

Business Value of Integrated Innovation with Microsoft CRM

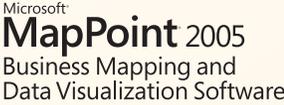
Microsoft Business Solutions CRM	 Microsoft Office		
	 Microsoft Office Outlook 2003	 Microsoft Office Word 2003	 Microsoft Office Excel 2003
	 Microsoft Office InfoPath 2003	 Microsoft Office OneNote 2003	 Microsoft Office SharePoint Portal Server 2003
	 Microsoft Office Publisher 2003	 Microsoft Office PowerPoint 2003	 Microsoft Office Information Bridge Framework
	 Microsoft Office Live Communications Server 2003	 Microsoft Office Solution Accelerator for Business Scorecards	 Microsoft Office Live Meeting
Microsoft Business Solutions CRM	 Microsoft Windows xp Tablet PC Edition	Microsoft Business Solutions CRM	 Windows Mobile
Microsoft Business Solutions CRM	 Microsoft Content Management Server 2002	Microsoft Business Solutions CRM	 Microsoft MapPoint 2005 Business Mapping and Data Visualization Software

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Introduction

Integrated innovation holds the promise of a more seamless user experience enabling multiple systems and applications to operate as one. The approach yields solutions that are easier to manage and simpler to use and deploy, providing greater overall value at lower operational costs.

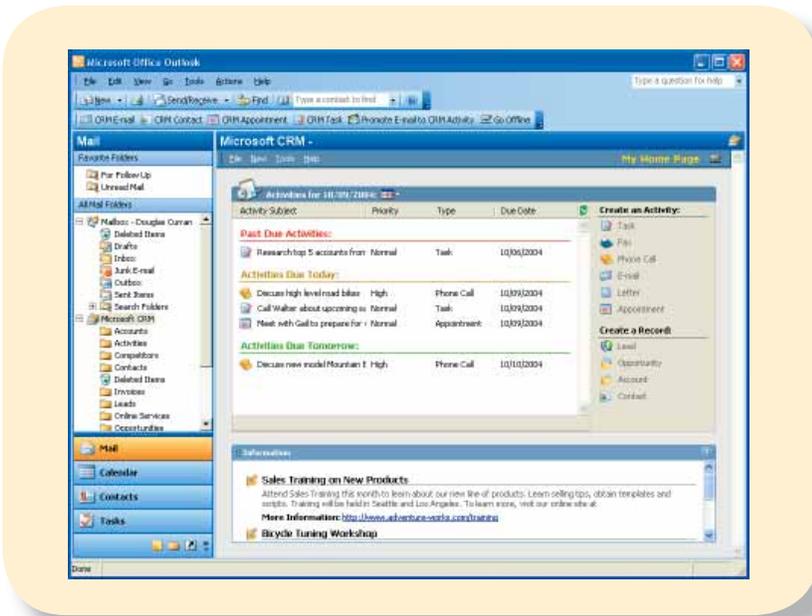
Integrated innovation enables organizations to think differently. Instead of thinking what users can accomplish with each individual system, business leaders can now think what the sum of the parts might bring to business efficiency, knowledge, and information exchange. With integrated innovation, one plus one does not equal two—it equals three or four. Users can access and act on information at the time and via the tool that has the most direct and immediate impact. And if that integration and the access to the data happens in a very familiar interface, then it not only simplifies the business process, it also gives the end-users the ability and confidence to accomplish new tasks with ease.

This collection of scenarios demonstrates a few of the many ways in which integrated innovation around Microsoft® Business Solutions CRM can give businesses the ability to interact with their customers more efficiently and worry less about the tools they use to manage customers. The scenarios bring out ways to leverage synergies with other Microsoft products to broaden the power of users to be more productive. All of this is possible because Microsoft products are built to work together seamlessly.

Improve your “outlook” with rich customer data

Using Microsoft Outlook® and the Microsoft Sales for Outlook Client in Microsoft CRM, you can gain access to and update all of your important organizational sales data without leaving Microsoft Outlook.

A sales representative manages a customer base of approximately 200 separate accounts. The company has made significant investments to provide a system to track sales and customer data for all the representatives. Microsoft Outlook is regularly used to communicate with customers. The representative is comfortable with its functionality but has to toggle between the customer data system and Outlook to get both basic and extended information about the customer. This increases the amount of time spent away from interacting with customers.



To improve efficiency, the sales representative needs a way to effectively manage the customer data without extensive training on new products or applications.

Using the Microsoft Sales for Outlook client powered by Microsoft CRM, the sales representative can manage all the sales data from inside Microsoft Outlook. Contacts and opportunities can be viewed and updated. In addition, current product information, new leads and many other aspects of the data related to the sales process can be viewed and updated. This can all be done from a single application that the sales representative already uses every day—without the need to log into a different system.

The Microsoft Sales for Outlook client provides a single integrated application for the sales representative to manage all sales data and customer information.

Products



Customized marketing campaigns made simple

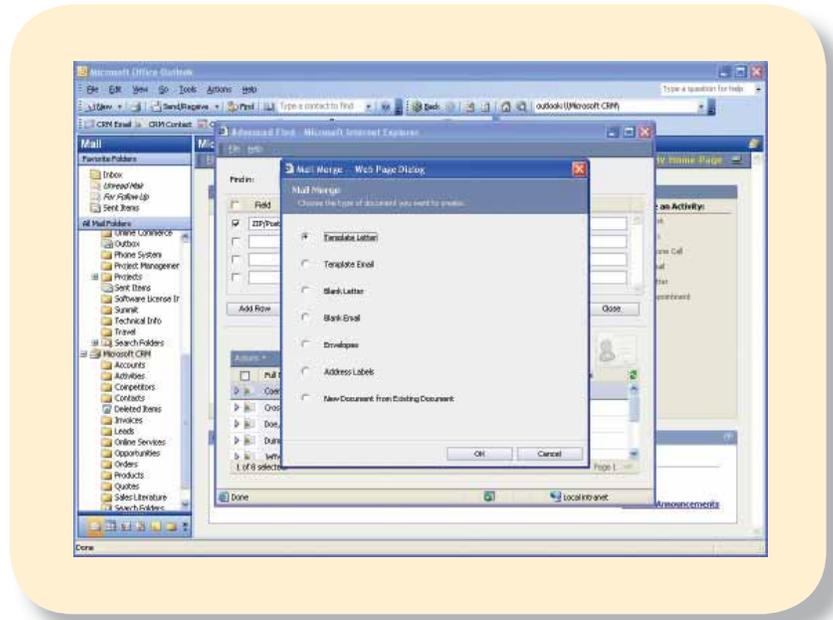
Using data from Microsoft CRM, a customized marketing campaign can be created using Microsoft Word or Microsoft Publisher.

