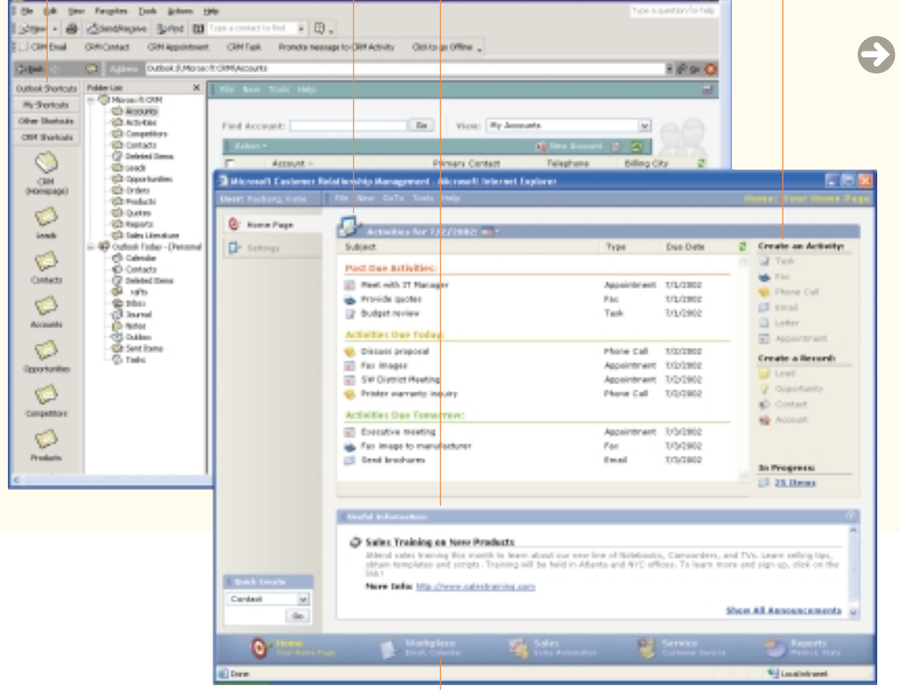
INCREASE EMPLOYEE PRODUCTIVITY

EASY TO LEARN AND USE, Microsoft Customer Relationship Management offers an intuitive user interface, centralized activity management, and single-click access to information, reports, and sales and customer service functionality.

View and update critical information **about activities and internal news.**

Sale employees can work **online or offline through Microsoft Outlook.**

Manage tasks, appointments, **and communications from a central location.**



The Microsoft CRM Home Page gives users a one-stop location for viewing and managing information, activities, and communications.

Quickly access your e-mail, calendar, **Sales and Customer Service functionality, and reports.**

INFORMED

ENSURE RETURN ON INVESTMENT

Manage Your Business More Effectively

MANAGE UNIQUE ORGANIZATIONAL STRUCTURES, establish efficient business processes, and maintain control over how employees access information and connect with customers. With Microsoft Customer Relationship Management, you can run your business efficiently and profitably, using a solution designed for rapid deployment, easy customization, and low total cost of ownership.

Manage your organization

Quickly and accurately map organizational hierarchies, including multiple departments and complex reporting structures.

Manage employee roles and responsibilities

Microsoft CRM includes customizable Sales, Service, and Manager roles that give employees appropriate access to information, management privileges, and business processes.

Empower employees to work collaboratively

Create teams and facilitate easy sharing of customer information, so that employees can work together to increase sales effectiveness and deliver consistent, efficient customer service.

Increase efficiency

Customizable workflow rules let you automate sales and service processes to save time, ensure accuracy, and establish consistent work practices.

Maintain secure, restricted access

A robust security model ensures that information is protected, yet accessible to employees with appropriate privileges.

The investment that pays you back

Low total cost of ownership means that Microsoft CRM will work for you today, tomorrow, and over the lifetime of your business. Easy set-up processes get you started fast, but you can also customize and maintain your solution within an affordable budget.

