

VISION

Microsoft Dynamics® CRM

Statement of Direction

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Executive Summary

Microsoft is bringing new innovations to customer relationship management (CRM) software with Microsoft Dynamics® CRM. It is 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, Microsoft Dynamics CRM “V.Next” which is targeted for release in late 2009/early 2010.

We expect to update this document with further details on a quarterly basis.

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 CRM capabilities across sales, service and marketing. The Dynamics CRM 4.0 architecture supports multi-language and multi-currency requirements as well as multi-tenancy for enterprise and on-demand CRM deployments. Dynamics CRM 4.0 also delivers a number of advances in reporting and workflow (which now runs on the enterprise Windows® Workflow Foundation platform).

The primary goal from the very first release of Microsoft Dynamics CRM has been to deliver a CRM 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 CRM solution by delivering it through standard and familiar Microsoft desktop applications that users know and understand.

Today, Microsoft Dynamics CRM is available to customers in a variety of subscription or ownership models:

- **On-premise:** 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 as follows:
 - **Partner-hosted:** a subscription via one of many global hosting partners.
 - **Microsoft-hosted:** a newly-launched subscription service directly from Microsoft called Microsoft Dynamics CRM Online.

Our mission is to deliver software and services that enable extraordinary customer relationships with world-class business results. This document is structured around the major areas of innovation over the next two years, namely:

- Microsoft Dynamics CRM 4.0 roadmap
- Microsoft Dynamics CRM Online roadmap
- Microsoft Dynamics CRM “V.Next”

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

In December 2007, Microsoft released Microsoft Dynamics CRM 4.0 which delivered a range of new capabilities for our customers including:

- Continued investment in the CRM capabilities enriching the extensive Sales, Customer Service and Marketing functionality.
- Windows Workflow Foundation to provide a world-class enterprise workflow capability.
- Multi-currency and Multi-language support for customers with global deployment demands.
- The power of choice over how to deliver and consume Microsoft Dynamics CRM; whether that is via an on-demand Software-as-a-Service (SaaS) or installing it on-premise, i.e. their own servers located in their own data center. The customer can move from on-demand to on-premise (and vice-versa) at any time while preserving their customizations and data.
- Integration with Microsoft's Unified Communications platform to embed "presence", i.e. the ability to see a customer or colleague's status such as Available, Busy, Away etc. and then interact with them via phone, email or instant messaging.
- For information on Microsoft Dynamics CRM 4.0, go to:
http://download.microsoft.com/download/6/8/a/68a51d11-bdea-4c9c-9923-044028bae2e4/MicrosoftDynamicsCRM_Top60Guide.xps

There is also a plan of continuous innovation and capabilities for Microsoft Dynamics CRM 4.0, which includes:

- Mobility
- Accelerators
- BizTalk Integration
- SharePoint Web Parts

Microsoft Dynamics CRM Mobility

Microsoft is currently conducting a strategic review of mobility options for Microsoft Dynamics CRM. Central to this strategy is ensuring that customers have a number of options to meet their CRM mobility requirements. Mobile applications for Microsoft Dynamics CRM need to cater for the following scenarios:

- Different mobile platforms and devices such as Microsoft Windows Mobile® and RIM Blackberry
- HTML 4.0 mobile browsers
- Online and offline access to the CRM application from the relevant mobile device

Microsoft Dynamics CRM 4.0 customers today have a range of mobile options through the Microsoft partner network. The mid and longer term strategy will provide mobile CRM solution options for customers both directly from Microsoft and through our partners. In the short term, Microsoft is providing two options for Microsoft Dynamics CRM 4.0 customers. Firstly, there will be a new release of Microsoft Dynamics CRM Mobile Express which runs on any mobile device that supports HTML 4.0 browsing. Secondly, Microsoft has formed an alliance with Ten Digits to provide their mobile solution (MobileAccess 4.0) for both Microsoft Windows Mobile and Research-In-Motion (RIM) Blackberry customers at a cost-effective price.

Whether your mobile CRM requirements are immediate or longer term the Microsoft Dynamics CRM mobile strategy will support your functional and device requirements now and in the future.

Additionally, Microsoft has released Microsoft System Center Mobile Device Manager 2008 which provides over-the-air management of Windows Mobile phones and security-enhanced access to corporate data behind the firewall.

CRM Mobile Express

Due out in the second half of 2008, the next release of CRM Mobile Express delivers the power of Microsoft Dynamics CRM to your mobile workforce with ease. The CRM Mobile Express client provides users the ability to view, create, and modify their CRM data on just about any internet capable device. There is no installation required on the mobile devices to enable this functionality. Additionally, an administrative interface is available to enable organizations to control what and how users view their CRM data on the mobile device.

