24 Wildly Creative Ways Companies Use Microsoft Dynamics® CRM to Drive Revenue and Serve Customers

Since you are reading this white paper, you must be looking for creative ways to help your organization add value to your customers. The pace of change we face in our businesses and our lives is astounding, and the expectations of our customers and community members keep rising.

But that's the great part. We live in a time when innovation has been unleashed. Creative people and businesses inspire us to keep improving and looking for better ways to work.

There is a reason we used "wildly creative"

When we started collecting the stories about how Microsoft Dynamics CRM is being used by some of the thousands of companies around the country, we couldn't believe what we heard. Using Microsoft Dynamics CRM to do the heavy lifting, organizations and their Microsoft partners are automating tasks and simplifying operations in every facet of their businesses – it's not limited to customers.

Because of the growing number of ways that Microsoft Dynamics CRM is being used, the term XRM has been coined.

What do CRM and XRM really mean?

While the acronym CRM officially stands for Customer Relationship Management, the word "Customer" can be replaced with "Constituent" in the case of government or with "Member" in the case of non-profits. Same idea, same relationships.

Taking that concept one step further, XRM refers to Anything Relationship Management (they just had to use an X to be hip). It's still Microsoft Dynamics CRM at the core, but the system is so flexible and powerful that businesses are using it for everything from scheduling jet ski rentals to organizing large scale events to…well, you'll see. That's why we wrote this report.

Real-life examples to inspire

Currently over 2 million users, working at 30,000 companies around the globe, depend on Microsoft Dynamics CRM to manage sales, marketing and operations. And those organizations look to the 1,200 certified Microsoft Dynamics CRM partners to solve unique business problems with CRM.

The examples that follow are real — gathered from partners working with all types of businesses to help them get the most from their CRM software. The hard part was to narrow down the selection to just 24 Creative Ways. We could have written an encyclopedia…but what fun would that be. So we tried to include ideas across departments and across industries.

Any one of these ideas may work for your business, non-profit or agency. Take the time to think about how each one might apply to your unique situation.

Regardless of your industry or the role you fill, we are very glad you are here and feel sure you will find inspiration in the pages that follow. Enjoy!

This white paper is brought to you by the **CRM Software Blog** - an international group of experts dedicated to assisting professionals in the CRM software selection process.

Table of Contents

24 Wildly Creative Ways Companies Use Microsoft Dynamics® CRM to Drive Revenue and Serve Customers

Tip: Engage users early

Change management is critical to the success of CRM adoption. Share the benefits of the new system early and often with users to help them overcome their resistance to change.

#1 Predict the Future

Identify buying patterns to predict future purchases. Companies are using purchase information collected in Microsoft Dynamics CRM to help them market more effectively to their customers. By analyzing the products that all customers purchase, you can predict additional products that any one customer will purchase.

Example: By using CRM to combine multiple external ticketing systems with their historic customer data, a National League baseball team has deeper insight into their customer's buying habits and preferences. This season, the team has already started running promotions to ticket holders based on their past and expected future purchases. Go team!

Predictive analytics with Microsoft Dynamics CRM data can also help you estimate the number of customers in danger of being lost, the expected lifetime value of customers and the products that customers are more likely to buy together.
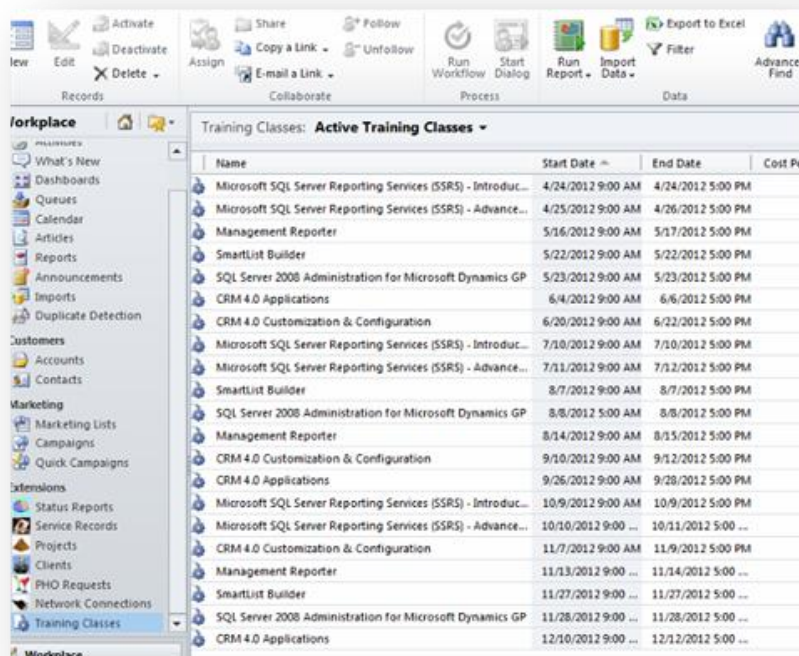
#2 Enlighten a Student

Manage online class registration automatically. Setting up classes in Microsoft Dynamics CRM allows you to track dates, signups and class documents in one centralized place. When a student registers for a training class on the website you can easily set up workflows through CRM to ensure each step in the process happens automatically, like:

- alert the class instructor when someone registers for their class,
- send registration confirmations to students,
- alert marketing to responses and registration,
- send payment information directly into the ERP/accounting system.

In addition to automating the registration process, track student activity like attendance, grades, certifications, and course evaluations. Also track and report on marketing activities, including social media, to measure the success of campaigns. Now, that deserves an A+.

Tip: Understand business processes

The way we always did it, may not be the best way anymore. Look at your business processes to make sure they support the fast pace of business today.

Microsoft Dynamics CRM's familiar interface is easy to customize.

#3 Shepherd Your Flock

Today's churches and other membership organizations need creative ways to manage membership, missions, fund raising campaigns, outreach and donations. You can make participation easier for your congregation with member spiritual growth paths, volunteer services, event management, and facilities scheduling.

Microsoft Dynamics CRM helps churches do a better job managing:

- membership services,
- volunteers and events,
- pledge and contribution programs,
- new member assimilation,
- internal and external communications,
- multi-site operations.

Because Microsoft Dynamics CRM is fully integrated with Office and Outlook, it's easy for staff and volunteers to use. Web-based portals give you the tools to work with young parishioners on their terms. What a blessing!

Dashboards deliver information with immediate impact.

#4 Breathe Easier

For medical product manufacturers and distributors, consumer protection is at the top of the priority list. While some companies are satisfied meeting compliance requirements, some are looking for more.

