



# Microsoft Dynamics CRM

Power your service productivity

World-class customer experiences start with your people. Microsoft Dynamics® CRM business software arms your customer service professionals with a customer service and support solution that combines the power of productivity with ease of use. Users can take advantage of a wealth of features like case management, workflows, dashboards, and knowledge management right within the Microsoft® Outlook® client so they can work in a way that is natural and personal to deliver consistent, fast, and efficient service.

## Become a Dynamic Business

### Your People: Boost Service Productivity

People want access to tools that are familiar, easy to use, and purposeful. With the familiar Microsoft Outlook interface, role-based forms, and embedded Microsoft Office features, Microsoft Dynamics CRM minimizes administrative tasks and gives your customer service professionals more time to focus on their core competency—servicing customers.

### Your Processes: Drive Service Efficiency

Processes that are efficient and consistent help drive higher levels of service quality while also minimizing costs associated with service delivery. With powerful workflow capabilities and guided service processes, you can expedite approvals, streamline escalations, and improve the efficiency of the overall service process.

### Your Ecosystem: Engage with Precision

Customers and partners expect service that is fast, accurate, and directly suited to their needs. With a 360-degree customer view, holistic case management capabilities, insightful analytics, and multi-channel communications support, your customer service professionals can engage with customers with precision and consistency.

The screenshot displays the Microsoft Dynamics CRM interface within an Outlook client. The main window shows a list of 'Active Cases' with columns for Title, Case Number, and Priority. A pie chart on the right, titled 'Case Mix (By Type)', shows the distribution of case types: Problem (28), Question (5), and Request (5).

Title	Case Number	Priority
Average order shipment time (sample)	CAS-01015-P5K3L2	Normal
Broken Record	CAS-01041-S6V9Z7	Normal
Complete overhaul required (sample)	CAS-01017-N7L1P0	High
Contact information required (sample)	CAS-01000-K1S2D4	Low
Contact information required (sample)	CAS-01018-W0L6N5	Normal
Damaged (sample)	CAS-01001-F7K3V1	High
Damaged during shipment (sample)	CAS-01014-Z5W5V6	Low
Defective item delivered (sample)	CAS-01002-B6F2M5	High
Delivery never arrived (sample)	CAS-01003-H4H2J4	Low
Delivery never arrived (sample)	CAS-01020-Q9R8W2	High
Faulty item (sample)	CAS-01024-F7N8T5	Normal
I have a problem with the new widgets	CAS-01028-H2V3C7	Normal
item broken	CAS-01034-V1V9Q5	Normal
Item defective (sample)	CAS-01004-Z7T7J4	Normal
Item defective (sample)	CAS-01027-Z9M1R5	High
Looking for setup instructions	CAS-01030-V7P5K0	Normal
Missing parts (sample)	CAS-01005-N6M5Z0	Normal
My item is broken	CAS-01042-I7H6H4	Normal
My Widget A burns up when I turn it on	CAS-01040-PLJ5I7	Normal
My widget A is broken	CAS-01009-D2F7M0	Normal
My widget is broken	CAS-01037-N7B6M5	Normal
My widget is not working well	CAS-01035-C8V6M5	Normal
Need help (sample)	CAS-01006-B6Q6B5	Low
Need help (sample)	CAS-01026-T2N4X1	Normal

Streamline case resolution using an intuitive user interface that simplifies common tasks and provides powerful inline data visualization capabilities to turn data into intelligent, actionable insight.

*"With Microsoft Dynamics CRM we were able to reduce escalations by 80% and the cost per incident by 22%. It has been essential to helping us improve our customer satisfaction levels."*

UMAIR CHAUDHARY  
Chief Operating Officer  
Barclays Bank LP, UAE and Gulf



*"One hour after implementing Microsoft [Dynamics] CRM, a dealer called with an issue. With one click, the customer service representative accessed the complete history of the dealer and all of the related data to successfully resolve and close the case with precision and speed."*

BEDE BRAEGELMANN  
Project Manager for Sales,  
Service & Marketing,  
Polaris Industries



*"CRM for Jelly Belly allowed us to standardize how we interact with our customers and easily share customer contact across departments and ultimately allowed us to reduce customer churn by an amazing 50%."*

DAN ROSMAN  
VP, Information Technology  
Jelly Belly



#### FAMILIAR: CUSTOMER SERVICE CAPABILITIES THAT ARE NATURAL AND PERSONAL

**Streamlined Case Management:** Take advantage of intuitive case management capabilities to streamline case creation, tracking, resolution, and escalation.

**Native Outlook Client:** Centrally manage contacts, calendaring, service tasks, and email through a familiar Microsoft Outlook interface for improved efficiencies.

**Advanced Personalization:** Spend less time looking for information and more time serving customers with personal views, most recently used lists, and record pinning.

**Full Interaction History:** Track the details of every interaction, including offers, orders, contracts, and cases, so you can provide the right service at the right time.

**Service Response:** Enable faster, more effective responses with built-in mail-merge, email templates, and one-click conversion of email messages to cases.

#### INTELLIGENT: INFORMATION THAT IS INSIGHTFUL AND ACTIONABLE

**Service Scheduling:** Manage field service appointments, facilities, and resources with the powerful unified service scheduling feature.

**Purchase History:** Track product purchasing history, contracts, and key renewal dates so agents can be proactive and market relevant service or product offers.

**Insightful Service Analytics:** Deepen insight with out-of-the box or configurable dashboards, drill-down analysis, and inline data visualization capabilities.

**Service Queue Management:** Build queues against any entity, user, or team and streamline work state management for improved efficiency.

**Service Record Auditing:** Improve visibility into service and support activities and effectively meet service level agreements (SLAs) with system-wide auditing.

**Guided Service Processes:** Streamline case resolution and escalations with guided dialogs, automated processes, and conditional formatting rules.

**Service Goal Management:** Instantly track service goals, such as first call resolution, average call time, and more with comprehensive goal management capabilities.

#### CONNECTED: SERVICE THAT IS COLLABORATIVE AND RESPONSIVE

**Centralized Document Management:** Manage cases, service contracts, FAQs, and more with embedded Microsoft SharePoint® document management capabilities.

**Knowledge Management:** Up-level your customer service skills by creating, retrieving, and sharing knowledge through a shared knowledge repository.

**Service Team Management:** Facilitate internal collaboration and coordinated problem resolution with team management capabilities and real-time communication tools.

**Web Self-Service:** Empower customers to find answers, create their own cases, and schedule service appointments through the web 24 hours a day, 7 days a week.

**Unified Desktop:** Use your CRM solution to deliver a unified service desktop that combines service applications within a single, streamlined interface.

#### GET STARTED TODAY

Try Microsoft Dynamics CRM today:

<http://crm.dynamics.com>

Explore the Microsoft Dynamics CRM Marketplace:

<http://www.microsoft.com/dynamics/marketplace>

Join the Microsoft Dynamics CRM Community:

<http://crm.dynamics.com/en-us/communities/crm-community.aspx>