

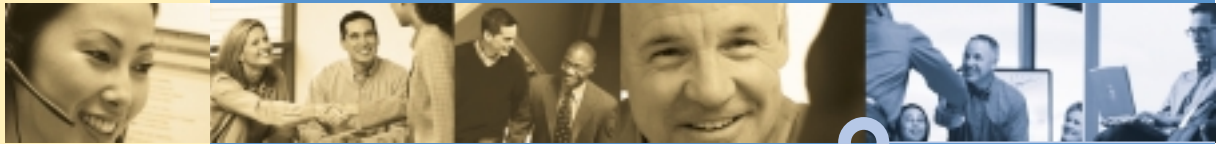
It's about customers.

**Microsoft**

Microsoft®  
**Customer  
Relationship  
Management**

PUT YOUR CUSTOMERS AT THE CENTER OF YOUR BUSINESS





#### THE GOAL:

Provide a CRM solution that meets the resources and needs of small and mid-market businesses, helping them build more profitable customer relationships.

#### THE NEED:

An easy-to-use, flexible, and integrated solution that empowers you and your employees to make informed decisions, increase sales success, and provide superior customer service.

#### THE SOLUTION:

**Microsoft® Customer Relationship Management**



#### Microsoft® Customer Relationship Management

**MICROSOFT HAS A VISION OF A CONNECTED WORKPLACE:** connecting employees to information, connecting your business to your customers, and connecting the systems that make your business run— regardless of platform or programming language. That's the .NET vision.

With Microsoft Customer Relationship Management, that vision extends to small and mid-market businesses. Built from the ground up using Microsoft .NET technologies, Microsoft CRM will transform the way your company acquires and retains customers, creating an interconnected workplace that extends across business systems and Web services.

But customer relationship management is about more than technology— it's about customers. Microsoft CRM frees employees from time-consuming processes and empowers them with the information they need to focus on selling effectively and delivering quality customer service— the business of building profitable customer relationships.

PUT YOUR CUSTOMERS AT THE CENTER OF YOUR BUSINESS



CUSTOMER RELATIONSHIPS ARE THE BACKBONE OF YOUR BUSINESS—but the tools to effectively manage these relationships have, until now, been geared toward large companies with the resources to support prolonged implementation processes and high costs for training, customization, and maintenance. Microsoft Customer Relationship Management offers powerful CRM functionality from the start—and makes it easy for you to customize, integrate, and maintain your solution efficiently and affordably.

Increase sales success

Shorten the sales cycle and improve close rates with leads and opportunity management, automated sales processes, quote creation, and order management. Maintain contact with customers via targeted e-mail; use Microsoft Word to create print communications.

Deliver consistent, efficient customer service

Customer service representatives can manage cases from initial contact through resolution, access a searchable knowledgebase of support information, and respond quickly and accurately to customer needs with automated routing and queuing of support requests.

Make informed, agile decisions

Microsoft CRM provides detailed reports and a complete view of sales and support activity and history, so you can identify the opportunities, trends, and problems that guide your decisions.

Share information

Integrated Sales and Customer Service modules give employees a complete, updated view of key customer information across the business. Employees can also share ad hoc information to ensure rapid response to sales opportunities and service requests.

Automate business processes

A built-in workflow engine with customizable templates and rules lets you define and automate processes for sales, customer service, and activity management.

Integrate across your business

Microsoft CRM offers tight integration with Microsoft Business Solutions and Microsoft Office, and supports rich integrations with third-party applications and Web services.

Ensure a rapid return on investment

Simple configuration and ease of use mean your employees become productive fast, with little or no training, and 7x24 support resources from Microsoft.

INCREASE EMPLOYEE PRODUCTIVITY

EASY TO LEARN AND USE, Microsoft Customer Relationship Management offers a familiar, intuitive user interface, centralized activity management, and a single-click access to activities, information, reports, and modules.