With Microsoft Dynamics CRM, medical device companies can:
- automatically notify product owners of a warning or recall,
- answer product questions with confidence using a CRM-based knowledgebase,
- suggest additional products that could enrich a customer's life.

Tracking products — from medical devices to precision machinery — when lives depend on them is serious business. Serial number spreadsheets and silos of customer information can't support fast response. Microsoft Dynamics CRM gives manufacturers, distributors and hospitals product lifecycle visibility from source parts to end user. You'll breathe easier having the information at your fingertips.

Tip: Establish adoption policy

Sales people may be hesitant to share all of their coveted prospect spreadsheets for entry into a common system. Help overcome their fear with a clear security and use policy.

#5 Make an Offer She Can't Refuse

Keep your sales team laser-focused on the most important leads. With automated lead scoring, you can separate the tire kickers from those ready to drive off the lot.

Example: A motorcycle accessory distributor uses email and social media campaigns to promote their cycle gear to the riding community. The marketing department has used historic data to define the predictors of purchase decision. Each click-through or download is tracked and reflected in the "Rating" of the lead.

When the lead reaches a Rating of 7, it's time to send the prospect a promotional offer that she can't resist. Microsoft Dynamics CRM automatically tracks the values and sends the email when the time comes. Easy riding!
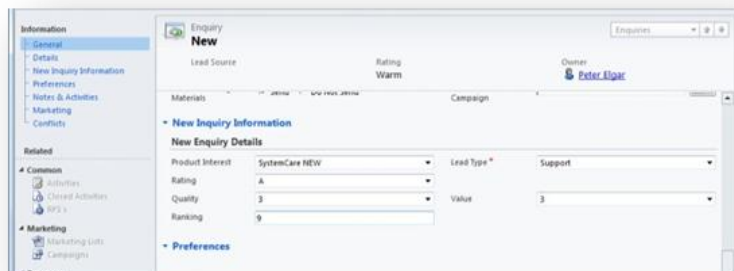
Rate leads to focus on the best opportunities.

#6 Soak in the View

Provide sales reps with access to all the information they need to manage their accounts in easy to see centralized views. From product inventory and credit history information to photos of the owners and facility – bring it all together.

Example: When a gas station franchise management company wanted to increase sales and cut costs at the same time, they looked to Microsoft Dynamics CRM. Instead of sending sales teams to the field repeatedly, they could give them all the information needed to make a phone sale in a visual dashboard. Almost as good as being there in person.

The sales team has relevant conversations with the store manager – they know what products and services they offer and where they are located. They know his sales – probably better than he does and can help him maximize the revenue and manage costs at the gas station.
Fill 'er up!

Photographs and charts bring data to life.
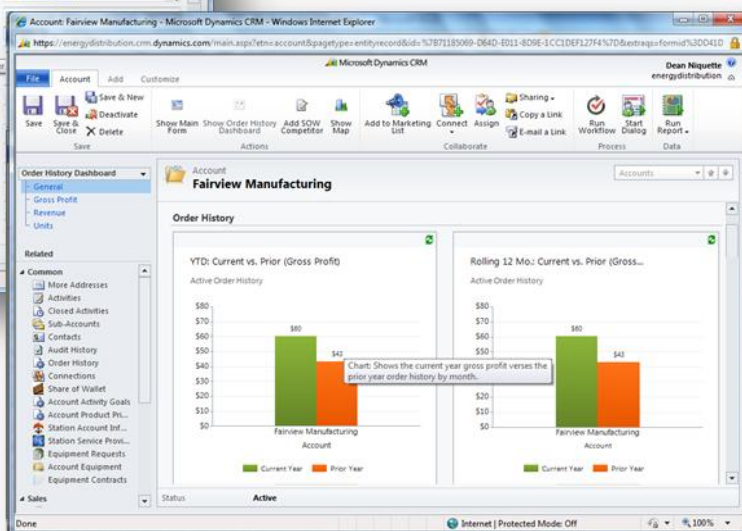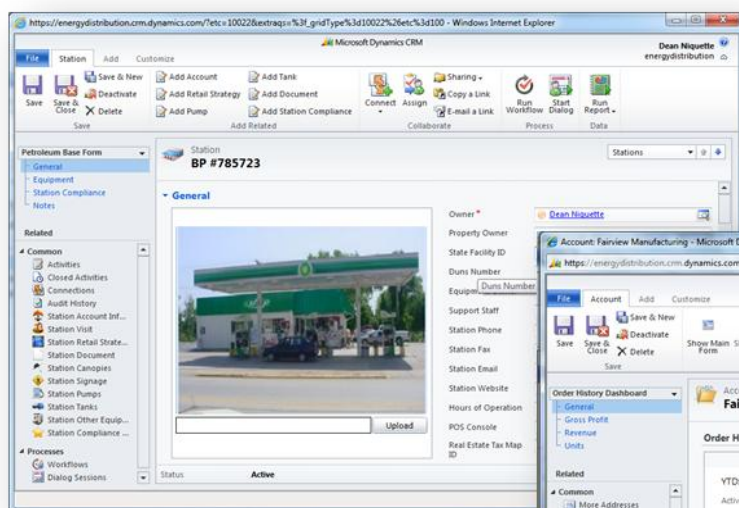
#7 Promote Civic Pride

Government agencies across the country are using Microsoft Dynamics CRM to improve services to the community.

Example: To better serve its roughly 230,000 residents, a city set up a 311 nonemergency call center. In peak months, the center handles up to 400 calls each day resolving everything from trash removal and street repair to nonemergency police calls and environmental code inspections.

Using Microsoft Dynamics CRM, the 311 system helps the city respond to citizen requests more effectively. Because data in the system is stored hierarchically, call center representatives can view related issues when fielding new requests. This contextual information helps representatives be more responsive to citizen questions and issues.

Constituent portals, built on Microsoft Dynamics CRM, allow citizens to avoid the red tape and get the services they need while cutting costs for the municipality. Power to the people!

#8 Set Off Alarms

Everyone is busy. It's easy to put off the call to the hesitant buyer or response to the email about the backorder. But each delay puts your business a little further behind…and you don't even know it's happening.

If you spent all your time making sure that every task got done on time, you wouldn't have time to do anything else. Microsoft Dynamics CRM can be the early warning system for the tasks and activities that fall behind.

Alerts can help keep your team on track to deliver service that will delight your customers and close deals faster. Just a few of the ways companies are currently using alerts include:

- parts that had been on order and not received for 3 days,
- repair jobs that had not been started in 24 hours,
- sales quotes that haven't been followed up in 2 weeks.

An alert dashboard will give everyone in the department or company a visual reminder of high priority tasks. You'll be able to easily recognize those who work hard to deliver on time. Bonus time!