EMPOWER

MAKE INFORMED, AGILE DECISIONS

Forecast, Measure, Analyze

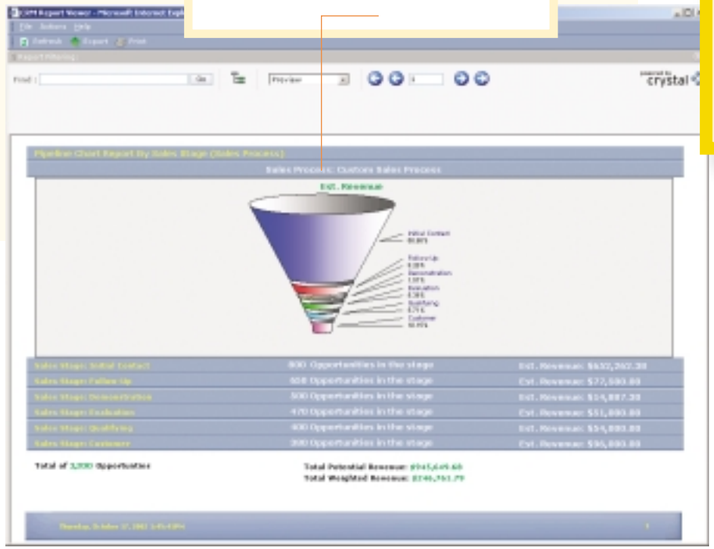
PROFITABLE CUSTOMER RELATIONSHIPS DEPEND on the ability to measure current business activity, forecast future revenues, identify customer trends, and evaluate sales and service performance. With Crystal Enterprise™ for Microsoft CRM, you'll get more than 100 reports to help you make smarter, faster decisions that increase sales success and ensure customer satisfaction.

With Microsoft CRM, data can be accessed and analyzed from virtually any source and shared across your business. Report data can be exported to other applications, such as Microsoft Excel, for further analysis.

Use reports to:

- Forecast future sales performance.
- Assess the value of the sales pipeline.
- Evaluate trends for leads and opportunities.
- Identify top customers.
- Identify top-selling products and pinpoint problem products.
- Track support incidents and identify bottlenecks or other problems.
- Analyze competitors' performance.
- Track employee performance for sales and customer service.
- Measure performance against quotas for sales employees.

Measure and forecast **selling activity using robust sales reports.**



Crystal Enterprise for Microsoft CRM includes reports that provide detailed analysis of activity and performance by product, employee, sales region, fiscal time period, turnaround time, and more.

MICROSOFT CUSTOMER RELATIONSHIP MANAGEMENT

SALES

The Right Information, at the Right Time, in the Right Place

ACCESSIBLE FROM MICROSOFT OUTLOOK AND THE WEB, Microsoft Customer Relationship Management Sales is designed to help your sales team work without limits – on the road or at the desk, online and offline, they'll have comprehensive customer and product information.

Microsoft Outlook integration

Work online or offline using Microsoft Outlook, with access to accounts, opportunities, products, quotes, orders, sales literature, and more. Microsoft CRM contacts, appointments, tasks and e-mail capabilities are integrated with Outlook.

Complete customer view

View and manage customer account activity and history, including: contact information, communications, open quotes, pending orders, invoices, credit limits, and payment history.

Lead routing and management

Track information on prospective customers, then qualify and assign inquiries. Leads entered into Microsoft CRM can be automatically routed to the correct salespeople or teams based on rules defined by the business or administrator.

Opportunity management

Convert qualified leads to opportunities without data re-entry, and then easily track opportunities through the sales cycle.

Sales process management

Track and close sales consistently and efficiently with workflow rules that automate stages in the selling process.

Product catalog

Use a full-featured product catalog that includes support for complex pricing levels, units of measure, discounts and pricing options.

Order management: quotes, orders, and invoices

Convert quotes to orders, then modify and save orders until they are ready to be submitted. If a financial application is integrated, invoices for orders are published automatically into Microsoft CRM from that system.

Quotas

Use customizable quotas to measure employee sales performance against goals. As opportunities are closed in Microsoft CRM, they are credited against the assigned quota.