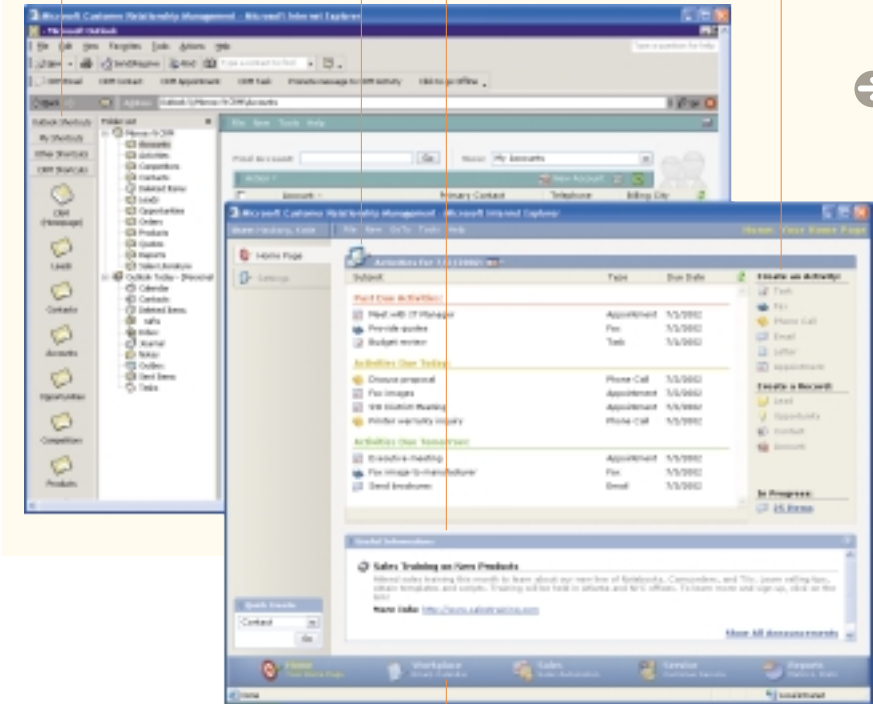


Sale employees can work online or offline through Microsoft Outlook.

View and update critical information about activities and internal news.

Manage tasks, appointments, and communications from a central location.

The Microsoft CRM Home Page gives users a one-stop location for viewing and managing information, activities, and communications.



Quickly access your e-mail and calendar, Sales and Customer Service modules, and Reports.

Work from Outlook or the Web

With Microsoft CRM, salespeople can access full sales functionality from Microsoft Outlook® – whether they're online and offline – or work from any location using a Web browser.



ENSURE RETURN ON INVESTMENT

Manage Your Business More Effectively

MANAGE UNIQUE ORGANIZATIONAL STRUCTURES, establish efficient business processes, and maintain control over how employees access information and connect with customers. With Microsoft Customer Relationship Management, you can run your business efficiently and profitably, using a solution designed for rapid deployment, easy customization, and low total cost of ownership.

Manage your organization

Quickly and accurately map organizational hierarchies, including multiple departments and complex reporting structures.

Manage employee roles and responsibilities

Microsoft CRM includes customizable Sales, Service, and Manager roles that give employees appropriate access to information, management privileges, and business processes.

Empower employees to work collaboratively

Create teams and facilitate easy sharing of customer information, so that employees can work together to increase sales effectiveness and deliver consistent, efficient customer service.

Increase efficiency

Customizable workflow rules let you automate sales and service processes to save time, ensure accuracy, and establish consistent work practices.

Maintain secure, restricted access

A robust security model ensures that information is protected, yet accessible to employees with appropriate privileges.



The investment that pays you back

Low total cost of ownership means that Microsoft CRM will work for you today, tomorrow, and over the lifetime of your business. Easy set-up processes get you started fast, but you can also customize and maintain your solution within an affordable budget.

MAKE INFORMED, AGILE DESISIONS

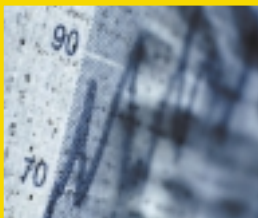
Forecast, Measure, Analyze

PROFITABLE CUSTOMER RELATIONSHIPS DEPEND on the ability to measure current business activity, forecast future revenues, identify customer trends, and evaluate sales and service performance. With Crystal Enterprise™ for Microsoft CRM, you'll get more than 100 reports to help you make smarter, faster decisions that increase sales success and ensure customer satisfaction.

