

HOW TO TURN MICROSOFT DYNAMICS CRM INTO A CUTTING EDGE SYSTEM THAT DELIVERS VALUE

A Guide to Upgrading Microsoft Dynamics to
Improve Lead Generation and Increase Sales

A Caltech CRM Publication

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Microsoft Partner
Silver Customer Relationship Management

IS THIS BOOK RIGHT FOR ME?

Is this ebook right for you? CRM solutions can be confusing and we want everyone to get the most from our material. See below definitions to find out if your level matches the content you are about to read.

Introductory

Introductory content is for anyone who is new to Customer Relationship Management (CRM) solutions. Also suitable for those wanting to know more about the principle of CRM solutions beyond basic contact management, and why CRM can be matched to processes and strategies.

Intermediate

← *This EBook!*

Intermediate content is for those people who may be using CRM solutions and have an understanding of how they work. This content is also suitable for those who understand many to many relationships, and how powerful CRM strategies can be when they are working in alignment with organisational goals and processes.

Advanced

Advanced content is for those who want to do more with CRM solutions beyond contact management. You will have a strong understanding of CRM solutions and how many to many relationships can propel compelling benefits, and enable processes to be more efficient. You will understand some technical elements of the solutions and integrating them across disparate systems.

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HOW TO TURN MICROSOFT DYNAMICS CRM INTO A CUTTING EDGE SYSTEM THAT DELIVERS VALUE

By Catherine Carlyle



Catherine helps new clients gain an understanding of CRM, and ensures they have everything they need to start using a CRM solution that delivers tangible benefits.

Catherine is the marketing manager at Caltech IT Limited (Caltech CRM) and she creates and manages content about CRM for Caltech CRM. She is also one of the first people you will speak to when looking to work with Caltech CRM.

Follow Catherine on twitter [@caltechit](https://twitter.com/caltechit)



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Still Using an older version of Microsoft Dynamics CRM? Really....



Here at Caltech IT Limited (Caltech CRM), we help our clients get the most from their [Microsoft Dynamics CRM](#) software.

We are passionate about making CRM effective and realising benefits for our clients. Being on the latest version of Microsoft Dynamics CRM is often crucial. The functionality and development that has been ploughed into Dynamics CRM is there to optimise and do more for less.

Since you are reading this ebook, you must be looking at reasons to upgrade, the best ways to upgrade and how to add value to your customers. You may be wanting to move hosting providers and get more value from your software. Whatever the reason, the speed of change in business and in technology is often overwhelming, and the pressures of work and demands of your clients keep rising.

And that's the best part! Whilst we are busy running our businesses and serving our customers, Microsoft is improving and continuously developing its CRM software, so its users can do more for less, and continue to strive to be more efficient and drive more benefits for your customers.

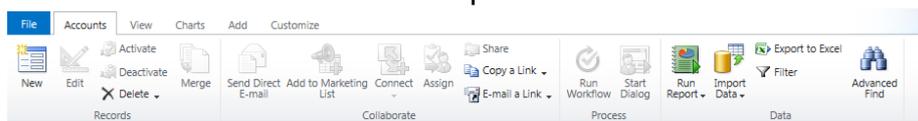
This ebook sets out the key reasons why you need to upgrade and not get left behind, how to upgrade, and how to run a smooth upgrade project. If using Microsoft Dynamics CRM is becoming a time consuming burden, this ebook is for you.

Benefits of Upgrading to the latest version of Microsoft Dynamics CRM

Whilst earlier versions of Microsoft Dynamics CRM are still perfectly viable CRM solutions for any organisation, Caltech recommends clients to be up to date with the latest CRM technology. At the release of Microsoft Dynamics CRM 2011, Microsoft included 500 functional improvements from Microsoft Dynamics CRM v. 4.0. Many of these changes were driven by customer and partner feedback.

The key benefits of upgrading from Microsoft Dynamics CRM 4 to Microsoft Dynamics CRM 2011 included:

- **Improved Navigation Bar (Ribbon).** With Dynamics CRM 2011, Microsoft has given users the ribbon functionality (as shown below) so that the application is more in line with other Microsoft products.

