

HOSTED CRM

Microsoft Dynamics CRM 3.0

Introduction

Customer relationship management applications bring new levels of sales, customer service and overall profitability to businesses of all sizes. However, many businesses find it difficult to justify the upfront investment in such applications or lack available in-house technical resources. For these organizations, deploying CRM as a hosted service represents a cost-effective alternative. It enables them to take advantage of sophisticated customer acquisition and retention tools that can help build their business, without a significant, upfront capital investment. Hence the market has seen increasing demand for hosted CRM solutions.

However, one key factor the current hosted offerings lack is **choice**. Businesses are stuck with a one-size-fits-all solution that often does not meet expectations. Microsoft Dynamics™ CRM 3.0 addresses the issue of choice, offering a broad scope of architectural, delivery and licensing options to fit your business needs. The solution also integrates with the broader Microsoft® offering of products and services to provide a holistic platform for business communication and collaboration. This document is an overview of how the Microsoft CRM hosted solution offers choices to address your individual business needs.

Microsoft Dynamics CRM 3.0

Microsoft CRM is a customer relationship management solution that provides the tools and capabilities needed to create and easily maintain a clear picture of customers from first contact through purchase and post-sales. With modules for **sales**, **marketing**, and **customer service**, Microsoft CRM delivers a fast, flexible, and affordable solution that drives consistent, measurable improvements in every business process, enables closer relationships with customers, and helps achieve new levels of profitability.

The Power of Choice

Microsoft CRM offers the flexibility and freedom to meet your business needs today and tomorrow
Powerful Features - Flexible Options - Transparent Migration

User Experience

Native Outlook
Web Browser
Online & Offline

Business Fit

Fully Customizable
Application Integration
Vertical Solutions

Flexible Deployment

Hosted
On-premise
Hybrid

Licensing Options

Subscription
Perpetual
Financed

Microsoft CRM 3.0 Hosted Solution

SALES: CREATE DEMAND AND GENERATE NEW BUSINESS

No matter how complex a company's sales processes are, Microsoft CRM provides easy-to-use features and capabilities to help improve the way sales and marketing organizations target new customers, manage marketing campaigns, and drive sales activities. The Sales module helps you:

- Increase the sales pipeline with qualified sales leads and opportunities.
- Maximize the sales strategy through centralized, coordinated sales processes.
- Enable the sales force to arrive prepared for important customer meetings by accessing sales opportunities and service histories for each customer.

MARKETING: BETTER DECISION-MAKING AND A CLEARER VIEW OF CUSTOMERS

In today's information-driven economy, most companies are awash in customer data. Success requires the ability to transform that information into clear, actionable knowledge and respond more quickly to changing customer needs and preferences. With Microsoft CRM, sales and marketing organizations can have instant access to complete customer information no matter where it is stored, along with the tools needed to turn that information into action. This allows your sales and marketing force to:

- Create a single view of each customer based on every piece of information collected.
- Focus marketing efforts using intelligent list and segmentation tools.
- Execute smarter marketing campaigns with powerful analytic tools.
- Understand what customers are really saying with reporting and analysis tools built on Microsoft SQL Server™

CUSTOMER SERVICE: PROVIDE MORE VALUE TO CUSTOMERS

Every interaction with a customer is an opportunity to strengthen that customer's loyalty by providing high levels of personalized service. Because it helps your company offer customers targeted, relevant information about the products and services that they are interested in, Microsoft CRM can help take advantage of opportunities to enhance customer relationships while maximizing the ability to both up-sell and cross-sell. With the Customer Service module your organization can:

- Respond faster to service issues by delivering the right answers to customers in real-time.
- Resolve customer issues according to desired service levels.
- Use centralized scheduling and dispatching to manage resources and coordinate services.