Territory management

Create territories for salespeople, enabling them to manage and evaluate territory-based sales processes with workflow rules and reports.

Reports

View, sort, and filter a wide range of reports to identify trends, measure and forecast sales activity, track sales processes, and evaluate business performance.

Sales literature

Create and maintain a searchable library of sales and marketing materials, including brochures, white papers, and competitor information.

Competitor tracking

Maintain detailed information on competitors and associate that information with opportunities and sales literature. Reporting functionality tracks competitor activity by product, region, or other criteria.

Workflow

Use workflow rules to automate leads routing, notifications, and escalations, as well as generate and send auto-response e-mail to customer requests.

Correspondence and mail merge

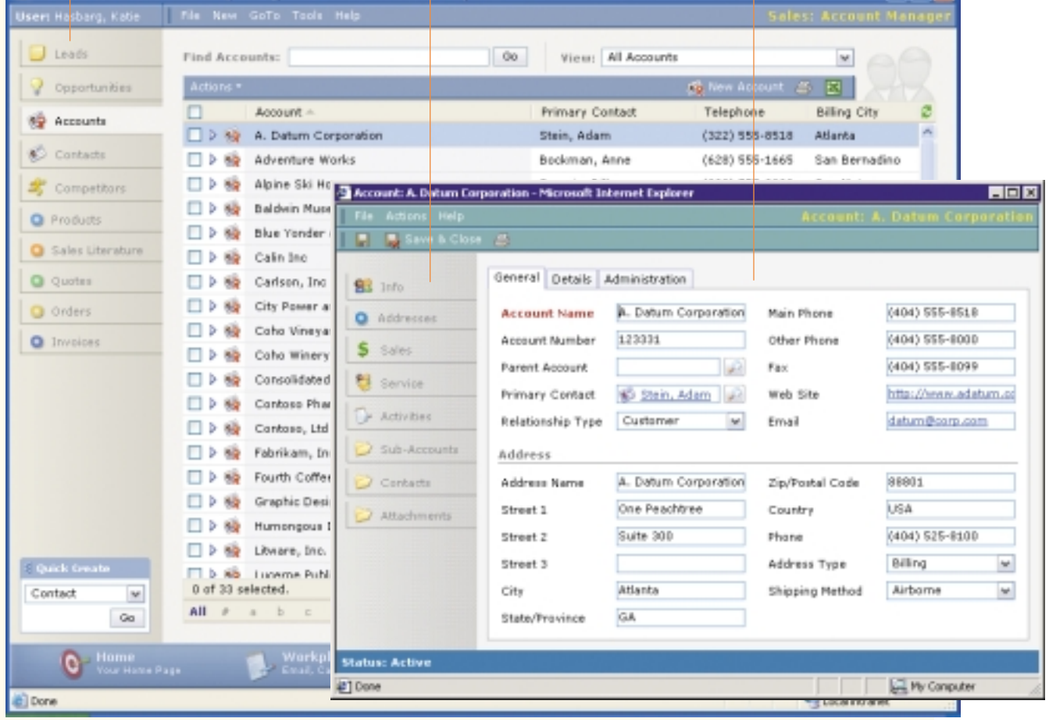
Use customizable templates to create and send e-mail to targeted prospects and customers. Print communication materials can be created and sent to prospects and customers using Microsoft Word Mail Merge.

MICROSOFT CRM SALES

Maintain a detailed, complete view **of each customer. Easily view and update account information and sales and service activity.**

Keep information about leads, **opportunities, accounts, competitors, products, and sales literature centralized and readily available.**

Track the data **you need to close sales using customizable forms.**



STAY INFORMED, CURRENT, AND CONNECTED – WHEREVER YOU ARE

Access Full Sales Functionality, Online and Offline

TO INCREASE SALES SUCCESS, employees need accurate customer information from across the business, along with the ability to access that information at any time, from any location. Microsoft CRM Sales integrates tightly with Microsoft Outlook so that salespeople can work both online and offline with access to full sales functionality.

Familiar Microsoft Outlook environment

Access Microsoft CRM Sales information and functionality quickly and easily from Outlook.