Microsoft CRM includes more than 100 Crystal Enterprise reports that let you access and analyze data from virtually any source and share the information across your business.

Use reports to:

- Forecast future sales performance.
- Assess the value of the sales pipeline.
- Evaluate trends for leads and opportunities.
- Identify top customers.
- Identify top-selling products and pinpoint problem products.
- Track support incidents and identify bottlenecks or other problems.
- Analyze competitors' performance.
- Track employee performance for sales and customer service.
- Measure performance against quotas for sales employees.



Crystal Enterprise for Microsoft CRM includes reports that provide detailed analysis of activity and performance by product, employee, sales region, fiscal time period, turnaround time, and more. You can also easily export Microsoft CRM report data to other applications, such as Microsoft Excel, for further analysis.

# SALES



The Right Information, at the Right Time, in the Right Place



ACCESSIBLE FROM MICROSOFT OUTLOOK AND THE WEB, Microsoft Customer Relationship Management Sales is designed to help your sales team work without limits—on the road or at the desk, online and offline, they'll have access to complete customer and product information.

Microsoft Outlook and Web access

Work online or offline using Microsoft Outlook, with access to full sales functionality. Work online from any location using a Web browser.

Complete customer view

View and manage customer account activity and history, including: contact information, communications, open quotes, pending orders, invoices, credit limits, and payment history.

Opportunity management

Easily convert leads to opportunities and then track opportunities throughout the sales cycle. Use customizable workflow rules to automate leads routing, notifications and escalations, and opportunity and pipeline activity management.

Sales process management

Automate stages in the sales process to ensure opportunities are tracked and closed consistently and efficiently, using customizable workflow rules and selling methodologies.

Information sharing

Share information about contacts, accounts, opportunities, orders, and more. Tightly integrated Sales and Customer Service modules let salespeople view accurate, updated information about customer support incidents, contracts, and other data relevant to customer needs and satisfaction.

Quotes

Create and modify accurate quotes for prospects and existing customers, using a full-featured product catalog that supports complex pricing levels, units of measure, and discounts.

Order management

Convert quotes to orders that can be modified and saved until they are ready to be billed as invoices.

Sales force management (quotas)

Measure employee sales performance against goals. As opportunities are closed in Microsoft CRM, they are credited against the assigned salesperson's quota.

Territory management

Create territories for salespeople, enabling them to manage and evaluate territory-based sales processes with workflow rules and reports.

Reports

A wide range of reports can be used or customized to identify trends, measure and forecast sales activity, track sales processes, and evaluate business performance.

Sales literature

Create, manage, and distribute a searchable library of sales and marketing materials, including brochures, white papers, competitor information, and more.

Competitor tracking

Maintain a library of detailed competitor information and associate that information with opportunities and sales literature. Run reports that track competitor activity by product, region, or other criteria.

Direct e-mail

Increase sales productivity easily: Select customers based on common characteristics, then use templates to send customized e-mails with special offers.

MICROSOFT CRM SALES

Maintain a detailed, complete view of each customer. Easily view and update account information and sales and service activity.

Keep information about leads, opportunities, accounts, competitors, products, and sales literature centralized and readily available.

Track the data you need to close sales using customizable forms.

The screenshot displays the Microsoft CRM Sales interface within a Microsoft Internet Explorer browser window. The main window is titled 'Microsoft Customer Relationship Management - Microsoft Internet Explorer' and shows the 'Sales: Account Manager' view. On the left, a navigation pane lists various modules: Leads, Opportunities, Accounts, Contacts, Competitors, Products, Sales Literature, Quotes, Orders, and Invoices. The central pane shows a list of accounts, with 'A. Dufresne Corporation' selected. To the right, a detailed view of the selected account is shown, including fields for Account Name, Account Number, Primary Contact, Relationship Type, Address, and various phone and fax numbers. The interface is designed for managing customer accounts and sales activities.



STAY INFORMED, CURRENT, AND CONNECTED – WHEREVER YOU ARE

Access Full Sales Functionality, Online and Offline

TO ENSURE SALES SUCCESS, YOUR SALESPeOPLE NEED ACCURATE, UPDATED INFORMATION from across your business, along with the ability to access that information at any time, from any location. With Microsoft CRM Sales for Outlook, salespeople can work both online and offline with access to full sales functionality.

