

# VISION

Microsoft Dynamics® CRM

## Statement of Direction

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## Executive Summary

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Microsoft is bringing new innovations to customer relationship management (CRM) software with Microsoft Dynamics® CRM, a flexible CRM solution that fits your people, fits your business, and fits your environment. This document outlines the future direction of Microsoft Dynamics CRM through to the next major release, codenamed Microsoft Dynamics CRM "5" which is targeted for release in the second half of 2010.

### Background

Microsoft Dynamics CRM launched in 2003 with versions 1.0 and 1.2 [2.0], followed by version 3.0 in December 2005. The current release, Microsoft Dynamics CRM 4.0 was released in 2007 and delivers enhanced capabilities across sales, service and marketing. The Microsoft Dynamics CRM 4.0 architecture supports multi-language and multi-currency requirements as well as multi-tenancy for enterprise and on-demand deployments. Microsoft Dynamics CRM 4.0 also delivers extensive reporting through Microsoft SQL Server® and enterprise workflow through Windows® Workflow Foundation.

The primary goal from the very first release of Microsoft Dynamics CRM has been to deliver a solution that users feel comfortable working with and is a natural part of their daily work activities. Our objective has been clear; to drive maximum user adoption of the solution by delivering it through standard and familiar Microsoft desktop applications that users know and understand.

### Power of Choice

Our mission is to deliver software and services that enable extraordinary customer relationships with world-class business results. Today, Microsoft Dynamics CRM is available to customers in a variety of subscription or ownership models:

- **On-premises:** customers may choose to purchase the licenses and run the application on their own servers.
- **On-demand:** customers may subscribe to the software on a per user per month basis from one of many global hosting partners or directly from Microsoft with CRM Online.
- **Change as your needs change:** customers can start with on-demand and move to on-premises as their needs change.

This document is structured around the major areas of upcoming innovation namely Microsoft Dynamics CRM 4.0, Microsoft Dynamics CRM Online and Microsoft Dynamics CRM "5".

NOTE: This document is not intended to be a detailed specification; it needs to be noted that individual features may be added, amended or dropped during these timelines.

### *The Microsoft Dynamics CRM Team*

## Microsoft Dynamics CRM 4.0 Roadmap

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### Background

In December 2007, Microsoft released Microsoft Dynamics CRM 4.0 which delivered a range of new capabilities for our customers. There is a defined plan of rapid innovation for Microsoft Dynamics CRM 4.0 customers and partners which has delivered additional capabilities such as mobility, BizTalk® integration, SharePoint web parts, Accelerators and regular service updates to the Microsoft Dynamics CRM Online service.

The Dynamics CRM 4.0 roadmap consists of [Accelerators](#), [Solutions](#), [Integrations](#) and [Developer Tools](#).

### Accelerators

During late 2008 and early 2009 Microsoft released the first wave of accelerators for Microsoft Dynamics CRM 4.0. Accelerators for Microsoft Dynamics CRM 4.0 are free-of-charge add-on solutions developed for Microsoft Dynamics CRM 4.0 customers and partners. Each accelerator showcases how Microsoft Dynamics CRM 4.0 can be configured and extended to broaden marketing, sales and service capabilities. Additionally, CRM Accelerators provide the building blocks for all kinds of xRM applications.

Each accelerator is entitled to limited support from Microsoft, the extent of that support will be restricted to troubleshooting the CRM customizations and any CRM API calls made from the accelerator code that adhere to SDK guidelines. Additionally, all accelerators are supplied with full source-code so they can be modified to meet specific customer requirements. Any existing source-code that is modified or new source-code that is added by customers which does not call the CRM API or does not adhere to CRM SDK guidelines will not be supported by Microsoft. Through accelerators, customers and partners benefit from new functionality on a more frequent basis, and they can be deployed to their environment quickly and easily.

### Previously Released

Accelerators that have been released for Microsoft Dynamics CRM 4.0 include:

- Event Management
- eService
- Enterprise Search
- Extended Sales Forecasting
- Notifications
- Newsfeed
- Workflow Tools
- Business Data Auditing
- SPI Sales Methodology

You can download all accelerators from <http://cram accelerators.codeplex.com/>

## **New Releases**

Newly released Accelerators include the following:

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### ***Social Networking – Available***

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The Social Networking Accelerator allows an organization to reach new prospects and engage in real-time dialogue across social networks. Using this solution, an organization can push real-time communications from Microsoft Dynamics CRM into social network sites – like Twitter, and harness the native business intelligence of Microsoft Dynamics CRM to analyze sentiment, optimize message reach, and automate sales and customer service activity and process. The Social Networking Accelerator enables organizations to monitor conversations, identify influential people, and participate in the conversation, all within the Microsoft Dynamics CRM application.

