Microsoft

Get ready to deliver amazing customer experiences with Microsoft Dynamics CRM

Microsoft Dynamics

Microsoft Dynamics CRM helps you focus on your customer

INTUITIVE DESIGN

Simple and immersive interface helps you get things done

ACTIONABLE INTELLIGENCE

The right information at the right time, right at your fingertips

PERVASIVELY CONNECTED

Anywhere access to the people and resources you need for success

The "Age of the Customer" has begun.

Customers want great experiences. Your CRM system can help you deliver them.

In a socially connected, always-on world, it has never been more important for companies to deliver compelling customer experiences. Microsoft Dynamics CRM helps you do just that.
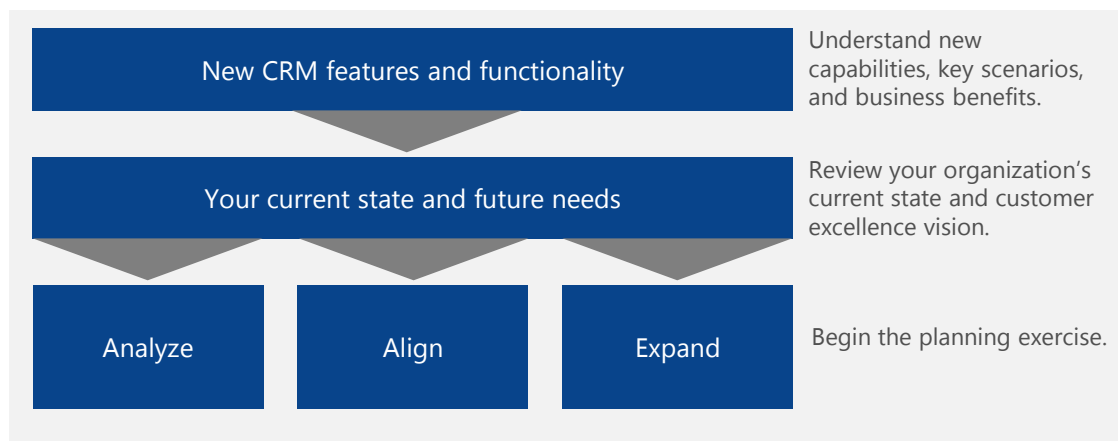
Customers today are smarter. With a constant connection to the Internet, they have quick access to information, and don't hesitate to go looking for what they want. Therefore, it's no surprise to find that customers are almost 60% down a sales cycle before they actually make contact with the company that they are researching. And that fact changes the way you market, sell, and service.

First, understand and plan for the technical and process possibilities.

Out with the old and in with the new! The intuitive design of our beautiful new user experience redefines what a business application should look like and what work should feel like. Actionable intelligence at your fingertips and within the context of what you are doing means you don't just look smart, you are smart. And no more social for the sake of being social - Microsoft's social tools keep you pervasively connected to the people and resources you need in the context of what you are doing. In addition, with our new mobile solutions, you can take your show on the road.

The best way to leverage this new functionality is to undergo a review of your customer-centered business processes and use cases in order to understand how Microsoft Dynamics CRM can extend your vision for customer excellence.

One approach to consider is to task a team to understand the new CRM features and functionality, review your organization's current state and vision, and develop a rollout plan by **analyzing, aligning,** and **expanding**.

New CRM features and functionality	Understand new capabilities, key scenarios, and business benefits.
Your current state and future needs	Review your organization's current state and customer excellence vision.

Analyze	Align	Expand	Begin the planning exercise.

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Next, prepare and guide your people through the change!

Now, prepare and guide your people through the change

New features and functionality are one thing, but this is also about a new way of working; increased customer focus, increased process agility, increased mobility, and access and social in context.

Here is one approach to preparing and guiding your people through the change and driving adoption, helping you accelerate time to value.

6 things you can do now to plan for the new CRM

- Create your team and start understanding the new features and functionality.

- **Analyze** your current state and future needs. What are your customers telling you they need and expect?

- **Align** your current capabilities with the new functionality. Where can you add mobile? Where do you need actionable intelligence?

- **Expand**. Where can you go beyond your current use cases and processes? Can you redefine customer service for your industry or create more efficient sellers?

- Develop a plan for testing your customizations in the new environment.

- Determine how your technology partners can help on your CRM journey.

Develop your change strategy & plan

Studies have shown that any adoption and change management effort requires a holistic and structured approach to be successful. Developing an overall strategy and plan that helps you understand who is impacted and how you will guide them through the transition is critical.

Build your sponsor model

Visible and active executive sponsorship is another critical success factor. Employees want to hear about the business reasons for a change from executives. They want to understand why this change is important to the business and why now. This is key in creating motivation and desire.

Create your communication plan

Communicate early and often. Different groups are impacted in different ways so make sure you tailor your message to your audiences while still maintaining alignment to core key messages. The sender is just as important as the message itself. Building awareness is an important first step to helping people through a change.

Create your training plan

Part of the change process is making sure employees have the knowledge and ability to successfully transition to the new way of working. A comprehensive training plan that focuses on processes and use cases, not just features and functionality, is crucial.

Create your coaching plan

Everyone needs a coach! Use your managers and supervisors to help employees understand how the change impacts them, listen to their concerns, and show them the value of the future state.

Drive adoption and reinforce the change

Gather feedback , measure adoption, and make adjustments to your plans in order to drive adoption and sustain the change.

Need help?

Adoption and change management services are available to help you plan for this change and drive adoption; minimizing the disruptions and accelerating time to value.

Contact your Microsoft Dynamics Partner or Microsoft Services representative to find out more.

For more information about Consulting and Support Solutions from Microsoft, visit www.microsoft.com/services. To find a Microsoft Dynamics Partner, visit crm.dynamics.com/marketplace.

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