#9 Ditch the Paper Order Form

Work right alongside your customer to configure an order and send the quote immediately from your tablet device.

Example: A forklift manufacturer uses Microsoft Dynamics CRM to make it as easy to order a forklift from the customer's office as it is from the display floor. Using an iPad and touchscreen technology, the sales person lets the buyer pick the options they like. From forks to tires, the customer clicks to order.

No fat catalogs to cart around and no long order forms to fill out. That's the way to move some inventory!

Tip: Follow proven methodology

An undisciplined CRM implementation will bring on headaches and cost you time down the road. As an outside expert, a partner can help you get the most out of CRM…the first time.

Tablet displays allow customers to participate in the process — no matter where you do business.
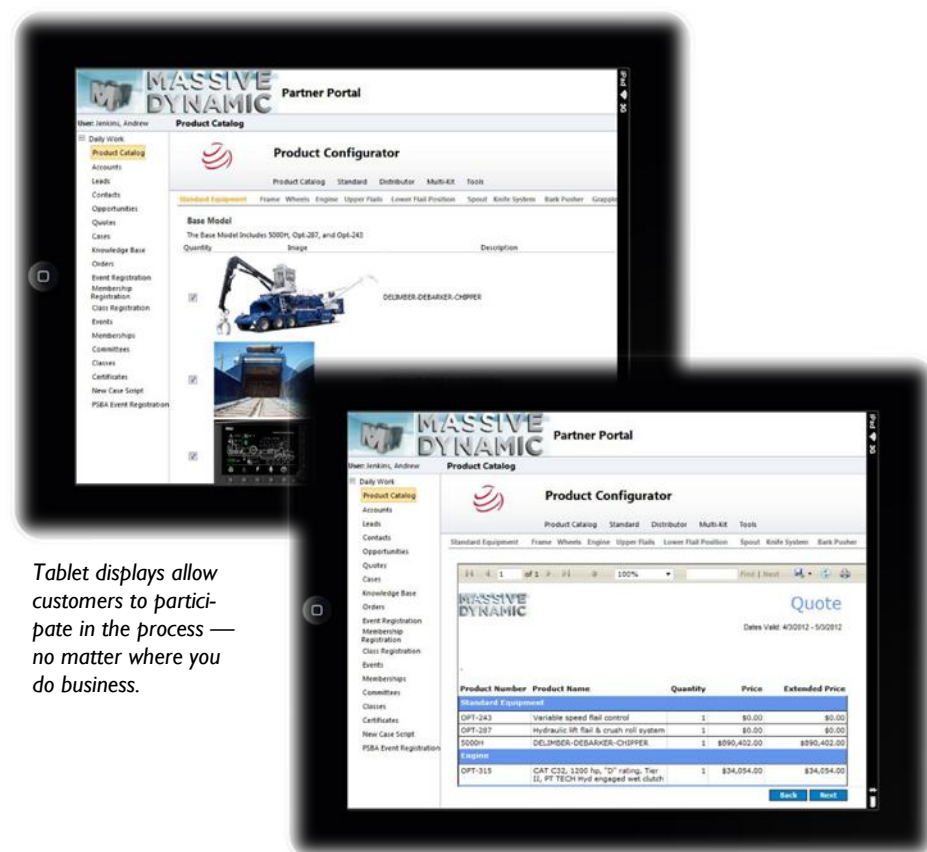
#10 Introduce the Right Hand to the Left Hand

When different departments sell different products to the same customers it seems like each one ought to know what the other is doing. All too often, that's not the case. The missed opportunity to sell the customer two products instead of one costs you money.

When an insurance broker engaged a Microsoft partner to evaluate their customer service, they found:

- five separate CRM systems that didn't talk to one another,
- marketing groups handicapped because they couldn't get a single view of a customer,
- customers who were talking to two or more sales reps from the company.

With Microsoft Dynamics CRM, they broke down the silos and now:

- sales teams see consolidated quote and policy information for each customer,
- service reps can access customer documents without leaving CRM,
- customers can cover all their insurance needs with one call.

Microsoft Dynamics CRM – like an insurance policy for meeting sales goals.

Tip: Ensure data quality

Spend the time upfront to plan your data migration carefully. Data maps help streamline the task and your partner can share valuable lessons learned to help you with import order.
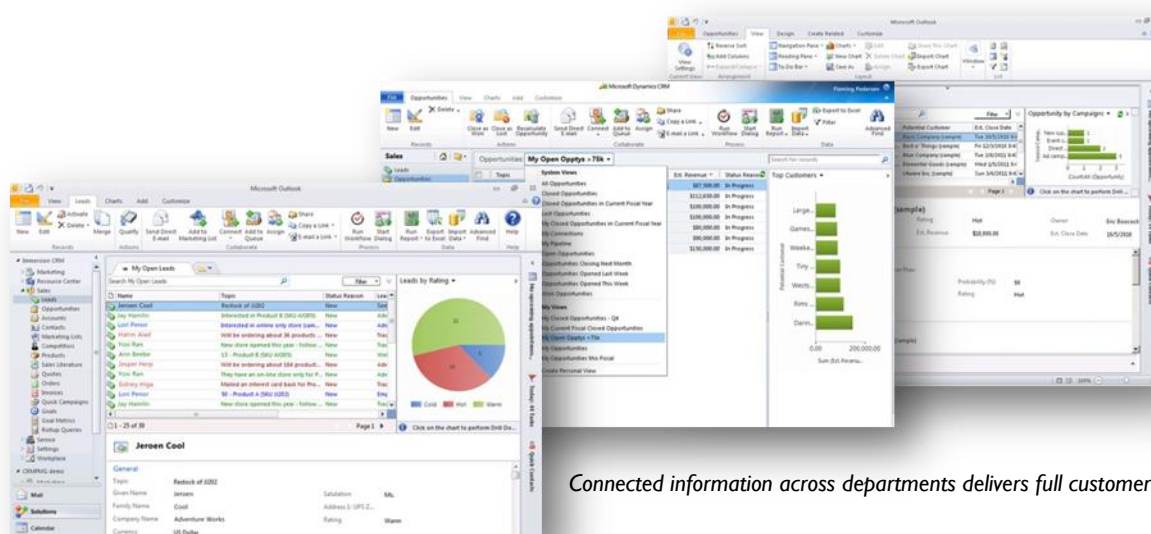

Connected information across departments delivers full customer visibility.

Tip: Partner for success

Apply industry best practices to your implementation with the assistance of an experienced Microsoft Dynamics CRM partner. Find a partner based on recommendations by their customers on [Microsoft's Pinpoint](#) directory site.

