



MICROSOFT DYNAMICS CRM

Roadmap

Release Preview Guide

Q4 2011 Service Update

Updated: August, 2011

EXECUTIVE SUMMARY

Microsoft has delivered significant innovation and value in customer relationship management (CRM) software with the recent release of Microsoft Dynamics® CRM 2011, a flexible CRM solution that provides the power of productivity through familiar, intelligent, and connected experiences for organizations of all sizes worldwide.

This Release Preview Guide outlines the next wave of Microsoft Dynamics CRM innovation to be released in the Q4 2011 Service Update.

We encourage you to read the whitepaper to preview new capabilities in Microsoft Dynamics CRM that will provide value for your organization. We believe you'll agree that Microsoft Dynamics CRM is well-positioned to provide tremendous value to organizations of all sizes and industries going forward.

The Microsoft Dynamics CRM Team

NOTE: The guidance included in this document reflects current release objectives as of August 2011. This document is not intended to be a detailed specification and individual scenarios or features may be added, amended or deprioritized based on market dynamics and customer demand.

BACKGROUND

Microsoft Dynamics CRM is available to customers through a range of purchase models using either an on-premises or cloud-based deployment. The current version of the product is Microsoft Dynamics CRM 2011 which is the fifth major release.

Microsoft Dynamics CRM Online was initially launched in May 2008, and received service updates in September 2008, March 2009, November 2009, March 2010, and January 2011.

IMPROVED AGILITY

The upcoming Service Update represents the first release in our new program where additional capabilities for Microsoft Dynamics CRM (both Online and On-premises) are delivered approximately twice yearly with releases targeted for Spring (Q2) and Fall (Q4) of each calendar year. The functionality detailed in this guide is completely optional for all customers depending on their business needs.

KEY NEW CAPABILITIES

The following diagram summarizes the investments that will progressively be available as part of the Q4 2011 Service Update for Microsoft Dynamics CRM.