The new release of CRM Mobile Express will be fully supported by Microsoft. The client uses common metadata from Microsoft Dynamics CRM so users can access all built-in and custom entities within CRM and system administrators can configure Mobile Express using the same tools they use to configure the solution for Microsoft Office Outlook® and web browser users. The new release has been optimized for limited bandwidth environments and will work on any HTML 4.0 Web browser and requires no client-side script or installation on the client device. Additionally, the new release of CRM Mobile Express will work with the multi-tenanted architecture of Microsoft Dynamics CRM 4.0 allowing users to point at different organizations from the same device.

Ten Digits Alliance

Microsoft and Ten Digits Software Inc. have announced an alliance to deliver full-featured mobile access to both Microsoft Windows Mobile phones and BlackBerry mobile phones for Microsoft Dynamics CRM 3.0 or 4.0. MobileAccess 4.0 is developed and distributed by Ten Digits and extends rich client access to Microsoft Dynamics CRM 3.0 or 4.0 for users of Windows Mobile phones and Research in Motion (RIM)-based BlackBerry mobile phones.

This solution gives organizations the choice and flexibility to meet the requirements of their users while giving them anytime, anywhere access to Microsoft Dynamics CRM 3.0 or 4.0. MobileAccess 4.0 provides access to Microsoft Dynamics CRM 4.0 functionality while offline to help fuel the productivity and responsiveness of remote employees and partners. MobileAccess 4.0 is administered within Microsoft Dynamics CRM 4.0 which helps minimize IT management overhead and setup.

To find out more about Ten Digits MobileAccess 4.0 for Microsoft Dynamics CRM, visit <http://tendigits.com>.

Microsoft System Center Mobile Device Manager 2008

With the release of Microsoft Windows Mobile 6.1, Microsoft System Center Mobile Device Manager 2008 brings organizations new security features and improved control over Windows Mobile devices. System Center plays a central role in the Microsoft vision to help IT organizations have self-managing, dynamic systems. Solutions such as Microsoft Windows Mobile 6.1 and Microsoft System Center Mobile Device Manager 2008 are tuned to simplify managing systems and applications.

Together, they enhance on-device security and enforce over-the-air policies. They allow IT professionals to manage phones more efficiently within organizations, and give mobile employees access to confidential information on corporate networks with firewalls.

Features of Microsoft System Center Mobile Device Manager 2008:

- Helps protect sensitive information if the mobile device is lost or stolen
- Performs instant remote mobile device wipe to help reduce security risks
- Provides security enhanced behind-the-firewall access for mobile users
- Helps lower mobile device maintenance and troubleshooting costs and management complexity
- Provides greater scalability with support for thousands of mobile users on a server

To find out more about Microsoft System Center Mobile Device Manager 2008 visit

<http://www.microsoft.com/systemcenter/mobile/default.aspx>

CRM Accelerators

CRM Accelerators are a range of free-of-charge add-on solutions which are being developed for Microsoft Dynamics CRM 4.0 customers and partners. Each accelerator will showcase how the Microsoft Dynamics CRM 4.0 platform can be configured and extended to broaden marketing, sales and service capabilities. CRM accelerators provide additional functionality for deployments of Microsoft Dynamics CRM 4.0. Microsoft Dynamics CRM customers are encouraged to further configure these accelerators to meet their specific business needs.

Each accelerator may consist of the following:

- Importable data model
- Business process workflows
- Business Intelligence elements such as custom reports
- Functional code samples (strictly adhering to SDK guidelines)
- Documentation for installing, operating, localizing and extending the solution
- An automated installer

Each accelerator will be fully supported as per any other customization that follows SDK guidelines. Additionally, all samples are supplied with full source-code so they can be extended further to meet specific customer requirements. Because of Microsoft Dynamics CRM's services-based architecture and metadata-driven application capabilities, accelerators can be easily deployed for both on-demand and on-premise environments.

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. Delivery of these accelerators will be during the second half of 2008.

The list of accelerators is as follows:

- Analytics
- eService
- Event Management
- Enterprise Search
- Sales Methodologies
- Extended Sales Forecasting
- CRM Notifications
- Business Productivity

Following is a description of each accelerator to be released.

