

Microsoft Dynamics™ CRM Quick Reference Card



Microsoft Dynamics CRM

Microsoft Dynamics CRM Value Proposition. Microsoft and its partners are helping redefine your Customer Relationship Management experience by delivering a fast, flexible, and affordable solution for driving consistent and measurable improvements together with the consistent strategy, excellence, and service you expect from a Microsoft partner to help guarantee your CRM success.

Using This Guide

When contacting leads, this guide will be your go-to document. In it you will find:

- **QUALIFYING QUESTIONS**, which will help you define your customer’s needs and let you steer the conversation appropriately.
- **QUICK FACTS**, full of useful information when talking to your lead.
- **KEY CAPABILITIES**, helps you understand the value of the software as it applies to each department.
- **HANDLING SALES OBJECTIONS**, address key differences and arguments related to competitors like SAP, Sage and Salesforce.com.
- **PROOF POINTS** section laid out by department, helping you stay on message while speaking specifically to the issues facing your lead.

Qualifying Questions

- Which administrative tasks are getting in the way of your people spending more time driving sales?
- How do you feel real-time data could benefit your business decisions?
- When service issues occur, how quickly can your current CRM system help solve the problem?
- Which of your departments has the most to gain from an updated CRM system?
- When it comes to the growth of your company, which of your systems will have the most trouble keeping up?
- How do your people use existing data to analyze and anticipate potential service issues?
- Which of your departments have the most trouble sharing pertinent information?
- How do your departments share information to identify sales opportunities?
- When diagnosing a customer issue, what could make for a quicker resolution time?

Quick Facts

- Works the Way You Do** — Businesses can drive high user adoption by delivering role-tailored CRM capabilities within a native Microsoft® Office Outlook® experience. People can choose to use a rich Office Outlook client or access the system through a browser-based client or a mobile device. Because most organizations are familiar with Microsoft Outlook and other Microsoft productivity tools, Microsoft Dynamics CRM helps minimize the need for training, reduces application switching, and enables high productivity teamwork across business units and systems.
- Works the Way Your Business Does** — Organizations can easily mold every aspect of a complete CRM solution—including sales, marketing, service, and analytics—to fit their unique business needs, including their specific line of business. Event-driven workflow capabilities can drive consistent process execution across the organization. Powerful reporting and analytics based on Microsoft Excel® and SQL Server™ Reporting Services deliver real-time visibility into every business process and customer interaction.
- Works the Way Technology Should** — Microsoft Dynamics CRM is based on proven, industry-standard Microsoft technologies that enable efficient configuration, customization, integration, and data security features, reducing IT workload and maximizing existing investments in Microsoft technologies. True .NET design means Microsoft CRM connects seamlessly to the external data sources you need, while Web Services Validation capabilities ensure seamless connections with external service and information providers.

Key Capabilities

- Sales:** Shorten the sales cycle and improve win rates with a 360-degree customer view, lead and opportunity management, automated lead routing, sales process automation, and competitor tracking.
- Service:** Increase capacity to handle requests without increasing employee count. Service representatives can track requests, manage support issues from contact through resolution, and deliver the consistent, efficient service that helps ensure customer satisfaction.
- Marketing:** Deliver the right message to the right audience through effective target marketing. Marketing professionals can segment customer data across multiple data points to ensure proper audience definition. Complex full cycle marketing campaigns can be planned and executed with the results feeding directly into lead and sales management processes.
- Analytics:** Intuitive business intelligence tools built on Microsoft SQL Server and the Microsoft Office system deliver role-tailored reporting and analytics capabilities that empower executives, managers, and sales and service people to track and manage business performance; quickly create reports; and measure and forecast revenue, identify opportunities, and proactively manage service issues.
- Mobility:** Microsoft Dynamics CRM Mobile works with most handheld or mobile devices to provide your mobile team with full, customizable sales, marketing, and customer service functionality, including support for multiple languages, regardless of where they’re working.*

Key Capabilities

Integration: Microsoft Dynamics CRM integrates with the Microsoft Office System, Microsoft Dynamics Business Management Solutions, and other business systems to give employees a complete view of customer information across departments, divisions, and external data sources.

Application Development Platform: Microsoft Dynamics CRM provides an organization with the ability to quickly configure and extend the application to meet specific business process requirements. In addition to a “codeless” configuration environment, IT professionals can leverage out-of-the-box Web services to deliver rich content from other legacy applications.