Many companies must routinely create focused marketing campaigns. For example, a campaign might target a specific customer segment whose term on their current service contracts will expire in the next month. Typically, a marketing assistant must create such a list by scanning the customer list for support contract expiration date information. This task usually takes one to two days to complete.

The marketing assistant needs a quick and easy way to gather a list of customers that meet a specific set of criteria and then send each of those customers a direct mail letter.

Using Microsoft CRM and Microsoft Word, the marketing assistant can easily create all of the items needed to facilitate automated execution of these campaigns. A list of customers whose service contracts are expiring can be retrieved from Microsoft CRM and exported to a letter template in Word that will be sent to each individual customer. A similar process can be used with Microsoft Publisher to create personalized flyers and greetings.

Microsoft CRM and the Microsoft Office System 2003 provide a quick and simple method to complete a customized marketing campaign.



Other examples

Personalized flyers; shipping labels; personalized greetings; thank-you cards.

Products

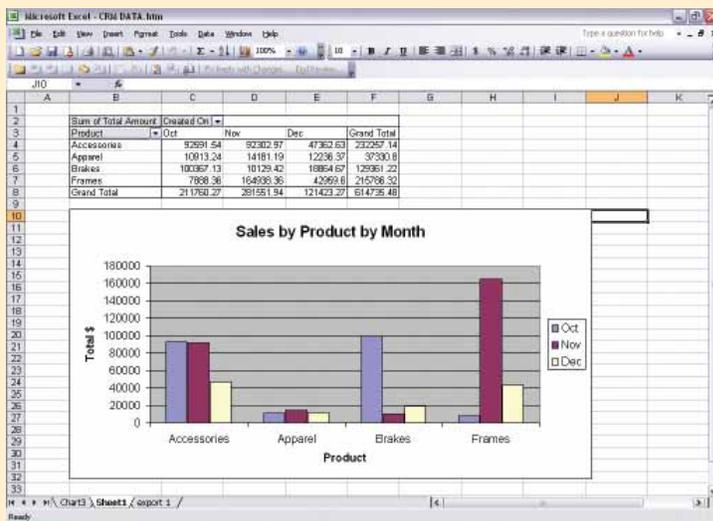


Slice and dice with your sales and service data

Using Microsoft Excel, you can export data from your Microsoft CRM database and run scenarios, reports, and graphs on all aspects of sales and service data.

A research analyst routinely tests the effects of changes to product costs, shipping dates, and transportation costs on revenue. These changes are applied to revenue figures from the prior year to project the effect on upcoming quarters. Currently, the analyst must gather data from multiple resources and create a separate spreadsheet to estimate how changes will impact revenue. This task is lengthy and subject to error due to the many manual steps in the process.

The analyst is very comfortable using Excel to slice and dice the data and to test various "what if" scenarios.



The research analyst needs a method to quickly and easily gather the prior year's sales data, apply changes to it, and make projections for upcoming quarters.

Using Excel and Microsoft CRM, sales data can easily be exported to Excel. Once the data has been imported to Excel, the research analyst can easily test changes to the sales data just as they normally would within Excel.

Because of the powerful exporting capabilities of Microsoft CRM, it is easy to create a system to allow analysis of data in many different ways using Excel.

Other examples

Business manager; marketing analyst; sales manager; customer service manager.

Products



Visualize your sales and service performance geographically

Using Microsoft MapPoint® and Microsoft CRM, a map can be created to graphically show the sales territories in a geographical region.

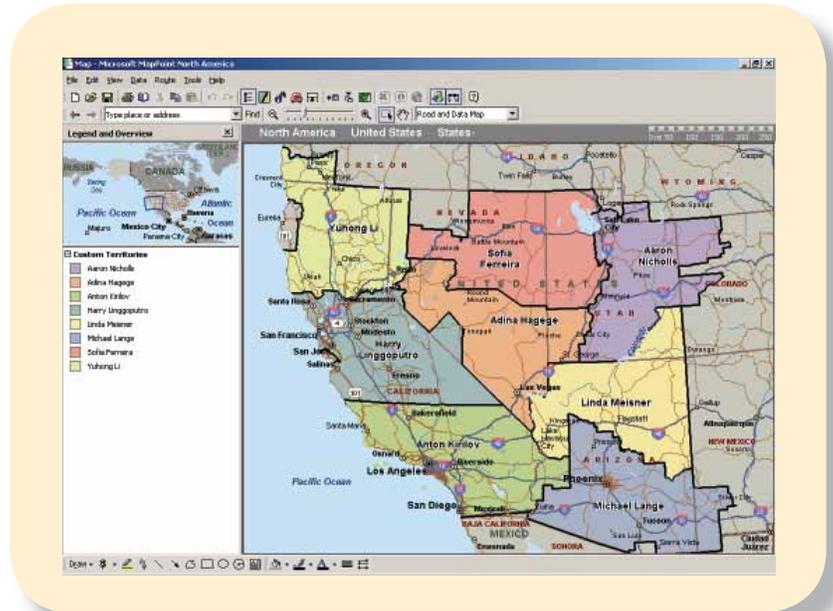
A sales manager for a large sales force is evaluating possible changes in the distribution of sales territories within the covered geography. He is spending large amounts of time studying the maps for each district and identifying where changes need to be made. To view which sales representatives are responsible for which territories, he must access a cross-referenced list of the sales force and their associated territories.

Information that will help the sales manager evaluate the geographic coverage, including sales pipelines, current customer locations, sales history, and associated product sales, is maintained in another application.