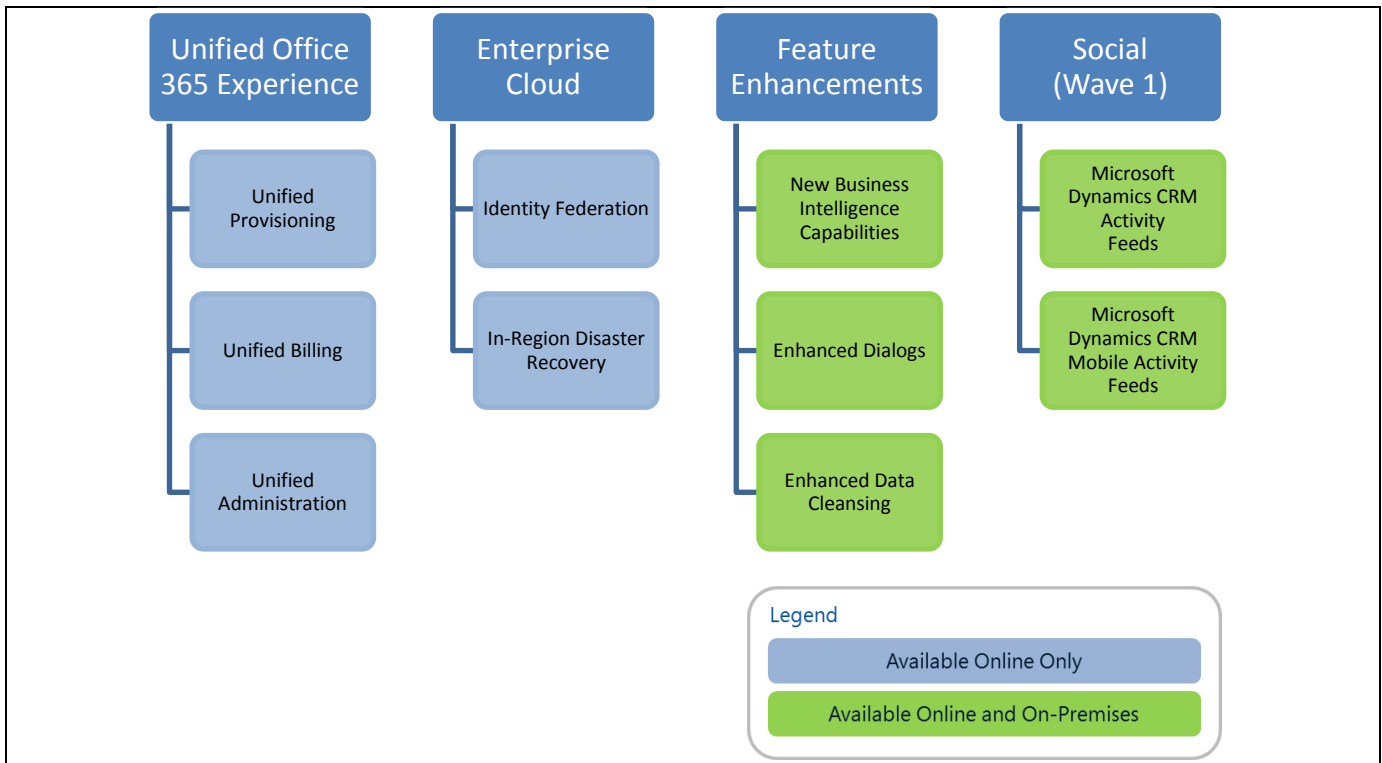


Figure 1: Q4 2011 Service Update Investment Areas

UNIFIED OFFICE 365 EXPERIENCE

Today Microsoft Dynamics CRM Online and Office 365 provide a seamless end-user experience. Users who connect to Exchange Online through Microsoft Outlook can track emails, appointments, tasks and contacts in

Microsoft Dynamics CRM Online. Similarly, Lync Online integration is native with Microsoft Dynamics CRM Online. Microsoft Dynamics CRM users can see presence information about users and contacts and collaborate with them directly within the CRM application. Finally, Microsoft Dynamics CRM Online can connect to SharePoint Online document libraries to surface contextual SharePoint content in a CRM record.

With the advent of the Q4 2011 Service Update, Microsoft Dynamics CRM Online will begin the process of transitioning customers to a common administration, billing and provisioning platform which Office 365 customers use today. This marks the beginning of a program that will enable even simpler administration of functionality, users and billing as part of an organization's subscription to Microsoft cloud services.

ENTERPRISE CLOUD

Identity Federation

The Q4 2011 Service Update will begin to provide more options around how organizations streamline user access to Microsoft Dynamics CRM Online. As these capabilities are progressively rolled out to our online customers, users will have single sign-on access to Microsoft Dynamics CRM Online where the organization uses Active Directory as their business directory service.

Enhanced Disaster Recovery

As part of Microsoft's vision and business mission around the cloud, Microsoft is investing in additional data center capacity in the United States (US), Europe Middle-East and Africa (EMEA) and Asia Pacific (APAC). As part of this investment Microsoft Dynamics CRM Online is extending disaster recovery infrastructure for our customers. The Q4 2011 Service Update will begin to offer system failover across data centers within a region (US, EMEA & APAC). This will ensure that you still have your mission-critical customer data physically residing in data centers in your region in the unlikely event of a data center interruption.

FEATURE ENHANCEMENTS

Enhancements to Dialogs

Microsoft Dynamics CRM 2011 introduced Dialogs which visually guide users through a business process in a wizard-like fashion. Users answer a series of questions and depending on the responses provided or data in CRM the dialog will "branch" and guide the user through the correct path to complete that business process. As part of the Q4 2011 service update Dialogs have been extended to support lookups and dates as well as improved flexibility in generating dynamic hyperlinks that guide users to contextual records and content in both CRM and external applications. These capabilities will be available for both Online and On-Premises customers.

Additional Business Intelligence (BI) Capabilities

Microsoft Dynamics CRM 2011 introduced powerful new capabilities in contextual charting and dashboards. The Q4 2011 Service Update extends this BI toolset with the ability for administrators and individual users to rapidly configure multi-series charts. This allows users to overlay different sets of information on the one chart for visual comparison purposes, e.g. Estimated vs. Actual Revenue by Potential Customer. These new tools allow users to conduct sophisticated analysis of CRM data using very simple design tools. Coupled with the new

charting designer capabilities, the Q4 2011 Service Update will extend the available set of chart types by adding stacked bar and column charts. These capabilities will be available for both Online and On-Premises customers.