Handling Sales Objections

COMPETITOR POSITIONING

HOW TO POSITION AGAINST / WHY WE WIN

Seibel Enterprise Edition claims 3,500 customers and a global presence. It is the number one CRM analytics vendor. Its relationship with Microsoft includes some integration with Outlook and Office. Dual platform strategy: .NET and Java.

Microsoft corporate viability and market presence; Microsoft technology architecture, integration with Office suite and .NET; Sell as temporary solution during Siebel implementation; .NET architecture to maximize business value of application portfolio; Siebel is hard to configure; Microsoft Dynamics CRM is also available as a hosted solution.

SalesForce.com claims 12,500 customers in 110 countries, and supports 11 languages. It is the number one hosted CRM vendor. It targets a broad range of companies across multiple verticals, and offers only hosted solutions. Its mantra is “No Software.”

Long-term low TCO and higher ROI; Microsoft viability and business model; Familiar, consistent, and integrated user interface; Security features of on-premises data storage and local operation; Offline mode superiority; Superior workflow and business process integration; Option for hosting or on-premises deployment; Ease of integration.

Onyx has 1,150 customers and a global presence. They use direct sales to divisions of Fortune 1000 companies. Their Enterprise CRM product has many horizontal components. Formerly a Microsoft partner with a .NET architecture, they are focused in financial services and public sector markets.

Microsoft corporate viability and market presence; Familiar, easy-to-use intuitive interface; Outlook integration; Microsoft technology architecture, integration with Office suite and .NET;

Pivotal claims 1,700 customers, 110 countries, 11 languages. They target a broad range of companies across multiple verticals. They were recently acquired by China.com; their future is uncertain.

Broader partner channel; Confusion over Pivotal future; Established first-rate sales and support; Ease of integration.

SAP — Business One CRM has 4,200 customers and offices in 50 countries. Their client/server-based solution is not fully web-enabled nor able to work with mobile devices. They leverage relationships with parent (“hub”) companies into subsidiary (“spoke”) sales. CRM functionality is relatively new.

Established first-rate sales and support reseller/channel organization; SAP hasn’t been successful to date in divisions of large companies; Outlook integration; Familiar, consistent, and integrated user interface; Cost effective CRM for a lower TCO; Integration capabilities and extensibility; Technology leadership (SAP uses Microsoft technologies in BusinessOne); More sales functionality; B1 and mySAP integration is mainly marketing; B1 is principally a small business product.

SAP — mySAP All-in-One has 5,600 customers. They are a packaged industry-specific solution with key verticals in auto, chemicals, consumer products, and high-tech. They have been investing heavily in the partner channel and focusing on rolling out products to the subsidiaries and branches of existing SAP customers.

Established first-rate sales and support reseller/channel organization; SAP hasn’t been successful to date in divisions of large companies; Full solution; Outlook integration; Familiar, easy-to-use, and intuitive user interface; Cost effective CRM for a lower TCO; Integration capabilities and extensibility; Technology leadership.

Proof Points (By Department)

SALES | Microsoft Dynamics CRM

- Simplifies data entry so users spend more time driving sales and less time performing administrative tasks.
- Enables you to access full sales functionality online or offline through Microsoft Outlook, or work from various locations using the Web client or Microsoft Windows® Mobile-based Pocket PC.
- Provides comprehensive reports to enable you to forecast sales, measure business activity and performance, track sales and service success, and identify trends, problems, and opportunities

MARKETING | Microsoft Dynamics CRM

- Transforms customer information into clear, actionable knowledge that enables your company to respond quickly to changing customer preferences and emerging market opportunities.
- Provides you with intelligent list and segmentation tools to reach prospective customers quickly and effectively.

- Provides reporting and analysis tools built on Microsoft SQL Server Reporting Services to give you the precise customer knowledge you need to make sound decisions quickly.

CUSTOMER SERVICE | Microsoft Dynamics CRM

- Enables you to quickly log, analyze, and resolve service issues with streamlined access to service contracts, frequently asked questions, and historical customer information.
- Allows you to assign, manage, and resolve support incidents with automated routing, queuing, and escalation of service requests, along with case management, communications tracking, and auto-response e-mail.
- Improves your first-call resolution rates using a searchable, shared knowledge base of articles organized by product and service category.

*Connectivity and synchronization may require separately purchased equipment and/or wireless products (e.g., WiFi card, network software, server hardware, and/or redirector software). Service plans are required for Internet, WiFi and phone access. Features and performance may vary by service provider and are subject to network limitations. See device manufacturer, service provider and/or corporate IT department for details.