Familiar Microsoft Outlook environment

Work with Microsoft CRM sales information and functionality quickly and easily from Outlook.

Work from any location

Work offline with Accounts, Leads, Opportunities, Quotes, Orders, Sales Literature, and more—when you're on the road, you'll have access to full sales functionality.

Integrated e-mail– and more

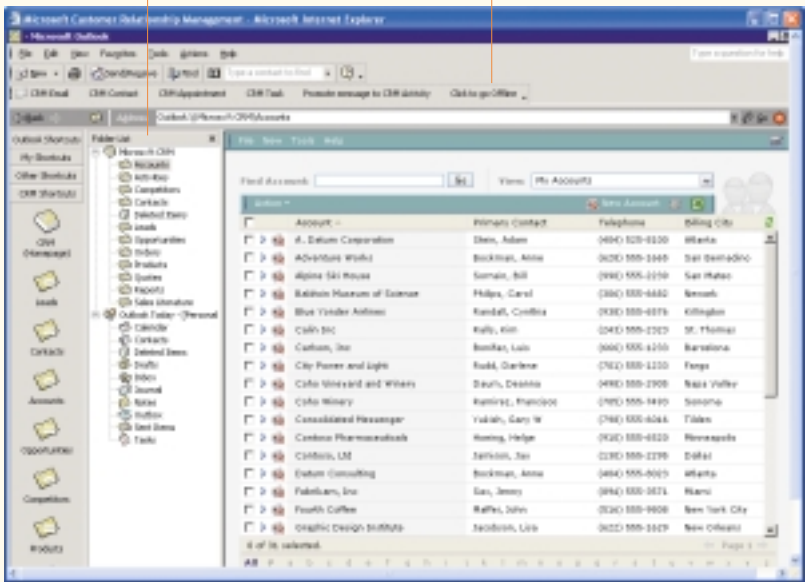
Microsoft CRM e-mail, contacts, tasks, and appointments are integrated with Outlook.

Powerful synchronization

Every time you go offline, Microsoft CRM Sales goes with you—you'll always work with updated information. If you make changes to data while working offline, the new information will synchronize with the Microsoft CRM server the next time you go online.

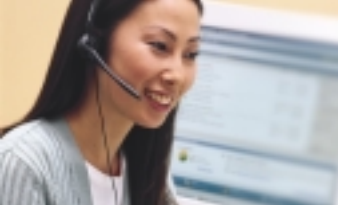
Access Microsoft CRM quickly and easily from the Outlook Folder List and Shortcut Bar.

Work offline with accurate, updated information and full sales functionality.



MICROSOFT CUSTOMER RELATIONSHIP MANAGEMENT  
CUSTOMER SERVICE

# SERVICE



Delivering Customer Loyalty



**DELIVER SUPERIOR CUSTOMER SERVICE AND INCREASE SUPPORT CAPACITY—WITHOUT ADDING EMPLOYEES.** Microsoft CRM Customer Service makes it easy for service representatives to track customer requests, manage support incidents from initial contact through resolution, and provide the consistent, efficient service key to customer satisfaction.

**Case management**

Create, assign, and easily manage customer service requests. Manage actions and communications for each case from a central location.

**Complete view of accounts and customer information**

View all customer information and accounts, including sales and order information, to better understand specific customer needs and answer questions customers might ask that are related to their accounts.

**Automated routing and queuing**

Customizable workflow rules let you automatically route service requests and cases to the appropriate representative or to queues for resolution, escalation, or reassignment.

**Searchable knowledgebase**

Publish support articles and other relevant support information to a searchable knowledgebase. Built-in review processes ensure information is complete, correct, and properly tagged for search.

**Service contracts**

Easily create and maintain service contracts within Microsoft CRM. When a support case is resolved, relevant contract information is updated automatically.

**Auto-response e-mail**

Use customizable templates and workflow rules to generate and send auto-response e-mails to customer requests.

**E-mail management**

Maintain an accurate record of customer-related communications, with automated tracking of customer e-mails that associates those e-mails with appropriate customer records.

