Where Microsoft Dynamics® CRM Meets Information: A Success Story

User Adoption Critical For A Successful CRM Implementation

Presented by:

AND

Written by Peter R. Chase
Executive Vice President, Scribe Software Corporation

October 2010

Microsoft Business Solutions
ISV/Software Solutions

Where Microsoft Dynamics CRM Meets Information: A Success Story

WHITE PAPER

As you plan your implementation of Microsoft Dynamics CRM, consider the following: adoption continues to plague the CRM industry, particularly in the area designed to track and manage sales operations. Will your implementation of Microsoft Dynamics CRM be any different, or will it end up as another expensive shelf-ware experiment?

The answer to this question may depend on recognizing the one significant difference between CRM users versus users of other systems you have implemented, such as accounting, inventory management, and procurement systems. The difference is, you cannot mandate CRM usage. Can you imagine an accounting clerk deciding they were not going to use the accounting system? The use of the accounting system is essential for them to perform their duties. The same does not hold true for CRM. Are you prepared to fire your top salespeople if they don't put their data into Microsoft Dynamics CRM system (hereinafter referred to as "Dynamics CRM")? In too many cases, salespeople are determining that the corporate CRM system is more a hindrance than a help and are not using it, with little or no consequence to this decision. So what option are companies left with? You must give your salespeople solid reasons to use your Dynamics CRM system or face the same fate.

Motivating salespeople is generally quite simple; envisioning a larger w-2 is typically all the motivation they need. Short of paying salespeople for every byte of data they put into the CRM system, the most straightforward way to drive adoption, is to convince the sales team that the use of the system will enable them to sell more. The formula for selling more is simple; how can a salesperson maximize sales in the limited amount of selling time they have? The best salespeople constantly qualify their time so that they are working on things that have the highest probability of delivering the highest amount of revenue.

How do you help your sales team more? Give them information that enables them to qualify their time better so they are working opportunities with the highest probability of closing. And when they are working on those opportunities, make sure they are completely informed about the customer at the point of engagement. Information is power; in this case the power to sell more.

So how does all this translate back to your company's Dynamics CRM implementation? Quite simply, it is all about information. Make your Dynamics CRM application a rich information delivery mechanism for the sales team and they will use it to sell more. Accomplish this, and your salespeople will gladly reciprocate by adopting the technology and providing you with the critical business intelligence you are seeking about your customers and prospects.

Integration is the area where you can deliver tangible benefits within Dynamics CRM. As it turns out, integration is also the most highly misunderstood area in CRM. Most people when they think about integration describe it as the integration of back office processes with Dynamics CRM. In fact, process level integration with the back office is a highly complex task that, except in certain industries, may not produce enough return to justify the effort.

What companies in all industries could gain from is the aggregation of key customer information within Dynamics CRM, providing one complete view of the customer. This single customer view enables your sales team to react quicker, sell more, and service customers better.

Do your sales leads come from a variety of different channels including inquiries on your Web site, outreach campaigns from external telemarketing firms, purchased lists, marketing campaigns, and trade show events?

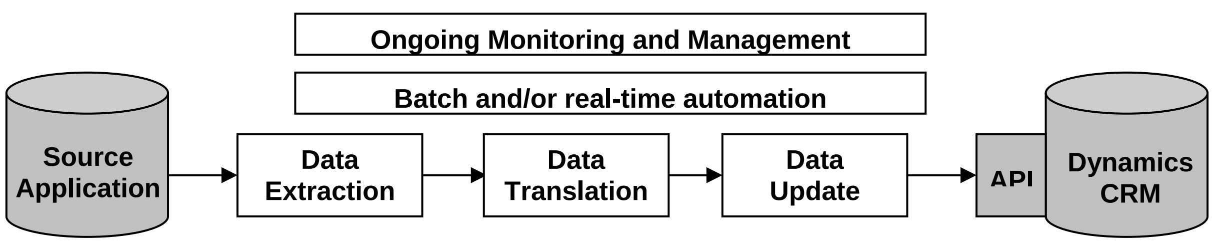
Would your sales people benefit from having a complete profile of their customers in Dynamics CRM that includes their order history, invoice history, the products they have installed, current maintenance agreements, and current credit status?

Would your sales people benefit from receiving alerts around key customer activity including past due orders or invoices, leads from contacts within strategic accounts, expired maintenance agreements, etc?

Do you have other systems, such as call center, support, and service that track and manage aspects of your customer relationship that you would like to synchronize with Dynamics CRM?

If you answered "yes" to any of these questions, then you could benefit from a straightforward integration solution that can deliver this key information into Dynamics CRM.