Analytics Accelerator

Many customers and partners will be familiar with Analytics Foundation for Microsoft Dynamics CRM 3.0 which was a business intelligence feature pack for Microsoft Dynamics CRM 3.0. Analytics Foundation for Dynamics CRM 3.0 included Dashboards, Key Performance Indicators (KPI's) and a suite of new reports. Analytics Accelerator for Microsoft Dynamics CRM 4.0 expands on this, and is designed to support a range of business intelligence "maturity" levels for customers and partners. The Analytics accelerator has been built to cater for differing business intelligence skill-sets and experience levels. Elements of the accelerator include:

- Sales, service and operations dashboards delivered with Microsoft SQL Server® Reporting Services (SSRS).
- Sales, service and operations dashboards and scorecards delivered with Microsoft PerformancePoint® Server.
- Additional reports delivered with SSRS.
- Two Online Analytical Processing (OLAP) cubes which are designed to allow customers to conduct in-depth analysis and key performance indicator (KPI) monitoring based on Microsoft Dynamics CRM 4.0 data. Customers can consume these cubes through Microsoft Excel®, Microsoft SharePoint® technologies and Microsoft PerformancePoint Server. The first OLAP cube is designed for simple setup and consumption, the second cube is more detailed and requires a more advanced knowledge of analytics and OLAP technologies within Microsoft SQL Server.
- Predictive analytics to provide statistical guidance in areas such as lead and sales opportunity management. There are several sample applications which ship as part of the accelerator that showcase how customers can leverage predictive analytics directly within the Microsoft Dynamics CRM 4.0 user interface.
- The analytics accelerator will work with SQL Server 2005 with some components enhanced to take advantage of SQL Server 2008.

The following images are taken from the beta version of the Analytics Accelerator:

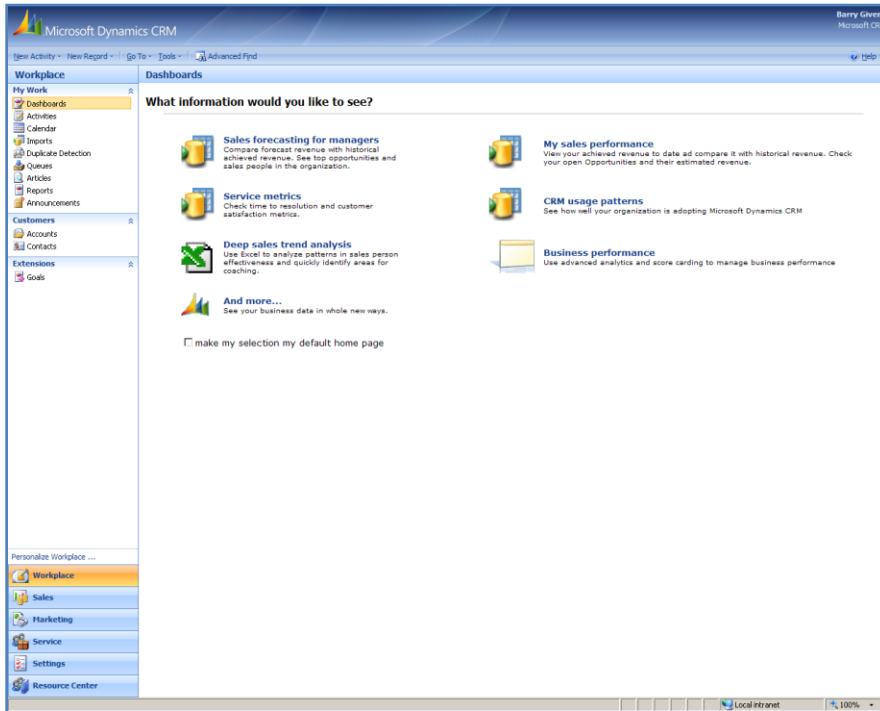


Figure 1: Beta version of the Analytics Accelerator landing page in Microsoft Dynamics CRM 4.0

