



CRM Software Review



About this Review

Thank you for requesting this executive summary of ISM's comprehensive CRM Software Review for Microsoft Dynamics CRM. Since 1989, ISM staff has tested dozens of software packages annually from CRM vendors around the world. Each review is currently based on 179 criteria, drawn from input we've received from senior executives and sales, marketing and customer service personnel. ISM receives no money from any vendor it reviews, to ensure 100% objectivity. Vendors must fully demonstrate their functionality for each criterion.

About ISM

Since 1985, ISM has created & implemented strategies to delight the customers of best-in-class organizations worldwide. ISM provides solutions that maximize user-adoption, ensure seamless collaboration between customer-facing functions and enhance customer engagement. We combine strategic vision with powerful technologies and tools to deliver actionable strategies that lead to an optimized customer experience, improved customer service, better-calibrated marketing programs and ultimately, to increased customer acquisition, retention & growth. Let us review your current customer-facing technology programs and activities, and ready your organization for 2030 and beyond.

Contact us for the full, detailed 20-page CRM Software Review for Microsoft Dynamics CRM or any of 30 other major CRM applications.

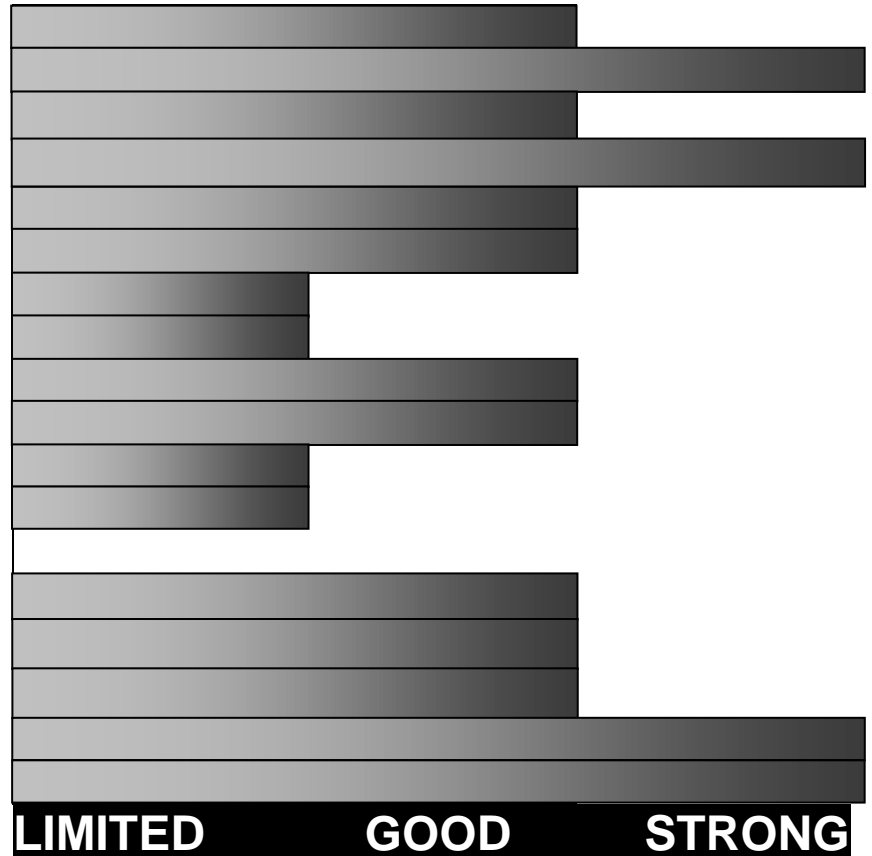
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Microsoft Dynamics CRM at a Glance:

Business Functions

Contact Management	✓
Account Management	✓
Sales Management	✓
Time Management	✓
Customer Contact Center	✓
Customer Service	✓
Telemarketing/Telesales	✓
Marketing	✓
Lead Management	✓
Business Analytics	✓
e-Business	✓
Project Management	✓
ERM	
Field Service	✓
Mobile CRM	✓
Social CRM Functionality	✓
Real Time Features	✓
User Friendliness/Support	✓

Evaluation of Business Functions



Strengths:

- Account management
- Time management
- Real Time features
- Contact profile
- Territory alignment/assignment
- Automated Email response
- Lead optimization
- Pre-defined reports