Social networking sites such as Twitter, Facebook and LinkedIn® enable marketing professionals, service managers and sales people to develop higher quality relationships with their customers. By allowing consumers to self-select and opt-in to public conversations these sites enable organizations to identify their most influential consumers, drive participation in product development and improve brand sentiment. Built on open platforms and available through mobile devices, SMS, Web browsers and standalone PC clients, these new communication tools provide organizations a way to maintain a persistent connection with their customers or constituents.

The social networking accelerator provides the following capabilities:

- Send outbound messages (statuses) to Twitter directly from CRM
- Retrieve replies and re-tweets (forwarded messages) from Twitter
- Retrieve user details such as follower counts from Twitter
- Categorize inbound messages (statuses) from Twitter with a positive, neutral or negative sentiment rating
- Convert social networking data into core CRM records such as leads, contacts and cases
- Analyze the social networking data in CRM through reports and dashboards to derive customer opinions and trends as well as determining who the key influencers or detractors are for your organization

Initially this accelerator is provided for on-premises customers only. Future releases will provide capabilities for Microsoft Dynamics CRM Online customers.

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### ***Partner Relationship Management (PRM) Accelerator – Available***

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The PRM Accelerator allows businesses to use Microsoft Dynamics CRM to distribute sales leads and centrally manage sales opportunities across channel partners. Using the PRM Accelerator, companies can jointly manage sales processes with key businesses partners using a centralized web portal as well as extend this integration to automate additional business processes using custom CRM entities and workflows.

The PRM accelerator provides the following capabilities:

- Partner profiling and segmentation
- Partner skillset management
- Partner training and accreditation management
- Partner performance reporting
- Lead allocation
- Opportunity pool and bid management
- Joint opportunity management
- Sales literature downloads
- Knowledge base searches
- Online service scheduling
- Typical PRM process management workflows

### **Future Accelerator Releases**

The roadmap for Microsoft Dynamics CRM 4.0 includes the following Accelerators.

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#### ***Portal Accelerators – Q2 2010***

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The new range of portal accelerators easily connects Microsoft Dynamics CRM to an organization's Web experience. This release provides new versions of eService, Event Management and Partner Relationship Management (PRM) accelerators that can connect to Microsoft Dynamics CRM Online as well as on-premises and partner-hosted deployments.

The portals also deliver content management with in-page editing which provides administrators with the ability to update content and modify the user interface directly from the portal pages.

Customers and partners can choose whether to deploy these portal accelerators on their own hardware or in the cloud through Windows Azure™. Portal accelerators simplify connection to CRM web-services to enable a variety of portal authentication mechanisms including Windows Live ID.

These accelerators are planned for release in Q2 2010 and will be available for download at <http://cramaccelerators.codeplex.com>.

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#### ***Customer Care Accelerator (CCA) – Q2 2010***

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This accelerator demonstrates how to design real-world customer care scenarios enabling developers to quickly create scalable solutions. It can be used to help customer care and contact center organizations provide consistent customer service experiences -by combining data elements from disparate applications such as mainframes, databases or Web sites for display in a single user interface. The quick ease of access to information helps agents deliver faster, more precise service which often leads to higher customer satisfaction levels – and results in helping businesses preserve or increase profit margins. The accelerator also includes centralized management tools and agent auditing and reporting capabilities.

The core business scenarios supported by the Customer Care accelerator include the following:

- **Integrated agent desktop** enables the aggregation of information from diverse business applications into an integrated agent desktop, providing users with a 360-degree view of customer interactions. Customer service representatives have fast access to business-critical

information to serve customers quickly and efficiently, which helps increase satisfaction and loyalty.

- **Desktop automation** workflows minimize human error and streamline business processes, eliminating the need for contact center agents to re-enter the same data in multiple applications and helping to ensure a consistent customer service experience.
- **Computer telephony integration (CTI)** is simplified for supplying caller screen pop-up information to agents. CTI makes it possible for the telephony system to connect to the CRM business application and give agents detailed customer information to help them better serve their customer.
- **Activity reporting** gives contact center managers the ability to quickly access agent desktop transaction reporting, identify process bottlenecks, streamline processes and automate routine tasks to improve overall call center efficiencies.

The Customer Care accelerator will be available for download at <http://crmaccelerators.codeplex.com/>

As with all CRM Accelerators, the Customer Care Accelerator is available at no additional cost to current Microsoft Dynamics CRM customers and partners. Accelerators can be deployed as packaged extensions to Microsoft Dynamics CRM or, in the case of the Customer Care Accelerator, can be used to help develop new solutions, enabling organizations to customize Microsoft Dynamics CRM to meet their specific business needs.

