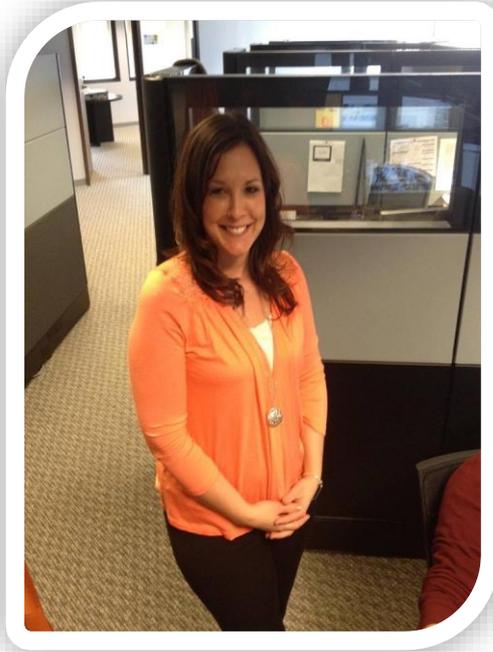




Microsoft Dynamics CRM User Group – July 2016

Host-Kristina Felchlin



Kristina Felchlin

Support Manager

920-560-3079

Kfelchlin@Ledgeviewpartners.com

Agenda

- User Adoption
- Training
- User Questions
- Upcoming Webinars

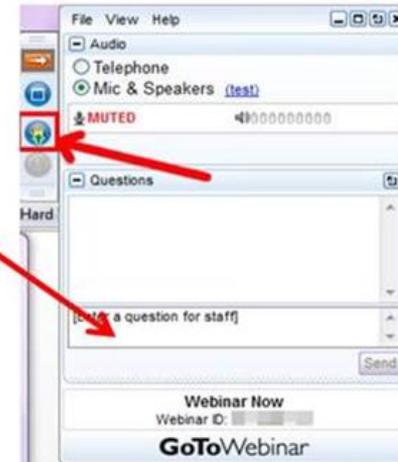


HOUSEKEEPING

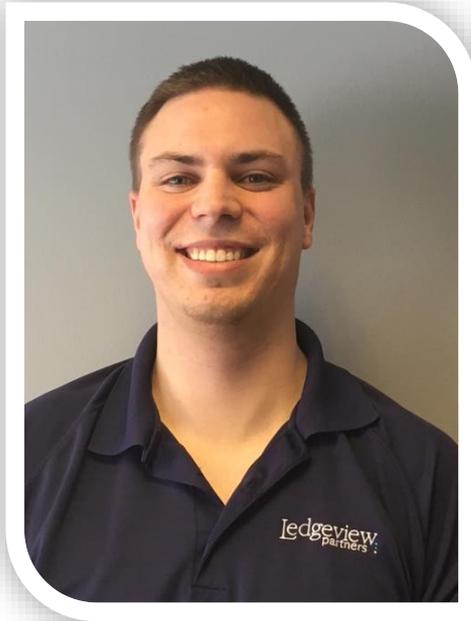
To ask a question of the presenter, please **use the questions box**. If you have any issues during the webinar, please use this box to communicate with the host.

- During the webinar, you are on mute. When unmuted by organizer, you can keep yourself muted by pressing the button.
- This webinar is being recorded and will be posted in the on-demand recordings library

connection for audio.
Today's meeting
is powered by
GoTo



Presenter-Michael Dodds



Michael Dodds

Support Consultant

920-560-6888

CRMSupport@Ledgeviewpartners.com

User Adoption

- 1 Focus on User Adoption from the Start
- 2 Define Expectations
- 3 Set Measurable Goals

User Adoption

- 4 Seek Continual Feedback
- 5 Encourage Buy-In from all Levels of Management
- 6 Enhance Features

User Adoption

- 7 Introduce Technology in Phases
- 8 Make CRM your One-Stop Shop
- 9 Keep it Clean

