

Microsoft Dynamics 365

Overview



Introduction

Microsoft Dynamics 365 can help reduce costs and increase efficiency by organising and automating business processes that nurture client relationships and satisfaction across sales, marketing and service delivery. Dynamics 365 solutions can deliver return on investment (ROI) through improved staff efficiencies, staff empowerment, customer engagement and enhancements to client products and services.

This paper looks at the features that are available and how these can transform your organisation.

This document is based on the Customer Immersion Experience examples.

For more information, please do not hesitate to contact sales@c2software.com

What is Dynamics 365?

Microsoft Dynamics 365 is a combined Customer Relationship Management (CRM) and Enterprise Resource Planning (ERP) solution, that enables organisations to: manage their account and contact relationships, improve sales processes, market smarter, and drive customer service. It provides social insights, business intelligence, and integration with other Microsoft solutions to improve productivity. Microsoft Dynamics 365 is available in the cloud, on-premises, or with a hybrid combination.

Accessing information anywhere and on any device

Microsoft also offer mobile apps and platforms that enable you to manage your customer relationships on your mobile devices, along with tools that integrate data and reporting from social media directly into your CRM application.

Dynamics 365 Explored

Dynamics 365 is built on a number of key pillars:

- Contact & Account Management
- Sales
- Marketing
- Customer Services
- Field Services
- Project Service Automation
- Social Engagement

Contact & Account Management

Teams need to be responsive to client requirements and be informed of all communications and interactions with the client. Dynamics 365 provides the tools to be able to easily track information on all individuals and organisations that you interact with. In addition, technology needs to make it easy for all staff involved in a process to be able to communicate and collaborate.

The features in Microsoft Dynamics 365 provide not only a best in class tools to manage processes e.g. Referral, but provide this across devices with full integration with tools such as Outlook, Excel, SharePoint, Skype for Business (Lync), Yammer and Skype. The seamless

integration between Dynamics 365, Office 365 and Power BI (for in-depth reporting and data analysis) helps drive organisational productivity.

Dynamics 365 | Sales | Accounts | GDI

ACCOUNT
GDI

Ownership: Public | Annual Revenue: £1,000,000.00 | No. of Employees: 12,000 | Owner: Diane Prescott

Summary

ACCOUNT INFORMATION

Account Name: GDI
Phone: +86-23-4444-0100
Fax: 86-23-4444-101
Website: <http://www.adatum.com>
Parent Account: --
Ticker Symbol: ADATU
Description: A GDI is proud to be the brand known for products that help people enjoy their lives. A GDI provides you with a wide selection of products both in our stores and online. You'll find huge selections of consumer electronics, desktops, notebooks, netbooks, and all the accessories to go with them. We have a HUGE selection of HDTVs, DVD and Blu-Ray players, DVRs, Home Theater Systems, GPS Players, Digital Cameras, Hi-Def Camcorders, Digital Picture Frames and so much more! Plus, we have a greatly expanded selection of computer components like computer cases, motherboards, memory and processors -- all the things to upgrade your current system, or build your own. In addition to our incredibly low prices, we offer world-class online content designed to provide you with the in-depth knowledge you need to make informed buying decisions. Our site features hundreds of professionally produced videos, close-up photographs of each item, product reviews by customers, and countless educational articles written by experts in the computer & electronics industry. You can expect fast shipping times from our warehouse -- we expect that more than 90% of our orders will be shipped from our warehouse the same day you place your order. Our goal is your 100% satisfaction!

POSTS | ACTIVITIES | NOTES | ONENOTE

Enter post here

Both Auto posts User posts

Product question
Case: Closed by CIE Administrator for Account A. Datum.
On Product question's wall
02/09/2015 11:37

Required Service
Case: Closed by CIE Administrator for Account A. Datum.
On Required Service's wall
02/09/2015 11:37

Operating manual required
Case: Closed by CIE Administrator for Account A. Datum.
On Operating manual required's wall
02/09/2015 11:37

Personal Electronics
CIE Administrator won Opportunity for Account A. Datum: £3,713,000.00. Congratulations!
On Personal Electronics's wall
02/09/2015 11:37

Home Appliances
CIE Administrator won Opportunity for Account A. Datum: £12,334,000.00. Congratulations!
On Home Appliances's wall
02/09/2015 11:37

Some interest in our JJ line of products
CIE Administrator won Opportunity for Account A. Datum: £732,000.00. Congratulations!
On Some interest in our JJ line of products's wall
02/09/2015 11:37

Primary Contact
Vincent Lauriant

Email: vlauriant@adatum.com
Business: +86-23-4444-0100

CONTACTS

Full Name: Vincent Lauriant | Email: vlauriant@adatum.com

RECENT OPPORTUNITIES

Topic	Status	Actual Close	Actual Revenue
Personal Electronics	Open		
Home Appliances	Open		

Illustration: Account (Organisation) form in CRM with full Activity tracking (Phone calls, Appointments etc.)

In terms of Accounts this can cover the organisations and businesses that you interact with. This can include customers, suppliers, partners, media etc. The flexible ability to surface related records on forms allows sales staff to quickly understand what is happening with client accounts and the relationships with other records e.g. connections between contacts.

