



Microsoft
Dynamics

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Dynamics

CRM 2015

Release Preview Guide

Detailing:

- Microsoft Dynamics CRM 2015
- Microsoft Dynamics CRM Online (2015 Update)
- Microsoft Dynamics Marketing (2015 Update)
- Microsoft Social Listening (2014 R2)



NOTE:

The guidance included in this document reflects current release objectives as of September 2014. 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. Please contact your salesperson for more information on the pricing and licensing of features contained in this release preview guide.

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Release Preview Guide

Introduction



At Microsoft Dynamics, our vision is to help our customers deliver the kinds of amazing customer experiences that will help their business thrive.

We believe that there has traditionally been a chasm between marketing and sales that needs to be bridged in order to truly deliver personalized, end-to-end experiences that customers will love. In a world where sellers and marketers must work more closely together to seamlessly and successfully engage customers, Microsoft is providing the solutions that can enable them to deliver amazing customer experiences together. By aligning your organization around what matters most, companies will be able to drive greater success and engagement with their customers.

This document highlights the capabilities in Microsoft Dynamics CRM 2015, Microsoft Dynamics CRM Online (2015 Update), Microsoft Dynamics Marketing (2015 Update) and Microsoft Social Listening (2014 R2) that will further our customers' abilities to deliver amazing customer experiences. With a commitment to an agile release cycle, there are currently several releases in planning and development. Dynamics CRM 2015 is a major release that will be delivered to our online customers as a customer driven update and to our on-premises customers as version 7.0. Microsoft

Key Investment Overview

To help our customers market smarter, sell effectively and provide care everywhere, we are investing in the following areas:

B2B Marketing

Business Context – The world is changing and it is impacting how companies need to engage with customers. Customers are 57% of the way through the buying cycle before they engage with you. Marketers, more than ever, need to be there every step with the customer, ensuring that when the customer does reach out, sales, marketing and the customer are all on the same page. Marketing owns more of the customer journey than ever before, so they must engage customers in new ways, across new channels in a personalized, relevant way. At the same time, marketers are being held increasingly accountable for the ROI of their marketing investment, yet most lack the ability to track campaigns end-to-end and understand impact in real-time. More than 50% of CMO's feel unprepared for the new marketing landscape.

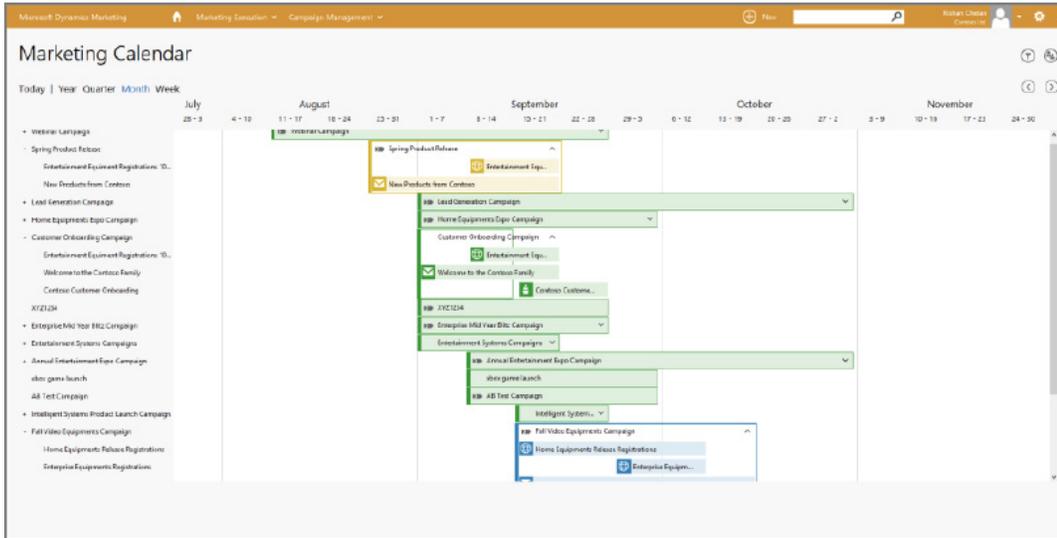
Microsoft Dynamics Marketing enables your marketing team to seamlessly go from planning, to execution, leveraging the power of Excel and Power BI to measure campaigns across channels from start to finish so you can bring your marketing vision to life. You can engage customers one-to-one across channels, build your sales pipeline and demonstrate the impact of your marketing investments in real-time.

Multi-channel Marketing

Today's buyer is smart and getting smarter each day. You need to understand what matters most to them and help them get to the truth that they seek. Quickly and consistently. The 2015 update of Dynamics Marketing helps organizations streamline campaign creation and improve segmentation with graphical email editing, A/B and split testing, integrated offers and approval workflows.