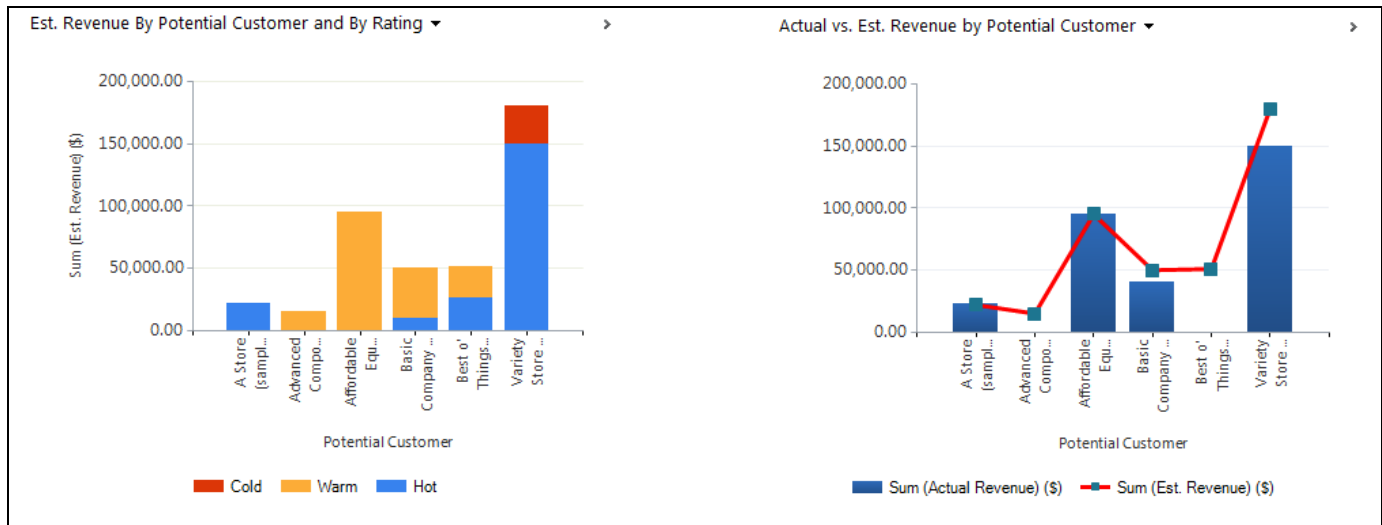


Figure 2: New Multi-series charts

Extended De-duplication rule processing

The Duplicate detection feature in Microsoft Dynamics CRM 2011 allows organizations to define duplicate detection rules for different record types (including custom entities). The Q4 2011 Service Update will introduce more flexibility in the configuration and assessment of duplicate detection rules. When assessing rules the system can be configured to ignore null values ensuring a higher proportion of potential duplicates can be flagged to the user or administrator for subsequent cleansing actions. These capabilities will be available for both Online and On-Premises customers.

SOCIAL INVESTMENTS – WAVE 1

The explosive growth of social technologies is fundamentally changing the way that organizations and individuals interact. People are now able to participate in rich online communities based on their mutual interests or professional commitments.

Organizations should consider three broad types of communities:

- **Internal:** Networks inside organizations that enable new forms of communication and collaboration, enabling greater responsiveness to stakeholder needs. E.g. Email, Micro-blogs, Wikis, Blogs and Intranet applications.
- **Managed:** Branded communities for people to engage with an organization and each other to solve their problems and offer feedback. The organization has more influence in shaping the conversation. E.g. Corporate support forums and blogs, email lists, LinkedIn communities, Facebook pages and customer portals.

- **Independent:** People use public domain social technologies to join or form their own communities independently of the organization. The organization has little or no influence in shaping the conversation. E.g. 3rd-Party forums and blogs, social networks such as Twitter and Facebook.