#11 Find Your BFFs

In the connected world, referrals have become even more important than ever - and harder than ever to track.

Example: A financial services company received most of their new business through referrals from partners like banks and brokers. Since they couldn't track the referral sources, they didn't know if their marketing programs were really effective.

With Microsoft Dynamics CRM, the referral source is populated automatically or entered during the client enrollment process. Now marketing can focus their efforts on their BFFs (best friends of the firm) to increase referrals. Tracking the success of referral partners and programs will help them improve results as they expand their referral partner base.
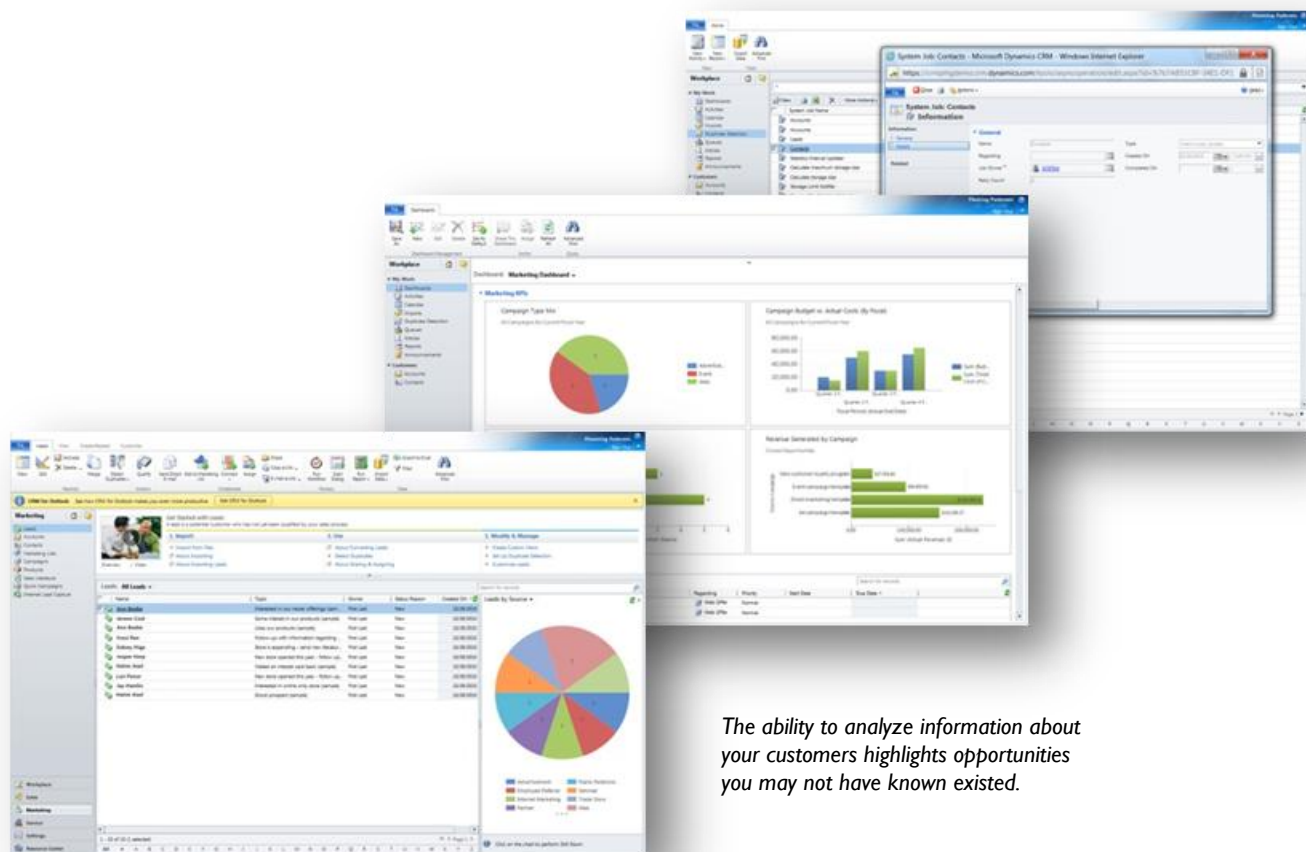
The ability to analyze information about your customers highlights opportunities you may not have known existed.

#12 Change the World

Non-profit organizations face all of the same challenges as commercial businesses — and the additional pressure to optimize limited funds. Non-profits are delivering on their mission with Microsoft Dynamics CRM by:

- Managing programs, annual overall budgets, department budgets, program budgets, contractual and non-contractual program payment requests.
- Building cooperative relationships with organizations, contacts, associated programs, and other stakeholders.
- Centralizing access to document libraries to share information across the organization – anywhere, anytime.
- Providing end-to-end visibility of the processes and information most critical in managing programs and corresponding events, as well as reporting to the board of directors.

By connecting members, employees, recipients, and stakeholders with one unified system your organization can focus all efforts on achieving your mission. Think about data globally, act on information locally.

Tip: Develop a training plan

While Microsoft Dynamics CRM is easy to use, training your people on standard processes and practices will help your organization maximize the value from the system.

#13 Maximize Your Utilities

When data is stored in different databases in the organization, the value of the information is diminished. Decisions are based on limited information and opportunities to leverage common knowledge are lost.

Example: A power and water utility company was responsible for managing government-owned land as part of their charter. Land use changes required complex processes and extensive documentation like abandonment, acquisition, and easement grants.

Microsoft Dynamics CRM allowed the utility company to unify several departments into one common database. Centralized access to information like deeds, maps and licenses saves agents time. Managers are now able to see the status of land use changes in one place. Earth shattering.

#14 Map Your Progress

Track customer goods in transit with map integration. Customers have come to expect knowing where their product is in the supply chain once they have ordered it. If you deliver your own or another company's products, that's tough to manage. What if your employees could look in Outlook to answer a customer's question about delivery?

Example: A regional trucking company uses the Outlook view of Microsoft Dynamics CRM to associate customer orders with truck contents and locations. Through integration with GPS, truck locations are visible to service agents. When the customer calls, the service agent can tell them exactly where the truck is and estimated time of delivery. That is going the extra mile in customer service.

Packing slips, invoices and bills of lading can all be associated with the customer order and accessed directly through Outlook. Centralized supply chain tracking from order to delivery.