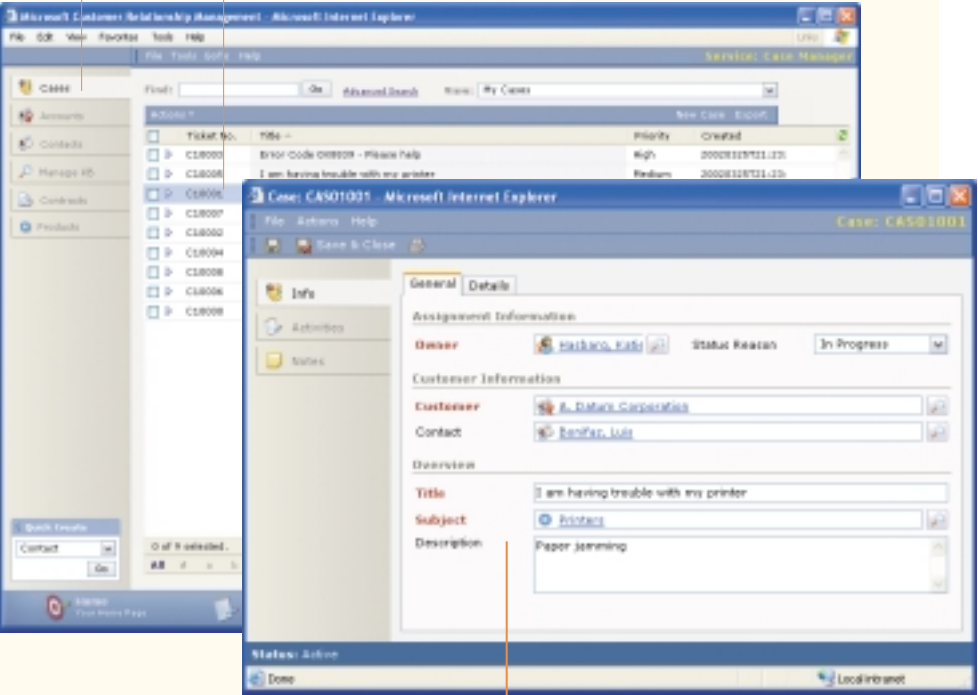
➔ **Increase employee satisfaction**

Customer service representatives will get started fast and work efficiently with powerful knowledgebase resources, easy sharing of information, and automated processes that save time and ensure accuracy.

MICROSOFT CRM CUSTOMER SERVICE

All support cases, account information, problem resolution tools, and contracts are centralized and easily accessible.

View and track all support incidents from initial contact through resolution.



Track the data you need to offer customers consistent, efficient service by using customizable case forms.


# SATISFACTION

DESIGNED FOR FLEXIBILITY, INTEGRATION, AND LOW TOTAL COST OF OWNERSHIP

A Microsoft .NET Solution

BUILT FROM THE GROUND UP ON MICROSOFT .NET TECHNOLOGIES, Microsoft CRM offers a flexible, n-tier architecture that can be easily integrated with other applications and Web services, as well as a rich environment for customizations that carry forward with upgrades.

- Because it's built on .NET technologies, users can access Microsoft CRM through a Web client running in Microsoft Internet Explorer and through a Microsoft Outlook client.
- Software vendors and systems integrators can easily incorporate Microsoft CRM Web service functionality into custom solutions developed in Visual Studio® .NET.
- Customizations automatically carry forward whenever you upgrade, saving time and reducing customization and maintenance costs.
- Microsoft SQL Server™ replication enables users to synchronize data between offline clients and the online application. Using Microsoft Outlook, sales people can access full sales functionality both online and offline.
- Microsoft CRM grows along with your business and supports a wide range of customizations, ranging from simple, out-of-the-box desktop deployments to robust Web services implementations.
- A robust security model, based on Microsoft Active Directory® log-ins and user-based roles, ensures effective management of applications privileges, platform privileges, and licensing rights.



➔ With support for open standards such as Extensible Markup Language (XML) and Web Services Description Language (WSDL), Microsoft CRM enables efficient, cost-effective integrations with external business systems—regardless of platform or programming language. As part of the .NET vision, Microsoft CRM will transform the ways small and mid-market businesses use Web-based information and services to develop profitable customer relationships.