The following diagram summarizes the key capabilities required to support the integration requirements outlined above:



As depicted in this diagram, there are five major capabilities that you will require to perform these data aggregations as follows:

- ***Data Extraction*** – You will require direct access to your source applications via a database or a proprietary application programming interface ("API",) from enterprise applications such as Great Plains, JD Edwards, SAP, MAS 90/200/500, and Siebel. You will also require the ability to capture net changes either through source queries or via published messages from the source where available.
- ***Data Translation*** – It is likely that the semantics and format of many fields your source data will be different than those in Dynamics CRM. Important capabilities include parsing and concatenating text fields, performing date and numeric calculations, executing conditional logic, and performing lookups to resolve synonym values. You will also need to maintain a cross reference of primary key values in order to apply updates from one record in your source to the corresponding record in Dynamics CRM.

- ***Data Update*** – This capability is the most crucial, yet complex area of your integration task. Capabilities you should look for include (i.) avoiding duplicates using fuzzy logic (like comparing elements of the company name and zip code to look for an Account match) for record lookup, (ii.) performing insert and update operations against multiple objects within Dynamics CRM when processing a single source record, and (iii.) performing all target processing against the Dynamics CRM integration API to ensure that all data imported has been validated by Dynamics CRM's application rules.
- ***Automation*** – This is where utilizing a customizable template model that incorporates a one-step process from source to target is very useful. Once you have designed your business process, you will need to implement an automated event detection mechanism to initiate an update to Dynamics CRM. Look for a solution that supports both batch and message-based processing. Each of those approaches is appropriate in different integration scenarios.
- ***Monitoring and Management*** - Once you have developed and implemented your data aggregation solution, you need to consider the ongoing management of the solution as well. You should look for a technology that (i.) enables you to remotely support the solution (including start and stop processes, diagnose errors, etc.) via your web browser, (ii.) will automatically alert an administrator via email when processes fail, error, or produce abnormal data conditions, and (iii.) can scale across multiple processors to support high volume data scenarios.

Traditional approaches to data aggregation for CRM cover a broad spectrum from custom development to the use of sophisticated technologies such as Microsoft's BizTalk Server. Unfortunately, these choices represent approaches that are either way too little or way too much. In the case of custom development, someone has to code all of the functionality outlined above in order to deliver a workable solution. More often than not, these custom solutions are either lacking in functionality, unreliable, or difficult to manage. In addition, they are inflexible to changes in your business.

BizTalk Server, on the other hand, may include some of the functionality required, but is designed as more of an infrastructure backbone to support a wide range of integration scenarios. This poses two challenges. First, BizTalk Server lacks quite a bit of the specific CRM focused functionality needed, forcing you to fill in the blanks with custom coding (and all the challenges of custom coding outlined above). Secondly, it tends to be very complex to install, configure, and manage, and generally requires significant additional hardware and software infrastructure investments. You can quickly lose track of the fact that you just want to get customer data to the sales team.

Scribe Insight for Dynamics CRM is a solution that has been purpose-built for aggregating customer data into Dynamics CRM from other applications. It's powerful, graphical design and management environment enables you to rapidly create solutions, within your current infrastructure to provide your salespeople with one complete view of their customers within Dynamics CRM.

About Scribe Software Corporation

Scribe Software Corporation provides cost-effective, no-coding solutions that can be used as the only tool businesses need to integrate virtually any application, data source or Software as a Service (SaaS) platform. Scribe solutions are simple to configure and provide ease of modification as business processes change. They are especially popular among organizations running Microsoft Dynamics CRM, Dynamics GP, Dynamics NAV and Sage SalesLogix applications as well as Salesforce.com and Microsoft Dynamics CRM Online. Scribe Software is led by experienced technology executives from Microsoft, Oracle, AutoDesk, i2, Vitria, Dun and Bradstreet, and WebTrends. For more information about Scribe, please visit www.scribesoft.com

About NexusTek

Headquartered near Denver in Centennial, CO, NexusTek is a Microsoft Gold Certified Partner that provides growing and medium size organizations with network services, managed IT services, and business software solutions based on Microsoft Dynamics SL and Microsoft Dynamics CRM. Since 1996, the company's team of expert software consultants and certified systems engineers has been helping businesses leverage technology to manage and share information, automate processes, and create efficiencies. For more information about NexusTek, please visit www.nexustek.com.

About the author

Peter R. Chase is Executive Vice President and founder of Scribe Software Corporation. With over 10,000 customers, Scribe is the leading provider of CRM integration solutions. In his capacity at Scribe, Mr. Chase has advised numerous CRM vendors as they formulated their strategic integration strategies. He has also worked with many of Scribe's customers to ensure a successful rollout of their CRM integration solutions.

Scribe Software Corporation
Three Bedford Farms Drive
Bedford, NH 03110 USA

Tel. 1.603.622.5109
Fax: 1.603.622.3862

Email: info@scribesoft.com
www.scribesoft.com