

CRM Accelerators Overview

Microsoft Dynamics CRM – November 2008

CRM Accelerators are a range of free-of-charge add-on solutions which are being developed for Microsoft Dynamics CRM 4.0 customers and partners. Each accelerator will showcase how the Microsoft Dynamics CRM 4.0 platform can be configured and extended to broaden marketing, sales and service capabilities. CRM accelerators provide additional functionality for deployments of Microsoft Dynamics CRM 4.0. Microsoft Dynamics CRM customers are encouraged to further configure these accelerators to meet their specific business needs.

Each accelerator may consist of the following:

- Importable data model
- Business process workflows
- Business Intelligence elements such as custom reports
- Functional code samples (strictly adhering to SDK guidelines)
- Documentation for installing, operating, localizing and extending the solution
- An automated installer

Each accelerator will be fully supported as per any other customization that follows SDK guidelines. Additionally, all samples are supplied with full source-code so they can be extended further to meet specific customer requirements. Because of Microsoft Dynamics CRM's services-based architecture and metadata-driven application capabilities, accelerators can be easily deployed for both on-demand and on-premise environments.

Through accelerators, customers and partners benefit from new functionality on a more frequent basis, and they can be deployed to their environment quickly and easily. Delivery of these accelerators will be during the second half of 2008.

The list of accelerators is as follows:

- Analytics
- eService
- Event Management
- Enterprise Search
- Sales Methodologies
- Extended Sales Forecasting
- CRM Notifications
- Business Productivity

Following is a description of each accelerator to be released.

Analytics Accelerator

Many customers and partners will be familiar with Analytics Foundation for Microsoft Dynamics CRM 3.0 which was a business intelligence feature pack for Microsoft Dynamics CRM 3.0. Analytics Foundation for Dynamics CRM 3.0 included Dashboards, Key Performance Indicators (KPI's) and a suite of new reports. Analytics Accelerator for Microsoft Dynamics CRM 4.0 expands on this, and is designed to support a range of business intelligence "maturity" levels for customers and partners. The Analytics accelerator has



been built to cater for differing business intelligence skill-sets and experience levels. Elements of the accelerator include:

- Sales, service and operations dashboards delivered with Microsoft SQL Server® Reporting Services (SSRS).
- Sales, service and operations dashboards and scorecards delivered with Microsoft PerformancePoint® Server.
- Additional reports delivered with SSRS.
- Two Online Analytical Processing (OLAP) cubes which are designed to allow customers to conduct in-depth analysis and key performance indicator (KPI) monitoring based on Microsoft Dynamics CRM 4.0 data. Customers can consume these cubes through Microsoft Excel®, Microsoft SharePoint® technologies and Microsoft PerformancePoint Server. The first OLAP cube is designed for simple setup and consumption, the second cube is more detailed and requires a more advanced knowledge of analytics and OLAP technologies within Microsoft SQL Server.
- Predictive analytics to provide statistical guidance in areas such as lead and sales opportunity management. There are several sample applications which ship as part of the accelerator that showcase how customers can leverage predictive analytics directly within the Microsoft Dynamics CRM 4.0 user interface.
- The analytics accelerator will work with SQL Server 2005 with some components enhanced to take advantage of SQL Server 2008.

The following images are taken from the beta version of the Analytics Accelerator:

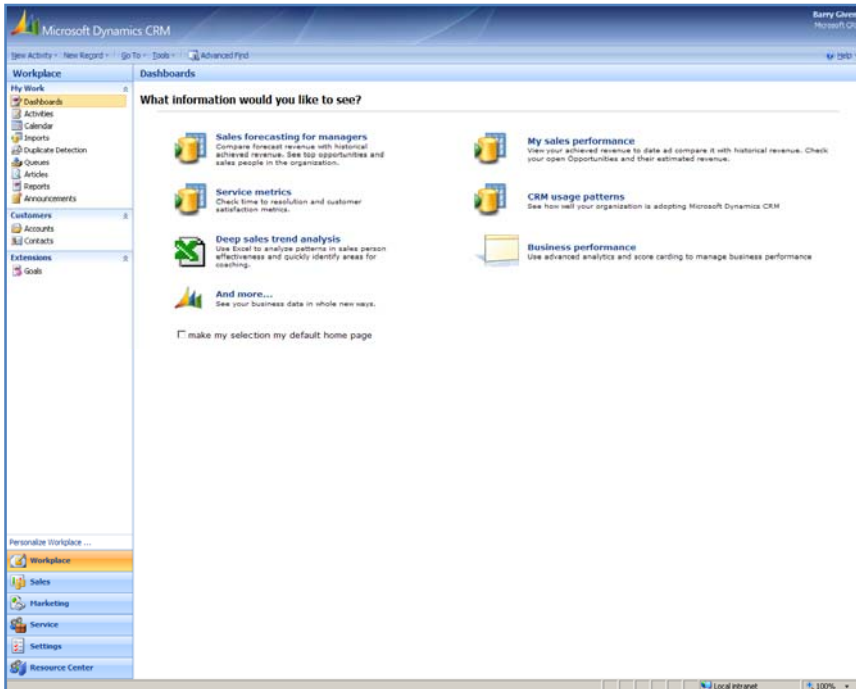


Figure 1: Beta version of the Analytics Accelerator landing page in Microsoft Dynamics CRM 4.0

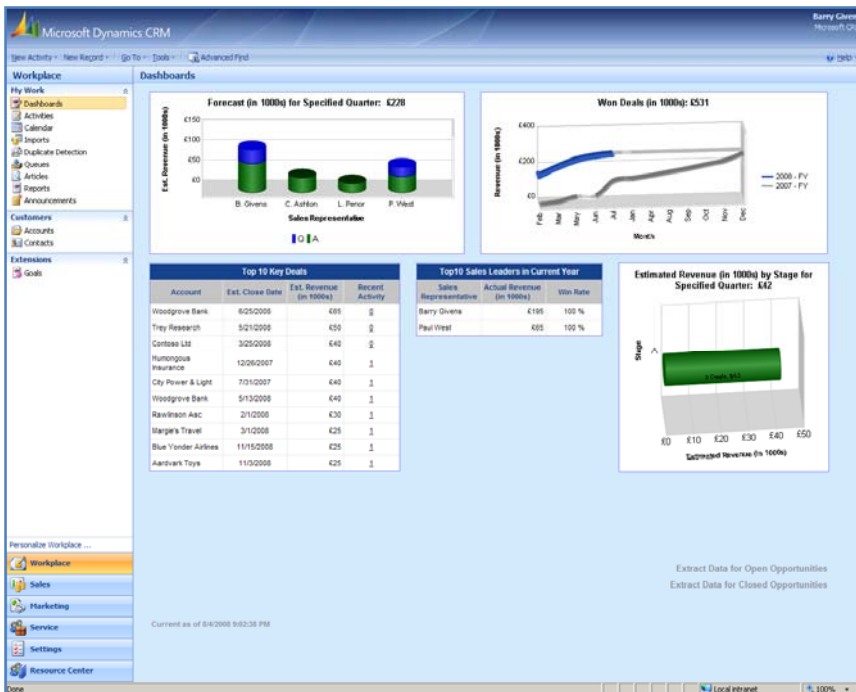


Figure 2: Beta sample sales dashboard for Microsoft Dynamics CRM 4.0

eService Accelerator

The eService accelerator provides businesses the ability to deliver self-service capabilities to their customers while tracking and managing these interactions in Microsoft Dynamics CRM.

Customer Service is generally considered a cost center where cost-savings and productivity are the top priorities for most businesses. This stands in stark contrast to marketing and sales which is usually viewed as a profit center where revenue generation is the focus. People that manage call centers or customer service operations are constantly looking for new processes and technologies that can help them drive customer service efficiencies. Essentially, they want to service more customers at less cost while at the same time maintaining (or even improving) customer satisfaction. This can be a difficult equation for organizations to solve.

eService provides the mechanism to help businesses solve that difficult equation. At its core, eService is comprised of a range of technologies that allow businesses to provide online support to customers, which can “deflect” calls and in-person visits, or at minimum reduce a portion of the cost to manage a service issue. As demographics shift worldwide and Internet technologies become more pervasive, many customers prefer to use an eService channel.