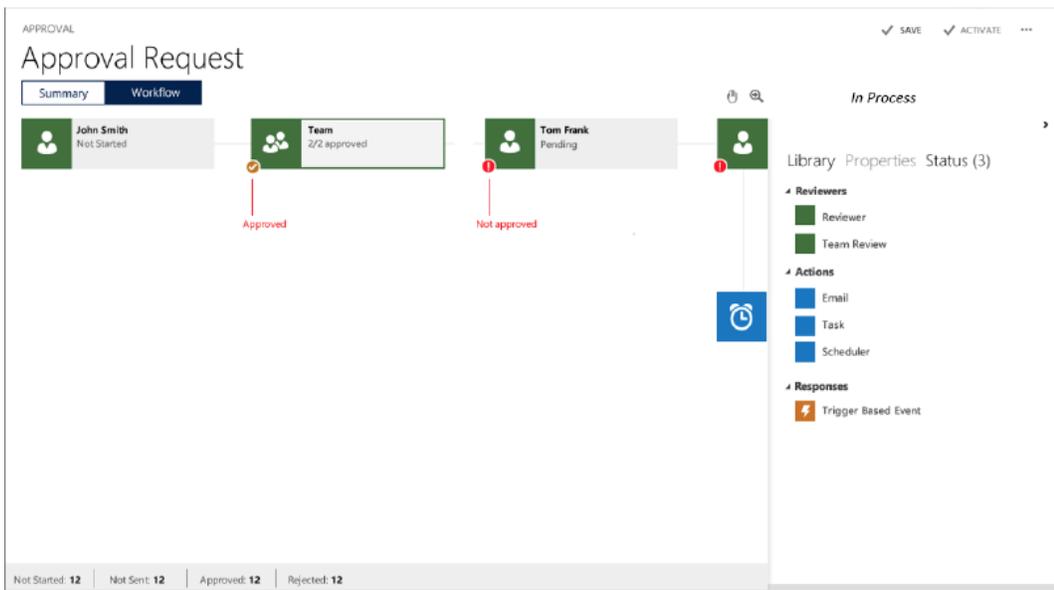
Marketing Resource Management

Gain unprecedented visibility into your marketing plan with the new Marketing Calendar and improve collaborative marketing with click to call capabilities from Lync.



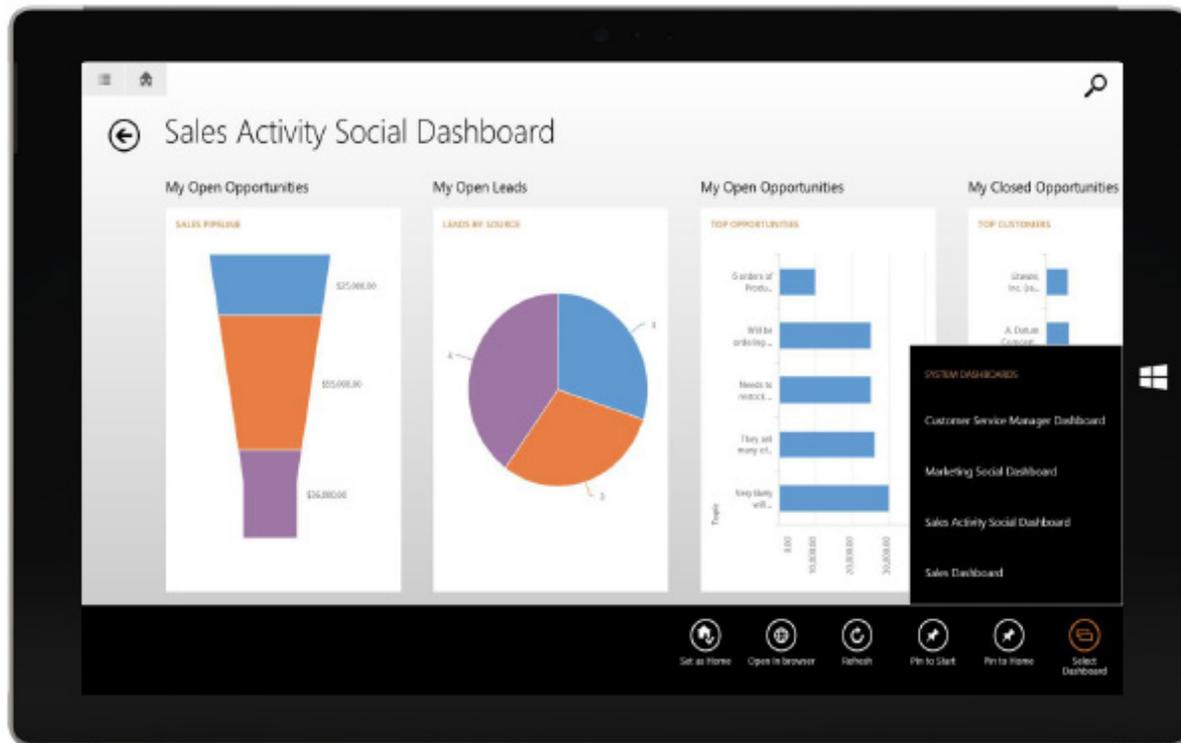
Internal Process Automation

Easily design approval processes and track their status to ensure your team is aligned and on target to meet deadlines.