Weaknesses:

- Lack of PRM
- Lack of ERM
- Limited project management
- Limited knowledge management
- Limited marketing
- Limited telemarketing/telesales
- Limited e-Business
- Limited supply chain management

Executive Summary

Microsoft Dynamics CRM is a Browser-based CRM application, which offers strong features in account management, real time features and time management, along with good features in contact management, sales management, customer service, customer contact center, field service, lead management and business analytics. The application can be accessed over the Web via Microsoft Internet Explorer or offline via MS-Outlook. Microsoft Dynamics CRM can also be deployed at a company's premises, hosted by a Microsoft Business Solutions Partner for a monthly fee (Web client only) or deployed as a SaaS application. The package can be integrated with MS-Office for additional functionality.

Contact management

Contact management features include a comprehensive contact profile in which contact information can be accessed within three tabs: General, Details and Administration. The General tab contains fields for general information on the contact. The Details tab contains fields for work-related and personal information concerning the contact. The Administration tab contains fields for billing information or preferred contact methods (e.g., Email, telephone, etc.). All tabs and fields can be customized for the user's preference. The package provides an account profile, order profile, quote profile and contract profile for account management functionality.

Sales management, Customer service

Sales management functionality includes an opportunity profile to track opportunity information. Sales cycle analysis, sales metrics and activity reports must be customized within the SQL Reporting package. A built-in calendar with daily, weekly and monthly views can be accessed for time management. Bi-directional integration with MS-Outlook is also available for time management. Customer contact center features includes the ability to create a workflow rule, which will send the appropriate Email response template to a customer/prospect that has sent a previous Email message. Customer service functionality offers incident tracking via case profiles. When a user selects a case, it will show similar cases on the side via the Form Assistant feature. A Campaign Wizard provides for the ability for a user to create a marketing campaign. Field service functionality enables users to access information remotely over a Pocket PC device.

Lead management, Business analytics

Lead management features provide lead profiles to track lead information. The Data Migration Wizard function enables users to import leads by various criteria from databases such as MS-Excel. The user can additionally convert a lead into an account, contact or opportunity via the Convert Lead Wizard. Business analytics include 30 built-in report templates set in SQL Reports format. Email alerts notifying of a threshold being reached can be set by the System Administrator via customization of workflow rules.

Social CRM

Social media features provide users with the ability to access direct links to an appropriate Facebook or LinkedIn profile via clicking on the Facebook or LinkedIn icon within an account/contact profile. Users can also access and upload InsideView data concerning organizations into Microsoft Dynamics CRM. Additionally, users can access activity feeds and micro-blog notices to follow changes relating to an opportunity or an account. These activity feeds and micro-blog notices enable Microsoft Dynamics CRM users to collaborate among themselves to obtain feedback related to an opportunity.

Additional functionality

Microsoft Dynamics CRM offers a Microsoft Dynamics CRM Diagnostics feature, which can run an automatic system check to make sure the Microsoft Dynamics CRM application is running at a 100% of its functionality. A "Fix" button enables users to correct any problems found automatically. The Microsoft SmartFinish feature will automatically show all similar words previously used when a user is typing a word into a field. Microsoft



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Dynamics CRM can also be used to set up manage event registrations on external Websites with integration with the Microsoft Solutions Accelerator.

Limitations

Microsoft Dynamics CRM lacks PRM and ERM. The application is additionally limited in marketing, telemarketing, e-Business, supply chain management, project management and knowledge management.

Contact

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Company Profile

YEARS IN BUSINESS	35+	PRICE – MULTI-USER	See Pricing Section
NUMBER OF EMPLOYEES	61,000+	SERVER	See Pricing Section
LICENSED SEAT/USERS SOLD – LAST 12 MONTHS	Vendor Disclosed		
TOTAL NUMBER OF CUSTOMERS	Vendor Disclosed		
LANGUAGES AVAILABLE	Available in 22+ languages		
LIST OF RESELLERS	Microsoft Dynamics CRM is sold only through Microsoft Business Partner channel. Hundreds of authorized partners are listed on the Microsoft Website.		

Pricing

MS-CRM Package	Per Server	Per User
Professional Edition	\$1,244 - \$1,761	\$622 - \$880
Workgroup	\$8,830 - \$12,500	\$440 - \$499
SaaS Edition		\$59 - \$69 user/month