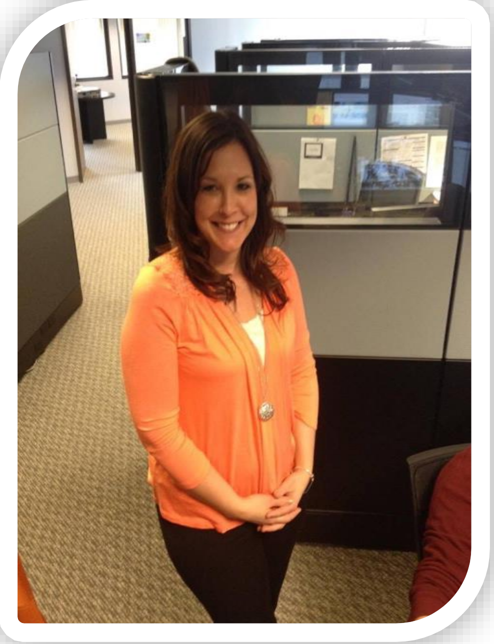
  

Ledgeview's Microsoft Dynamics CRM User Group

Host-Kristina Felchlin



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Microsoft Dynamics CRM

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HOUSEKEEPING

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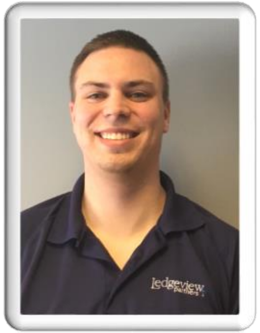
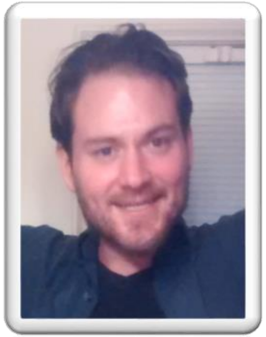
Michael Dodds



Tyler Felton

Taylor Nassen



Josh Philipps

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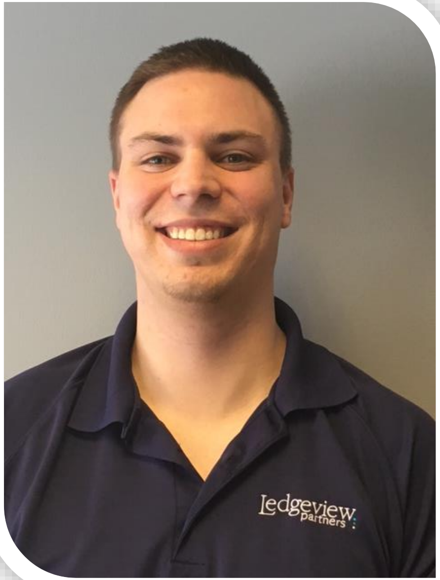
Agenda

- ❑ Sales Process
- ❑ Global Search
- ❑ User Questions
- ❑ What's New in 2016

Presenter-Michael Dodds



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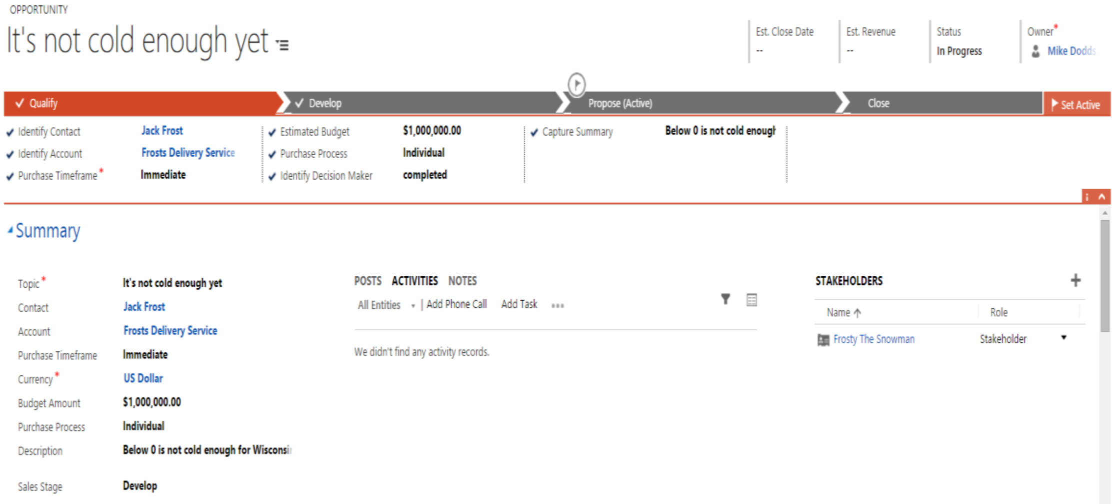
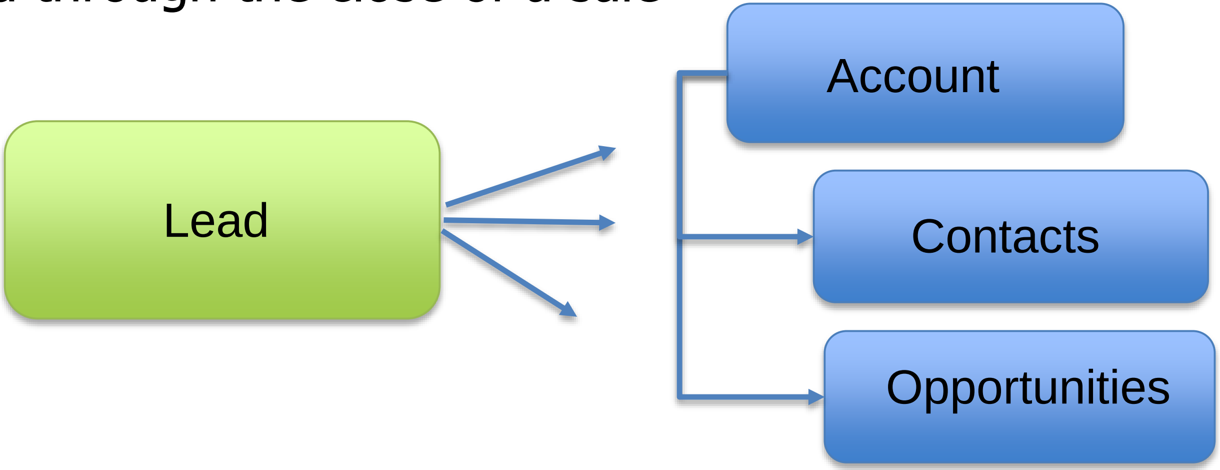
Sales Process