CRM for tablets enhancements

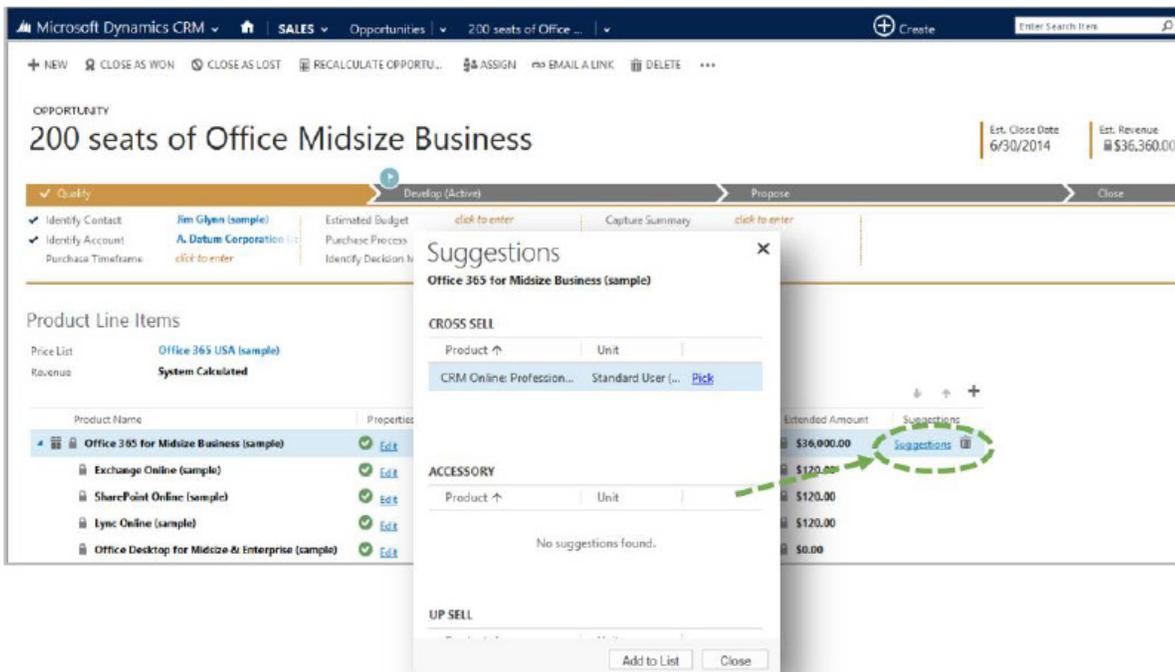
Microsoft Dynamics CRM for tablets helps you stay connected and productive wherever you are. Use your Windows 8, iPad or Android tablets to stay up to date with your customer info—even when you're on the go. CRM for tablets has been enhanced to increase sales productivity with flexible, role tailored dashboards and analytics, personalized home pages and the ability to navigate by hierarchy, as well as improved support for disconnected scenarios. A new personalized home experience allows mobile employees to pin key records and surface analytics from any tablet enabled dashboard in CRM and to easily access and analyze their key data on the go.



Connectivity is not always available while traveling. With offline drafts new records can be created and changes can be synchronized once reconnected.

Product Families

Boost selling effectiveness with the ability to bundle products and recommend related products for cross-sell/up-sell and simplify and minimize product management with product attributes. Improvements to the product selling experience help sales operations managers and salespeople manage and sell their company's products more effectively. Sales operations managers can easily configure product offerings that bundle related products together and provide tailored pricelists giving sellers the ability to position the best products at the best price. Salespeople can see suggestions for cross-selling and up-selling, and get recommendations for accessories or substitutes right on the opportunity form while they are working their deal.



Product properties (attributes) such as updatable, read-only, required and hidden allow sales operations managers to determine how they can be used by the sales agent at run time, that is, while adding an associated product to an opportunity, quote, order, or invoice. can be created and changes can be synchronized once reconnected.

B2B Marketing

Deepen your lead management capabilities with webinar integration and improved lead scoring, including the ability to introduce multiple lead scoring models.

The image displays two screenshots of the 'New Rule' configuration window in Microsoft Dynamics CRM 2015.

Left Screenshot: Shows the 'New Rule' window with a dropdown menu open for selecting a field. The menu lists various fields under 'Condition' and 'Action'. The 'Campaign (Interaction)' field is highlighted. The 'Condition' section shows 'Field' set to 'Campaign (Interaction)' and 'Is In Set' selected. The 'Action' section shows 'Update score with' set to '0'.

Right Screenshot: Shows the 'New Rule' window with the following configuration:

- Condition:**
 - Field: Event (Participation) (dropdown)
 - Is In Set: Is In Set (dropdown)
 - Values: Webinar (text input)
 - Where: For each Participation (dropdown)
- Action:**
 - Update score with: 0 (text input)
 - Devalue By: (text input) Points (dropdown)
 - Score Range: Min (text input) Max (text input)

Buttons for 'Submit' and 'Cancel' are visible at the bottom right.