Dynamics 365 | Sales | Accounts | Alpine Ski House

ACCOUNT
Alpine Ski House

Ownership: Private | Annual Revenue: £483,000,000.00 | No. of Employees: 6,100 | Owner: Kelly Kroust

Summary

ACCOUNT INFORMATION

Account Name: Alpine Ski House
Phone: +43-1-12345-0
Fax: +43-1-12345-0
Website: <http://www.alpineskihouse.com>
Parent Account: --
Ticker Symbol: APSK
Description: Alpine Ski House grew out of a small company making ski jackets in our basement. Today, we are the top choice of winter sports apparel for professional athletes and enthusiasts around the world. For us at Alpine ski house, our love of wild and beautiful places translates into apparel that helps you enjoy them in comfort.

ADDRESS

Am Euro Platz 0101
A-1111 Vienna
Austria

POSTS | ACTIVITIES | NOTES | ONENOTE

Enter post here

Both Auto posts User posts

Delivery never arrived
Case: Closed by CIE Administrator for Account Alpine Ski House.
On Delivery never arrived's wall
02/09/2015 11:37

Karen Berg
Alpine Ski House was nominated for Business of The Year, make sure to congratulate their team next time you meet with them.
On Alpine Ski House's wall
02/09/2015 11:22

Delivery never arrived
Case: Created by CIE Administrator for Account Alpine Ski House.
On Delivery never arrived's wall
02/09/2015 11:06

Contact information requested
Case: Created by CIE Administrator for Account Alpine Ski House.
On Contact information requested's wall
02/09/2015 11:06

Contact information requested
Case: Reactivated by CIE Administrator on 02/09/2015 11:06.
On Contact information requested's wall
02/09/2015 11:06

Computers
Opportunity: Created by CIE Administrator for Account Alpine Ski House.
On Computers's wall

Primary Contact
Cathan Cook

Email: Cathan@alpineskihouse.com
Business: 555-0158

CONTACTS

Full Name: Cathan Cook | Email: Cathan@alpineskihouse.com

RECENT OPPORTUNITIES

Topic	Status	Actual Close
Computers	Open	
Incorporating home appli...	Open	
Very likely will order Prod...	Open	

Illustration of a typical Account form

The screenshot shows a Microsoft Dynamics 365 contact record for Cathan Cook. The interface includes a top navigation bar with 'Dynamics 365', 'Sales', and 'Contacts > Cathan Cook'. Below the navigation bar is a toolbar with various actions like 'NEW', 'DEACTIVATE', 'CONNECT', etc. The main content area is divided into several sections:

- CONTACT INFORMATION:** Displays personal details for Cathan Cook, including Full Name, Job Title (Purchasing Assistant), Account Name (Alpine Ski House), Email (Cathan@alpineskihouse.com), Business Phone (555-0158), Mobile Phone, Fax, Preferred Method of Contact (Any), and Address (Clerwood House, 96 Clermiston Road, Edinburgh EH12 6UT). A map of the address is shown below.
- POSTS, ACTIVITIES, NOTES:** A tabbed interface showing a list of activities. The 'ACTIVITIES' tab is active, showing three entries:
 - Cathan Cook:** Please call this customer to see how ... Modified by CIE Administrator 22/10/2015 15:45
 - Marco Tanara:** Scheduled an appointment with the customer. Captured preliminary customer and product in... Completed by CIE Administrator 02/09/2015 11:46
 - Cathan Cook:** Diagnosed and created a list of issues. Created follow-up activities. Generated email using the... Completed by CIE Administrator 02/09/2015 11:46
- Company:** Alpine Ski House
- RECENT CASES:** A table with columns Case Title, Case Number, and Price. It shows 'No Case records found.'
- RECENT OPPORTUNITIES:** A table with columns Topic, Status, and Actual Close. It shows 'No Opportunity records found.'
- ENTITLEMENTS:** A table with columns Entitlement Name, Remaining Terms, and Status. It shows 'No Entitlement records found.'

The bottom of the screen shows the status 'Active' and a note 'unsaved changes'.

Illustration of a typical Contact form

Contacts can be associated with an Account and the record tailored to the business e.g. Interests for events, preferences, etc. Contact records can be re-associated with other Account when someone moves, ensuring that a full contact history is maintained.

Sales Processes

Dynamics 365 makes it easy for sales staff to keep track of all their Leads and Opportunities, managing them through a sales process that is specific to the business and the type of opportunity. This combines with goals and dashboards to ensure that sales staff and management can instantly report on sales performance.