Power Of Integration

MAINTAIN A COMPLETE, EASILY SHARED VIEW OF CUSTOMER INFORMATION ACROSS YOUR BUSINESS, streamline business processes from the start, and integrate easily with third-party applications and Web services.

Integration functionality for Microsoft CRM includes:

Microsoft CRM Sales and Customer Service

- When data is entered in Microsoft CRM, the information updates automatically throughout the application.
- Sales and Customer Service modules integrate tightly, making it easy for employees to share information across your business.
- Salespeople can view customer service information, such as support cases, that might affect sales processes for a specific opportunity or customer.
- Customer service representatives can view customer accounts, including sales and orders, to identify specific customer needs and answer account-related questions.

Microsoft Office 2000 and Microsoft Office XP

- With the Microsoft Outlook client, sales employees can work online or offline with full sales functionality, including accounts, contacts, opportunities, products, sales literature, activities, e-mail, and more.
- Integration with Microsoft Office lets users create and print communications using Microsoft Word Mail Merge, as well as export data to Microsoft Excel.

Microsoft Business Solutions

- Microsoft CRM integrates easily with Microsoft Business Solutions ERM applications.
- Integration includes key data mapping for contacts, accounts, products, pricing lists, orders, and invoices.

Third-party applications and Web services

- Microsoft CRM functionality can be exposed through open APIs for integration with third-party applications and Web services.

CONNECT



➔ Microsoft CRM includes Microsoft BizTalk® Server 2002 Partner Edition, ensuring fast, cost-effective integrations with robust messaging functionality, reliable data-mapping tools, and rich data transformation using XML technologies.





# CUSTOMIZE



## IMPLEMENT EASILY IN YOUR MICROSOFT ENVIRONMENT



DESIGNED TO MEET THE BUDGET and support needs for small and mid-market businesses, Microsoft CRM can be purchased, deployed, and maintained at a reasonable cost, with the assurance of expert support from Microsoft Business Solutions Partners.

- **Ensure fast deployment**, easy maintenance, and straightforward upgrades with centralized installation.
- **Use flexible business management settings** to mirror your company's organizational structures, including multi-level, multi-division businesses, or businesses with subsidiaries.
- **Migrate data from multiple sources**. Microsoft CRM offers predefined data migration and mapping for Microsoft Business Solutions and other CRM applications.
- **Configure forms, settings**, and interfaces to suit your business needs.
- **Integrate with new or existing solutions**, including Microsoft Business Solutions, third-party applications, and Web services.
- **Scale the installation** as your business changes and grows.

### Expert, Reliable Support

Microsoft CRM is delivered through a global network of certified Microsoft Business Solutions partners, ensuring hands-on assistance with the setup and maintenance process, as well as 24-hour access to Microsoft Technical Support services.

### Create Customized Solutions

A .NET solution, Microsoft CRM enables developers to build new functionality into the application, integrate with business systems and Web services, and scale the installation to meet changing business needs.

Developers can work with:

- Flexible, n-tier .NET architecture, including secure, exposed API calls.
- Direct access to platform APIs for rapid solution development in Visual Studio .NET.
- Software Development Kit (SDK) documentation.
- Integration tools: Microsoft BizTalk Server 2002 Partner Edition.

## CUSTOMIZE TO MEET YOUR BUSINESS NEEDS

MICROSOFT CUSTOMER RELATIONSHIP MANAGEMENT OFFERS OUT-OF-THE-BOX FUNCTIONALITY, with options that allow both administrators and IT professionals to configure the user interface and settings to meet business needs. Both simple configurations and systems customizations can be implemented quickly and efficiently, saving time and ensuring reduced maintenance costs.

### Map organizational structures

Using flexible default settings, your channel partner or administrator can closely mirror your company's organizational structure, including the ability to represent reporting structures and multi-department organizations.

### Specify user access rights

Define and configure role-based security settings to ensure users have appropriate access to information and business processes.