- Key step is analyzing your unique processes and configuring CRM to reflect it.
- This might mean just changing a few fields or it might mean significantly modifying the forms and view, deciding to add new record types, and/or deciding to disable unused features.
- Utilize a business process flow to provide a visual indicator for the user of where they are in the process.



Sales Process

- Leads designed to support the sales process from acquiring a new lead through the close of a sale



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Sales Process

Benefit of Leads

- Lead record is very simple and it allows you to nurture the market and capture the critical qualifying information needed to identify a sales opportunity
- An individual contact stays in the Leads area until the user initiates a conversion process–that is bringing the contact into your main database
- Leads area is a "holding tank" for contacts and companies you don't know or haven't qualified yet.
- It protects your database of Accounts and Contacts from becoming cluttered
- Allows Users to set Activities to follow up with the Leads

Benefits of Lead Source

- Lead Source allows you to categorize your Lead Generation efforts
- Understand the effectiveness of your current Lead Generation
- See actual Revenue generated for each Lead Source
    - Put more attention and effort into those that are effective

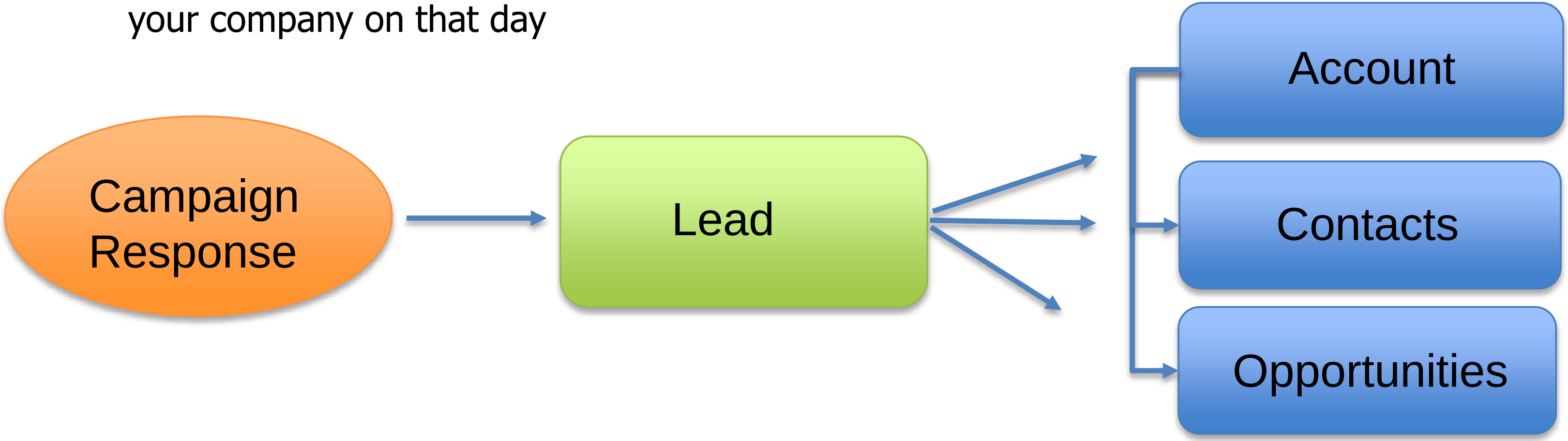
Sales Process

Benefits of Account, Contact and Opportunity auto creation

- System creates these records which eliminates the need to create these entries
  - Please note this does not include Custom Fields
- Flow right into the Opportunity discussion if your Lead is qualified

Sales Process

- New contacts get converted to Leads and existing contacts get a follow-up that can be completed and put into the contact's history showing they attended an event or connected with your company on that day



Global Search

- Benefits of Global Search
  - Accessible in any screen in CRM
  - Searches across several Entities
    - Can filter to specific Entities
  - Add New Activities and Records
  - Import Data
  - Utilize "*" for improved Searching

Question From a User

“What is the best way to track CRM user activity/adoption?”