Work from any location

Work offline with accounts, leads, opportunities, quotes, orders, sales literature, and more – when you're on the road, you'll have access to full sales functionality.

Integrated e-mail– and more

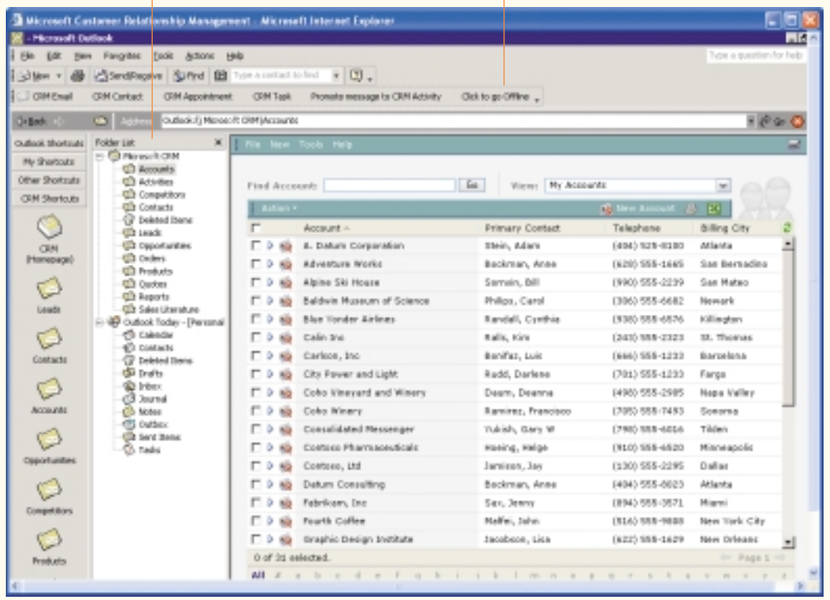
Microsoft CRM e-mail, contacts, tasks, and appointments are integrated with Outlook.

Powerful synchronization

Every time you go offline, Microsoft CRM Sales goes with you—you'll always work with updated information. If you make changes to data while working offline, the new information will synchronize with the Microsoft CRM server the next time you go online.

Access Microsoft CRM quickly **and easily from the Outlook Folder List and Shortcut Bar.**

Work offline **with accurate, updated information and full sales functionality.**



MICROSOFT CUSTOMER RELATIONSHIP MANAGEMENT

CUSTOMER SERVICE

Delivering Customer Loyalty

DELIVER SUPERIOR CUSTOMER SERVICE AND INCREASE SUPPORT CAPACITY–WITHOUT ADDING EMPLOYEES. Microsoft CRM Customer Service makes it easy for service representatives to track customer requests, manage support incidents from initial contact through resolution, and provide the consistent, efficient service key to customer satisfaction.

Case management

Create, assign, and manage customer service requests from initial contact through resolution, as well as manage communications and other activities.

Service requests

Incoming support inquiries from a Web site or via e-mail are automatically associated with the appropriate case, helping increase accuracy and efficiency for processing requests.

Queuing

Send cases to a waiting area – the queue – where they can be easily accessed by individuals and teams.

Routing and workflow

Use workflow rules to automatically route cases to the appropriate representative or team for resolution, escalation, or reassignment.

Comprehensive view of customer information

View customer information and accounts, including sales and order information, to better understand specific customer needs and answer questions.

Searchable knowledge base

Resolve common support issues quickly with a searchable knowledge base that contains relevant articles and information. Built-in review processes help ensure that published information is complete, correct and properly tagged for search.

Product catalog

Work with a full-featured product catalog that includes support for complex pricing levels, units of measure, discounts, and pricing options.

Contract management

Create and maintain service contracts within Microsoft CRM to help improve billing accuracy for support incidents. Each time a support case is resolved, relevant contract information is updated automatically.

E-mail management (includes auto-response e-mail)

Maintain customer-related communications with automated tracking of customer e-mail messages. Incoming e-mail is associated with appropriate customer records. Customizable templates and workflow rules make it easy to generate and send auto-response e-mail to customer requests.