The sales manager needs an easy and complete way to gather all of the pertinent information and populate a geographic map in order to visually lay out the proposed redistribution of sales territories. Then he needs to be able to monitor the performance of each territory on an ongoing basis.

Using Microsoft CRM, the sales manager can easily use the Advanced Find functionality to create lists of information based on the criteria he feels is most important. He can then export that list to Microsoft Excel. Once the list is in Excel, the sales manager can organize and prioritize the data. After the data is organized, the sales manager can use Microsoft MapPoint to import the Excel data to map the customer and sales information on the geographic coverage map. The same method can be used later to regularly evaluate performance of the newly created territories and adjust territory assignments accordingly.

MapPoint, Excel, and Microsoft CRM create an environment where the sales manager has a graphical representation of the current state of their sales territories and distribution of sales and opportunities.



Other examples

Customer penetration; demographic maps.

Products



Plan your route efficiently

Using Microsoft MapPoint and Microsoft CRM, a salesperson can map the best route to take for client visits.

A sales manager wants to discuss a new product line with some of his most important clients and decides to take a business trip to visit them. To get the feedback he needs, the sales manager needs to gather a list of the top customers and where they are located. To maximize time with clients, he must map the most efficient route to all of the customers.



Using Microsoft CRM, the sales manager can create the list of top customers in the area being visited, and import them into Microsoft MapPoint. MapPoint will then automatically plan out the most efficient routes based on the imported addresses and parameters.

MapPoint and Microsoft CRM create a simple way to make business trips targeted and efficient.

Products



Microsoft
MapPoint 2005
Business Mapping and
Data Visualization Software

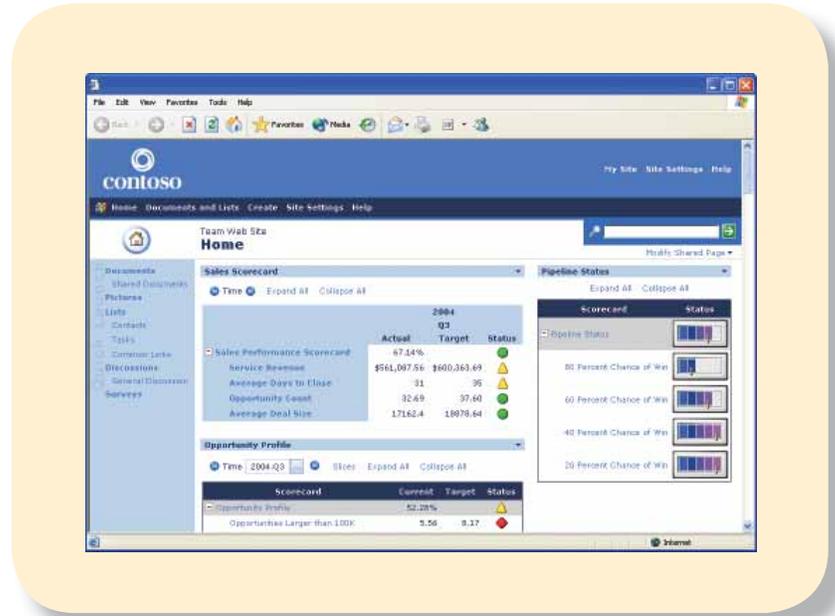
Sales and service performance at a glance

Using Microsoft SharePoint® Portal Server and Microsoft CRM, you can create a Microsoft CRM executive dashboard to view your sales and service information.

A vice president of sales frequently hunts for details about his sales performance.

Using Microsoft SharePoint Portal Server and Microsoft CRM, a summary of key performance indicators for sales can be displayed on the executive dashboard in real time that can be accessed using a web browser. The vice president can drill down on any summary information with a click of the mouse to take a look at the individual transactions behind the executive dashboard information.

SharePoint Portal Server and Microsoft CRM provide an automatic way to display Microsoft CRM information and provide easy access to detailed sales information.



Work effectively with your opportunity-pursuit team

Using Microsoft SharePoint Portal Server and Microsoft CRM, everyone involved in the sales process can see sales data and collaborate on sales engagement documents.

A managing consultant at a professional services firm manages the creation of proposals for opportunities that are initiated by sales representatives within his organization. The managing consultant must work with the sales representative, as well as product architects, database architects, programmers, and others in order to complete the proposal. The proposal process is complex and time-consuming because of the number of people who need to collaborate to complete a final proposal.



The managing consultant needs a way to easily collaborate electronically with all of the members of the proposal creation team. Everyone must be able to see all of the information about the opportunity and the client. And the team needs to quickly see changes.

Using Microsoft Windows SharePoint Services, a Web page portal can be created to allow collaboration within the company on documents and information related to a specific opportunity or client.

From within Microsoft CRM, team members can connect to the portal, gaining quick access to all documents that support the proposal process, as well as the proposal itself.

The collaborative power of Windows SharePoint Services combined with Microsoft CRM enable an environment that supports efficient and effective proposal creation.

Other examples

Technical sales engineers can collaborate on designs; sales pursuit teams can jointly work with product teams.

Products



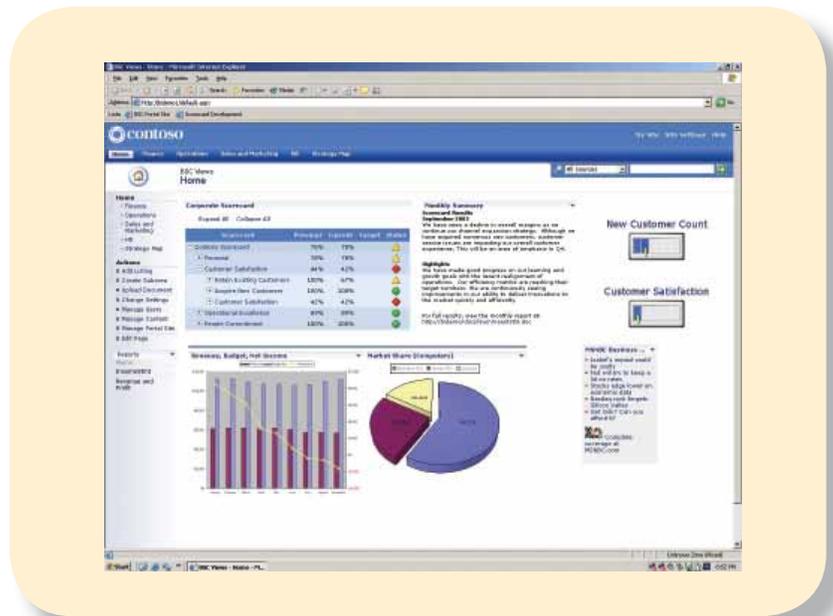
Grade your sales and service performance using a scorecard

Use a decision-support system for better and faster decisions by leveraging data from Microsoft CRM and other systems using the Microsoft Office Solution Accelerator for Business Scorecards, Microsoft SharePoint, and Microsoft SQL Analysis Services.