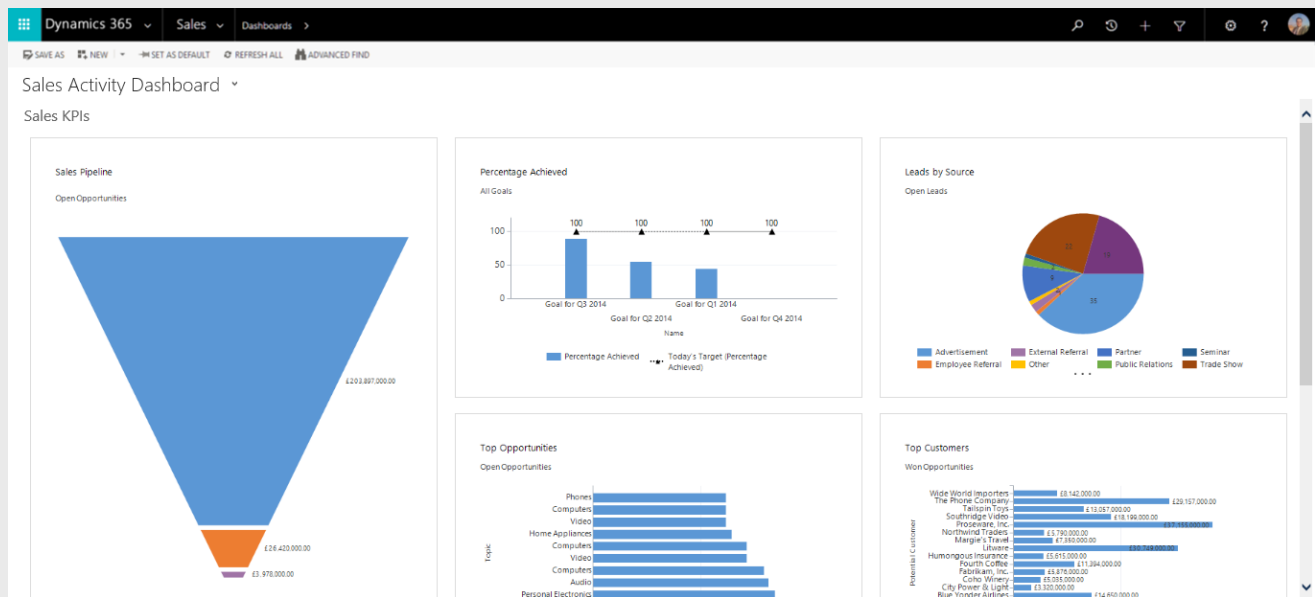


Illustration: Sales Activity Dashboard in Dynamics CRM

Managing Leads & Opportunities through a Tailored Sales Process

Leads and opportunities can be managed through one or more defined sales processes that are tailored to the specific requirements of the business. These stages can also be linked to the sales probability, automatically driving the sales pipeline and forecasting figures.

Leads and Opportunities can be used to track enquiries and all relevant activities and correspondence can be associated with the Opportunity record. Supporting documentation can also be stored and accessed in Dynamics 365, via SharePoint integration.



Illustration of a typical Sales Process with Stage Indicator

The screenshot shows a Microsoft Dynamics 365 Opportunity form for a customer named 'Alpine Ski House'. The opportunity is titled 'Computers' and is in the 'Propose' stage. The estimated close date is 27/11/2014, and the estimated revenue is £3,140,000.00. The status is 'In Progress' and the owner is 'Diane Prescott'. The form is divided into several sections: 'Qualify (Active)', 'Develop', 'Propose', and 'Close'. The 'Qualify (Active)' section includes tasks like 'Identify Contact', 'Identify Account', and 'Purchase Timeframe'. The 'Develop' section includes 'Estimated Budget' (£3,140,000.00), 'Purchase Process', and 'Identify Decision Maker'. The 'Propose' section includes 'Capture Summary'. The 'Close' section includes 'Next Stage'. Below these sections is a 'Summary' tab with fields for 'Topic', 'Contact', 'Account', 'Purchase Timeframe', 'Currency', 'Budget Amount', 'Purchase Process', 'Probability', and 'Description'. The 'Summary' tab also includes a 'Current Situation' and 'Customer Need' section. The 'Summary' tab is further divided into 'TOPICS', 'ACTIVITIES', 'NOTES', and 'ONENOTE'. The 'ACTIVITIES' section shows a list of activities with columns for 'Name', 'Role', and 'Status'. The 'Summary' tab also includes a 'STAKEHOLDERS' section and a 'SALES TEAM' section.

Illustration of a typical Opportunity form

Planning & Capturing Customer Activities

The interactions with customers can be captured within Dynamics 365. It is critical to the success of a CRM solution that it is easy for staff to create and complete these tasks. Dynamics 365 support for creation and tracking of these Activities through Outlook and mobile apps ensure that staff can create these, without changing their working practices.

The screenshot shows a Microsoft Dynamics 365 Activity stream. The stream is titled 'ACTIVITIES' and includes a list of activities with columns for 'Name', 'Role', and 'Status'. The activities are as follows:

- Cathan Cook**: Please call this customer to see how ... Modified by CIE Administrator 22/10/2015 15:45
- CIE Administrator**: 29/09/2015 14:25
- Vincent Lauriant**: Checked customer and product information. Created follow-up activities. Generated email us... Completed by CIE Administrator 29/09/2015 13:47
- Marco Tanara**: Scheduled an appointment with the customer. Captured preliminary customer and product in... Completed by CIE Administrator 02/09/2015 11:46
- Cathan Cook**: Diagnosed and created a list of issues. Created follow-up activities. Generated email using the... Completed by CIE Administrator 02/09/2015 11:46
- Case Resolution: Problem Solved**: Item delivered and customer satisfied Completed by CIE Administrator 02/09/2015 11:44
- Check the delivery status**: Diagnosed and created a list of issues. Captured preliminary customer and product informatio... Completed by CIE Administrator 02/09/2015 11:38

Illustration of a typical Activity stream

Plan & Execute Leading Marketing Campaigns

Dynamics 365 allows staff to plan and execute marketing and communication campaigns. Marketing lists are supported on specified criteria (e.g. Contacts in London who have not been contacted in the last six months), for leads, accounts and contacts. These marketing activities (e.g. sending email) can be executed directly from Dynamics 365, or can be delivered through one of the many leading email marketing products that integrate with Dynamics 365.