## **Solutions**

The roadmap for Microsoft Dynamics CRM 4.0 includes this newly released solution.

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### ***Non-Profit Solution for Microsoft Dynamics CRM – April 2010***

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This Microsoft Dynamics CRM Online solution for Non-Profits enables non-profits to manage their business in the cloud. The following functionality is included in this solution and will allow an not-for-profit organization to quickly get up and running with a cloud based solution that provides the following capabilities:

- **Donation and Pledge Management** - Create programs, accept one-time or recurring pledges and capture donations. Track donations against pledges, programs or campaigns.
- **Member and Constituent Management** - Categorize relationships. Track interactions with members and constituents, and their contributions (e.g. financial donations, benefit hours).
- **Campaign Management** - Create highly targeted lists and associate them with campaigns. Use embedded Mail Merge capabilities to instantly send mass communications (requires Outlook)
- **Case Management** - Create, manage, and resolve cases by phone, e-mail, chat, Web, or in-person contact. Access cross-team and organizational knowledge to improve staffer/constituent interactions across phone, e-mail, chat, Web, or in-person contact.
- **Event Management** - Plan a variety of functions, including venue logistics, speaker coordination, session content, event sponsorship and event capacity. Assess the effectiveness of the event through various reports on key performance indicators such as funds raised, attendance, press coverage.

- **Donation Collection** - Collect donations online from an organization's website via an integration with a payment solution. Track all online donations made through the organization's website, including transaction ID information and a link to the donor.
- **Analytics** - Tailored dashboards and reports available within Outlook and off-line
- **Integration with Payment Solutions/Gateways** – Collect donations online with integrated signup for Amazon Payment Services. Additional payment gateways may be added in the future. Payment solution comes with complete source code which can be customized to fit needs and environments

This solution enables you to manage your entire operations and donor engagement from within Outlook or a browser. You also have the ability to take your data offline and work in a disconnected mode with offline data synchronization.

The Microsoft Dynamics CRM Online Solution for Nonprofits aims to solve the needs of small to mid-sized nonprofit organizations and non-governmental organizations (NGOs). Sign-up and access details include:

- \$9.99/user/month (minimum 5 users)
- Go to <http://crm.dynamics.com/ngo>
- Currently available in CRM Online countries only (US and Canada).
- International availability to coincide with CRM Online International launch countries
- The Non-Profit Solution for Microsoft Dynamics CRM requires a provisioned Microsoft Dynamics CRM Online account and System Customizer / System Administrator access to install the functionality.
- The Amazon payment integration requires a provisioned Windows Azure account (<http://www.azure.com>), developer access to Windows Azure and API keys established with Amazon.

## ***Integration Tools***

The roadmap for Microsoft Dynamics CRM 4.0 includes the following integration tools.

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### ***Microsoft Dynamics CRM Adapter for Microsoft Dynamics GP – May 2010***

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The Microsoft Dynamics CRM Adapter for Microsoft Dynamics GP is an integration solution for these two products. The CRM On-premises version is available, and the CRM Online version is

The primary emphasis of the solution is simplicity and ease of use while providing a highly reliable, bi-directional and fault tolerant business document integration between Dynamics CRM 4.0 (Update Rollup 5 and above) and Dynamics GP 10 (Service Pack 4 and above) and the new GP 2010. The solution does not require any additional software and is available at no cost to licensed customers who have a current Enhancement Plan for Microsoft Dynamics GP.

The system is based on a transformation engine and uses specific adapters to identify source and destination systems. The source adapter reads data and the destination adapter writes data. There is a pre-defined and configurable map which ships as part of the solution to define the specific data in each system which will be exchanged. This map serves as a starting point for a customer but can easily be modified to meet specific needs using a map authoring utility provided with the solution.



Fault tolerance is built into the solution; in the event of an integration failure, the solution will retry failed documents according to configurable rules.

This adapter is currently available for Microsoft Dynamics CRM On-premises and will be made available for Microsoft Dynamics CRM Online in the May 2010 Service Update.

This adapter will be updated for CRM5 and released after the CRM5 release.

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### ***Microsoft Dynamics CRM Adapter for Microsoft Dynamics AX6 - 2011***

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This adapter will be based on the same framework as the Dynamics GP adapter, and will be released with the AX6 release, currently scheduled for 2011.

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### ***Microsoft Dynamics CRM Adapter for Microsoft Dynamics NAV2009 – 2011***

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This adapter will be based on the same framework as the Dynamics GP adapter, and will be released late 2010 to mid-2011.