A sales executive must have a complete picture of the company's sales information at all times. Currently, many different reports must be checked daily to manually pull together the data that creates this picture. An executive has to aggregate various data pieces and slice and dice them to make their decisions. This is a daily task for managers, using precious time that might be applied to other pressing tasks.

A system is needed that allows the executive to view all the required information in an interactive and intuitive way. The data from Microsoft CRM and other systems needs to be aggregated in one place so that executives can run scenarios and view trends.

Using the SQL Analysis Services functionality in Microsoft SQL Server™, data can be aggregated from Microsoft CRM and other sources. It can then be presented in a scorecard format using the Microsoft Office Solution Accelerator for Business Scorecards. This allows color-coded views of the data and analyzes past performance, reviews current trends, and predicts future scenarios. Such a decision support system will allow executives to make better decisions and take timely actions by putting key metrics in front of all executives via a Web browser.



The Solution Accelerator for Business Scorecards graphically summarizes data from Microsoft CRM and other sources to allow faster, better decision-making.

Products

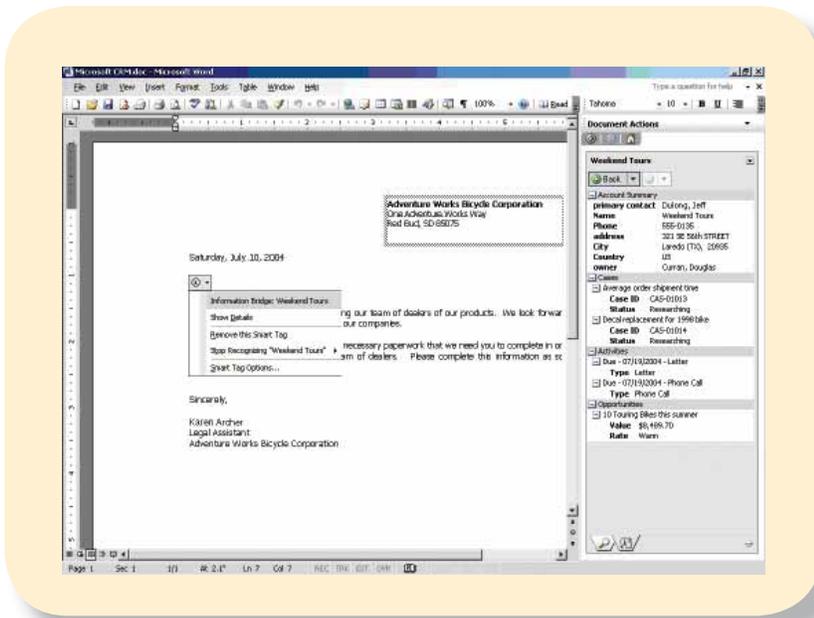


Enable rich customer information access to everyone in your organization

Using the Microsoft Office Information Bridge Framework, customer information can be accessed from Microsoft Word by any employee who does not normally use Microsoft CRM to deliver knowledge of client activity when sending an e-mail to or contacting a client about a new or existing service.

A legal assistant for a product manufacturer routinely follows up with existing dealers wanting to carry new product lines. The assistant sends an e-mail containing several legal documents that are required to complete the dealer's new product line application process. In order to view all the needed information, the legal assistant must contact colleagues to provide her relevant information.

The legal assistant needs an easy way to access the contact information for the dealer, the application information, and the list of contracts the dealer must sign. This data is placed into an e-mail to send to the dealer. The legal assistant would like to do this without leaving Microsoft Word.



Using the Information Bridge Framework in the Task Pane of Word to view information from Microsoft CRM, the legal assistant, by clicking on the magnifying glass icon, can perform the quick search function to find the dealer. Once the dealer is located, the appropriate address and contact information can be easily inserted into the e-mail. Information about the new products the dealer will offer is also accessible. Another quick search can then be performed to retrieve the latest contract information about those products. Once the assistant has searched for and compiled all of the necessary information, the follow-up e-mail can be sent.

Information Bridge Framework provides a fast and efficient way to access Microsoft CRM data quickly— all without ever leaving Word.

Products



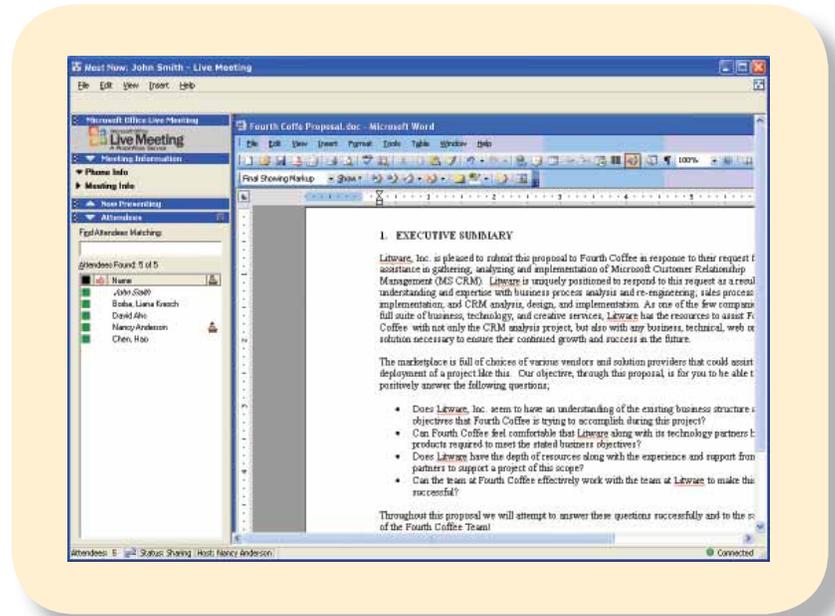
Walk through your proposal without leaving your desk

Using Microsoft Live Meeting, you can review the proposal you just created or go through the latest slide deck about your newest product with your customer while you have them on the phone.