Dynamics 365 can also be integrated with leading email marketing solutions. We have experience of integrating MailChimp with Dynamics 365 and have a cost effective solution at: <http://www.powerobjects.com/powerpacks/powermailchimp/>

Find out more about marketing in Dynamics 365:
<http://www.microsoft.com/en-gb/dynamics/crm-marketing.aspx>.

Customer Care - Drive Improved Customer Service

Dynamics 365 provides the platform to facilitate great customer service. With Case Management provided as a core feature it provides a flexible framework for dealing with client (or staff) questions, issues and requests. These requests can be prioritised and managed within Dynamics 365, via queues and workflows, ensuring the right people are alerted at the right time. If you are in danger of missing your service level agreements, Dynamics 365 can escalate and route issues appropriately.

Customer service appointments and management of staff and resources are all provided as standard in Dynamics 365, including a full resource booking calendar, with Outlook integration. Find out more about customer care and service in Dynamics 365: <http://www.microsoft.com/en-gb/dynamics/crm-customer-care.aspx>

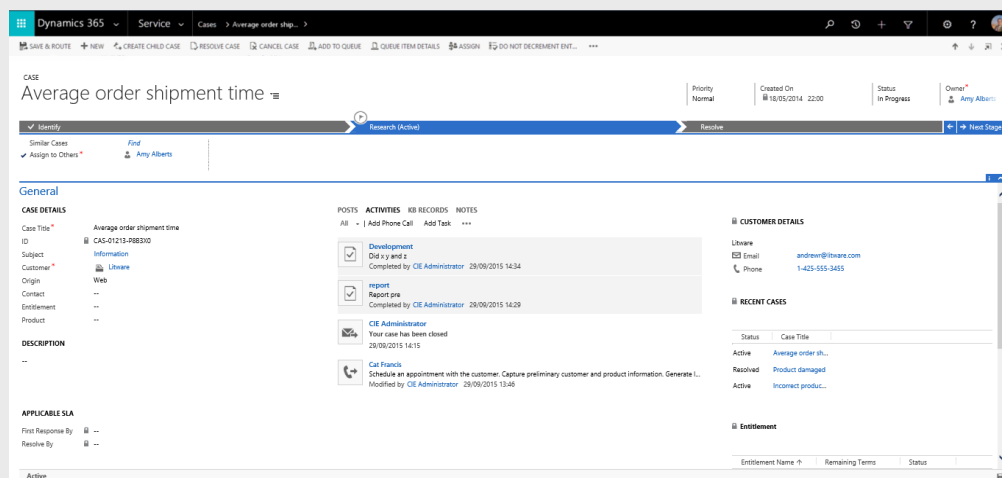


Illustration: Case Screen with resolution flow, used for queries, issues, complaints etc.

Microsoft Field Service delivers advanced scheduling, resource optimisation and mobile enablement capabilities to keeping the customer at the centre of the business. Field Service offers advanced analytics with machine learning capabilities, which allow organisations to move from a costly break-fix model to a never-fail service model.

Field Service improves customer satisfaction through service delivery and inventory management that features flexible service schedules that can be recurring if needed. Field Service enables accuracy of service contracts, warranties and installed products across customers, geographies and locations. Field Service provides the ability to manage people and equipment with flexible scheduling options that accommodate both customer service representatives and dispatchers.