There are no specific reports that show log in or usage activity

A few options to show Entity Creation or Modification are:

- Creating a View or Report that shows all Activities Created in the last X Days
  - This can also be done for Creating or Modifying Opportunities, Accounts, Contacts, etc
  - There is a stock Report called “Activities”

Question From a User

"How do we create a standard product
Quote template that can be easily edited?"

- Options are:
  - You can create an Excel or Word Quote Template – this is only available in Dynamics CRM 2016
    - You can further customize the Quote Template through XML Mapping
    - Add all the Quote Products related to that Quote Entity
    - Set the rows of the table to repeat
    - Upload the Template to CRM
    - Generate the Template from any Open Quote
  - There are available options to purchase templates – this would be from Microsoft based companies, Ledgeview Partners would not be able to supply

Question From a User

"How do I track emails sent in marketing campaigns?"

There are two way to track Campaign Responses

- You can manually create Campaign Responses when you receive a response to your Marketing Campaign
- Set your System Settings to allow for Campaign Responses to be automatically created for incoming emails
  - Navigate to Settings
  - Navigate to Administration
  - Click on System Settings
  - Click on the Marketing Tab
  - Set the "Create campaign responses for incoming email" radio button to Yes

Please Note: It is recommended not to use the bulk email in the Marketing Campaign through CRM as there is a higher probability to be added to the list that does not allow mass emails. We recommend utilizing a 3rd party integration such as ClickDimensions or ActOn

Question From a User

"How do I work with the ribbon workbench?"

- Download the Ribbon Workbench
- Create a Solution Entity for the file you plan to modify
- Export the file for backup and recovery
- Load your Solution
- Edit the Solution
- Customize
- Publish

To properly work with the Ribbon Workbench, you will want the following:

- 2 - 4 hours of training on the Ribbon Workbench
- In most cases you will need Developer resources

Question From a User

"How do I promote a lead only to Account and Contact, but not create an opportunity?"

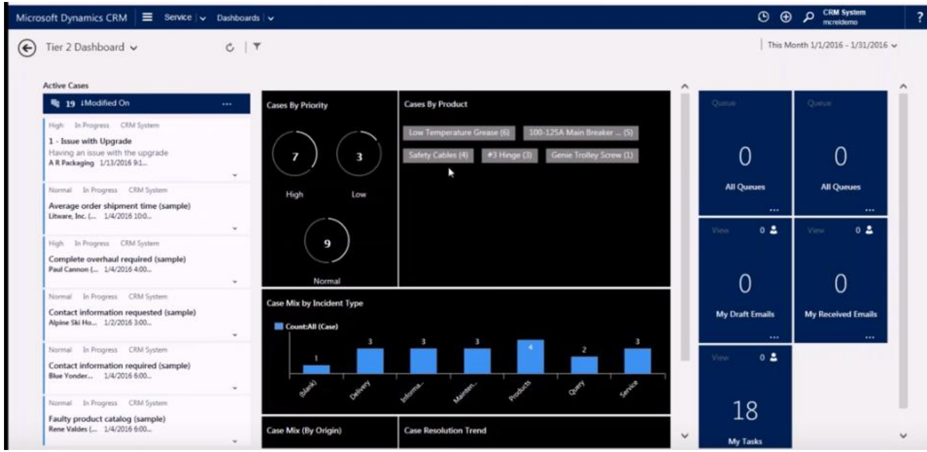
Ledgeview Partners has created a Solution that can be imported to your CRM that will:

- Put in a new button "Other Qualify" that can just qualify for creating Contact or qualify for just creating Account and Contact without creating the Opportunity

- The import this solution will take approximately 1 – 2 hours

What's New in 2016

- Service Enhancements
  - Knowledge Management
    - Can put Diagrams and Pictures in Articles
    - Can email Knowledge Articles
  - Case Enhancements
    - Process Flow
    - Search Knowledge Articles
    - Streamlined Routing
  - Interactive Service Hub
    - This will be a separate area in CRM
    - More Dynamic Dashboards
    - Resolve, Cancel a case, etc
  - Field Service
    - Helps with Dispatching
    - Understand what your Field Service Reps are working on



- CRM App for Outlook
  - Can be used on:
    - Computer's utilizing Outlook 2013 or 2016 (Recommend staying with the Outlook Plugin)
    - Outlook Web
    - Windows Phone, iPhone or Android Phone
  - Can pick which entity to track against
  - Will only track emails into CRM, will not track appointments
  - Don't have to open up CRM to view related Records
- OneNote and Delve Integration

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CRM User Group: Tuesday, February 16th
Topic: Creating Reports

Office 365 vs Google: Wednesday, February 3rd

How To Empower Your Sales Team with Customer Analytics: Thursday, February 11th

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