User Adoption

- 10 Follow-up Consistently with the Users
- 11 Go Mobile
- 12 Refine and Reward

User Adoption

13

User Adoption is Never Complete

14

Identify a CRM Power User

Tips for effective Training

Don't Shortchange Training

- Establish CRM Training Best Practices
- Train Users on what they need to know first
- Always Allow Enough Time to Train
- Provide Ongoing Training
- Lunch and Learns
- New Hire Onboarding
- Provide them with a tip and trick of the week, month
- Allow time for questions
- Allot a small section of sales or team meetings to discuss how to use/pain points in CRM
- Provide relevant, specific examples for all members in the training (do not generalize)
- Physically demonstrate how to do the task rather than talking about it
- Make it interactive, give the user a scenario to work on instead of watching the trainer train
- Teach it, Show it, Do it
- Don't make the training time too long, take frequent breaks or split the sessions into multiple days

Types of Training

- User Training
- Administrator Training
- Train the Trainer
- Role Focused Training

Training Opportunities Available at LVP

- User Training
 - Specific to Users CRM Environment
 - Defined Agenda
 - Interactive, Teach It, Show It, Do It
 - Q&A Session for items not covered

Training Opportunities Available at LVP

- Administrator Training
 - Beginner Admin
 - Advanced Admin



User Questions

“When exporting activities from the account-view screen or the reports wizard, the email activity DESCRIPTION FIELD fills up with HTML instead of the text. How do I fix this?”

- The best way to export the description field without customization is to:
 - Create an Advanced Find for all Email Messages or filter to a desired segment
 - Include the Description Field
 - Include the Regarding Field
 - Export to Excel

“How can I capture Notes from an Opportunity onto the Account and Contact? And capture Contact Notes onto the Account?”

- This can be done through workflows
 - Any attachments on the notes would not be able to be added to the new notes. This would require a Customization Project
 - Any updates to the original note would not update the new notes created. I recommend pursuing a custom entity for Notes.



The screenshot shows a 'Note: Information' form with the following fields:

- Title:** A text field containing the placeholder text `{Title(Note)}`.
- Description:** A large text area containing the placeholder text `{Description(Note)}`.
- Regarding:** A text field containing the placeholder text `{Company Name(Regarding (Contact))}`.

- Utilizing Activities to track Notes is a good alternative as Activities will show in the Parent (i.e. Opportunity → Contact)

“When you select to track a message in Outlook, do all subsequent messages (received and sent) from within that conversation also get tracked? Or is it a manual process where you select to track each message individually?”

- If you have the Auto Track feature configured, all subsequent emails are tracked
 - For Email Router this can only be done through a Forward Mailbox
 - This feature works 80-90% in a perfect environment
 - Recommend if utilizing Auto Track, to turn on Smart Matching and Tracking Token
 - It is highly recommend that you manually hit the Track/Set Regard button for the most current email in the chain at the end of the day

“How do I setup a user dashboard for a team member in Sales?”

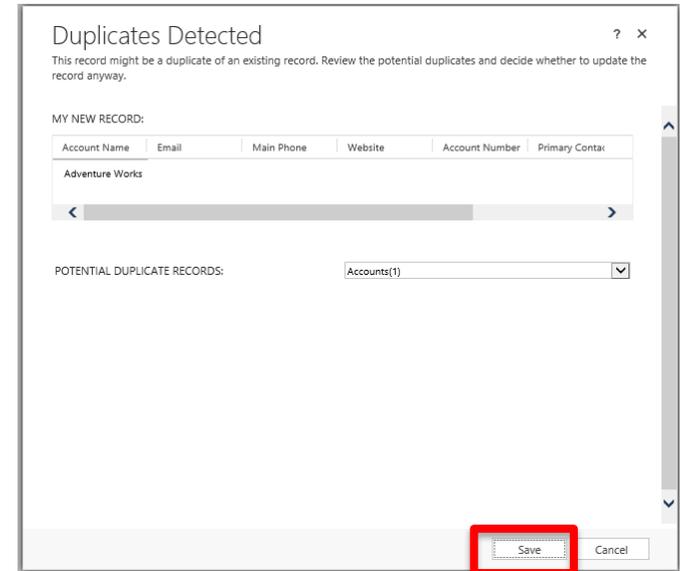
- I recommend creating one Dashboard that can be utilized by each Sales Person
 - What makes this unique to each sales person is utilizing the Owner Equals Current User filter
 - Regardless of the information included in the dashboard, you can utilize one dashboard for the entire team
- Create the views and/or charts
- Create a System Dashboard from Customizations

“What will I need to do to prepare my users for the 2016 Upgrade? I have not accepted it yet because I'm not sure what affect it will have with users running on Win 7 Ultimate OS and Outlook 2010?”