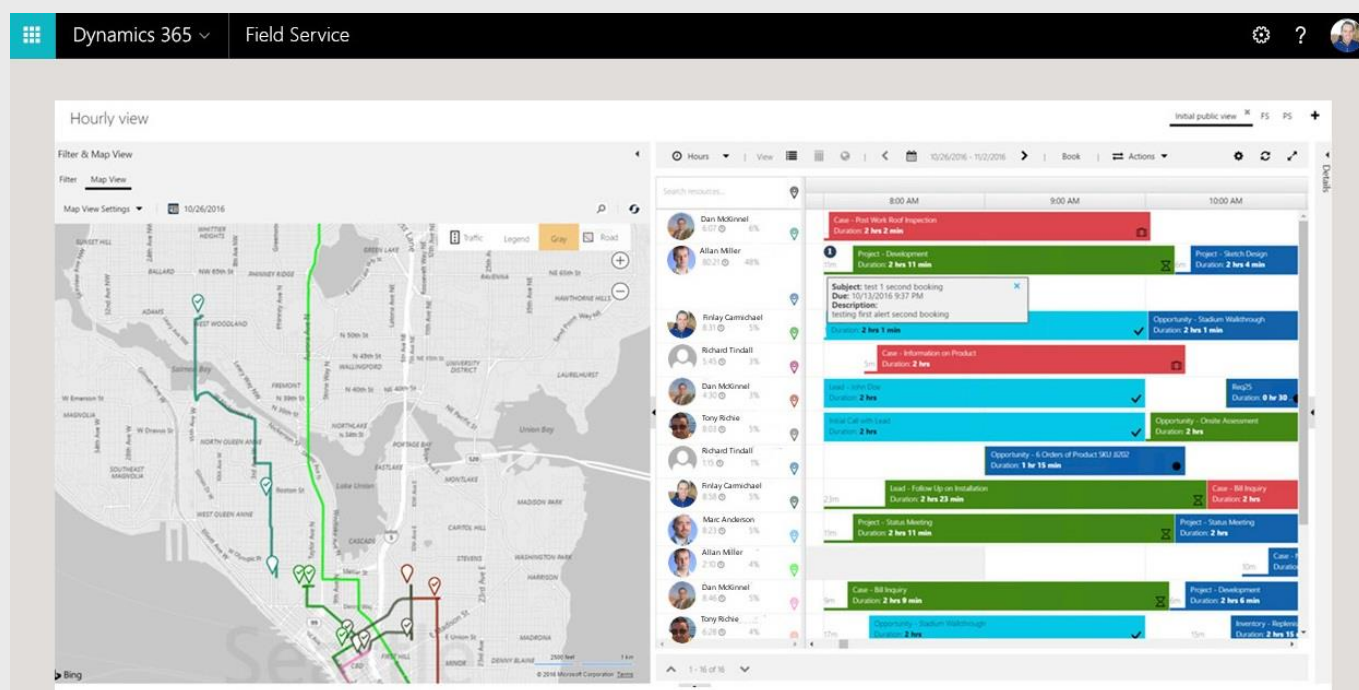


Illustration: Field Service Dashboard, filter map view and schedule board

Find out more about Microsoft Field Service in Dynamics 365: <https://www.microsoft.com/en-us/dynamics365/field-service>

Project Service Automation

Project Service Automation for Microsoft Dynamics 365 is an end-to-end service that provides staff with a single system of engagement for project sales, resourcing, delivery and billing for teams. Project Service Automation enables people, processes and technology together that aims to empower teams to complete projects on time and on budget.

Microsoft Dynamics 365 for Project Service Automation automation helps to estimate, quote, and contract work when planning and assign resources and enhances team collaboration to capture time, expense, and progress data for real-time insights and accurate invoicing.

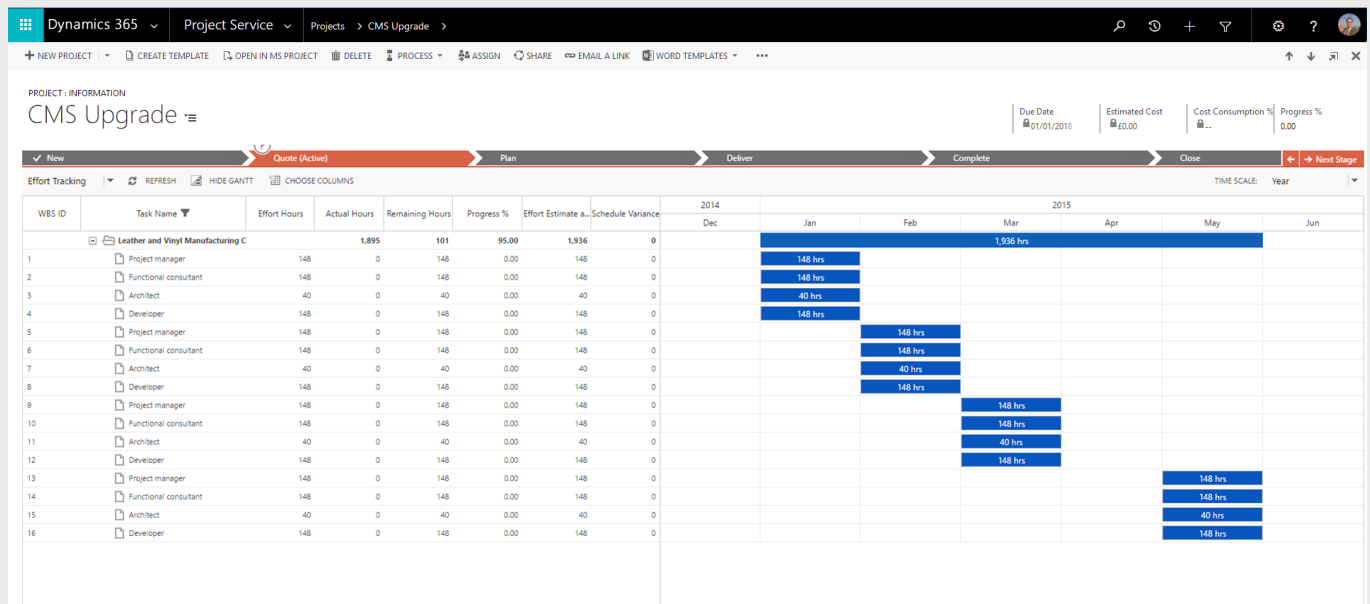


Illustration: Project Service Automation of project effort tracking of estimated hours

Find out more about Microsoft Project Service Automation in Dynamics 365:
<https://www.microsoft.com/en-us/dynamics365/project-service-automation>

Social – Listen, Gather & Act

Enable your staff to monitor social media and identify social media posts about the organisation or partners. Microsoft Dynamics Social Engagement allows you to track online sentiment (good and bad) and see who is enquiring or talking about your organisation. This also extends to customer service with social media posts easily converted to Cases, ensuring they get addressed via established processes.