Tip: Secure executive sponsorship

User adoption will suffer if the boss isn't fully behind the project. Ask the leadership team to communicate the vision of CRM's role in the success of the company.
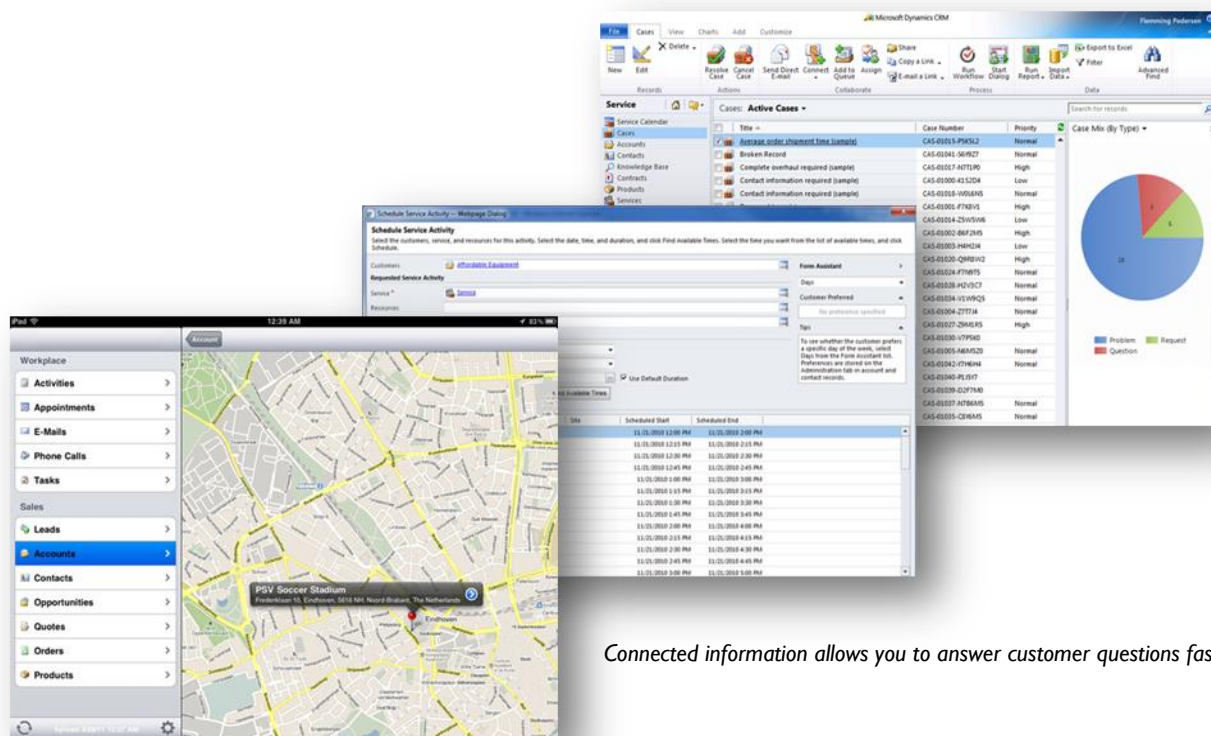
Connected information allows you to answer customer questions fast.

Tip: Drive organizational alignment

Be better together. Microsoft Dynamics CRM gives you the unique opportunity to break through the silos of information in your organization.

#15 Cover Your Assets

Some inventory processes are so unique they need a special solution to make it all work.

Example: An educational non-profit organization supplies 15,000 teachers with 145 different hands-on math and science kit types with over 3,900 potential components. Adding to the complexity of inventory management, the kits are checked back in and usable components returned to inventory.

Before CRM, their kitting process was not systemized and they never had real-time insight into what was in stock because kits and kit items were constantly moving. They made educated estimates for placing orders and sometimes even had to literally run out to a store and buy products to fulfill shipments.

Now, inventory is always up to date. If a teacher doesn't return an item that should be sent back, Microsoft Dynamics CRM automatically sends an email requesting the missing item.

The organization now runs on 55% of the previous budget. They can quickly plan for the entire year of inventory needs, allowing orders to be placed at much larger volumes, qualifying for bulk discounts. Now, that passes the test!
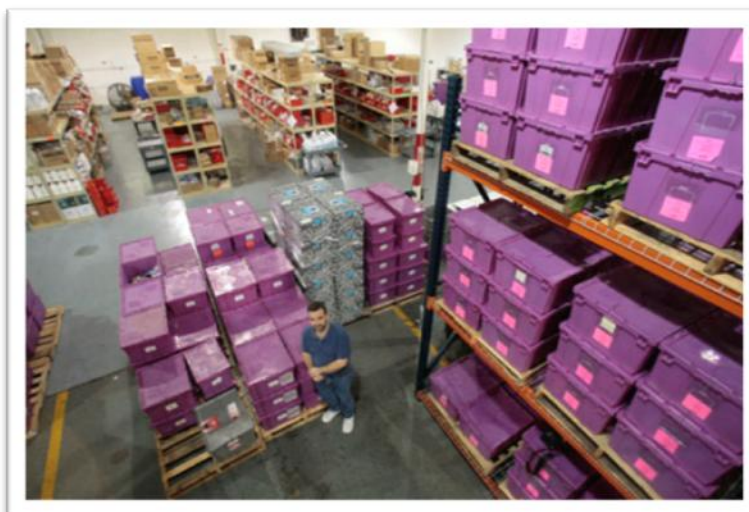
Complex inventory made simple with Microsoft Dynamics CRM.

#16 Reunite Old Friends

Get a comprehensive view of lapsed customers and generate automated lists of customers you can re-attract based on purchase history.

Example: A publishing company was getting ready to launch a new media site and knew that many of their past advertisers would want to sign up. To find all the past advertisers, the sales team had to sort through paper reports from their three different systems – they couldn't even export the contact data into Excel.

A Microsoft Dynamics CRM partner helped the publisher combine all their customer data to get the sales team back on track. Now sales agents have a single view of all customer history and activity through Microsoft Dynamics CRM. It's nice bringing old friends back into the fold.

Tip: Think about mobile

Consider all the ways your sales and service teams can use the mobile capabilities of Microsoft Dynamics CRM. How can you serve your customers more effectively in the field?

#17 Get a Makeover

Small and large manufacturers can help their dealers maximize sales and plan more effective promotions with better data.

Example: A specialty makeup company was struggling with inconsistent results from their diverse set of retailers. Dealers ran out of stock during promotions and returns were too high.

With Microsoft Dynamics CRM, field sales teams were able to help dealers plan inventory to match upcoming promotions. Each store's sales and promotion results were tracked to fine tune inventory levels for each location.

The added value from the small manufacturer helped retailers maximize profits and minimize the hassle of returns. Beautiful!