Reports

Use comprehensive reporting tools to identify common support issues, evaluate customer needs, track service processes, and measure service performance.

Increase employee satisfaction

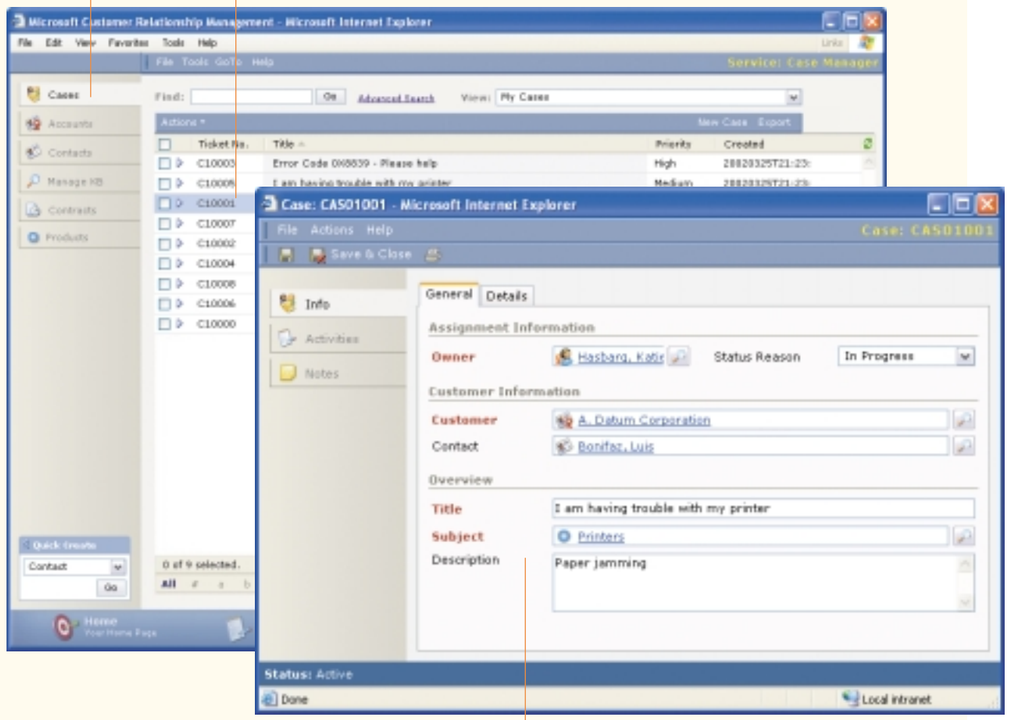
Customer service representatives will get started fast and work efficiently with powerful knowledgebase resources, easy sharing of information, and automated processes that save time and ensure accuracy.

SATISFACTION

MICROSOFT CRM CUSTOMER SERVICE

All support cases, **account information, problem resolution tools, and contracts are centralized and easily accessible.**

View and track **all support incidents from initial contact through resolution.**



Track the data you need **to offer customers consistent, efficient service by using customizable case forms.**

DESIGNED FOR FLEXIBILTY, INTEGRATION, AND LOW TOTAL COST OF OWNERSHIP

A Microsoft .NET Solution

BUILT FROM THE GROUND UP ON MICROSOFT .NET TECHNOLOGIES, Microsoft CRM offers a flexible, *n*-tier architecture that can be easily integrated with other applications and Web services, as well as a rich environment for customizations that carry forward with upgrades.

- Because it's built on .NET technologies, users can access Microsoft CRM through a Web client running in Microsoft Internet Explorer and through a Microsoft Outlook client.
- Software vendors and systems integrators can easily incorporate Microsoft CRM Web service functionality into custom solutions developed in Microsoft Visual Studio® .NET.
- Customizations automatically carry forward whenever you upgrade, saving time and reducing customization and maintenance costs.
- Microsoft SQL Server™ replication enables users to synchronize data between offline clients and the online application. Using Microsoft Outlook, sales people can access full sales functionality both online and offline.
- Microsoft CRM grows along with your business and supports a wide range of customizations, ranging from simple, out-of-the-box desktop deployments to robust Web services implementations.
- A robust security model, based on Microsoft Active Directory® log-ins and user-based roles, ensures effective management of applications privileges, platform privileges, and licensing rights.