Dynamics 365 also includes Yammer (part of Office 365) integration as standard. This ensures that staff can collaborate easily on CRM records e.g. Referrals

Find out more about the Social features of Dynamics 365: <http://www.microsoft.com/en-gb/dynamics/crm-social.aspx>

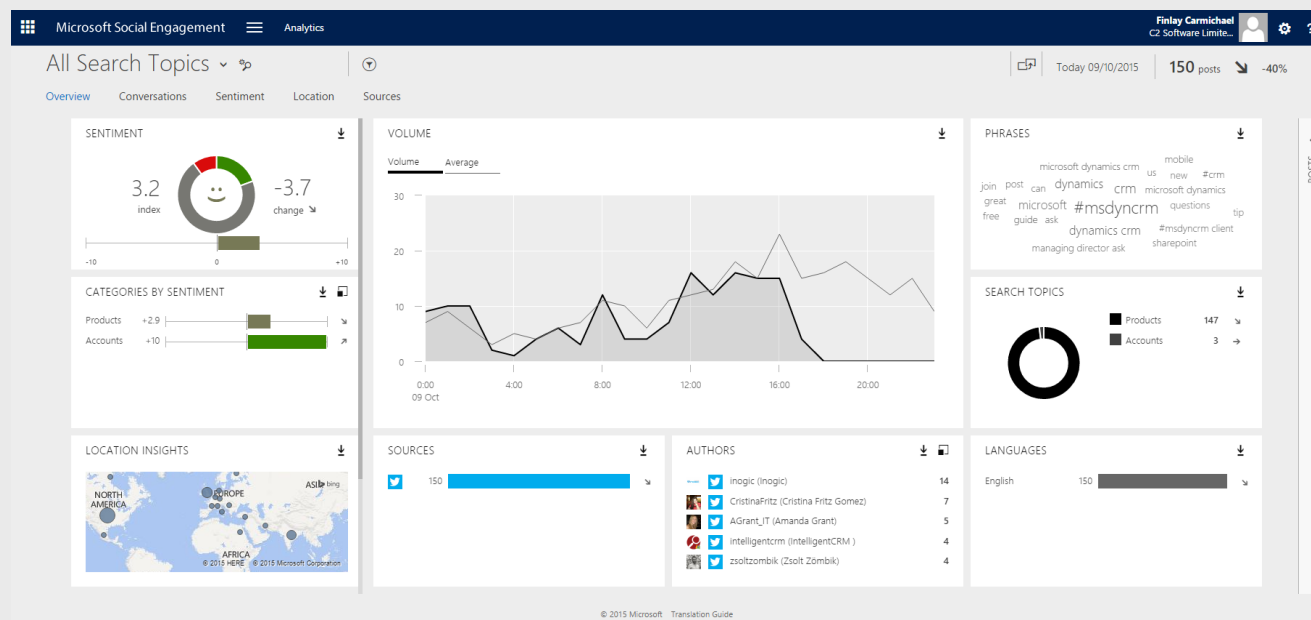


Illustration: Social Engagement – pulling in information from a range of social media and web sources. Allows monitoring of clients, brands and organisations

Extending & Integrating Dynamics 365

Microsoft Dynamics 365 is much more than just a fixed CRM tool; it is a platform to help automate all aspects of the organisation. A key advantage is that it can be tailored to deliver many business solutions. As such Microsoft Dynamics 365 is an XRM (Anything Relationship Management) platform.

The flexible nature and open API (programmers interface) also means that Microsoft Dynamics 365 can also be integrated with other open systems e.g. finance solutions.

Dashboards & Reporting

Dynamics 365 provides a powerful set of business intelligence tools to help ensure that the data captured in Dynamics 365 can provide insights for the business. This could be used to report on tenders, activities meetings etc. It could also be used to produce accurate information for board meetings.

Flexible Dashboards

Dynamics 365 provides a range of dashboards out of the box for Sales, Marketing and Customer Service. In addition, it provides a framework to create both company wide and personal dashboards to help staff monitor and deliver against their goals.

Dashboards can include graphs, charts, lists and content from external sources. These dashboards are also interactive allowing users to drill down into the data e.g. show age of leads at a particular sales stage.