#18 Steer the Conversation

In a phone conversation with a client or a prospect, it's hard to remember to ask every question. Especially for trainees learning the ropes. With Microsoft Dynamics CRM's guided dialogs, you can prompt follow up questions based on answers and build decision tree interviews.

Example: A continuing education school must determine if prospective students have the qualifications to enroll in classes. Different levels of classes require different pre-requisites.

With guided dialogs, interviewers don't have to have a PhD to navigate the requirements and the student's qualifications. The answer to each question determines the next questions until all of the criteria have been met. Guidance notes along the way provide cheat sheets to help the interviewer get it right every time.
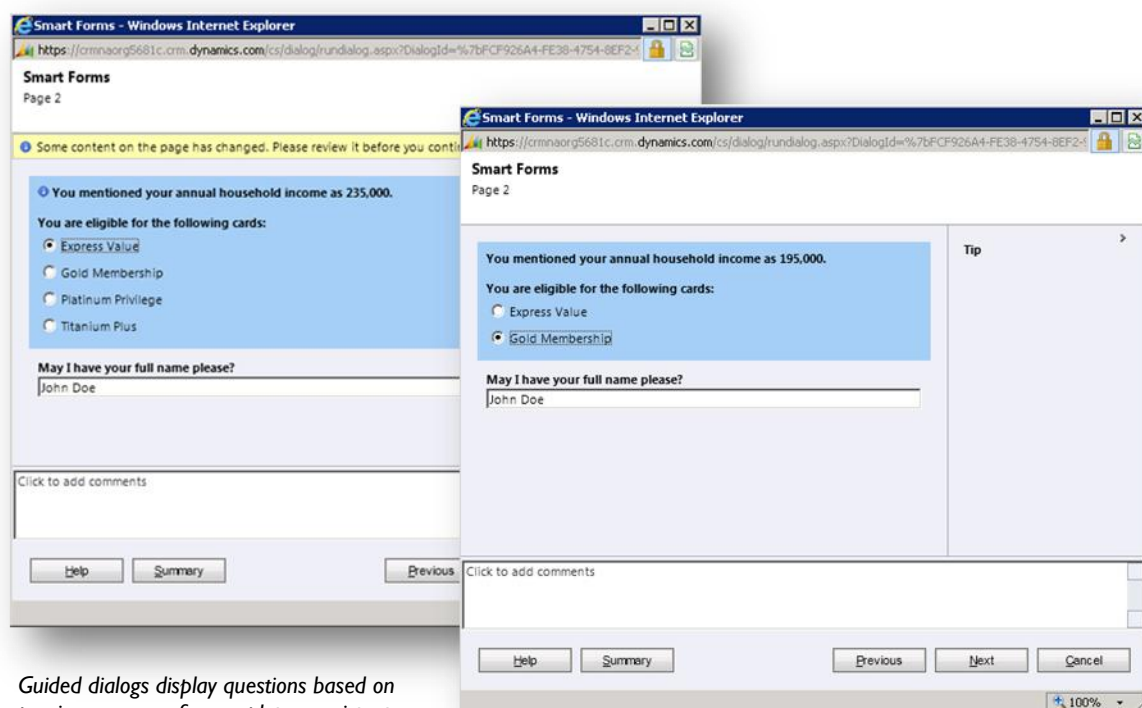
Brilliant!

Tip: Roll out gradually

Consider an iterative approach to deployment. A partner can help you plan a test implementation followed by a department by department roll out.

Guided dialogs display questions based on previous answers for complete, consistent interviews.

#19 Ride the Waves

Scheduling rentable assets can get pretty complicated. What's in, what's out and when are they due back.

Example: A watersports rental company was growing and needed to find a better to way to schedule rentals of kayaks, jet skis, wind surfboards and life jackets. With multiple locations supporting group outings, balancing inventory across facilities was complex.

With Microsoft Dynamics CRM, service agents can see exactly what equipment is available across all locations. Online bookings are also linked in for a real-time view. Now, life's a beach.
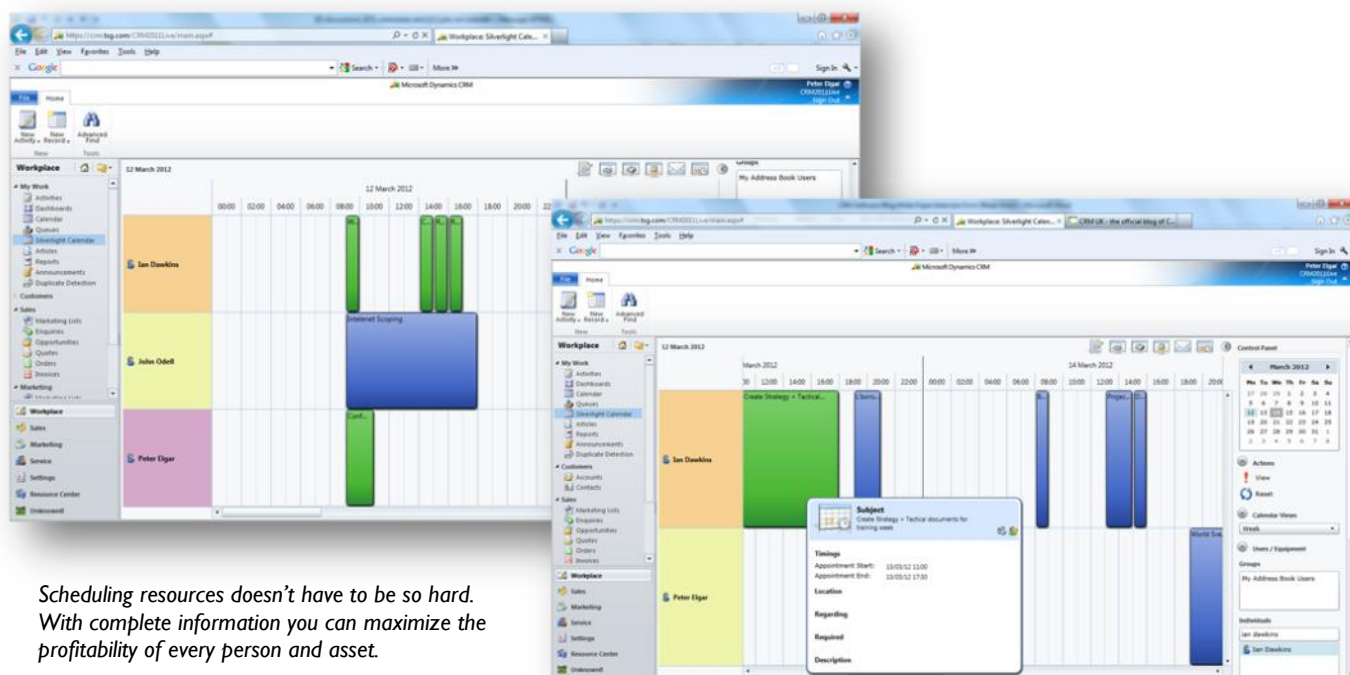
Scheduling resources doesn't have to be so hard. With complete information you can maximize the profitability of every person and asset.