A sales representative needs to step through product presentations and proposals that have been created for a customer. This is typically handled by scheduling a face-to-face meeting at the customer's location. This can be expensive or delay the process because of travel scheduling. When a face-to-face meeting is not optimal, the proposal is often just sent to the customer.

Using Microsoft Live Meeting and Microsoft CRM, the sales representative can retrieve pertinent information and walk the client through the new proposal simply by having the client open their Web browser.

Live Meeting and Microsoft CRM provide a way to collaborate with the client on the front and back end of the sale allowing for a high level of interaction with the client without an actual on-site visit.



Other examples

Client consultation regarding product improvements and updates; client consultation using knowledge base articles.

Products



Provide real-time interactive support to your customers

Using Microsoft Live Meeting and Microsoft CRM, you can provide real-time interactive support for your customers.

A customer service representative routinely gets calls from product dealers concerning the process for performing product repairs and upgrades. The customer service representative must walk the dealers through a series of steps on the phone for both repairs and upgrades. The product dealer takes notes and attempts to complete the task. It is often challenging for the dealer to visualize the tasks based solely on verbal cues from the customer service

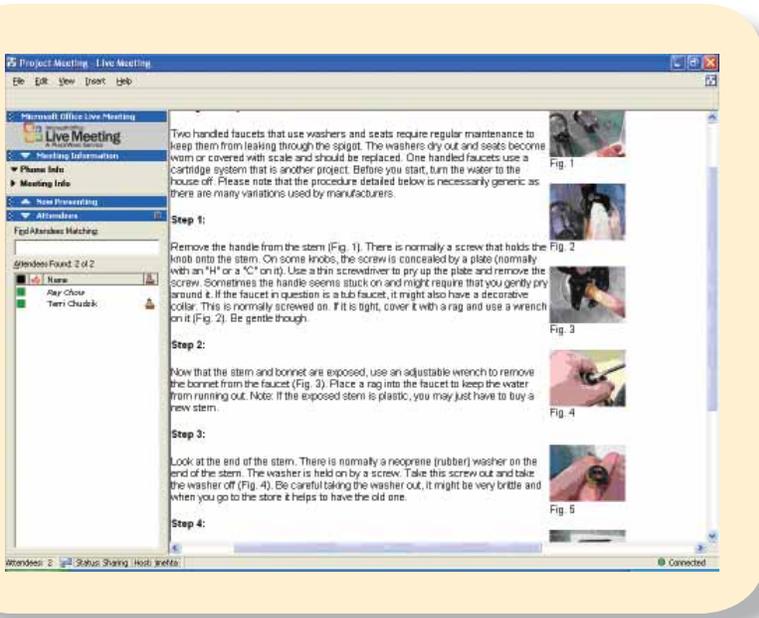
representative. Often the dealer will have to call the customer service representative multiple times before problems are resolved.

Customer service representatives need a process to examine the steps for product repairs or upgrades, allowing them to easily walk through the process with dealers.

Using Microsoft Live Meeting and Microsoft CRM, a system can be created where a customer service representative can provide real-time information and guided demonstrations of the steps required to resolve problems and complete product upgrades. While on the call with the product dealer, the customer service representative can search the Microsoft CRM knowledge base for

a Microsoft PowerPoint® slide deck that contains the steps the client needs to take in order to make the repair or perform the upgrade. Once the slide deck has been located, the customer service representative can invite the customer to an online meeting via Live Meeting. The product dealer can see the various components and steps via Live Meeting simply by launching their Web browser, and the customer service representative can help by using pictures and annotations.

Using Live Meeting, PowerPoint, and Microsoft CRM, a system can be developed that allows a more hands-on approach to customer support. Through the use of the interactive guidance provided through Live Meeting, customers can complete repairs or upgrades with only one call to the customer service department, significantly reducing customer service costs.



Products



Add another dimension to your customer interaction

Using Microsoft Live Meeting and Microsoft CRM, you can invite your customers with top-tier support contracts to your monthly executive user-group meeting.

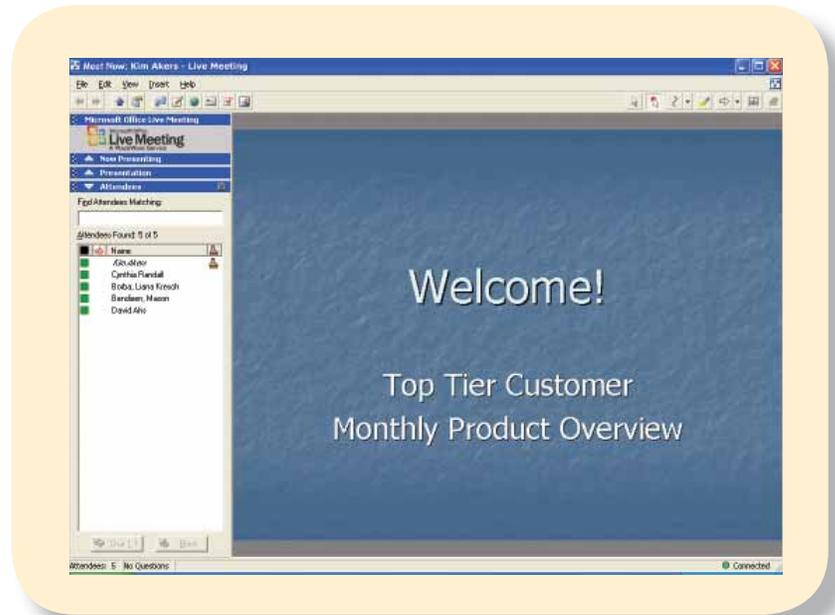
A large products company has created a new customer service program. Several benefits apply only to top-tier service contracts. One benefit includes a monthly invitation to an executive-level briefing on new product revisions and discussions with industry experts.