The Microsoft Dynamics CRM 4.0 eService accelerator provides customer self-service capabilities (via a web portal) as a configurable out-of-the-box offering. The web self-service portal exposes the following CRM functions to customers:

- Customer authentication into the portal and workflows to manage the setup of a contact as a web self-service customer.
- Customer profile updates to contact details; this capability is configurable allowing organizations to choose which attributes of the profile they want to expose to the customer portal such as name, contact details and communications preferences.
- The ability to view, create, edit and close service cases. There are two permission levels available to web portal customers:
 - Account-Level: these customers can view and modify all cases raised against the account they are associated with.
 - Contact-Level: these customers can only view and modify service cases that they themselves have raised.
- Online service scheduling allowing customers to search for convenient times and then book service appointments with the organization.
- Search against the Microsoft Dynamics CRM knowledge base (KB) using keywords. Once the appropriate KB article has been located the customer can then email that article to themselves or others.

The accelerator can either be used within the customer’s own web portal or they can use the pre-built portal solution provided by Microsoft in the ASP.NET 2.0 Small Business Starter Kit <http://www.asp.net/downloads/starter-kits/small-business/>.

All source code from the customer portal solution is provided so that customers and partners can extend the solution further and tailor it to their specific business requirements.

The following images are taken from the beta version of the eService Accelerator:

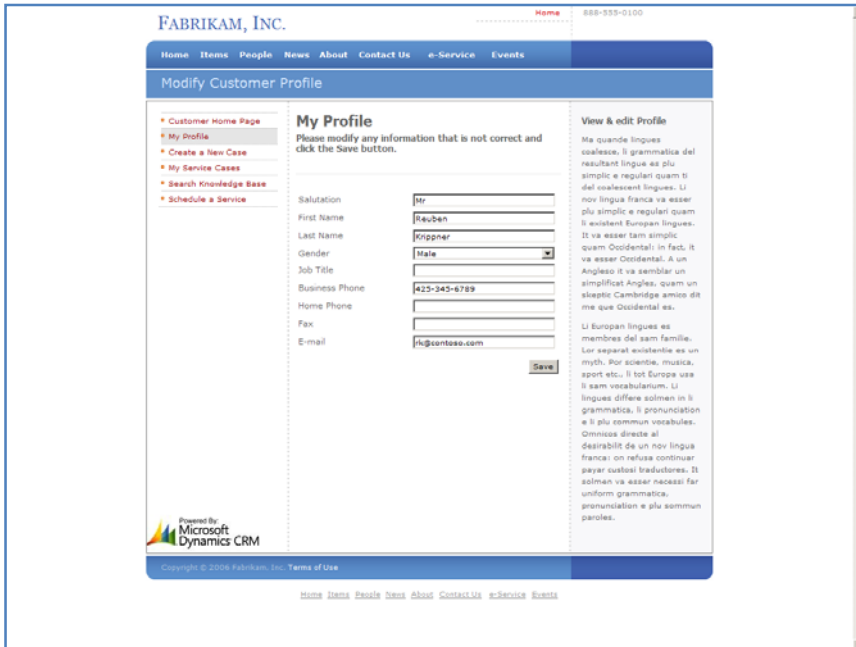


Figure 3: Beta sample Customer Profile edit page

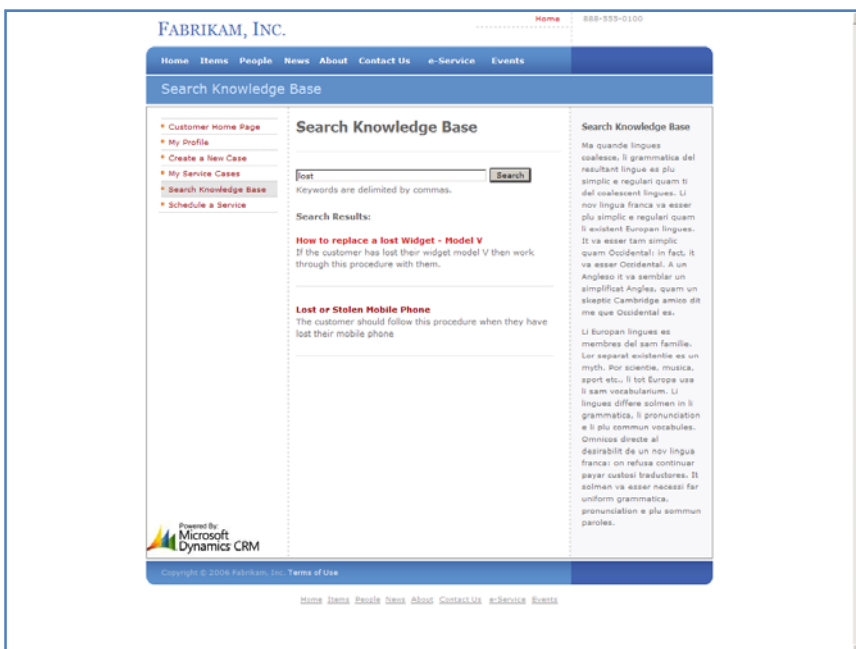


Figure 4: Beta sample KB Search page



Figure 5: beta sample Service Scheduling page

Event Management Accelerator

The event management accelerator gives companies the ability to easily manage the planning, execution, tracking and reporting requirements for events. The event management accelerator focuses on three areas of event management, namely:

- Event Planning - logistics around an event such as:
 - Booking the venue
 - Presenters
 - Catering
 - Presentation content preparation
- Event Attendance - all aspects around managing the attendees such as:
 - Inviting the target audience via phone, fax, letter and email
 - Managing registrations via phone, letter, fax, email and web
 - Tracking all people who actually attended the event
- Event Review – Microsoft Dynamics CRM reports that measure the effectiveness of the event:
 - How many people attended the event?
 - What was the revenue impact of the event?

A core component of the event management accelerator will be a web application that customers and partners can deploy to allow web registration for their events and track these registrations in Microsoft Dynamics CRM.

The following images are taken from the beta version of the Event Management Accelerator:

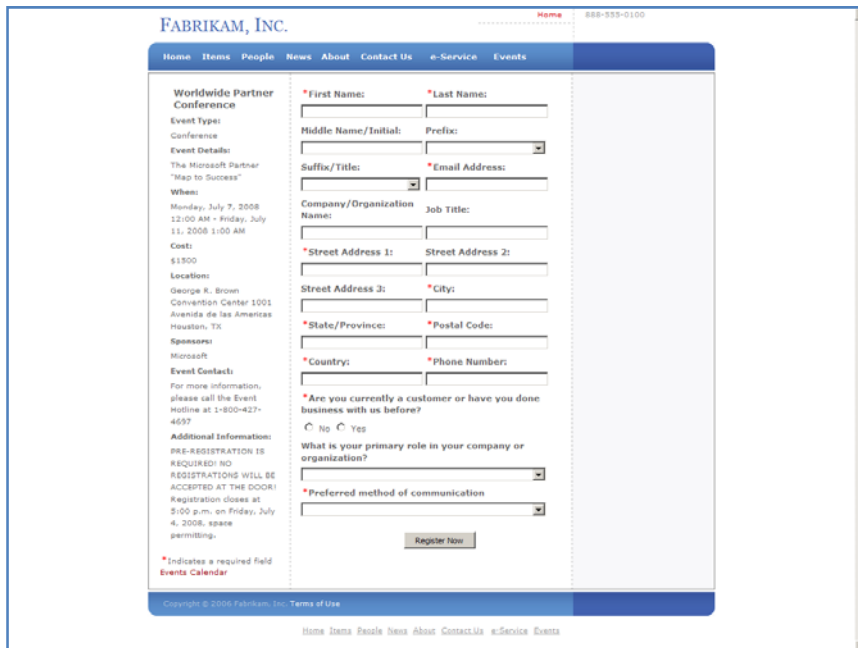


Figure 6: beta sample Event Registration page

Enterprise Search Accelerator

The enterprise search accelerator allows Microsoft Office SharePoint Server (MOSS) customers to view and search for Microsoft Dynamics CRM data directly from their SharePoint portals. By combining these two technologies users from different areas of the business will be able to:

- View and edit any Microsoft Dynamics CRM data such as accounts, contacts, opportunities, sales orders, invoices, service cases and any custom entity data through SharePoint. The Microsoft Dynamics CRM security model is preserved and enforced so that users can only view or edit CRM information that their security role allows.
- Launch a SharePoint search which can return documents, emails, web content and Microsoft Dynamics CRM data.

The enterprise search accelerator provides one enterprise portal that users can search and view important customer information and documents from several sources within the organization. Additionally, the technology, Business Data Catalog (BDC), and techniques used with this accelerator can be employed to surface data from other line of business applications to further enrich the SharePoint portal.

The BDC makes it easy for people to connect to, find, and act on information stored in structured line-of-business systems (such as Microsoft Dynamics CRM) by using a declarative framework to securely integrate them into search results. With the BDC customers and partners can configure actionable audience-specific portals, dashboards and mash-up interfaces for this data without writing any code.