## ***Developer Tools***

The roadmap for Microsoft Dynamics CRM 4.0 includes the following developer update.

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### ***Microsoft Dynamics CRM SDK Update – May 2010***

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This SDK update provides Advanced Developer Extensions and a Portal Integration Toolkit.

Advanced Developer Extensions for Microsoft Dynamics CRM is a set of new tools included in the Microsoft Dynamics CRM SDK that simplifies and accelerates the development of internet-enabled applications that interact with Microsoft Dynamics CRM 4.0. Building a Web portal that is tightly integrated with CRM helps organizations maximize the value of their Microsoft Dynamics CRM investment. Advanced Developer Extensions for Microsoft Dynamics CRM makes it easy for developers to build an agile, integrated CRM Web solution.

Advanced Developer Extensions for Microsoft Dynamics CRM supports all Microsoft Dynamics CRM deployment models: On-Premises, Partner-Hosted (IFD), and CRM Online.

Key capabilities of the Advanced Developer Extensions for Microsoft Dynamics CRM include:

- An enhanced code generation tool called CrmSvcUtil.exe which generates .NET classes based on the unique schema and relational structure of each CRM database. Developers can then code against Microsoft Dynamics CRM APIs using these strongly-typed classes.
- These generated classes simplify the creation of queries and optimizes returned data from both CRM Online and CRM on-premises. Queries that require data from related entities can now be simplified to a single line of code, where previously it required multiple lines of code.
- Classes generated by CrmSvcUtil.exe enable developers to streamline integration and connectivity with 3rd party applications (mash-ups, portals, etc.) that need access to Dynamics CRM data through the CRM APIs
- LINQ for Dynamics CRM translates a LINQ query expression into a CRM SDK Query. This introduces standardized and consistent patterns to easily query and update CRM data. LINQ is a Microsoft .NET Framework component that provides a standardized way to query across many different data sources. LINQ is a standard .NET universal query mechanism that can be extended to support any type of data store.
- A Portal Integration toolkit which provides a scenario-based set of resources for developers to improve portal integration efforts. This toolkit enables developers to create integration services between external portals and Dynamics CRM more efficiently.
- Connectivity & Caching management which provides improved scalability and application efficiency for portal applications connecting to CRM Online. Developers can now specify a single-line connection string to connect to the CRM API whether that is CRM Online, On-Premises or Partner Hosted.
- The Portal Integration toolkit also provides sample code and guidance on how to best connect portals with Microsoft Dynamics CRM.
- Portal accelerators provide complete reference sample applications to get you up and running quickly.

The Microsoft Dynamics CRM SDK refresh will be available for download from <http://www.microsoft.com/downloads/details.aspx?FamilyID=82E632A7-FAF9-41E0-8EC1-A2662AAE9DFB&displaylang=en> in May 2010.

## **On-Demand Microsoft Dynamics CRM Roadmap**

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### **Introduction**

On-demand Microsoft Dynamics CRM allows customers to access their everyday productivity applications over the Internet to drive effective marketing, sales and customer service. On-demand Microsoft Dynamics CRM equips business professionals with online and offline access to customer information through a full suite of marketing, sales and service solutions within a familiar Microsoft Office Outlook interface to help ensure rapid user adoption and fast results. On-demand Microsoft Dynamics CRM is flexible for users as they can also access it through a web browser; this allows users to work in the environment that they feel most comfortable with and understand.

Organizations can start using the marketing, sales and service capabilities in their on-demand Microsoft Dynamics CRM application immediately. They can utilize the intuitive configuration capabilities to quickly add or modify fields, forms, workflows and reports to tailor it to fit their business needs.

Microsoft Dynamics CRM is architecturally different from other CRM solutions in the marketplace in that the software which is run over the internet as a service is exactly the same application, data model and process definitions as that run by customers on their own servers. This architectural innovation allows a customer to start with an on-demand deployment but if they feel at any time it is more appropriate to transfer their Microsoft Dynamics CRM solution to their own servers they can do this at any time. All configurations and data can be moved to the new deployment.

### **Partner-Hosted**

Customers today who wish to take advantage of on-demand Microsoft Dynamics CRM have many choices as to the service provider they wish to use. Through the extensive Microsoft partner network, customers can choose a provider based on what best suits their requirements and budget. For more information on hosting partners in your region please go to

<http://www.microsoft.com/hosting/solutions/hostedcrm.msp>.

### **Microsoft-Hosted (Microsoft Dynamics CRM Online)**

Alternatively, customers may choose to subscribe to on-demand Microsoft Dynamics CRM through Microsoft directly; this service is called Microsoft Dynamics CRM Online. Currently Microsoft Dynamics CRM Online is available in the United States, Canada and Puerto Rico and will be expanded internationally the second half of 2010. See the market expansion plan in the following section.