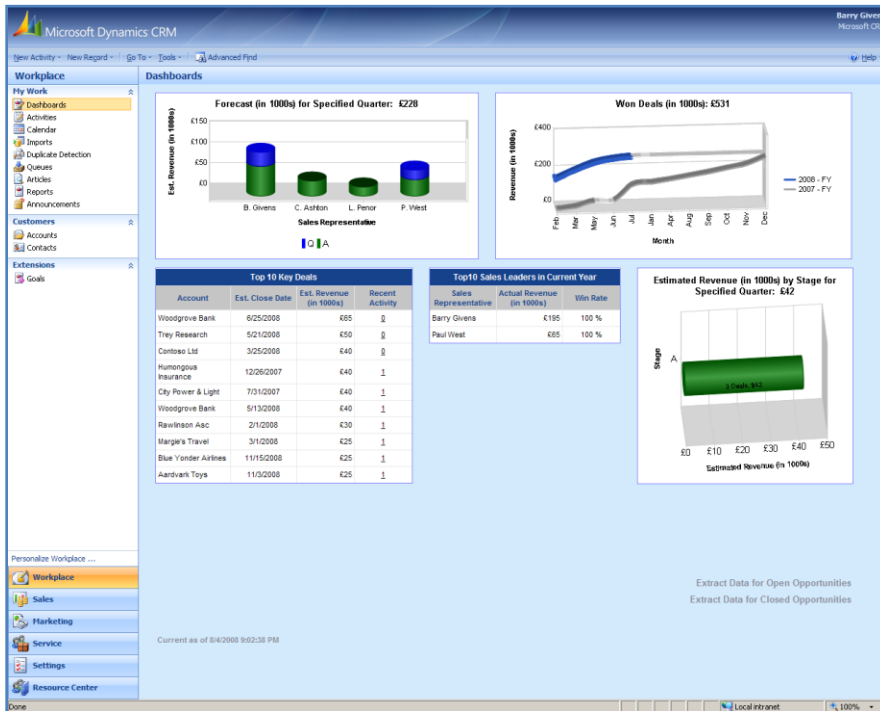


Figure 2: Beta sample sales dashboard for Microsoft Dynamics CRM 4.0

eService Accelerator

The eService accelerator provides businesses the ability to deliver self-service capabilities to their customers while tracking and managing these interactions in Microsoft Dynamics CRM.

Customer Service is generally considered a cost center where cost-savings and productivity are the top priorities for most businesses. This stands in stark contrast to marketing and sales which is usually viewed as a profit center where revenue generation is the focus. People that manage call centers or customer service operations are constantly looking for new processes and technologies that can help them drive customer service efficiencies. Essentially, they want to service more customers at less cost while at the same time maintaining (or even improving) customer satisfaction. This can be a difficult equation for organizations to solve.

eService provides the mechanism to help businesses solve that difficult equation. At its core, eService is comprised of a range of technologies that allow businesses to provide online support to customers, which can “deflect” calls and in-person visits, or at minimum reduce a portion of the cost to manage a service issue. As demographics shift worldwide and Internet technologies become more pervasive, many customers prefer to use an eService channel.

The Microsoft Dynamics CRM 4.0 eService accelerator provides customer self-service capabilities (via a web portal) as a configurable out-of-the-box offering. The web self-service portal exposes the following CRM functions to customers:

- Customer authentication into the portal and workflows to manage the setup of a contact as a web self-service customer.
- Customer profile updates to contact details; this capability is configurable allowing organizations to choose which attributes of the profile they want to expose to the customer portal such as name, contact details and communications preferences.
- The ability to view, create, edit and close service cases. There are two permission levels available to web portal customers:
 - Account-Level: these customers can view and modify all cases raised against the account they are associated with.
 - Contact-Level: these customers can only view and modify service cases that they themselves have raised.
- Online service scheduling allowing customers to search for convenient times and then book service appointments with the organization.
- Search against the Microsoft Dynamics CRM knowledge base (KB) using keywords. Once the appropriate KB article has been located the customer can then email that article to themselves or others.

The accelerator can either be used within the customer's own web portal or they can use the pre-built portal solution provided by Microsoft in the ASP.NET 2.0 Small Business Starter Kit <http://www.asp.net/downloads/starter-kits/small-business/>.

All source code from the customer portal solution is provided so that customers and partners can extend the solution further and tailor it to their specific business requirements.

The following images are taken from the beta version of the eService Accelerator:



Figure 3: Beta sample Customer Profile edit page

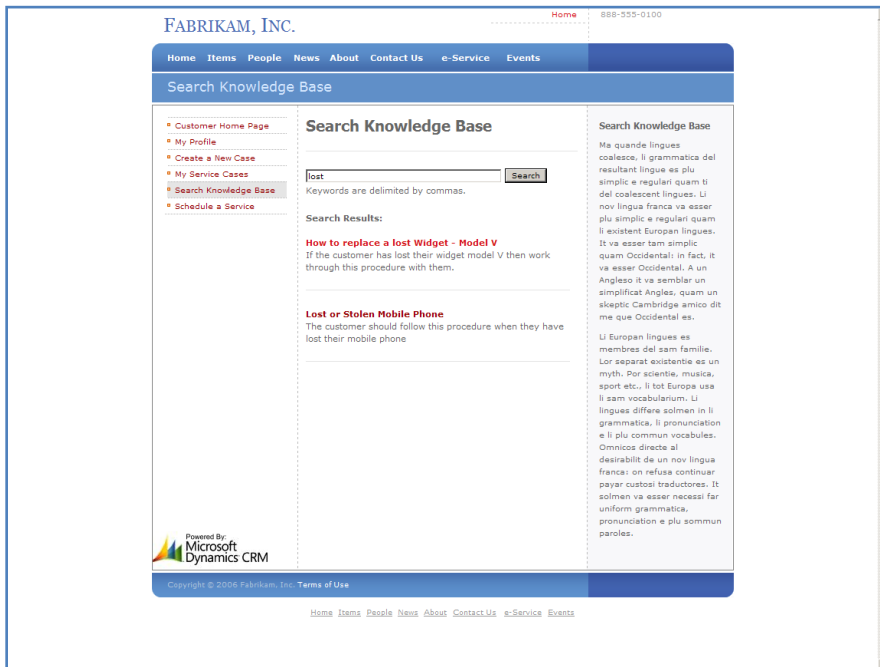


Figure 4: Beta sample KB Search page

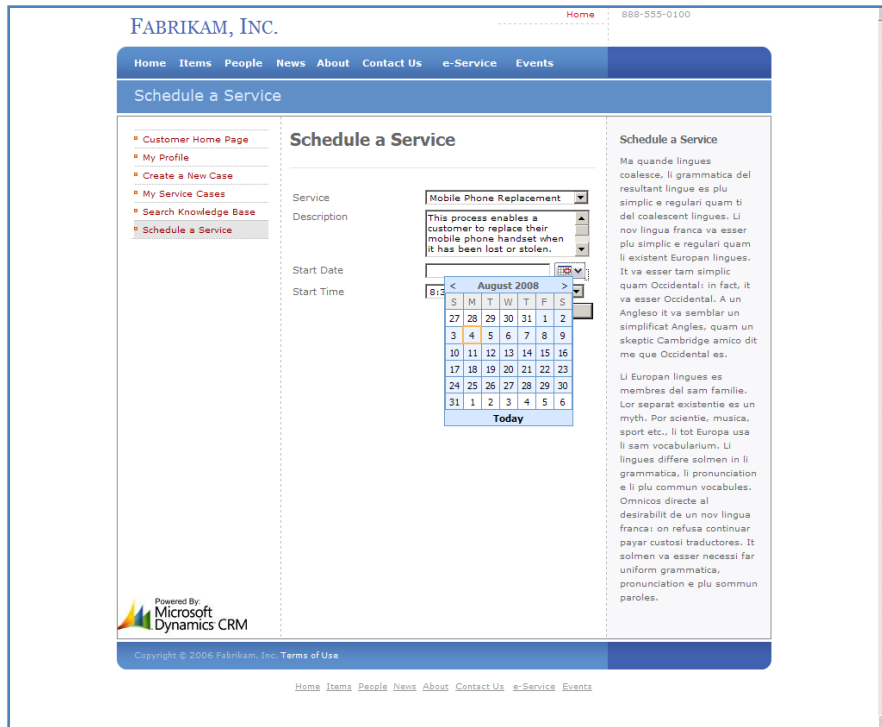


Figure 5: beta sample Service Scheduling page

Event Management Accelerator

The event management accelerator gives companies the ability to easily manage the planning, execution, tracking and reporting requirements for events. The event management accelerator focuses on three areas of event management, namely:

- Event Planning - logistics around an event such as:
 - Booking the venue
 - Presenters
 - Catering
 - Presentation content preparation
- Event Attendance - all aspects around managing the attendees such as:
 - Inviting the target audience via phone, fax, letter and email
 - Managing registrations via phone, letter, fax, email and web
 - Tracking all people who actually attended the event
- Event Review – Microsoft Dynamics CRM reports that measure the effectiveness of the event:
 - How many people attended the event?
 - What was the revenue impact of the event?

A core component of the event management accelerator will be a web application that customers and partners can deploy to allow web registration for their events and track these registrations in Microsoft Dynamics CRM.

The following images are taken from the beta version of the Event Management Accelerator:

Figure 6: beta sample Event Registration page

Enterprise Search Accelerator

The enterprise search accelerator allows Microsoft Office SharePoint Server (MOSS) customers to view and search for Microsoft Dynamics CRM data directly from their SharePoint portals. By combining these two technologies users from different areas of the business will be able to:

- View and edit any Microsoft Dynamics CRM data such as accounts, contacts, opportunities, sales orders, invoices, service cases and any custom entity data through SharePoint. The Microsoft Dynamics CRM security model is preserved and enforced so that users can only view or edit CRM information that their security role allows.
- Launch a SharePoint search which can return documents, emails, web content and Microsoft Dynamics CRM data.