The following images are taken from the beta version of the Enterprise Search Accelerator:

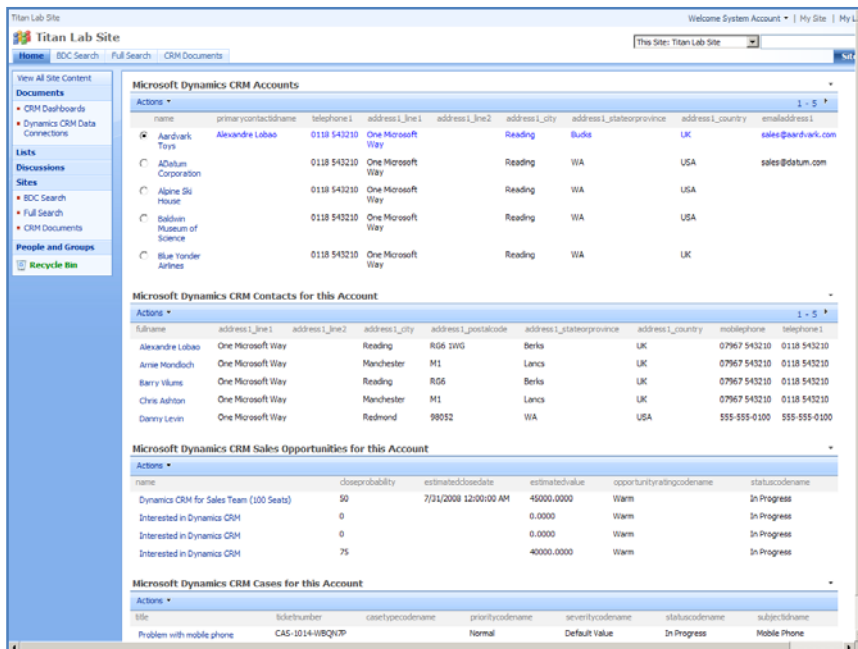


Figure 7: Sample SharePoint portal configured using the Enterprise Search Accelerator

Sales Methodologies Accelerator

The sales methodologies accelerator is for customers who work with or want to work with one of the leading sales methodology vendors, including: Target Account Selling (TAS), SPI Solution Selling and Miller Heiman. Each of these vendors has their own distinct software products which need to be integrated with Microsoft Dynamics CRM to provide a holistic approach to sales management. The sales methodologies accelerator will provide customizations, advice and guidance for customers on how these sales methodologies can be configured, managed and integrated with Microsoft Dynamics CRM 4.0.

Extended Sales Forecasting Accelerator

The extended sales forecasting accelerator enriches the out-of-the-box sales forecasting capabilities in Microsoft Dynamics CRM 4.0. Principally, sales users of Microsoft Dynamics CRM can review their individual sales pipeline and quickly classify opportunities as committed, excluded or upside. Sales managers can monitor and track sales targets, budgets and performance against these forecasts for specific time periods (e.g. months and quarters).

Underpinning these capabilities will be new Microsoft Dynamics CRM 4.0 reports that summarize sales performance for the organization as a whole or for individual salespeople.

CRM Notifications Accelerator

The CRM notifications accelerator allows users to subscribe to the CRM “business events” that are significant to them, e.g. a salesperson is interested in new leads and opportunities assigned to them whereas a customer service representative is interested in new service cases assigned to them. Once the

user has subscribed (each user manages their subscription profile) to the types of events that are important to them they can elect how they want these event notifications to be delivered. Notifications are delivered via a Really Simple Syndication (RSS) feed and can be consumed with many desktop tools including Microsoft Outlook 2007 or the standard newsfeed Windows Vista® gadget.

The CRM notifications accelerator further drives system and process efficiency for users by giving them visibility into the business events which are directly relevant to their role.

Business Productivity Accelerator

The business productivity accelerator is a toolkit of timesaving customizations and workflows for Dynamics CRM 4.0. Final scoping is not yet complete but here is a glimpse of some of the components under consideration:

- Generic sales process workflows for simple and more complex sales organizations. For Microsoft partners there is a workflow process for the Microsoft Solution Selling Process (MSSP).
- Business data auditing workflows
- Customizations to manage a customer reference program with Microsoft Dynamics CRM 4.0
- Generic service process workflows for complaints management.

There are many other ideas under consideration for this accelerator and the final list will be communicated prior to final release.

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