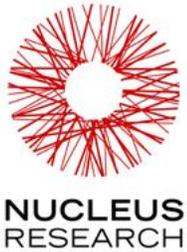


MICROSOFT DYNAMICS CRM 2015



THE BOTTOM LINE

On September 16, 2014, Microsoft announced Dynamics CRM 2015 and updates to Microsoft Dynamics CRM Online and Microsoft Dynamics Marketing. In looking at the new capabilities, Nucleus found it could streamline collaboration between marketers and sales people to increase productivity and accountability and reduce administrative overhead.

THE ANNOUNCEMENT

Microsoft announced Dynamics CRM 2015 on September 16, with the main theme of helping businesses bridge the gap between sales and marketing. This release is specifically aimed at facilitating collaboration between marketers and sales people by providing more transparency and visibility into each group's activities. This is facilitated through the addition of several new features including:

- A sales collaboration panel, which allows sellers to provide input into campaigns and targeting.
- The ability to streamline campaign creation and improve segmentation with graphical e-mail editing, A/B testing, integrated offers, and approval workflows.
- An interactive marketing calendar, which allows marketers to view and manage overall campaign activities more easily.
- Support for salespeople to bundle and recommend products for upsell and cross-sell across product families.
- An enhanced guided sales process that helps steer sellers towards desired outcomes.
- New mobile sales capabilities with flexible role-tailored dashboards and analytics, as well as personalized home pages.
- Microsoft Social Listening adds Italian as a sixth native language for sentiment tracking and analysis as well as expanded listening capabilities with access to real-time insights.

Microsoft Dynamics CRM continues to further its integration with Microsoft's leading productivity applications, including Microsoft 365, Yammer, Lync, Skype, SharePoint, and

Power BI for Office 365. All of these new CRM capabilities announced today are planned to be generally available in the fourth quarter of 2014.

WHY IT MATTERS

Historically, the applications to support sales (salesforce automation) and marketing (marketing automation) have operated in a somewhat disconnected manner. They are purchased by different buyers, used by different groups, and have different goals. Even in the best of situations, most companies spend considerable time and effort measuring the effectiveness of marketing's campaigns, nurturing and qualifying leads, and ensuring they are appropriately addressed – and hopefully closed – by sales.

With this latest release, Microsoft has leveraged its investments (both organic and by acquisition) in marketing and sales automation – as well as its usability and integration capabilities – to streamline the handoffs between sales and marketing.

INCREASING COLLABORATION

The sales collaboration panel is intended to reduce the disconnect between sales and marketing by enabling sales people to add their insights to campaigns and targeting. Marketers can also more easily create campaigns through the use of graphical email editing, A/B testing, integrated offers, and approval workflows. Keeping in line with the goals of improved collaboration, marketers can easily use Lync click-to-call for scheduling and Webinar execution, reducing hassles. In addition, there is an interactive marketing calendar that enables marketers to more easily view the long-term direction of the campaigns.

Microsoft recognizes that marketers must be able to easily communicate among themselves and with sales people in order to create the most effective marketing campaigns. With the sales collaboration panel and with interdepartmental collaboration capabilities, marketers can more easily incorporate the input of the salespeople. The capabilities also make collaboration across marketing easier.

GIVING SALES MORE TO SELL

Dynamics CRM's new capabilities enable salespeople to more easily bundle products for upsell and cross-sell across product families, and also to do more with enhanced mobile device capabilities. In 2012, Nucleus found that providing salespeople with mobile access to CRM led to a 14.6 percent increase in productivity (Nucleus Research *m13 – The value of mobile and social for CRM*, March, 2012), and that number has grown as CRM has gotten smarter and mobile app development has become more sophisticated. The role-tailored dashboards and analytics, as well as personalized home pages, will help individual sales people be more effective and productive.

QUANTIFYING THE VALUE

Microsoft Dynamics CRM 2015 brings many advantages to its users including:

- An increase in the productivity of the salespeople. With enhanced mobile capabilities it is easier for salespeople access their work on the go. Also, the ability to bundle products helps lead to more sales.
- An increase in collaboration between the sales and marketing teams increases the potential effectiveness of marketing campaigns and reduces the time needed to coordinate and evaluate sales and marketing efforts.
- On an ongoing basis, streamlined communication and greater visibility reduces the burden on sales operations teams and reduces administrative overhead.

CONCLUSION

The new capabilities in Microsoft Dynamics CRM 2015 is largely focused on one of the biggest historic CRM challenges: getting sales and marketing to play nicely together. In an ideal world, the capabilities will allow marketers and salespeople to have visibility into each other's work and enable them to share suggestions and insight. In reality, providing greater visibility and transparency into marketing campaigns and their impact will drive greater accountability and less room to hide. As the ability to understand and leverage supporting technologies becomes a core career-advancing requirement for marketers, learning and adopting these new capabilities will give marketers an opportunity to focus more on strategic thinking and new ideas and less on sales operations and tactical sales support. For sales, taking advantage of these capabilities will drive better individual productivity and performance.