The enterprise search accelerator provides one enterprise portal that users can search and view important customer information and documents from several sources within the organization. Additionally, the technology, Business Data Catalog (BDC), and techniques used with this accelerator can be employed to surface data from other line of business applications to further enrich the SharePoint portal.

The BDC makes it easy for people to connect to, find, and act on information stored in structured line-of-business systems (such as Microsoft Dynamics CRM) by using a declarative framework to securely integrate them into search results. With the BDC customers and partners

can configure actionable audience-specific portals, dashboards and mash-up interfaces for this data without writing any code.

The following images are taken from the beta version of the Enterprise Search Accelerator:

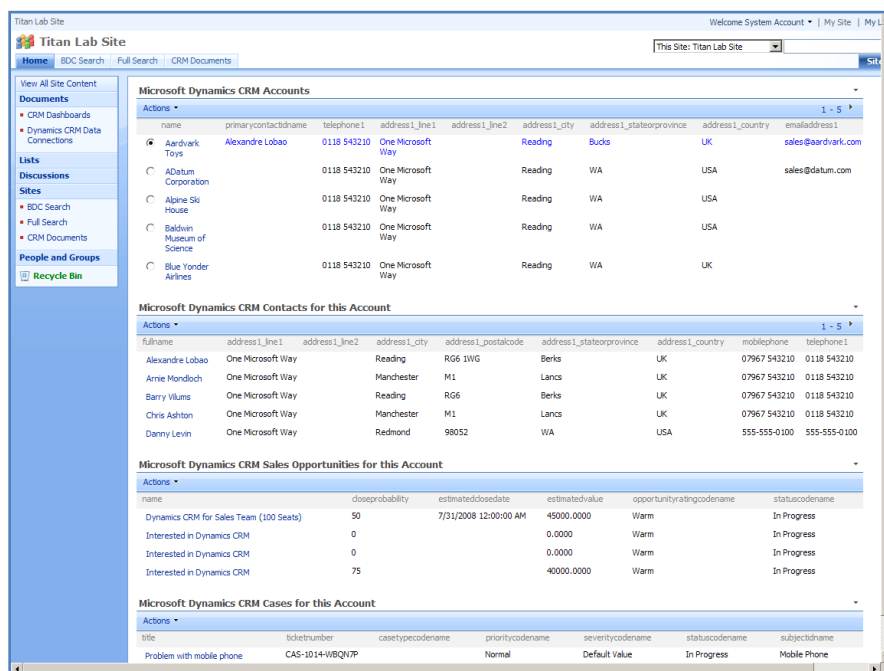


Figure 7: Sample SharePoint portal configured using the Enterprise Search Accelerator

Sales Methodologies Accelerator

The sales methodologies accelerator is for customers who work with or want to work with one of the leading sales methodology vendors, including: Target Account Selling (TAS), SPI Solution Selling and Miller Heiman. Each of these vendors has their own distinct software products which need to be integrated with Microsoft Dynamics CRM to provide a holistic approach to sales management. The sales methodologies accelerator will provide customizations, advice and guidance for customers on how these sales methodologies can be configured, managed and integrated with Microsoft Dynamics CRM 4.0.

Extended Sales Forecasting Accelerator

The extended sales forecasting accelerator enriches the out-of-the-box sales forecasting capabilities in Microsoft Dynamics CRM 4.0. Principally, sales users of Microsoft Dynamics CRM can review their individual sales pipeline and quickly classify opportunities as committed, excluded or upside. Sales managers can monitor and track sales targets, budgets and performance against these forecasts for specific time periods (e.g. months and quarters).

Underpinning these capabilities will be new Microsoft Dynamics CRM 4.0 reports that summarize sales performance for the organization as a whole or for individual salespeople.

CRM Notifications Accelerator

The CRM notifications accelerator allows users to subscribe to the CRM “business events” that are significant to them, e.g. a salesperson is interested in new leads and opportunities assigned to them whereas a customer service representative is interested in new service cases assigned to them. Once the user has subscribed (each user manages their subscription profile) to the types of events that are important to them they can elect how they want these event notifications to be delivered. Notifications are delivered via a Really Simple Syndication (RSS) feed and can be consumed with many desktop tools including Microsoft Outlook 2007 or the standard newsfeed Windows Vista® gadget.

The CRM notifications accelerator further drives system and process efficiency for users by giving them visibility into the business events which are directly relevant to their role.