With support for open standards such as Extensible Markup Language (XML) and Web Services Description Language (WSDL), Microsoft CRM enables efficient, cost-effective integrations with external business systems–regardless of platform or programming language. As part of the .NET vision, Microsoft CRM will transform the ways mid-market businesses use Web-based information and services to develop profitable customer relationships.

ARCHITECTURE

Power Of Integration

MAINTAIN A COMPLETE, EASILY SHARED VIEW OF CUSTOMER INFORMATION ACROSS YOUR BUSINESS, streamline business processes from the start, and integrate easily with third-party applications and Web services.

Integration functionality for Microsoft CRM includes:

Microsoft CRM Sales and Customer Service

- When data is entered in Microsoft CRM, the information updates automatically throughout the application.
- Tightly integrated Sales and Customer Service functionality makes it easy to share customer and product information across the business.
- Salespeople can view customer service information, such as support cases, that might affect sales processes for a specific opportunity or customer.
- Customer service representatives can view customer accounts, including sales and orders, to identify specific customer needs and answer account-related questions.

Microsoft Office 2000 and Microsoft Office XP

- With the Microsoft Outlook client, sales employees can work online or offline with full sales functionality, including accounts, contacts, opportunities, products, sales literature, activities, e-mail, and more.
- Integration with Microsoft Office lets users create and print communications using Microsoft Word Mail Merge, as well as export data to Microsoft Excel.

Microsoft Business Solutions

- Microsoft CRM integrates easily with Microsoft Business Solutions Financials.
- Integration functionality includes key data mapping for accounts, contacts, product catalog, orders, and price lists.

Third-party applications and Web services

- Microsoft CRM functionality can be exposed through open APIs for integration with third-party applications and Web services.

CONNECT

Microsoft CRM integration leverages Microsoft BizTalk® Server 2002 Partner Edition, offering robust messaging functionality, reliable data-mapping tools, and rich data transformation using XML technologies.

IMPLEMENT EASILY IN YOUR MICROSOFT ENVIRONMENT

DESIGNED TO MEET THE BUDGET and support needs for mid-market businesses, Microsoft CRM can be purchased, deployed, and maintained at a reasonable cost, with the assurance of expert support from Microsoft Business Solutions Partners.

- Help ensure rapid deployment, easy maintenance, and straightforward upgrades with centralized installation and simplified setup processes.
- Use flexible business management settings to mirror your company's organizational structures, including multi-level, multi-division businesses, or businesses with subsidiaries.
- Migrate data from multiple sources. Microsoft CRM offers predefined data migration and mapping for Microsoft Business Solutions and other CRM applications.
- Configure forms, settings, and interfaces to suit your business needs.
- Integrate with new or existing solutions, including Microsoft Business Solutions, third-party applications, and Web services.
- Scale the installation as your business changes and grows.

Expert, Reliable Support

A global network of certified Microsoft Business Solutions partners offer hands-on assistance with setup and maintenance processes for Microsoft CRM, along with comprehensive training and support resources.

Create Customized Solutions

A .NET solution, Microsoft CRM enables developers to build new functionality into the application, integrate with business systems and Web services, and scale the installation to meet changing business needs.

Developers can work with:

- Flexible, *n*-tier .NET architecture, including secure, exposed API calls.
- Direct access to platform APIs for rapid solution development in Visual Studio .NET.
- Software Development Kit (SDK) documentation.
- Integration tools: Microsoft BizTalk Server 2002 Partner Edition.

CUSTOMIZE TO MEET YOUR BUSINESS NEEDS

MOLD YOUR SOLUTION TO MEET ORGANIZATIONAL AND INDUSTRY-SPECIFIC NEEDS – but do it easily and affordably, with efficient customization processes that help reduce costs and improve return on investment.

Map organizational structures

Using flexible default settings, your channel partner or administrator can closely mirror your company's organizational structure, including the ability to represent reporting structures and multi-department organizations.