FLEXIBLE PLATFORM: A SOLUTION THAT GROWS WITH YOUR BUSINESS

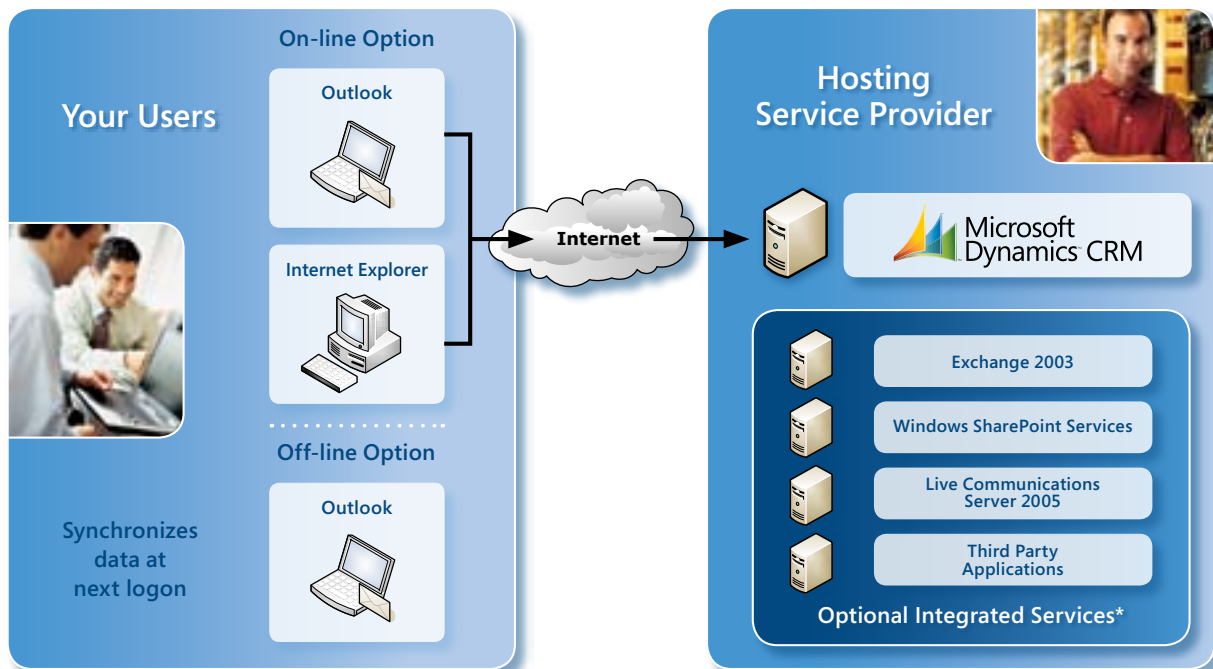
Microsoft CRM allows for powerful customization and integration to meet your business needs. Your Microsoft Certified Partner can help you customize and integrate a hosted Microsoft CRM solution into your business. This includes the integration of third party ISV applications such as specialized vertical solutions, giving you the ultimate in flexibility.

Key Benefits

Works the Way You Do	Rich CRM capabilities with a native Microsoft Office experience
Works the Way Your Business Does	Consistent customer processes with real-time business insight
Works the Way Technology Should	Fast to deploy, simple to customize, and easy to manage

The Power of Choice

Microsoft CRM addresses the key opportunities — and challenges — that determine the success or failure of any CRM initiative: user adoption, business fit, and total cost of ownership. The Microsoft CRM hosted solution is built on the exact same code base as Microsoft CRM Professional Edition, providing a choice of user interface, on-line or off-line usage, flexible solutions and deployment, and the ability to migrate as your business needs evolve.



Microsoft CRM offers you true power of choice, including:

USER EXPERIENCE:

Users have a full range of client interface options, just as they do with an on-premise solution:

- **Microsoft Office Outlook®**
Users have access to the complete set of Microsoft CRM functionality without ever leaving Microsoft Office. Users also have the option of working off-line and automatically synchronizing the next time they log in.
- **Internet Explorer**
Hosted CRM users also have access to the complete set of Microsoft CRM functionality using Internet Explorer 6.0 or higher.

Note: Users can switch between access methods any time they wish.

Microsoft CRM 3.0 Hosted Solution

FLEXIBLE SOLUTION SCENARIOS:

Most customers will use Microsoft CRM in conjunction with other solutions, such as Microsoft Exchange Server and third party ISV applications. For this reason, Microsoft provides flexible options to fit your unique business needs. Following are three possible solution scenarios:

- **Microsoft CRM Hosted Solution with On-premise Exchange**

In this scenario the only service that is hosted off-site is the CRM solution. Many organizations already operate on-premise Exchange Servers and do not wish to move this service off-site.

- **Microsoft CRM Hosted Solution with Hosted Exchange**

In this scenario you can opt to host Exchange along with Microsoft CRM 3.0. This frees you from needing any messaging systems on-site as the service provider manages and maintains both services.

- **Additional Applications and Services**

In addition to the Microsoft CRM hosted solution, many service providers offer a wide range of other integrated applications and services, including Microsoft Windows® SharePoint® Services, Microsoft Office Live Communications Server, and third party ISV applications.*

LICENSING AND DEPLOYMENT:

In addition to the flexible solution scenarios there are a number of licensing options and deployment models specific to Microsoft CRM. Your business needs determine the correct choice for both Microsoft CRM licensing and deployment. For licensing you may decide to:

- **Pay on a per user subscription basis**
- **Purchase the application upfront with perpetual licensing**
- **Arrange for Microsoft financing**

You can change licensing and deployment models as your business needs change. For example, you might begin with a hosted subscription service but, as more departments begin to take advantage of Microsoft CRM, you may convert to an in-house model under a perpetual licensing option.

To summarize, the four licensing and deployment choices for Microsoft CRM are:

- **Hosted with subscription licensing**
Subscribe to the application and access it via the Internet.
- **Hosted with perpetual licensing**
Own the application entirely but it resides at a service provider's data center.
- **On-premise with subscription licensing**
Keep the CRM system on your site yet pay on a per month per user basis while a service provider manages the system remotely.
- **On-premise with perpetual licensing**
Like any other traditional business application.

For more information visit www.microsoft.com/crm or contact your local Microsoft Partner.

**NOTE: All options may not be offered by your service provider.*

Microsoft

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