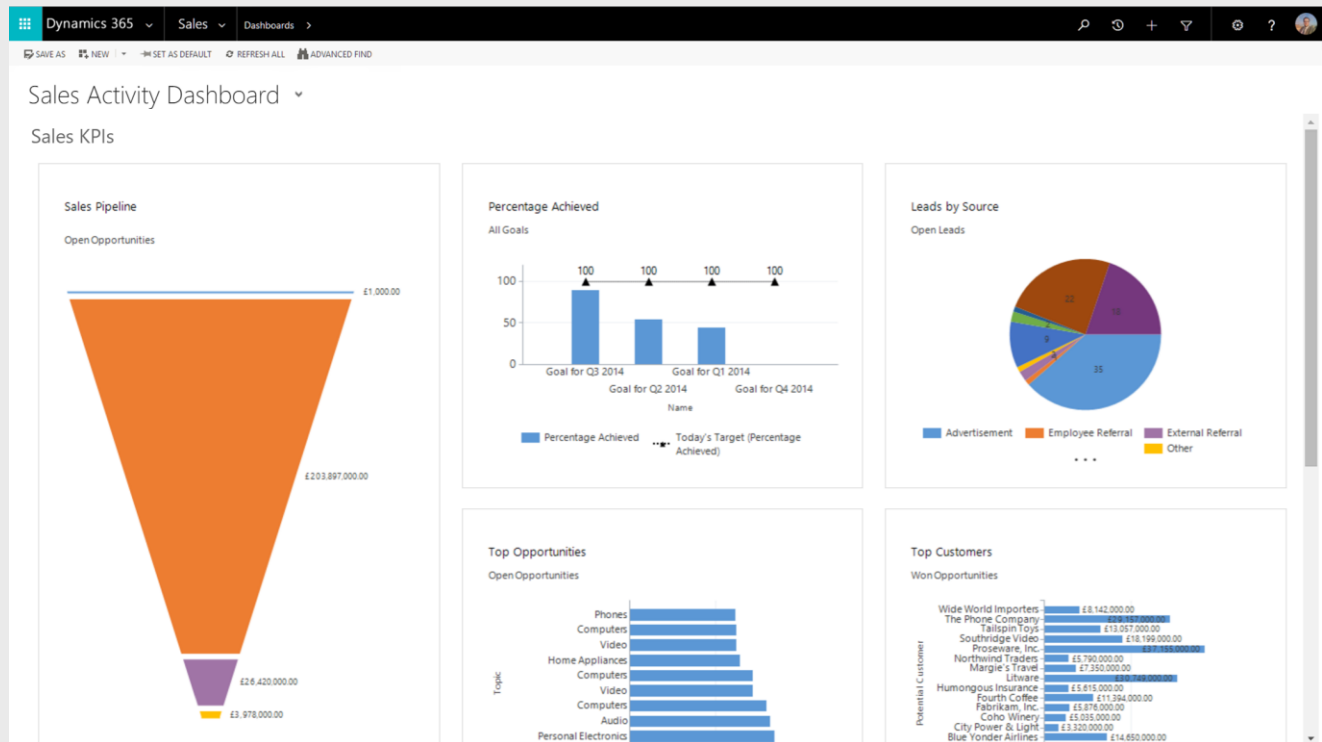


Illustration of a built in Sales Dashboard

Reporting Engine

A number of reports are provided as standard including Sales Pipeline, Sales History, Lead Effectiveness, Customer Service etc. These provide powerful analysis tools as standard. In addition, a report wizard allows non-technical staff to create and manage their own reports. This ensures that staff can explore and analyse the data, without reliance on the technical team.

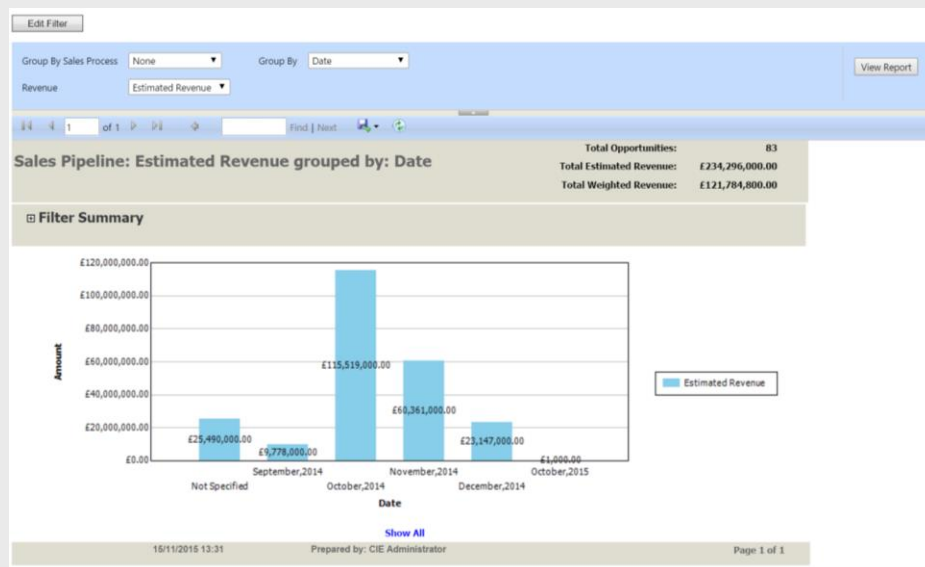


Illustration of a built in Sales Pipeline Report – Grouped by Date

Graphs & Charts

Graphs and charts can be created easily, without the need for technical skills. These charts and graphs can be applied to any view in the system allowing easy comparison between data sets.