Tip: Leverage Microsoft Office Integration

The integration with Microsoft Office will make life so much easier for your employees. No more cutting and pasting.

#20 Perfect Your Projects

When you manage projects – whether it's an event or a software implementation – you need to track time and costs, schedule resources and monitor progress. Companies manage projects with Microsoft Dynamics CRM for:

- easy time and expense entry,
- resource utilization metrics tracking,
- invoicing for time, expenses and materials,
- scheduling meetings, tasks and activities,
- managing project documents,
- instant visibility into budgeted vs. actual time spent.

When employees submit time and expenses from the field you can accelerate billing to improve cash flow. Dashboards allow project managers to see the whole picture from task completion to budget status in a single view. True perfection!

Project tasks and progress are front and center for flawless project delivery.
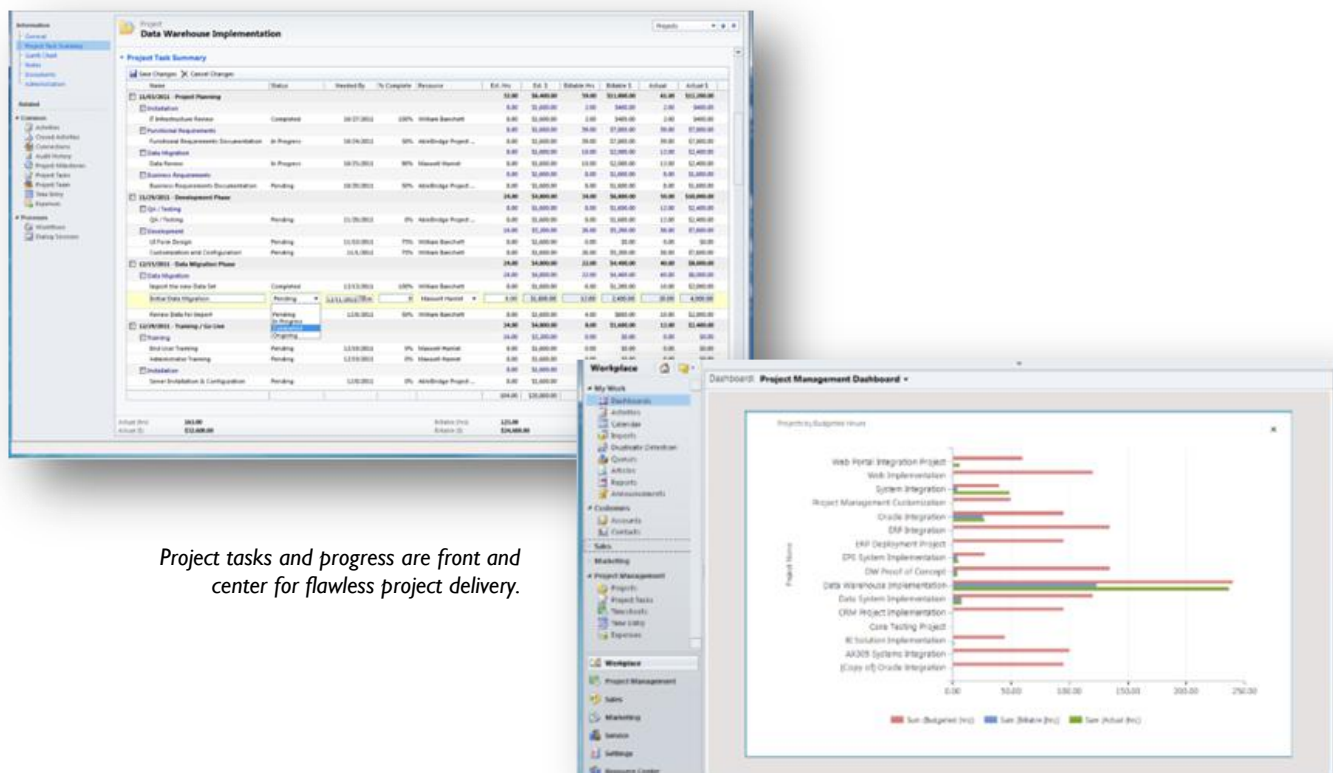
Tip: Industry applications

CfMD (Certified for Microsoft Dynamics) applications solve unique industry needs out of the box. Find them in the Microsoft Dynamics Marketplace.

#21 Wow a Prospect

Don't let hot sales leads get lost or sidetracked. Alerts and workflows set up in Microsoft Dynamics CRM can trigger a task assignment for a prospect that hasn't received a follow up call in minutes, hours or days.

When a global software company's sales force was spending too much time searching through lists of follow up calls for the hot leads, they:

- automated assignment of outbound calls and follow up activities with customers and prospects,
- consolidated history of contact interactions to one screen for easy view,
- closed the loop with a marketing dashboard tracking marketing's efforts vs. sales prospecting efforts vs. actual sales execution.