Specify user access rights

Define and configure role-based security settings to ensure users have appropriate access to information and business processes.

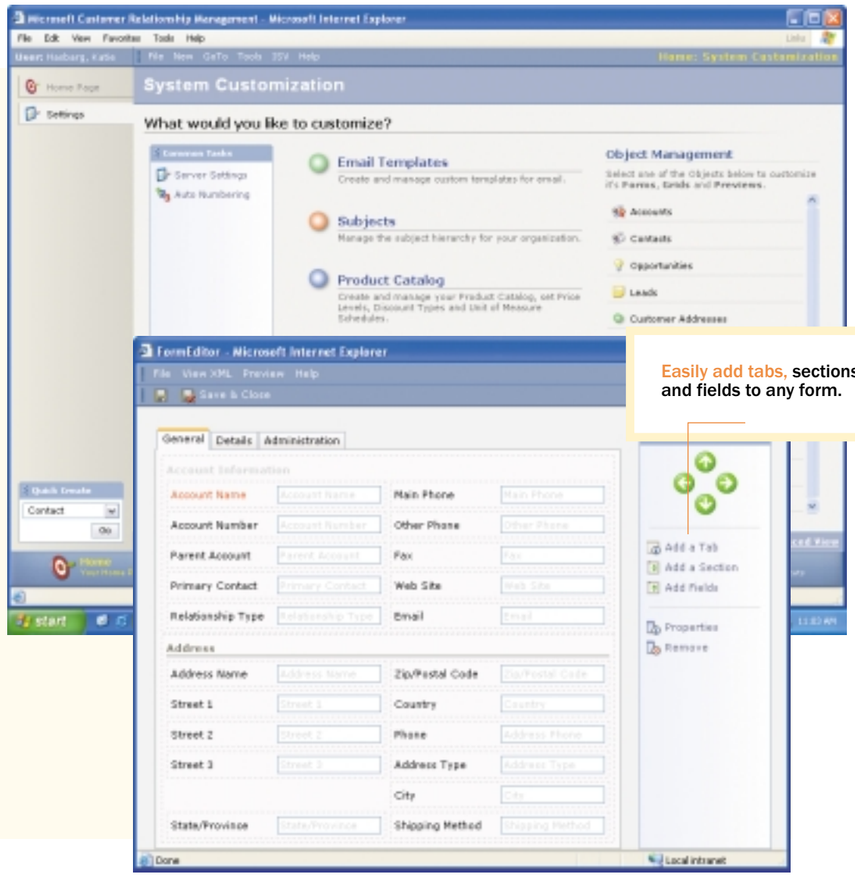
Customize forms

Ensure you capture the data you need to close sales and optimize customer service with easily customizable forms.

Modify or create workflow rules

Define workflow rules or create new rules for automated business processes, including leads routing and notifications, opportunity and pipeline management, sales processes, case management, and data transfer to other applications.

Customize to meet your business needs. Save time and money, but meet your unique business needs– tailor forms and views quickly and easily, without calling on IT support.



Easily add tabs, sections, and fields to any form.

Microsoft®
Customer
Relationship
Management

A MICROSOFT.NET SOLUTION

DESIGNED FOR MID-MARKET BUSINESSES

- Accessible through Microsoft Outlook and the Web.
- Offers users a complete customer view, easy sharing of information, automated sales and service processes, and access to full sales functionality through Outlook.
- Includes comprehensive reports for evaluating business performance and forecasting sales activity.
- Designed for rapid deployment and efficient, affordable customization and maintenance.
- Easy to learn and use.
- Integrates easily with Microsoft Business Solutions Financials.
- Extends to integrations with third-party and Web-based systems.

Power of Choice

Microsoft CRM offers flexible pricing and packaging options, with Sales, Customer Service, or Suite licensing available for Standard or Professional Editions. Pricing starts at $395 per named user plus $995 for the server.

Microsoft®
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Relationship
Management

.NET

For more information about

Microsoft Customer Relationship Management, go to:

www.microsoft.com/crm

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