To send invitations, the meeting coordinator consults a printed list of customers who participate in the top-tier service program. Individual e-mails are then sent to each executive customer. Because this list is dynamic, the process often results in one or more clients missing these opportunities because they did not receive the e-mail, leading to customer dissatisfaction. It also takes a large amount of time to complete this task.

The products company has a need to create an automated way to send each executive customer an e-mail invitation to the monthly webcast.

Using Microsoft Live Meeting and Microsoft CRM, the products company can create a system to automate the conference benefit. With Microsoft CRM Advanced Find functionality, the meeting coordinator can retrieve all of the executive contacts for customers with top-tier support contracts in place. Once these contacts are retrieved within Microsoft CRM, direct e-mails are sent from Microsoft CRM. This e-mail contains all of the logon information for the monthly webcast using Live Meeting simply by launching a Web browser.

Microsoft CRM and Live Meeting provide a quick and easy way to add another level of customer service support to clients.



Other examples

Training; sales presentations; customer roundtable.

Products



Discover their presence and instantly communicate with others in a distributed organization

Using the Microsoft Live Communication Server and Microsoft CRM, a communications vehicle can be created to detect the presence of individuals and instantly communicate between distributed teams.

A group of senior customer service representatives frequently receives escalated calls from clients who have previously spoken to another customer service representative regarding a problem. The senior customer service representatives must be able to quickly communicate with the original customer service representatives in their organization while on a customer service call. This necessitates putting the customer on hold. Clients become angry at the wait for service while senior customer service representatives become frustrated because they cannot reach the original customer service representative or other employees.



The senior customer service representatives need to be able to detect if others are available to join a call with the customer or discuss customer issues with customer service representatives via instant messaging while on the call.

Using Microsoft CRM, the senior customer service representative can find out which customer service representatives interacted with the customer previously, detect their presence, and determine if they are available for instant messaging or a phone call.

Using Live Communication Server and Microsoft CRM, the presence of other employees is known across the organization, and those employees can be contacted for assistance in a customer call.

Other examples

Distributed call centers; matrixed organizations.

Products



Mass registration made quick and easy

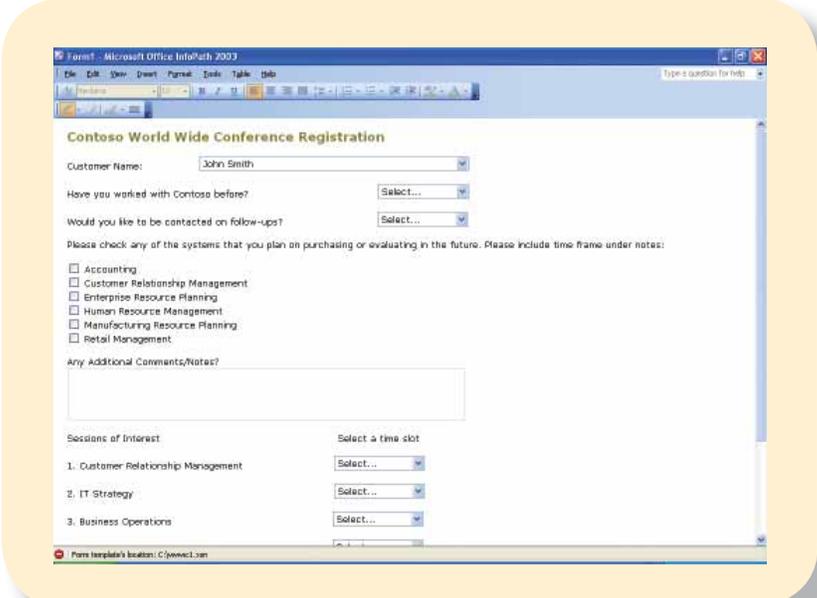
Using a Microsoft InfoPath® form, hundreds of registrants can enter their information, which can then be uploaded to Microsoft CRM as leads at the end of the conference.

A large product vendor has contracted a third-party conference management company to produce their upcoming annual customer conference. The conference management company is using a staffing agency to help with registration and profiling of customers at the conference. All registrations and profiles are manually completed at the entrance to the conference. Once the conference has concluded, the information must be manually entered into the product vendor's system. The vendor, staffing agency, and conference attendees are frustrated at the length of time these processes take.

The product vendor and the staffing agency need a fast, easy way to gather customer information and integrate it into their existing system.

Using Microsoft InfoPath and Microsoft CRM, the product vendor is able to create an InfoPath form to capture important and necessary customer data. Once the conference registration is complete, the data can be imported to the Microsoft CRM database, where the information on existing customers is added to their records and records are created for new customers.

InfoPath and Microsoft CRM provide a quick, consistent, and easy way to gather customer information using temporary staff.



The screenshot shows a Microsoft Office InfoPath 2003 form titled "Contoso World Wide Conference Registration". The form is displayed in a window with a standard Windows XP interface. The form fields include:

- Customer Name: A text box containing "John Smith".
- Have you worked with Contoso before?: A dropdown menu with "Select...".
- Would you like to be contacted on follow-ups?: A dropdown menu with "Select...".
- Please check any of the systems that you plan on purchasing or evaluating in the future. Please include time frame under notes:
 - Accounting
 - Customer Relationship Management
 - Enterprise Resource Planning
 - Human Resource Management
 - Manufacturing Resource Planning
 - Retail Management
- Any Additional Comments/Notes?: A large text area.
- Sections of Interest: A list of three items, each with a "Select a time slot" dropdown menu:
 1. Customer Relationship Management
 2. IT Strategy
 3. Business Operations