Now, sales people spend their time talking to the most qualified prospects first. They know if the prospect has downloaded the software to test drive or requested information about functionality. Wow!
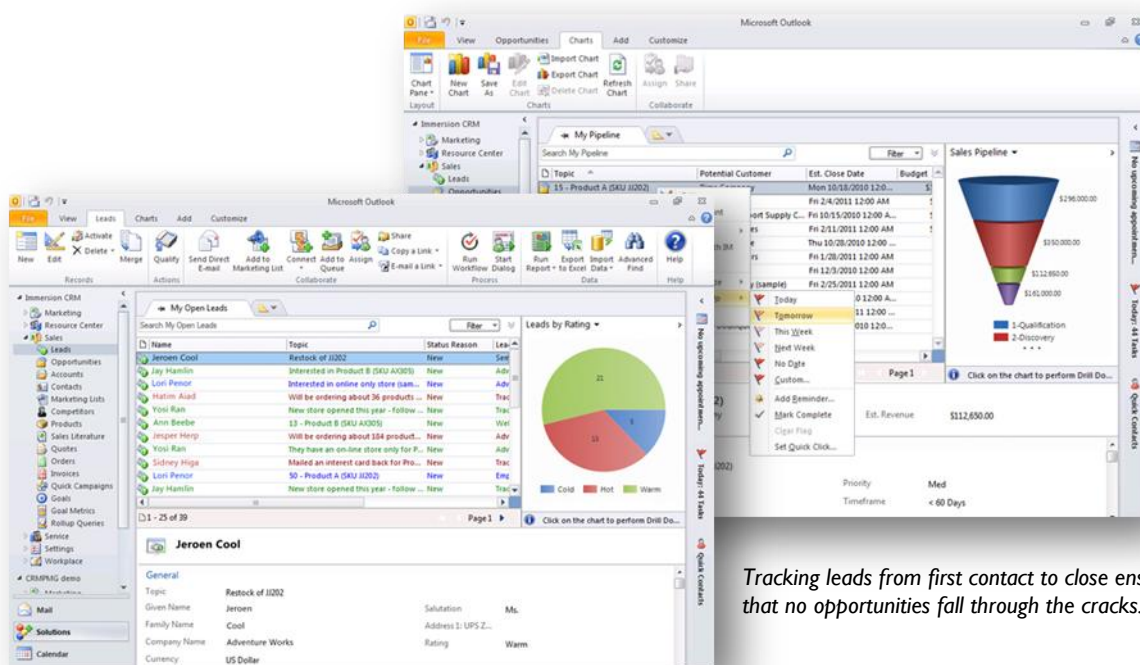
Tracking leads from first contact to close ensures that no opportunities fall through the cracks.

#22 Keep All the Balls in the Air

Are all your jobs and quotes in three brown folders on the CEO's desk? While it's hard to break the habits of the past, it's much easier when you can do it right from Outlook.

Example: An industrial electronics repair shop needed to modernize their systems to manage the growth of the business. The brown folders just weren't keeping pace.

With Microsoft Dynamics CRM, each repair job from receipt of the part through quoting approval to shipping it out the door is managed automatically. Users can access all the information they need to do their job without ever leaving Outlook.

To keep all the jobs on track, "Alerts" give everyone a heads up on exceptions. An Alert can be triggered by a required part that has not been ordered yet, a quote for a repair that has not been approved after 7 days, or anything else that needs to be addressed in order to keep sales and operations running smoothly. Each Alert is powered by the workflow capabilities of CRM to check for certain conditions and timing, and then when a rule is not met, an Alert is generated and added to the list.

Now, the repair shop can sign the big contract and know they won't drop the ball.
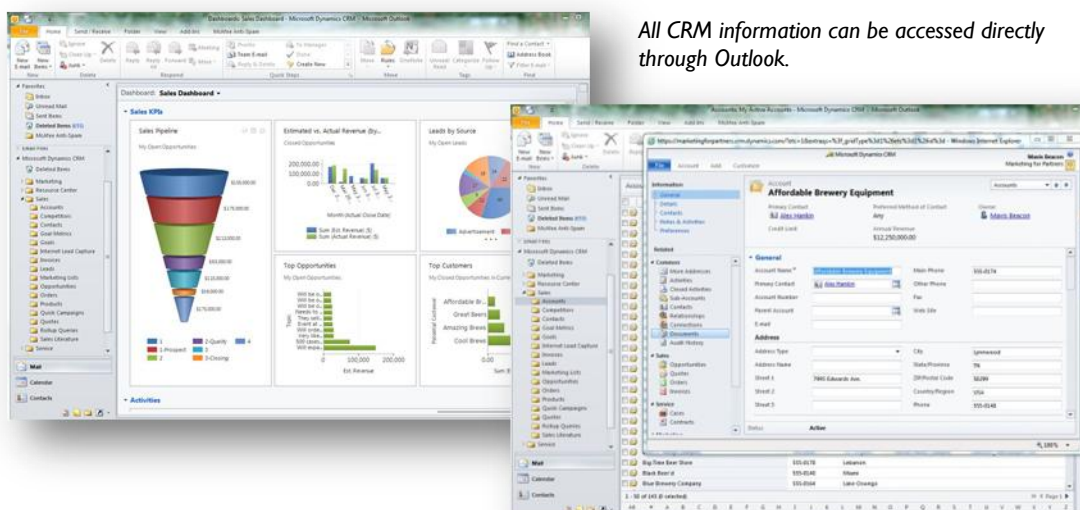
Tip: Don't be afraid to automate

When considering what to automate, forget about the software and be creative – CRM has the flexibility to enhance and automate any kind of business process. CRM's architecture, especially workflow, has capabilities well beyond what most users expect.

All CRM information can be accessed directly through Outlook.

#23 Accept a Challenge

Customer contests are growing in popularity but can be time consuming to manage. When you work with the right tools, it's easy to automate repeatable processes.

Example: A social-minded retailer promoted a contest every week to build their community of fans. They needed a place where fans could record their contest answer, hear about winners and keep tabs on new contests.

Expensive custom webpage development for each and every contest was cost prohibitive. With Microsoft Dynamics CRM working in conjunction with a central website, the retailer was able to cut costs and easily manage the contests.

All data from the participants is stored, to enable detailed analysis. Now the retailer can fine tune contests to meet fan interests. A fan 5k walk for charity is in the works to give back to the community that supports them. Score!

Tip: Plan for the future

Align your Microsoft Dynamics CRM implementation with the strategic goals of the company. A partner can help you plan how CRM will support future growth and expansion.

#24 Follow the Paper Trail

The paperless office is a great concept, but a distant dream for many businesses. For those companies that need to know where paper documents are, Microsoft Dynamics CRM leads the way.

Example: A CPA firm relied on manual methods to track the progress of their client's tax returns as they moved through the process. Returns are worked on by multiple accountants based on specialties and availability. When a client called in to check on the status of his return, he had to listen to hold music while the search was launched.

With Microsoft Dynamics CRM, each step of the tax preparation process is tracked through workflows including time stamps to help measure productivity.   As each step in the defined workflow process is completed, the next step is automatically generated to guide the progress. And when questions arise, they are answered instantly. Eureka!

Next Steps – Get Creative

Contact Magenium Solutions to sign up for a free trial of Microsoft Dynamics CRM today.

C'mon Get Creative!

Hopefully the stories shared in this white paper have inspired you to think outside-the-box when it comes to CRM software. When you make an investment in business software, you want to be able to maximize the functionality of the application to get the highest return on investment possible. At Magenium, we have a deep knowledge of Microsoft Dynamics CRM. We can take our knowledge and experience to help you get creative with the vast functionality the software offers and help you get the great ROI you need.

About Magenium Solutions

Magenium Solutions is an Illinois based Microsoft Dynamics CRM Partner We hold the Microsoft Silver CRM Competency which places us in the top 5% of Microsoft partners worldwide.

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