Business Productivity Accelerator

The business productivity accelerator is a toolkit of timesaving customizations and workflows for Dynamics CRM 4.0. Final scoping is not yet complete but here is a glimpse of some of the components under consideration:

- Generic sales process workflows for simple and more complex sales organizations. For Microsoft partners there is a workflow process for the Microsoft Solution Selling Process (MSSP).
- Business data auditing workflows
- Customizations to manage a customer reference program with Microsoft Dynamics CRM 4.0
- Generic service process workflows for complaints management.

There are many other ideas under consideration for this accelerator and the final list will be communicated prior to final release.

BizTalk Server Integration

The current BizTalk adapter for Microsoft Dynamics CRM provides integration between Microsoft Dynamics CRM 3.0 or 4.0 and non-Microsoft business applications using Microsoft BizTalk® Server 2006 mapping capabilities. This adapter allows customers and partners to complete the following operations:

- Use Microsoft Dynamics CRM as a send adapter.
- Discover and use the schema of any Microsoft Dynamics CRM actions and entities.

Due out in the second half of 2008, a new release of the BizTalk Server adapter will be released to take full advantage of Microsoft Dynamics CRM 4.0. This adapter will allow customers and partners to leverage the multi-tenancy architecture in Dynamics CRM 4.0, i.e. integrate line-of-

business applications to various CRM deployments (also known as organizations). The new release of the adapter will continue to work with Microsoft BizTalk Server 2006.

SharePoint List Web Part for Microsoft Dynamics CRM 4.0

The current List Web Part for Microsoft Dynamics CRM 3.0 provides a subset of the Microsoft Dynamics CRM 3.0 record list functionality. It allows users to view Microsoft Dynamics CRM 3.0 records as a list from a SharePoint page, open records in Microsoft Dynamics CRM 3.0 from that list, and connect different Microsoft Dynamics CRM 3.0 List Web Parts to filter associated CRM lists. It supports the following versions of SharePoint:

- Microsoft Windows SharePoint Services 2.0
- Microsoft Office SharePoint Portal Server 2003
- Microsoft Office SharePoint Server (MOSS) 2007 (32-bit only)
- Microsoft Windows SharePoint Services (WSS) 3.0 (32-bit only)

The CRM records are displayed in a grid that behaves similarly to the grid within Microsoft Dynamics CRM 3.0. Users who have the proper privileges can perform actions such as create and edit.

Due out in the second half of 2008, there will be an updated SharePoint List Web Part for Microsoft Dynamics CRM 4.0. This web part will have the same features as the previous release but will also support the following:

- The multi-tenancy architecture of Microsoft Dynamics CRM 4.0; the web part is configured with the Microsoft Dynamics CRM organization that will supply the list data.
- Support for CRM on-premise and Internet Facing Deployments (IFD); support for Microsoft Dynamics CRM Online will be added in the first half of 2009.
- MUI and language packs in all languages supported by Microsoft Dynamics CRM 4.0
- MOSS and WSS 64-bit environments

On-Demand Microsoft Dynamics CRM

On-demand Microsoft Dynamics CRM combines your everyday productivity applications with powerful CRM software accessed over the Internet to improve marketing, boost sales and bolster 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 with no disruption to CRM system operations.

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/serviceproviders/solutions/hostedcrmpartners.mspx>.

Alternatively, customers may choose to subscribe to on-demand Microsoft Dynamics CRM through Microsoft directly; this service is called Microsoft Dynamics CRM Online. Please note that Microsoft Dynamics CRM Online is currently only available in the United States and Canada.

Microsoft Dynamics CRM Online

Between now and the release of Microsoft Dynamics CRM "V.Next" there is a separate release timetable for Microsoft Dynamics CRM Online. Each release will add additional features and value to the Microsoft Dynamics CRM Online platform. There are two releases of Microsoft Dynamics CRM Online planned between now and the release of Microsoft Dynamics CRM "V.Next" as follows:

Microsoft Dynamics CRM Online Release 2

Microsoft Dynamics CRM Online will launch a multi-network search engine marketing module, where we will debut integration with Microsoft Ad Center. The components of this include:

- Search engine keyword research, bid and purchase
- Ad creation and placement
- Online lead tracking
- Campaign performance measurement and dashboards

Microsoft Dynamics CRM Online Release 3

Final planning is concluding for Microsoft Dynamics CRM Online Release 3. There are three key themes for this release including:

- Enriching the analytics and business intelligence capabilities
- Service enhancements
- Enterprise manageability

Microsoft Dynamics CRM Online Release 4

Release 4 planning is currently still in progress in terms of features and functions. Architecturally however, Microsoft Dynamics CRM Online Release 4 will be based on the Microsoft Dynamics CRM "V.Next" platform.