- Dynamics 2016 is compatible with both Windows 7 Service Pack 1 and Office 2010(Cached-Exchange Mode Only)
- If you utilize the Outlook Client, The outlook Client must be CRM 2015 or newer
 - The CRM 2013 Outlook Client is not compatible

“We have a lot of duplicates and it seems when you enter a screen says there is one and you can't save yet we have so many that are saved and I'm not sure how this happens?”

- If you have Duplicate Detection Rules turned on, you will be notified if you are creating a duplicate, but will allow you to bypass this warning and save
 - If you are doing an import, the duplicate records based on your duplicate detection rules will fail
- The duplicates that are currently in the system could have been created prior to Duplicate Detection Rules being Published
- I recommend utilizing Duplicate Detection Jobs to locate duplicates and merge them
- You can utilize Bulk Record Deletion to Delete records
 - I recommend Merging Records in case there is any additional information in the Duplicate Records



“Do you have suggestions for best practices when using Act-On with Dynamics CRM? In particular, at what point should we consider moving soft or suspect leads into Dynamics CRM? Our RSMs use CRM more-less like an address book, and we didn’t just want to flood the system with top-of-funnel, lower quality leads. Do you agree with our approach of leaving these types of leads in Act-On?”

With a lead management program in place, your marketing teams can be nurturing leads and then passing the qualified leads to the sales team for follow up. The sales team will no longer have to sort through a list of unqualified leads to find the leads that have a higher probability of closing. The challenge can be establishing that lead “criteria” so you know when a lead should be passed to the sales team.

The first step in doing this (if you haven’t already) is to work with your Marketing & Sales teams to define your buyer personas and define your customer journey touchpoints. Your goal here is to determine your audiences, define their wants/needs/desires, align marketing communications to those groups and then understand what “triggers” indicate that they are “sales ready”. There is no hard and fast rule for this as each organization is unique and within each organization the buyer personas are also unique. By completing this exercise you will be on your way to then creating your marketing segments that align with your ideal customer group. These segments can be built off of demographic data sets (job title, company size, location, etc.) as well as behavioral data sets such as the # of web visits, forms submitted, emails clicked, etc. It is also recommend that you add sales qualifiers to your web forms to help you collect information such as the timeframe for purchasing, need assessment, etc.

Your next step then would be to leverage the lead scoring functionality in your Act-On system. Within Act-On you have the ability to assign a numeric value to both demographic as well as behavioral data sets. With scoring rules in place, you can create segments of your lists based of the scores you’ve defined. Marketing can use these lead scoring values as well to further segment the database and send targeted communications based on the sales stage they are in. In addition, when a lead scores enough points (the level determined by your team), they can be flagged as ready to be passed to sales. Remember, Marketing’s job is typically not done once you pass the lead to sales, you can continue to assist the sales team by supporting the lead with appropriate marketing communications that is aligned to this sales stage.

Both the Act-On and ClickDimensions tools have functionality to support the process above. However, the lead scoring functionality is more robust in Act-On as it allows for more granular scoring criteria. In addition, the enterprise version of Act-On provides you the ability to maintain separate scoring rules for different audience segments by using their multiple score sheets. The multiple scoring sheets allows you to run different scoring rules for each of your defined personas, industries, buyer type, product line, etc. While the direct integration of ClickDimensions is a nice feature as the data is immediately exposed in your CRM, there are ways to pass the lower level leads to Dynamics from Act-On if you had that need.

Resources

On Demand CRM User Group Webinars

On-Demand: January 2016 User Group Featuring "Sales Process"

Ledgeview's January Microsoft Dynamics CRM User Group

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

Microsoft Dynamics CRM

salesforce

[Download January 2016 User Group PowerPoint PDF](#)

Support Consultant Team

Contact Information:

Phone: 920-560-6888

Email: CRMSupport@ledgeviewpartners.com

Monday-Friday 8-5pm Central

Michael Dodds



Tyler Felton



Taylor Nassen



Josh Philipps



Upcoming Webinars



Ledgeview's CRM for User Group Webinar

Topic: Data Management

Tuesday August 16th, 2016

Automating Field Service through

Work Orders and Mobile

Tuesday July 26th, 2016

Upcoming Webinars



5 Strategies to Better Segment your Current Lead Database

Thursday July 28th, 2016

To Register: Visit LedgeviewPartners.com

Click News and Events, Scroll to the Upcoming Webinars section.