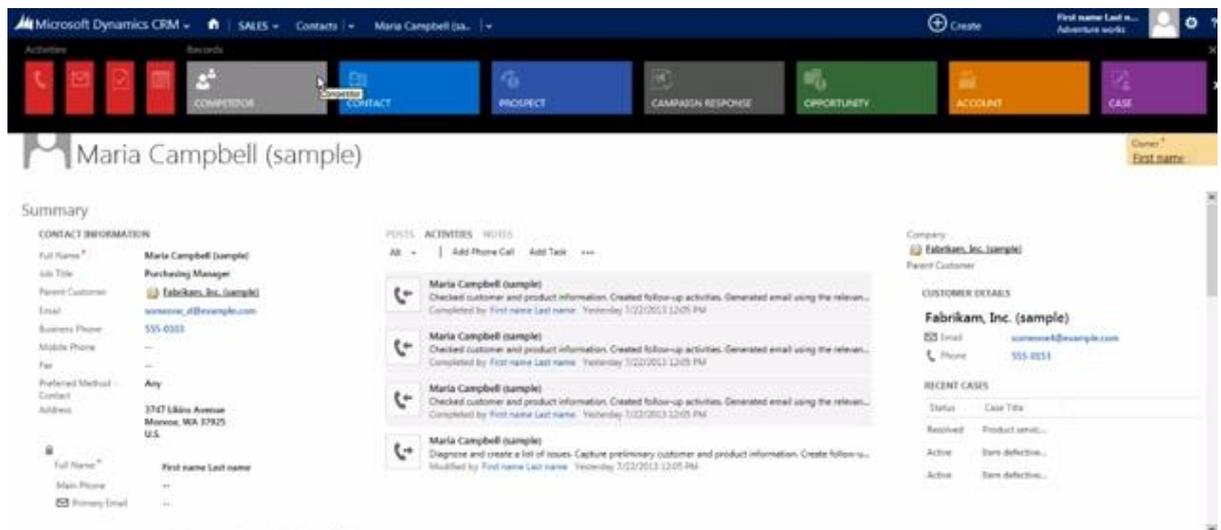


- **Quick Links.** Instead of the tabs feature used within CRM 4, Dynamics CRM 2011 provides a series of quick links in the navigation pane to the right of the record, which allows users to scroll quickly through one page of information, thus reducing the number of clicks. Each quick link represents a tab, which can be expanded and collapsed to facilitate data entry.
- **Reporting and Graphs - Dashboards.** Dashboards are a new feature for Microsoft Dynamics CRM 2011 and they allow users to see multiple charts and grids in a layout that is right for them and their business. There are several out-of-the-box dashboards available which Caltech CRM recommends its customers use initially before configuring any custom dashboards.
- **Charts.** Charts can be seen throughout the Dynamics CRM system on a number of different entities and this allows users to create custom graphs showing information that is relevant to them. Security restrictions can be applied to Charts to allow only users with the appropriate security permissions to view the data.
- **Custom Activities.** Although there are a number of default 'Activities' available, including phone calls, emails, faxes, letters, etc., an organisation may require new activity types depending on their individual business needs. Microsoft Dynamics CRM 2011 allows new custom activity types to be created which can be customised as required.

- **Improved Outlook Integration.** Although Microsoft Dynamics CRM 4 did integrate fully with Microsoft Outlook, Microsoft Dynamics CRM 2011 is vastly improved and users now have the ability to see how each record is being tracked in CRM from the Outlook reading pane. Other features include the ability to apply conditional formatting to CRM records and the ability to convert an email into a Lead, Opportunity or Case record directly from Outlook.
- **SharePoint Integration.** Microsoft Dynamics CRM 2011 supports SharePoint 2010 and 2013, allowing users to upload documents onto the SharePoint document management system via the CRM application.
- **Deduplication.** Microsoft Dynamics CRM 2011 can be set automatically to find duplicated records.
- **Dynamic Marketing Lists.** Marketing lists can be dynamic or static which allows marketers to refresh lists within parameters automatically.
- **Role based.** Microsoft Dynamics CRM 2011 offers role based user experience enhancing their usage of CRM and ensuring ease of use and adoption.
- **Languages.** Microsoft Dynamics CRM 2011 is available in over 40 languages.

The key benefits of upgrading from Microsoft Dynamics CRM 2011 to Microsoft Dynamics CRM 2013 included:

- **A Fresh New Interface.** The interface moved from the “ribbon effect” to the tiles.



- **Guided Processes.** Under each process is a list of tasks that you can specify to be completed. Once each task is confirmed, users can check that part of the process as ‘done’ and can move onto the next stage of the process.
- **Skype and Lync integration.**
- **CRM Mobile.**
- **Recently Viewed.** Microsoft Dynamics CRM 2013 has a breadcrumb effect and also displays recently viewed pages to help users with navigation meaning there are less mouse clicks.
- **License changes.** These license changes may help to reduce your costs.
- **More Power to the User.** Dynamics CRM 2013 gave more power to the user, with the ability to create charts, dashboards, reports and workflows.