## **Microsoft Dynamics CRM Online**

Between now and the release of Microsoft Dynamics CRM "5" there is a separate release timetable for Microsoft Dynamics CRM Online. Each release (referred to as a service update) will add additional features and value to Microsoft Dynamics CRM Online.

### **Previous Service Updates**

The 2009 Service Updates included:

- March 2009 Service Update – Delivered 99.9% SLA, Internet Lead Capture and more
- November 2009 Service Update – Delivered Instant-on Trial, Mobile, Dashboards and more

### **Upcoming Service Updates**

The 2010 Service Update roadmap includes:

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## **Microsoft Dynamics CRM Online May 2010 Service Update**

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**Theme:** Business Connectivity Enabled Through Developer Productivity

The May 2010 Service Update release of CRM Online provides customers with the tools that allow developers to better integrate their Microsoft Dynamics CRM Online deployment with other on-demand and on-premises applications and portals to enable improved business connectivity. Multi-lingual capabilities for North American companies improve their ability to connect and align with other internal groups across multiple languages.

- For IT Pro - **Simplify Integration** – Simplify integration efforts with Dynamics CRM Online through new developer tools in the updated CRM SDK
- For IT Pro - **Accelerate Business Connectivity** – Extend your CRM Online environment and your business with Event Management, eService and Partner Relationship Management Accelerators
- For IT Pro - **Connect ERP and CRM** – Connect your Dynamics ERP and CRM system to support end-to-end processes, business insight and user productivity
- For End-User - **CRM Online Going International** - CRM Online May 2010 Service Update delivers the first wave of moving CRM Online into International markets with multi-lingual capabilities for North America customers who have departments or teams with non-English language requirements.

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## **Microsoft Dynamics CRM Online "H2" 2010 Service Update**

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Planning is under way to upgrade Microsoft Dynamics CRM Online to utilize Microsoft Dynamics CRM "5" when it is released the second half of 2010. This will be a seamless process for existing CRM Online customers who will then be able to take advantage of the range of improvements and new capabilities delivered in this new release.

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**CRM Online International Market Expansion – Aligned with CRM "5"**

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With the release of Microsoft Dynamics CRM "5" the CRM Online service will expand internationally to additional markets in the second half of 2010. There are 29 new markets currently planned. Additional markets are also in planning but are yet to be confirmed.

**Current markets:**

- United States
- Canada
- Puerto Rico

**Planned international markets:**

Austria	Belgium	Czech Republic	Denmark
Finland	France	Germany	Greece
Hong Kong	Hungary	India	Ireland
Israel	Italy	Japan	Luxembourg
Malaysia	Mexico	Netherlands	New Zealand
Norway	Poland	Portugal	Romania
Singapore	Spain	Sweden	Switzerland
United Kingdom			

## Microsoft Dynamics CRM "5" Roadmap

The next release of Microsoft Dynamics CRM, code named CRM "5" is scheduled for release in the second half of 2010. There are three broad categories of investments for CRM "5":

- Deliver a new level of user productivity and collaboration capabilities
- Continued enrichment of the core CRM capabilities
- Provide a best-of-breed business solution development framework

Development and testing is in progress for Microsoft Dynamics CRM "5" which encompasses several milestone builds before various external feedback and testing programs are initiated with customers and partners in the lead-up to general release. There is an exhaustive list of investments in Microsoft Dynamics CRM "5" which ranges from small "tweaks" and enhancements to broad new feature areas. The following sections provide a summary of some of the investments across the three categories.

### *User Productivity and Collaboration*

Customers, partners and the analyst community continue to agree that the primary reason why a CRM solution may fail is simply that the users within an organization don't use the software! A key product strategy for Microsoft Dynamics CRM "5" is to continue to provide a CRM solution that users want to work with, is as familiar as their regular desktop software such as Microsoft Office and allows them to more effectively manage their day-to-day commitments and customer interactions regardless of their role. Building on the success of Dynamics CRM 4.0, Microsoft is committed to further investing in a rich and satisfying user experience leveraging both Microsoft Office and Windows.

**Continue to improve the end-user experience:** focus on providing further flexibility for a user to set up their role-based view of the system quickly. With each new release of Dynamics CRM Microsoft has reshaped how CRM functionality can be delivered through Microsoft Office Outlook to drive a more natural user experience. Microsoft Dynamics CRM "5" will further enhance the user experience and information view of CRM data within Microsoft Office Outlook to ensure simplicity and ease of use.