Microsoft Dynamics CRM “V.Next”

The investments for the next release of Microsoft Dynamics CRM fall into three broad categories:

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

“V.Next” to deliver a new level of user productivity and collaboration capabilities

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 “V.Next” 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.

The specifics around delivering this new level of user productivity and collaboration capabilities are still in the detailed design phase but the following provides a glimpse of some of the areas that will receive investment.

Continue to improve the Microsoft Office Outlook experience: Further enhance the user experience and information viewing experience 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.

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 working towards a business application platform 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. The strategy is to open Microsoft Dynamics CRM to the world of Enterprise Content Management (ECM) provided by SharePoint.

Enrich business insight through improved business intelligence: providing users with the means to analyze and understand the information that impacts their role across sales, service and marketing. These visualizations could also be tailored through personalization (see above). The objective is to provide an interactive analytical tool for a user that is simple to use.

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.

"V.Next" to deliver continued enrichment of the core 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 specifics around the enriched core CRM capabilities are still in the detailed design phase and too broad to completely summarize in this document. During the coming months the full list of features will be scoped and prioritized and Microsoft will progressively communicate this to our customers and partners as they take shape. The following provides a glimpse of some areas that we will focus on.

Contact and Account Management: still the foundation of CRM; the goal is to further improve on the excellent contact and account management capabilities of Microsoft Dynamics CRM 4.0. This involves allowing users to even more effectively model and visualize 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). The focus is to make teams 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. Working with Microsoft's Unified Communications platform will provide even more capabilities for contact centers to leverage these channels with Microsoft Dynamics CRM.

Other areas: aside from the investments outlined above there are other aspects of Microsoft Dynamics CRM “V.Next” to be enriched, namely:

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

“V.Next” to provide a Best-of-Breed Business Solution Platform

Microsoft Dynamics CRM 4.0 has delivered a rich business application platform that is highly scalable and configurable. It provides a platform that delivers multi-tenancy for larger multi-national companies as well as hosting providers. Many Independent Software Vendors (ISV's) have adopted Microsoft Dynamics CRM 4.0 as a generic business application development platform where they can rapidly configure a completely unique application and associated data model and then employ their domain and .NET technical skills to create a solution not traditionally associated with customer relationship management. Examples of these applications include human resource management, vendor management, IT helpdesk, public sector citizen management, and grant management. These types of solutions are referred to by Microsoft as “xRM”, indicating that it is any solution that manages complex relationships across different organization types and industries.

Microsoft will invest further in the application platform across on-premise, partner hosted and Microsoft hosted for the next release of Microsoft Dynamics CRM to enable more partners and customers to rapidly configure and develop business solutions. The cornerstone of this investment is to provide a framework for application “packages” to run on this generic business application platform. Thus the underlying technology platform becomes an application engine to run a whole range of business applications. Microsoft Dynamics CRM simply becomes one business application that is run on the application platform. As with Microsoft Dynamics CRM 4.0, this application platform will be multi-tenanted and is therefore hosting ready. Imagine the possibilities of an application platform that can be readily configured, is enterprise scalable, provides extensive enterprise workflow capabilities and has the integration hooks with Microsoft Office and SharePoint!

The specifics around the business solution platform are still in the detailed design phase but the following provides a glimpse of some of the areas that will receive investment:

-
- Business data auditing capabilities.
 - Extended utilization of the Windows Workflow Foundation platform.
 - 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.
 - Platform 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 “V.Next”.

Conclusion

This document has outlined the future direction of Microsoft Dynamics CRM through to the next release. Between now and the release of Dynamics CRM "V.Next" Microsoft has an aggressive roadmap of innovation to broaden capabilities for new and existing Dynamics CRM 4.0 customers, namely:

- Mobility
- Accelerators
- BizTalk Adapter
- SharePoint List Web Part

Coupled with these solutions will be continued focus and expansion of our on-demand Dynamics CRM offerings whether that is through Microsoft directly (Dynamics CRM Online) or our extensive global partner network.

As we look towards the release of Dynamics CRM "V.Next" 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 Dynamics CRM
- provides a flexible and scalable business solution platform

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.

This briefing document will be updated periodically between now and the release of Microsoft Dynamics CRM "V.Next". Our intention is to keep our prospective and current customers, partners and interested parties informed of the full Microsoft Dynamics CRM roadmap. We look forward to keeping you informed of the innovations and exciting capabilities that Microsoft Dynamics CRM will deliver for you now and into the future!

The Microsoft Dynamics CRM Team

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

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