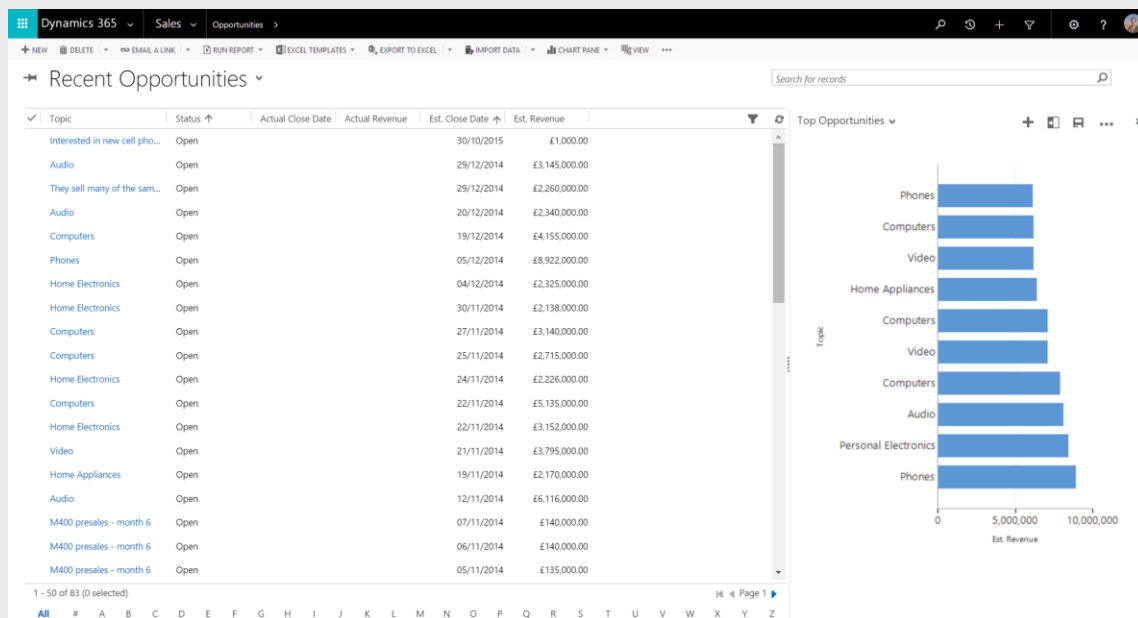


Illustration of a typical View/Graph combination

Power BI

Power BI is a separate service from Microsoft that complements Dynamics 365. Power BI allows data to be explored in real time and pulls dashboards together from multiple data sources e.g. CRM, ERP, databases, Google Analytics, Email Marketing etc. A Dynamics 365 connector is

provided as standard to allow sales data to be explored.

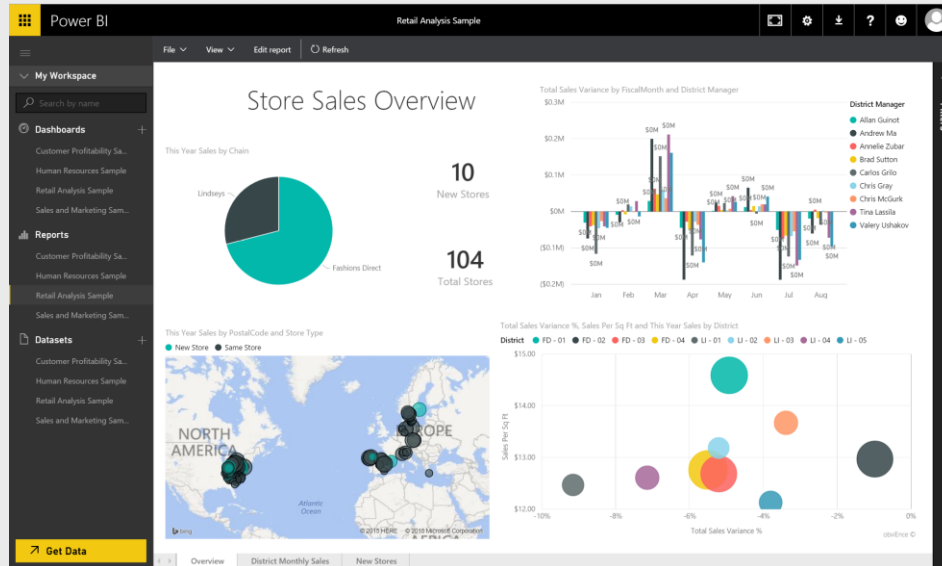


Illustration of a typical Power BI Dashboard

Accessing Dynamics 365 from any Location on any Device

Dynamics 365 provides mobile and tablet apps for all major platforms e.g. iOS, Android and Windows. These apps are fully featured e.g. includes dashboards, and are provided at no additional cost. This ensures that staff can access Dynamics 365 from any location and reflects the mobile nature of today's workforce.



Illustration of the Dynamics 365 Tablet App

About C2 Software

C2 was formed in 1997 by an experienced team of business-orientated professionals. We are Business Transformation experts focussing on Microsoft solutions for Dynamics 365 and SharePoint Online.

We are a Microsoft Certified Partner and we provide services to numerous prominent clients throughout the UK. Our business understanding enhances productivity, customer self-service, business automation, business intelligence and customer care.

There are over 20 employees within C2 and our team are specialist software engineers and consultants. We have a proven reputation for delivering innovative SharePoint, Dynamics 365 and web CMS based solutions. We specialise in the following which aligns to the Microsoft Technology Stack:

- Microsoft Dynamics 365 (CRM) Implementations
- Web Development and Web Content Management (SharePoint & Microsoft Web Portals)
- Power BI
- Systems Integration (e.g. Office 365, SAP Business One, Sage)

Accreditations

As an organisation we take our accreditations very seriously and we strive for continuous improvement. As such we have invested in training and certification. Our current certifications include:

- Microsoft Network Partner
- Microsoft Dynamics CRM Certified Solution Advisor (certifications):
 - Dynamics CRM Customisation & Configuration
 - Dynamics CRM Implementations
 - Dynamics CRM Installation & Deployment
 - Dynamics CRM Sales & Pre-Sales
 - Dynamics CRM Pre-Sales
 - Sure Step Methodology - methodology for managing Dynamics implementations
 - .NET Development
- ISO 9001 (Quality) Accredited
- ISO 27001 (Information Security) Accredited SO 14001 (Environmental) Accredited Investors in People Accredited