**Increase accessibility through the Microsoft Office "ribbon" interface:** provide a user experience that is consistent with established Microsoft Office designs such as the ribbon interface. This style of interface is designed to increase efficiency and make it easier for users to find features to get their work done.

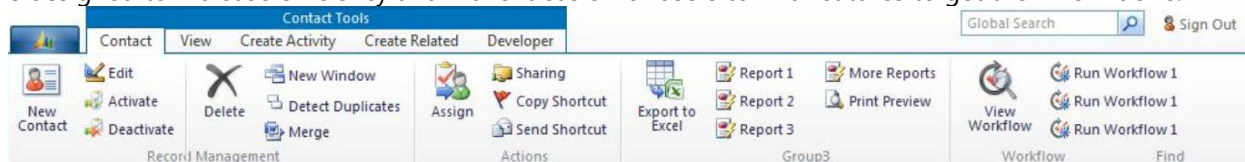


Figure 1: Prototype Ribbon for Contact Form

**Improve productivity through a streamlined user interface:** optimize the viewing experience within Microsoft Dynamics CRM by reducing the number of open screens on the desktop. Streamline the number of keystrokes, mouse-clicks and the number of open forms required to complete a typical task within Microsoft Dynamics CRM, this in turn directly fuels user productivity and insight as the key information or process can be accessed and accomplished more quickly and intuitively.

**Drive user adoption through personalization:** allowing the user to drive how they want to interact with Microsoft Dynamics CRM and nominating which views of information are most relevant to their role.

**Facilitate collaboration with SharePoint® integration:** Microsoft is investing in a business application development framework that combines the customer view and interaction management strengths of Microsoft Dynamics CRM with the collaborative strengths of SharePoint. The most common scenario revolves around document management. Users will be able to seamlessly work with documents and participate in processes from SharePoint without leaving the CRM application.

**Enrich business insight through improved business intelligence:** the objective is to provide an interactive analytical tool for a user that is simple to use. Rich contextual visualizations (charts and other graphical representations) can be configured and embedded within views of CRM records. These visualizations can be placed into personalized dashboards so that each user can have a unique view of the system based on their role. Each visualization offers click-through capabilities to allow users to drill into more detailed views of CRM data as required. Visualizations will include different chart types such as pie, bar, column, line and funnel. Users can rapidly configure filters for their visualizations to meet their specific requirements as well as employ mathematical formulae to summarize data.

**Balanced workload management for more efficient use of resources:** providing a flexible means for organizations, divisions, departments, teams and individuals to group and prioritize work items.

## ***CRM Capabilities***

Microsoft is committed to broadening and enriching the core customer relationship management capabilities provided by Microsoft Dynamics CRM. In the next release there will be broad investment across sales, service and marketing functionality. The following section highlights some of the core CRM investments to be included in Microsoft Dynamics CRM "5".

**Contact and Account Management:** still the foundation of CRM; the goal is to further improve on the valuable contact and account management capabilities provided by Microsoft Dynamics CRM 4.0. This involves allowing users to even more effectively model customer organizational hierarchies while catering for varying degrees of complexity within those structures. The focus is to enrich the user's view of their customers and make better decisions about which relationships should be pursued from a sales, service and marketing standpoint.

**Team-Based Collaboration:** a fundamental principle of any CRM solution should be to help teams collaborate and work together more effectively. Team structures in today's business environment can be both structured (e.g. a sales team) and/or virtual (e.g. a collection of people drawn from different departments to complete specific projects or for finite time periods). These capabilities combined with the investments in SharePoint integration will allow teams to be even more productive and collaborative across sales, service and marketing scenarios.

**Call Center and Unified Communications Support:** providing users the means to accomplish more tasks with less keystrokes and mouse-clicks – this is vital in contact centers to improve customer interaction volumes. Contact centers need to deal with customers across channels such as Voice and Instant

Messaging (IM). Working with Microsoft's Unified Communications will provide even more capabilities for contact centers to leverage these channels with Microsoft Dynamics CRM.

**Territory Management:** extending the territory management capabilities in Microsoft Dynamics CRM to facilitate more complex hierarchical territory structures. The focus here is to deliver even more flexibility in territory definition to incorporate geographic-based, industry-based and product-based sales territories. Utilizing this framework there will be an even broader range of lead allocation options across sales territories which can then be further tailored to the customers' requirements through configuration.

**Performance Management:** providing capabilities for Microsoft Dynamics CRM to define, measure and report on attainment levels of organizational goals. These goals can be defined for any period of time and can focus on revenue or count-based targets for an organization, business unit, team or individual. Goals can also be hierarchical to provide a rolled up view of performance against goals at any level of the organization. When combined with the investments in data visualization this provides a valuable performance management toolset available within Microsoft Dynamics CRM.

