# Microsoft® **Customer Relationship Management**



### **Increase sales success**

Shorten the sales cycle and improve close rates with leads and opportunity management, automated sales processes, quote creation, and order management.

### **Deliver efficient, consistent customer service**

A shared knowledge base and automated routing and queuing make it easy to serve customers efficiently.

### Make informed, agile decisions

Comprehensive reports let you forecast sales, measure business activity and performance, evaluate sales and service success, and identify trends, problems, and opportunities.

### Work from Outlook or the Web

Access full sales functionality online or offline through Microsoft Outlook, or work online from any location using a Web browser.

### **Share information**

Tightly integrated Sales and Customer Service functionality makes it easy to view, update, and share information across teams and departments.

### **Use easily**

Designed for ease of use, Microsoft CRM ensures that sales teams get started fast.

### **Customize and scale easily**

Configure user interfaces and workflow processes, customize the solution to fit your business, and scale the installation to meet changing needs.

### **Integrate powerfully**

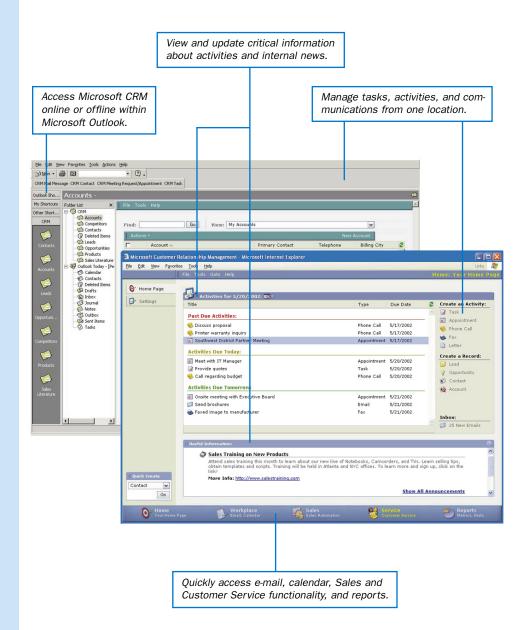
Integrate with Microsoft Office, Microsoft Business Solutions Financials, and other business systems.

Microsoft CRM is **built from the ground up on Microsoft .NET architecture**, delivering tremendous business value through easy integration with third-party applications and Web services.

# overview

### **Microsoft Business Solutions Customer Relationship Management**

Increase sales success, deliver superior customer service, and make informed, agile business decisions with Microsoft® CRM. Accessible from Microsoft Outlook® and the Web, Microsoft CRM is easy to use, customize, and maintain, integrates with other business systems, and scales to grow along with your business.





# The CRM solution that grows alongside your business

## **Microsoft Customer Relationship Management**

Features		Description	
Sales			
<ul> <li>Microsoft Outlook client</li> </ul>	/	Work online or offline through Microsoft Outlook, with synchronized access to full sales functionality.	
Complete customer view	1	View all contact and account information and history from a central location, including customer service records.	
Information sharing	1	Tightly integrated Sales and Customer Service modules make it easy to share information across departments.	
<ul> <li>Leads and Opportunity management</li> </ul>	1	Automate leads routing and escalation, convert leads to opportunities, and track and manage opportunities through the sales cycle.	
Sales process management	1	Automate stages in the selling process to track and close sales efficiently and consistently.	
Product catalog	1	Create a full-featured product catalog that includes complex pricing levels, units of measure, discounts, and pricing options.	
Order management	1	Easily convert quotes to orders, and then modify and save orders until they are ready to be submitted and invoiced.	
• Quotas	/	Measure employee sales performance against individual goals.	
<ul> <li>Reports</li> </ul>	1	Forecast sales, identify top opportunities and customers, and evaluate trends with robust reporting tools.	
<ul> <li>Sales literature</li> </ul>	/	Maintain a searchable library of sales literature that can be used online or offline.	
<ul> <li>Territory management</li> </ul>	1	Create sales territories and manage territory-based processes with workflow rules and reports.	
<ul> <li>Competitor tracking</li> </ul>	1	Analyze competitor performance and maintain a library of articles on competitor activity.	
<ul> <li>Correspondence and mail merge</li> </ul>	1	Create and send e-mail, using customized templates, to targeted prospects and customer groups. Create and send print communications using Microsoft Word Mail Merge.	
Customer Service			
Case management	1	Create, assign, and easily manage cases for customer service requests. Manage actions and communications for each case from a central location.	
<ul> <li>Complete view of accounts</li> </ul>	1	View all accounts, including sales and order information, to identify top customers and better understand specific customer needs.	
<ul> <li>Automated routing and queuing</li> </ul>	1	Workflow rules let you automatically route service requests and cases to the appropriate representative or to queues for resolution, escalation, or reassignment.	
Searchable knowledge base	1	Publish support articles and other relevant support information to a searchable knowledge base.	
Service contracts	1	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	/	Generate auto-repsonse e-mail to customer requests.	
E-mail management	1	Maintain an accurate record of customer-related communications, with automated tracking of customer e-mails that associates those mails with appropriate customer records.	
Integration			
<ul> <li>Sales and Customer Services functionality</li> </ul>	1	Sales and Customer Service functionality integrates tightly, making it easy to share information across the business.	
Microsoft Outlook client	/	Salespeople can use Microsoft Outlook to work online and offline with access to full sales functionality.	
Microsoft Office	1	Integration with Microsoft Office lets users create print communications using Microsoft Word Mail Merge, as well as export data to Microsoft Excel.	
Microsoft Business	1	Microsoft CRM integrates easily with Microsoft Business Solutions Financials. Key data mapping includes	

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

Microsoft Customer Relationship Management is designed to meet budget and support needs for mid-market businesses. Delivery and implementation through certified Microsoft Business Solutions partners include hands-on assistance with setup and maintenance processes, along with comprehensive training and support resources.

For more information about Microsoft Customer Relationship Management, go to:

www.microsoft.com/crm

accounts, contacts, product catalog, orders, and price lists.



Solutions

Third-party applications

and Web services