In Microsoft Dynamics CRM 2015 Microsoft focused changes on the Dynamics Marketing product which is available Online as an Enterprise license. It also made improvements to Social Listening and processes.

Other benefits for upgrade may depend on your CRM usage. However it’s time to think about upgrading if you experience any of the following:

- If you have hit restrictions or are having continual problems.
- If you are experiencing problems daily and using Microsoft Dynamics CRM seems more hassle than its worth, then contact us for a free site audit – it’s time to make some changes.
- Microsoft Dynamics CRM 2011 is also used widely with mobile and is compatible with social media.

Top Features of Microsoft Dynamics CRM

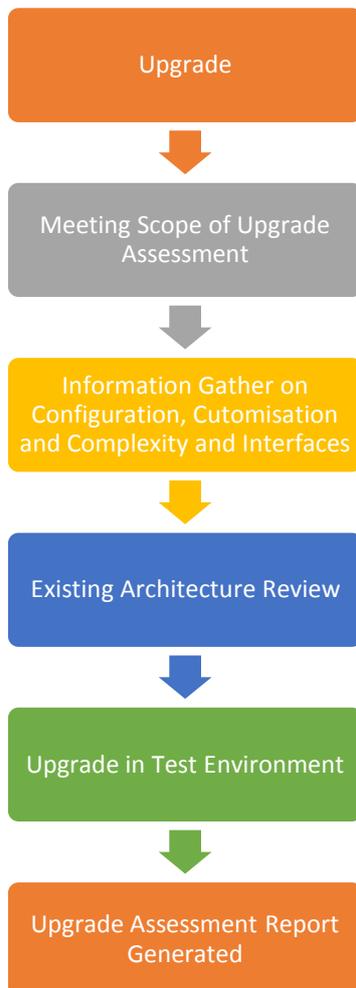
Following the success of Microsoft Dynamics CRM, Microsoft gathered 10 of its top CRM Product Developers together to find out what their top favourite features of are.

Their top features include:

- a) Security enhancements (role based enhancements and audit history)
- b) Industry solutions
- c) Reporting through dashboards
- d) User interface enhancements such as the ribbon effect
- e) Apps availability in the marketplace
- f) Web resources for development – Silverlight and javascript
- g) Globalisation – 41 languages
- h) Tighter Outlook integration
- i) SharePoint integration
- j) Development tools such as Visual Studio.

See the top 10, by 10 in 10 minutes [here!](#)

How to Upgrade to Microsoft Dynamics CRM to Realise Value and Benefits



Once the decision has been made to upgrade your Microsoft Dynamics CRM solution, it is important that an understanding of the existing system including all workflows, Java Script and plugins are comprehensively understood.

With any CRM upgrade, there are always risks. Caltech uses Microsoft SureStep Agile to enable our clients to improve their return on investment by choosing the optimal upgrade plan as well as helping them to realise the benefits of upgrading over a short length of time.

An Upgrade Assessment will provide you with a high level overview demonstrating any complexity involved in upgrading, documentation of the upgrade risks, as well as recommending the best route to upgrade.

Our [SureStep](#) CRM Upgrade Assessment includes:

- Assessment of customization and configuration of your Microsoft Dynamics CRM site.
- Review of any interfaces and integrations.
- Review of current infrastructure.
- Define the scope of the upgrade.
- A comprehensive list of functional areas that are improved in the version of Microsoft Dynamics CRM you will move to.
- Duplicate site set up on our test environment providing end to end testing.
- Confirmation of the recommended upgrade approach.

For some Microsoft Dynamics CRM sites, this upgrade assessment can be fairly rudimentary, but for more advanced sites a more complex upgrade assessment will be required.

If you are using an old version of Microsoft Dynamics CRM and are put off upgrading due to potential costs or time constraints, do contact us and we will provide a FREE site audit. It may save you more time every day and ensure that your users are working to their optimum.

Case Study Upgrade Dynamics CRM

Caltech has carried out approximately 60 upgrades, from various versions of CRM to newer versions anything from V3 , V4 V2011, v2013, and we find each of these upgrades very different from each other depending upon whether the initial site was implemented by Caltech or another partner. The detail of what has previously been built must be understood in its entirety as any specific plug in or complicated Java Scripts may need to be rewritten.

We carry out an exploratory meeting and then a site audit. From these two meetings we can then deliver a Proposal for Upgrade document.