**Other areas:** aside from the investments outlined above there are other aspects of Microsoft Dynamics CRM "5" to be enriched, namely:

- Further improving the flexibility of sales opportunity management to incorporate team selling models.
- Extending the outbound marketing capabilities to allow richer communications via email, including document attachments.
- Further simplifying and extending marketing list management capabilities.
- Providing users the ability to schedule future recurring activities.

### ***Best-of-Breed Business Solution Framework***

Microsoft Dynamics CRM 4.0 has delivered a rich business application framework that is highly flexible, scalable and configurable. Microsoft is committed to further invest in the "5" development framework to facilitate even faster and easier development of CRM and xRM applications.

Microsoft will invest further in the xRM application framework to enable more partners and customers to rapidly configure and develop business solutions with Microsoft Dynamics CRM. From a customer standpoint this continues to deliver on the "Power of Choice" vision for Microsoft Dynamics CRM which enables organizations to choose the appropriate consumption model either on-premises or on-demand.

**Solution Management:** providing a framework for application "packages" (referred to as Solutions) to run on Microsoft Dynamics CRM. Microsoft Dynamics CRM Solutions are a similar concept to Microsoft Windows providing the capability to add or remove programs and features. The concept is very powerful as it allows components to be layered on to the base system but also on top of other solutions. It also provides a way to protect the intellectual property of the solution and includes change management and versioning. Thus the underlying technology framework becomes an application engine to run a whole range of business applications. As with Microsoft Dynamics CRM 4.0, this application framework will be multi-tenanted and is therefore hosting ready. Imagine the possibilities of an application framework that can be readily configured, is enterprise scalable, provides extensive enterprise workflow capabilities and has the integration hooks with Microsoft Office and SharePoint!



**Secure Code on the Server:** Microsoft Dynamics CRM 4.0 allows code on the server (for plug-ins or workflows) but that code runs in full trust. The challenge here is to protect the Microsoft Dynamics CRM server from poorly secured code and poor application logic to preserve system integrity and performance. Microsoft Dynamics CRM "5" will deliver capabilities around profiling, tracing and isolation levels to ensure that both on-premises and large on-demand environments alike can run securely and efficiently.

**Integration and connectivity:** One of the most common needs for any organization today is application connectivity. In fact, application integration is usually one of the most costly and troublesome areas of IT. Typical challenges with integration of business applications include:

- Managing the fixed and ongoing infrastructure costs
- Integrating to and leveraging past technology investments and legacy systems to their maximum
- Security, access and exchange of data across applications within and outside the organization
- Lack of a common system across internal and external systems
- Matching fluctuating processing capacity with demand for these resources

Microsoft Dynamics CRM "5" will extend capabilities to tackle these integration challenges through a number of investments detailed below.

**Service-Oriented Architecture:** Microsoft will continue to prioritize and enhance the ability for customers to integrate with Microsoft Dynamics CRM using industry standard web service protocols.

**Native Windows Communication Foundation (WCF) connectivity:** by providing support for WCF, Microsoft Dynamics CRM "5" further improves the capability to integrate the Microsoft Dynamics CRM web services into multiple contexts, including BizTalk and non-Microsoft clients such as Java™.

**Scalable, Federated security:** in conjunction with the investments around further aligning industry standards support for connectivity with different platforms Microsoft Dynamics CRM "5" will provide rich claims-based authentication using the new [Windows Identity Foundation](#). This framework allows Microsoft Dynamics CRM "5" to provide rich integration of authentication and authorization capabilities with a range of providers and scenarios.

**Extended Event Pipeline:** another key investment in the integration choice model for Microsoft Dynamics CRM customers and partners is to leverage the [Windows Azure™ Platform](#) to facilitate flexible, cost-effective integration between Microsoft Dynamics CRM and other applications both within and outside the organization.

The Windows Azure Platform is a cloud operating system and collection of services that can deliver web, mobile, or hybrid [software-plus-services](#) applications to users. Existing software can utilize the services to add cloud capabilities, and developers can easily write applications for the cloud to be used by end users, or write services that can be consumed within other applications.

There are three broad components of the Windows Azure Platform:

- **Windows Azure** provides a scalable environment with compute, storage, hosting, and management capabilities. It links to on-premises applications with secure connectivity, messaging, and identity management.
- **SQL Azure** is a Relational Database for the Cloud. Your Data: Anyplace, anytime. SQL Azure is a full relational database in the cloud.
- **Windows Azure Platform AppFabric** helps developers connect applications and services in the cloud or on-premises. This includes applications running on Windows Azure, Windows Server and a number of other platforms including Java, Ruby, PHP and others. It provides a Service Bus for connectivity across network and organizational boundaries, and Access Control for federated authorization as a service.