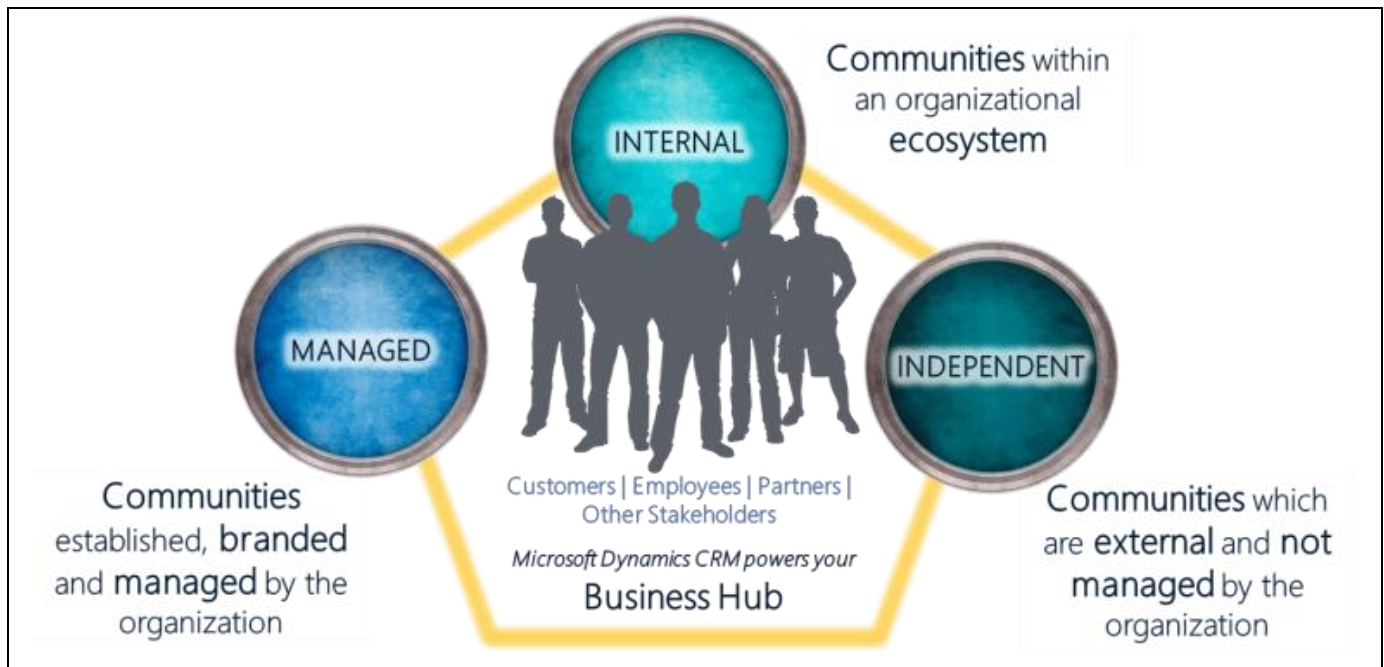


Figure 3: Three Communities Model

Microsoft Dynamics CRM Activity Feeds

The Q4 2011 service update will deliver the first of several waves of social innovation for Microsoft Dynamics CRM. This release will deliver Activity Feeds which simplify business insight and collaboration across internal communities. Activity Feeds will enable a user to follow and listen in on important activities that take place around the people, accounts, contacts, leads, sales deals (opportunities) or anything else that they care about. This frees them from having to keep a lot of information in their head, instead they can utilize Microsoft Dynamics CRM to provide them the information they need in an intelligent, and timely manner.

Organizations today have to be collaborative. Activity Feeds help people collaborate better by enabling them to communicate via quick and short updates (commonly referred to as micro-blogging). Activity Feeds do not replace emails or in-person communications; rather they augment these traditional methods of communication by providing a way to post status, questions, answers and comments in a very simple manner similar to popular social networks such as Twitter and Facebook.

All Activity Feed status can be posted manually by users or automatically based on pre-defined system rules through workflow, e.g. post a status when an opportunity is won. Activity Feeds can also be posted to by external applications through the Microsoft Dynamics CRM web services API. Activity Feeds expose Lync presence functionality so that users can initiate communication activities such as IM, phone calls, emails etc. Like all other functionality in Microsoft Dynamics CRM, Activity Feeds respect the core security model to ensure that the right information is shared with the right people. These capabilities will be available for both Online and On-Premises customers.