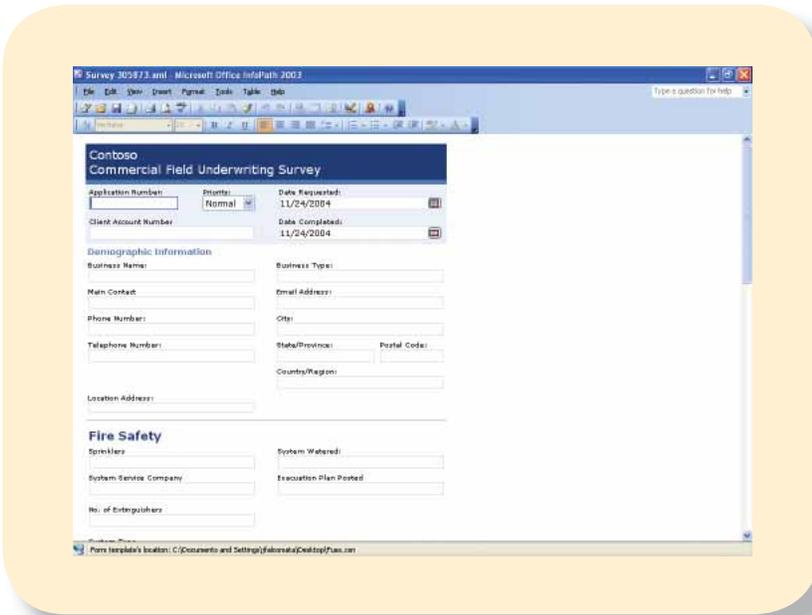
Products



Fill out complex forms and associate them with the customer record

Using Microsoft InfoPath and Microsoft CRM, you can complete any complicated form, and update information back to Microsoft CRM.

An insurance service agent visits commercial manufacturing sites to assess the current condition of equipment on site. She must gather large amounts of data and graphs at each location she visits. Once the service agent returns to the office, the assessment for each site is completed by compiling a packet of data sheets, and supporting graphs for each site. A colleague then manually enters the details into a central database so the information can be used for future reference by customer service teams. This often takes a week from the time the on-site visit took place.



The service agent needs to be able to gather information easily and rapidly make it available to the customer service teams.

Using Microsoft InfoPath, Microsoft CRM, and a Tablet PC device running Microsoft Windows XP Tablet PC Edition, an InfoPath form can be created to allow the agent to gather all of the information. Once the service agent returns to the office, all of the gathered data is imported to Microsoft CRM and attached to the customer record.

Using InfoPath, a Tablet PC, and Microsoft CRM, a large amount of complex data can be captured while offline and then imported to the CRM system for updates without duplicate data entry.

Other examples

Commercial field underwriting; home inspection; commercial inspection; building cleanup; proposal creation form.

Products



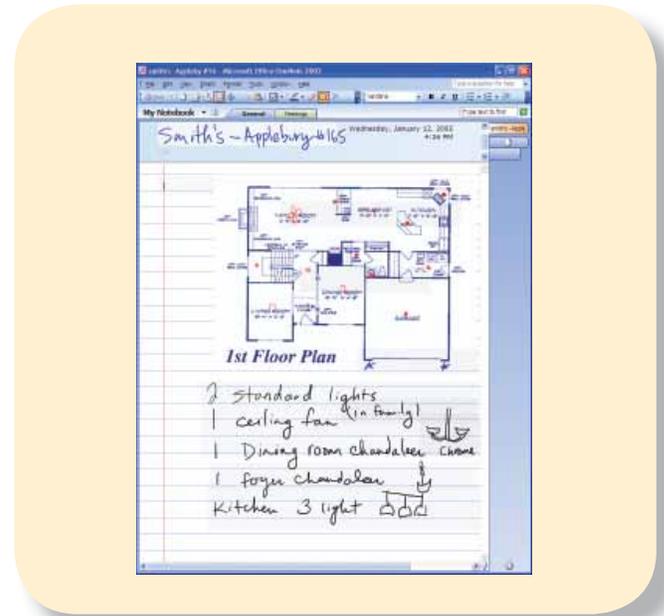
Retain your handwritten notes and sketches with your customer data

Using Microsoft OneNote® and Microsoft CRM, you can save all of the notes and diagrams you make during your face-to-face meeting with your client, right in your Microsoft CRM system.

A sales representative attends several meetings a day with prospective clients. In the course of those meetings, ideas are gathered from the client that may range from quick thoughts to graphical data. This requires capturing several different types of media, such as notes, sketches, and audio notes. Using a note pad and occasionally an audio recorder, the sales representative attempts to capture all of the prospective client's needs. The sales rep often finds that notes are missing or audio files did not make it back to the office. This frequently delays the proposal and sales process.

Written, sketched, graphical, and auditory notes need to be captured and stored efficiently along with the customer opportunity through a single mechanism.

Using Microsoft OneNote and Microsoft CRM, all of the needed media notes can be stored right with the customer opportunity. The sales representative uses a Tablet PC running on Microsoft Windows XP Tablet PC Edition with OneNote to capture any idea in written, sketched, diagram, or audio format gathered during brainstorming sessions with the client. Once connected to the Microsoft CRM system, the sales representative can update all of the information about the opportunity and attach the information from OneNote to the opportunity. The files can be accessed at any time in the sales process.



Using OneNote, Tablet PC, and Microsoft CRM, a system can be created to allow the gathering and storage of different kinds of data in Microsoft CRM without imposing any structure on the idea flow during brainstorming sessions. This data can then easily be associated with the opportunity for future reference.

Other examples

Client proposal feedback; transcription with voice recognition; engineering design discussion; customer advisory council; executive assistant in executive brainstorming meetings.

Products



Leverage your customer data to generate winning proposals

Using the Microsoft Office Solution Accelerator for Proposals with Microsoft Word 2003, information can be linked from Microsoft CRM in order to quickly create and collaborate on proposals.

A sales development team works together on large proposals for customers. While they frequently collaborate on parts of the proposal, each team member is responsible for specific parts of the proposal and typically completes that work individually. Once the work is completed, one team member must spend a great deal of time assembling all the individual parts and making sure that the latest versions of the sections are included in the final proposal.

Then the proposal must be reviewed by all team members for accuracy. This process is cumbersome and frustrating because team members cannot view the entire proposal until it is complete.

The sales development team needs a system that allows them to work on individual parts of proposals independently, as well as collaborate on the entire document while it is in process.