Overview Upgrade Example



An NHS organisation. This was a 40 user site and was implemented in 2008 on Dynamics CRM version 4. Caltech did not carry out the implementation of this site but has been successful with the upgrade to Dynamics CRM 2013. They had to upgrade to 2013 rather than the latest version as their server was not suitable for V.2016.

The Site Audit Proposal for Upgrade document, gave this organisation suggestions in order to enable their CRM instance to do what they required. It was clear it needed to be upgraded as well as offering more functionality, and therefore 3 approaches were offered:

- Upgrade and enhance together.
- Upgrade and then enhance.
- Scrap the version 4 system and start again.

Caltech recommended that upgrading and enhancing in tandem was not the best way forward as it would have created more obstacles for the users of CRM. It was agreed this organisation would upgrade and then enhance.

There were 75 workflows on the system and 50 of them were in use at the time of upgrade. There was a significant volume of JavaScript, and none of the JavaScript would run successfully in the 2013 system.

Integrated systems were considered as part of the site audit, including interfaces to other solutions for compatibility investigation including SharePoint. Testing was carried out over a number of weeks in a test environment, before uploading to live.

Upgrading Microsoft Dynamics CRM Hosted Environments

Hosted (Cloud) solutions are very popular. Organisations can get all the benefits of Microsoft Dynamics CRM software without the upfront investment in licensing and IT infrastructure, or the ongoing costs of system maintenance.

Microsoft Dynamics CRM Online 2015 is available from Microsoft, and Caltech CRM supports and works with clients using this online offering.

Microsoft Dynamics CRM 2015 is also available from Caltech IT Limited (Caltech CRM) as a hosted offering. There are no unnecessary tie-ins and no hidden costs.

Summary of Caltech CRM Hosted Microsoft Dynamics CRM Offering

- Data : 10GB
- Data Centre : UK Based
- Offering : Microsoft Dynamics CRM
- SQL Back Ups : Included Daily Retention 2 weeks
- Roll Ups : Applied FOC
- Major Upgrades : Free audit / Upgrade Assessment
- Fee : Paid per user per month
- Notice Period : 3 months initially then 30 days thereafter
- Protection : Cisco ASA Firewall Antivirus
- Caltech Support : Unlimited telephone and email support conditions
- Uptime : 99% guarantee
- Account Management : Dedicated account manager

Caltech offers an initial FREE site audit. To find out more call us on 01924 507 280.



Upgrading Microsoft Dynamics CRM On-Premise Environments for Long Lasting Results

Upgrading Microsoft Dynamics CRM V. 4 or 2011 to Microsoft Dynamics CRM 2013 or 2015 on premise follows the Upgrade Assessment path.

If software assurance is in place you will be entitled to the latest software release. You may have select agreements in place with Microsoft.

Either way, our CRM consultants can offer advice on upgrade and licensing. For a FREE site audit call us on 01924 507 280.

Choosing a CRM Hosting Partner

When choosing a [hosting CRM](#) provider you need to ensure:

- They value your business and your clients!
- They understand CRM
- They use SureStep to implement and upgrade
- There is a dedicated support team
- There are clear SLA's
- There is a clear upgrade path – not stuck on old versions unnecessarily
- There are no lengthy tie-ins
- Back-ups are included
- Your data is secure
- There is an opportunity to customize your CRM site
- The partner is passionate about CRM and providing a hosting environment
- There is a 99% Uptime SLA
- There is dedicated account management
- They offer useful resources such as User Groups
- They have a CRM specific accreditation (such as Microsoft Dynamics CRM Silver Partners)

Here at Caltech CRM we live and breathe Dynamics CRM. And we are passionate about service and providing a fantastic hosted platform for our clients.

We provide free user groups every year which will extend your knowledge of Dynamics CRM and help you get more from your solution.

Our hosted [clients](#) include a well-known secure hospital setting, several housing associations, retail clients, distribution clients, travel and hospitality industry users to name but a few. Why not check out our testimonials!

Thank you for reading our ebook. If you want to know more about how to upgrade your Microsoft Dynamics CRM environment, and ensure you are getting value from your software, email us at george@caltech.co.uk

Remember, if you are put off upgrading due to costs or time constraints, we offer a free site audit. Using Microsoft Dynamics CRM should never be painfully onerous – it should add value to your everyday working life and deliver tangible results.



Partner with CRM Experts

**We deliver CRM solutions
you need, on time and on
budget!**

**CRM Implementation
CRM Customisation
CRM Development
CRM Support
CRM Industry Solutions**

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