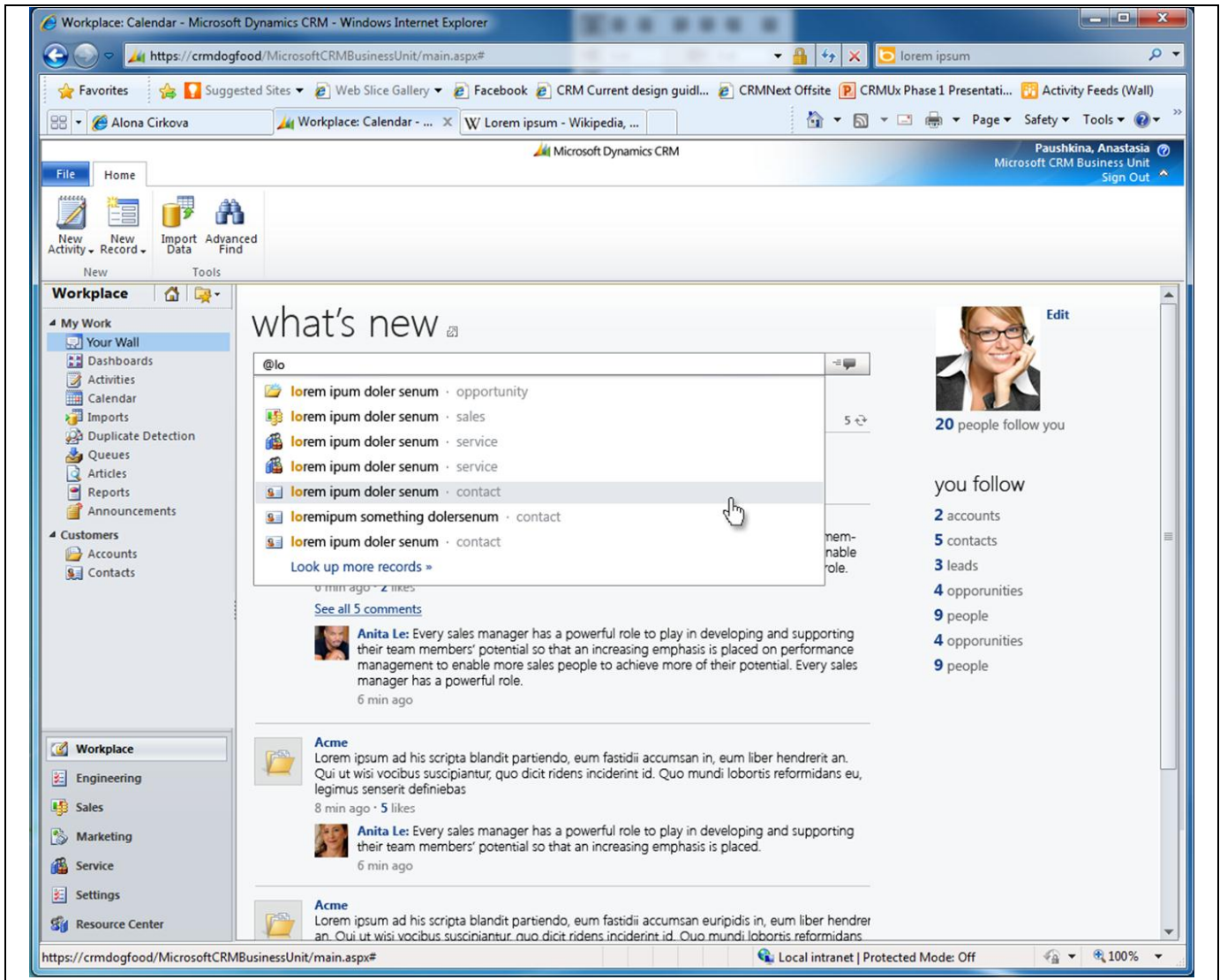


Figure 4: Activity Feed Wall

Microsoft Dynamics CRM Mobile Activity Feeds

Coupled with the new internal social collaboration capabilities provided by Activity Feeds, the Q4 2011 Service Update will deliver a mobile client for Activity Feeds which runs on Windows Phone 7. This application enables real-time views of Activity Feeds that the user has subscribed to in Microsoft Dynamics CRM. Users can post statuses, questions, answers and comments directly from their phone into CRM Activity Feeds. Additionally, users will have read-only access Accounts, Contacts, Leads and Opportunities to allow them to stay on top of key customer information even when they are out of the office. When the user opens a record on their phone they will have a range of specific one-click phone actions they can take such as initiating phone calls and emails directly from the CRM record or planning their travel route to the customer through the Bing Maps service provided by Windows Phone 7. Finally, the forms for the mobile application are configured in Microsoft Dynamics CRM just like any other form for the web and Outlook clients. This application will be available for both Online and On-Premises customers.



Figure 5: Microsoft Dynamics CRM Mobile Activity Feeds

CONCLUSION

The need for strong customer relationships has never been higher. As we look towards the next release of Microsoft Dynamics CRM and over the longer term, Microsoft is committed to delivering on our “Dynamic Business” vision and will continue to invest in delivering a solution that:

- Drives maximum user productivity
- Delivers business insight and collaboration irrespective of a person’s role within their organization
- Enriches the core sales, service and marketing capabilities of your organization
- Provides a flexible and scalable business solution framework

It is truly an exciting time to be engaging with Microsoft Dynamics CRM! We look forward to keeping you informed of the innovations and exciting capabilities that Microsoft Dynamics CRM will deliver for you now and into the future!

The Microsoft Dynamics CRM Team

Microsoft Dynamics is a line of integrated, adaptable business management solutions that enables you and your people to make business decisions with greater confidence. Microsoft Dynamics works like and with familiar Microsoft software, automating and streamlining financial, customer relationship and supply chain processes in a way that helps you drive business success.

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