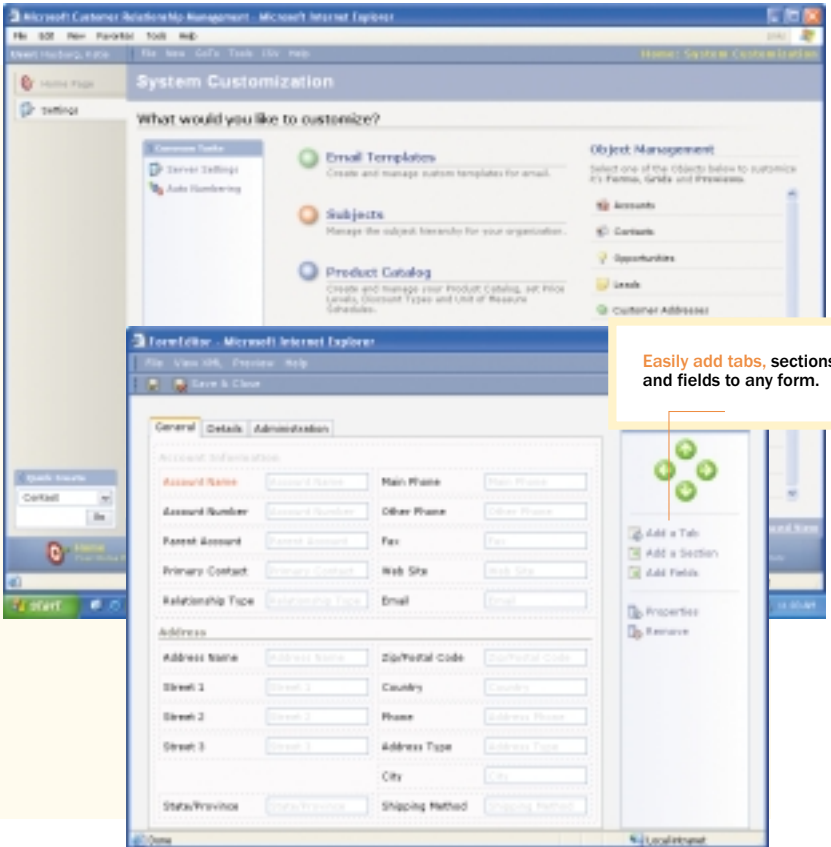
### Customize forms

Ensure you capture the data you need to close sales and optimize customer service with easily customizable forms.

### Modify or create workflow rules

Define workflow rules or create new rules for automated business processes, including leads routing and notifications, opportunity and pipeline management, sales processes, case management, and data transfer to other applications.

Customize to meet your business needs. Save time and money, but meet your unique business needs— tailor forms and views quickly and easily, without calling on IT support.



## A MICROSOFT.NET SOLUTION

### DESIGNED FOR SMALL AND MID-MARKET BUSINESSES

- Accessible through Microsoft Outlook and the Web.
- Offers users a complete customer view, easy sharing of information, automated sales and service processes, and access to full sales functionality through Outlook.
- Includes comprehensive reports for evaluating business performance and forecasting sales activity.
- Designed for rapid deployment and efficient, affordable customization and maintenance.
- Easy to learn and use.
- Integrates easily with Microsoft Business Solutions ERM applications.
- Extends to integrations with third-party and Web-based systems.



#### Power of Choice

Microsoft CRM offers flexible pricing and packaging options, with Sales, Customer Service, or Suite licensing available for Standard or Professional Editions. Pricing starts at \$395 per named user plus \$995 for the server.

Microsoft®  
**Customer  
Relationship  
Management**

.NET

For more information about

Microsoft Customer Relationship Management, go to:

[www.microsoft.com/crm](http://www.microsoft.com/crm)

**Microsoft**

© 2002 Microsoft Corporation. All rights reserved.

This brochure is for informational purposes only. MICROSOFT MAKES NO WARRANTIES, EXPRESS OR IMPLIED, IN THIS BROCHURE. Microsoft, Active Directory, BizTalk, Outlook, Visual Studio, and Windows are either registered trademarks or trademarks of Microsoft Corporation in the United States and/or other countries. The names of actual companies and products mentioned herein may be the trademarks of their respective owners.

0902 PART NO. XXX-XXXX