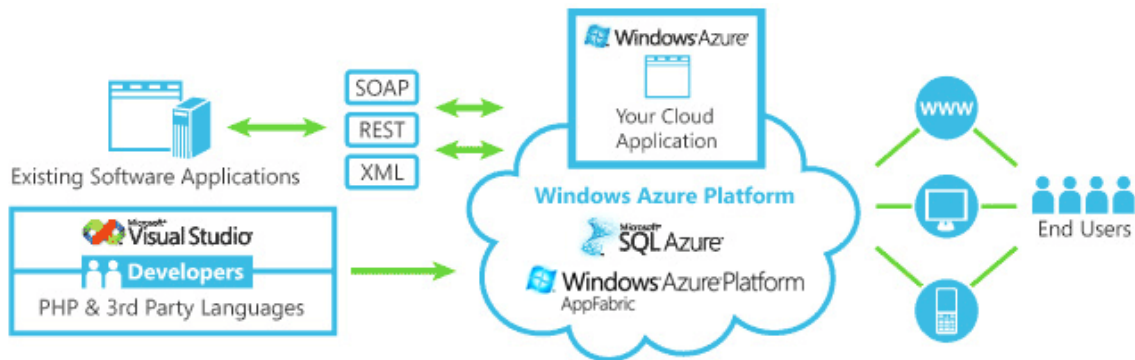


Figure 2: The Windows Azure™ Platform

**AppFabric Service Bus:** Specifically, Microsoft Dynamics CRM “5” will provide capabilities to leverage the AppFabric Service Bus which helps to provide secure connectivity between loosely-coupled services and applications, enabling them to navigate firewalls or network boundaries and to use a variety of communication patterns. Services that register on Service Bus can easily be discovered and accessed, across any network topology.

In order to meet the integration challenges outlined above, it's common for many organizations to use an enterprise service bus (ESB) solution. However, these solutions can be time-consuming to implement and costly to maintain. The AppFabric Service Bus is focused on making the ESB pattern a reality at Internet scope as part of the Windows Azure Platform. The AppFabric Service Bus provides many of the same architectural characteristics found in typical ESB solutions, including things like identity and access control, naming, a service registry, and a common messaging fabric. The AppFabric Service Bus is designed to operate in the cloud in a highly scalable and federated manner. Using this service you can integrate your applications with your own services running in the cloud or with a variety of 3<sup>rd</sup> party services provided by Microsoft or other vendors, and with a variety of applications that may be running inside or outside of the corporate firewall.

The primary objective of Microsoft Dynamics CRM "5" integration with the AppFabric Service Bus is around extending the eventing capabilities in CRM to access services hosted in the cloud. It provides the ability to develop and utilize a "plugin in the cloud". The benefits of this approach are that you can easily develop and deploy application integration components which elastically scale according to your workload. Using this feature you will be able to connect Microsoft Dynamics CRM "5" to other applications that may be hosted on Azure, On-premises, or elsewhere. These other applications may be within your network or external to your organization and through the AppFabric you have flexibility as to how you authenticate to these applications. The developer experience mirrors the development of a plugin and uses the same registration process as a plugin.

**Other areas:** additional aspects of Microsoft Dynamics CRM "5" that will receive investment:

- Business data auditing capabilities.
- Extended utilization of the Windows Workflow Foundation.
- Re-usable configurations such as global pick-lists and cascading/hierarchical pick-lists.
- Improved Microsoft Visual Studio® integration for a smoother development experience.
- Multi-tenant management – streamlined management for hosted environments.
- Leveraging virtualization with Microsoft Windows Server® 2008.
- Adjustments to take advantage of the improved performance and business intelligence capabilities of Microsoft SQL Server 2008.
- An updated Microsoft BizTalk Server adaptor for Microsoft Dynamics CRM "5".
- Web Resources which allows organizations to register, embed and consume content such as images, HTML and SilverLight™ controls within Microsoft Dynamics CRM forms.

## Conclusion

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This document has outlined the future direction of Microsoft Dynamics CRM through to the next release. As we look towards the release of Microsoft Dynamics CRM "5" and over the longer term Microsoft 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 Microsoft Dynamics CRM
- provides a flexible and scalable business solution framework

It is truly an exciting time to be implementing or evaluating Microsoft Dynamics CRM! Our mission is to deliver software and services that enable extraordinary customer relationships with world-class business results. 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***

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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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