Using the Microsoft Office Solution Accelerator for Proposals collaboration environment and Microsoft CRM, the team can gain access to the proposal from the Microsoft CRM opportunity record. The Solution Accelerator for Proposals allows sections of the document to be assigned to different people, notifying them and tracking the status of the work. Once the

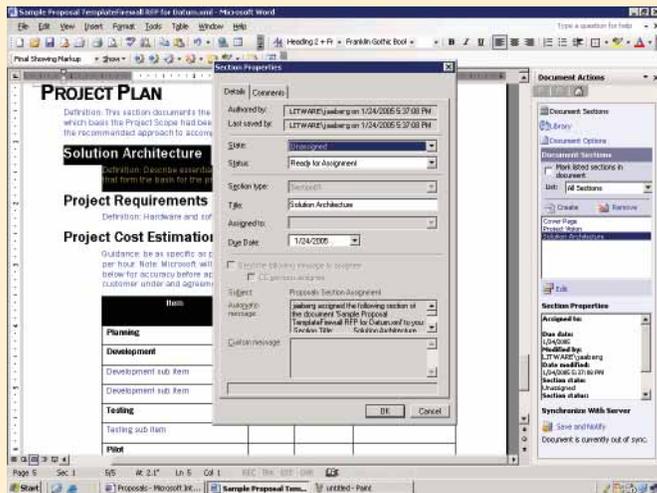
proposal is opened, the Solution Accelerator for Proposals can be used to track changes to the proposal, and team members can work on the assigned sections independently. Once the proposal is complete and submitted, the final copy is attached to the opportunity in Microsoft CRM, and automatically sent to all team members.

Using the Solution Accelerator for Proposals and Microsoft CRM, a system has been created to allow collaboration on proposals among the sales development team.

Examples

Professional services business development team; grant-writing services; government contractor proposal teams; commercial construction companies.

Products



Optimize your meeting time at the next conference

Prospect information can be collected and appointments scheduled on-site using Microsoft CRM Mobile on a Windows Mobile™-based Pocket PC.

A business development professional attends at least one industry conference per quarter, as well as several other conferences throughout the year. A laptop is very cumbersome to use at conferences. An easy way to transport the relevant data to the conference in order to meet with customers is needed, along with the ability to add new prospects or update customer information.

Using Microsoft CRM Mobile, the business development professional can use a Windows Mobile–based Pocket PC device to download all of the relevant data for customers who are attending the conference. In addition, a special list of all the customers who have closed new deals in the last month can be pulled in. Once at the conference, the business development professional can update contact information, add new prospects, and view existing information about customers. This data can then be updated to the Microsoft CRM server.

Microsoft CRM Mobile on a Windows Mobile–based Pocket PC provides an easy way to view and update relevant customer information while on the road.



Products



Gather your customer data at the time of interaction

Using a Windows Mobile–based Pocket PC and Microsoft CRM Mobile, customized data can be collected in the field.

Manufacturing equipment inspectors spend 90 percent of their days in the field. The majority of this time is spent walking in and around facilities that are not conducive to using a large electronic device. Tasks include reviewing equipment usage, troubleshooting minor problems, and recording information that will be maintained in a central repository. Often, by the time the data is actually entered into the system, inspectors have forgotten details that they did not write down at the time of inspection, but which may become crucial to future inspections or repairs. Entry mistakes are also common.



Using Microsoft CRM Mobile, inspectors can update the new inspection data onto custom forms and view contact information and historical data about upcoming customers on their schedule.

Once the inspections have been completed, the information entered or updated on the Windows Mobile–based Pocket PC device is synchronized with the Microsoft CRM server triggering satisfaction surveys sent to the customer.

Using a Pocket PC device and a Windows Mobile–based Microsoft CRM Mobile, site inspectors have a quick and easy way to enter and update data.

Other examples

Repair services; account planning with business partner or customer; inspection services; quality assurance checks.

Products



Keep your customers current with your product catalog changes

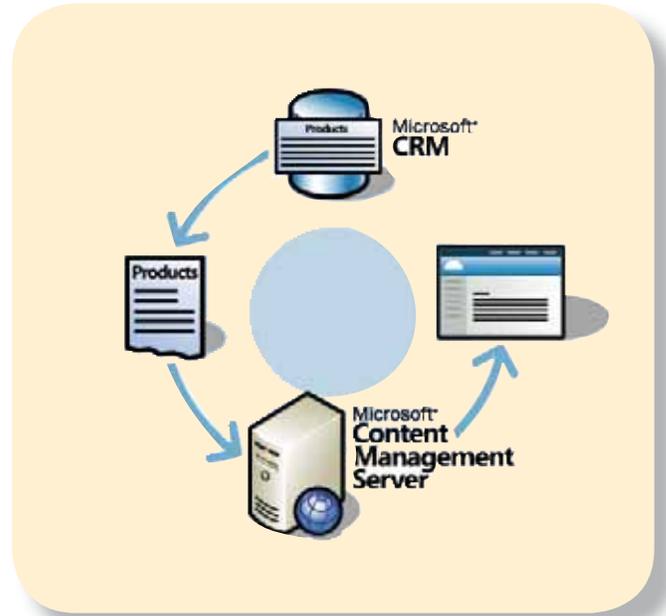
Using Microsoft Content Management Server, you can keep your Web site up to date with recent product descriptions, codes, and prices from Microsoft CRM.

A manufacturing company needs a way to keep track of and publish their product catalog to their customers. The product catalog prices and items available change on a daily basis. Currently, marketing assistants update both pricing and availability each day and pass that information on to the sales group that helps customers place orders. Information always seems to be lagging in real-time pricing and availability of products, causing customer dissatisfaction and frustration among the sales group.

A system is needed to enable easy updates to the product catalog and prices. In addition, the catalog needs to be published online so customers can see accurate information about products.

Using Microsoft Content Management Server and Microsoft CRM, a system can be created to automate the product group's publishing practices, by regularly publishing product information on the company's Web site.

Microsoft Content Management Server and Microsoft CRM provide a single point of maintenance for the product catalog and an easy way to publish product information for public consumption online.



Products

Microsoft
**Content Management
Server 2002**

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