



Microsoft Dynamics™ CRM: The Power of Dialogs

March 2012



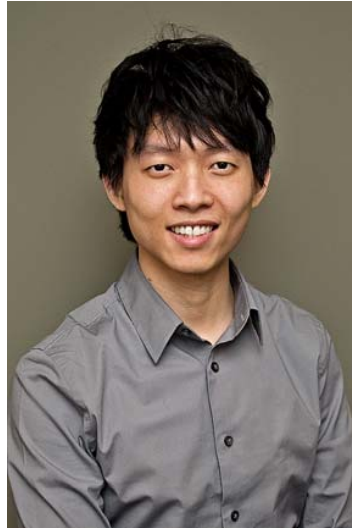
Assurance ■ Tax ■ Consulting

Welcome!

Important Web Seminar Notes

- We have automatically muted the line. During the presentation, all participants will be in listen-only mode
- Please turn off all webcams
- Following the presentation we'll have a Q&A session. Submit questions via the Q&A feature. Simply select the Q&A window, type your question into the dialog box, and click the "Ask" button
- The slides and recording of this call will be sent to attendees for today's program
- Having technical difficulties?
 - Call 800.374.1852 or
 - E-mail pfs@intercall.com
- For audio help, please call 1.800-374.2441

Introduction



Hien Tieu

Associate

856.722.6230

Hien.Tieu@mcgladrey.com

Agenda

- Changes to Workflow Processes
- Introduction to Dialog
- Dialogs in Action
- Automate Your Business Processes
- Leveraging Dialogs in CRM 2011

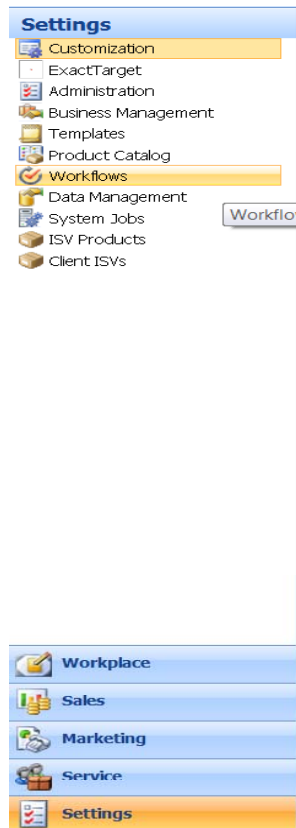
What Changed?

- Some of the biggest changes in Microsoft CRM 2011 have been in the workflow engine

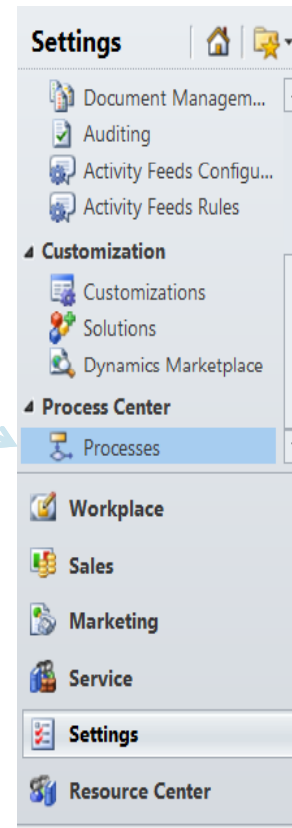
Microsoft CRM 4.0	Microsoft CRM 2011
Workflow Process is under Settings.	Workflow Process is not under Settings.
Workflow	Workflow is renamed to Processes
No Process Center, no Dialogs	Processes contains Workflows and Dialogs.

User Interface Differences

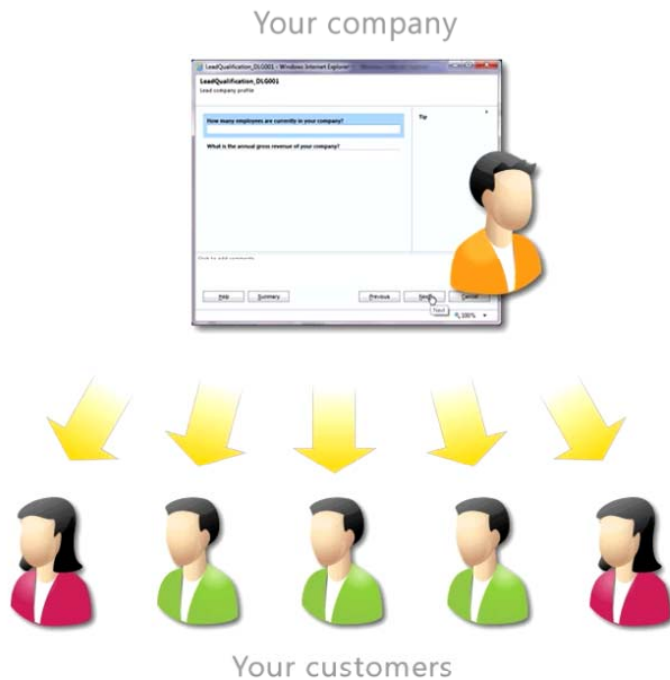
- Dynamics CRM 4.0



- Dynamics CRM 2011



Optimize Business Processes



Workflow vs. Dialog

- A WORKFLOW is a sequence of steps which can be used to automate business processes.
- A DIALOG is an interactive form which can be launched from any record to facilitate:
 - Information gathering
 - Record creation
 - Script/process adherence
 - Simplifying complex forms

Dialog Features



Advantages of the Dialog Feature

Instances where wizard or call script are needed for users

Guide user through series of automated steps

Ensuring consistent business practices

Requiring collection of vital information from a customer or process

More user interaction compare to workflow

Applications for Dialogs

Call Center Scripts:

- How do your inbound call representatives handle customer issues? Do they follow a script? How do they document customer responses?
- Create a script in CRM based on the issue the customer is experiencing and have your reps type the answers as the questions are asked.
- Use dialogs/child dialogs to build out a complex call center scripts.

Applications for Dialogs

Automate your business logics

- Taking a sale inquiry from the customer.
- Create a phone call.
- Start the Dialog session.
- Greet the caller.
- Follow the script.

DEMO

Dialogs in Action



Why Use Dialogs? (Continued)

Prospecting for New Customers?

- The dialog user interface contains script for your call specialist to follow during their calls.
- Then it creates a LEAD record based on certain inputs in the dialog.
- For example, it can create a potential LEAD record if the person you are calling is interested in buying in the next 6 months.

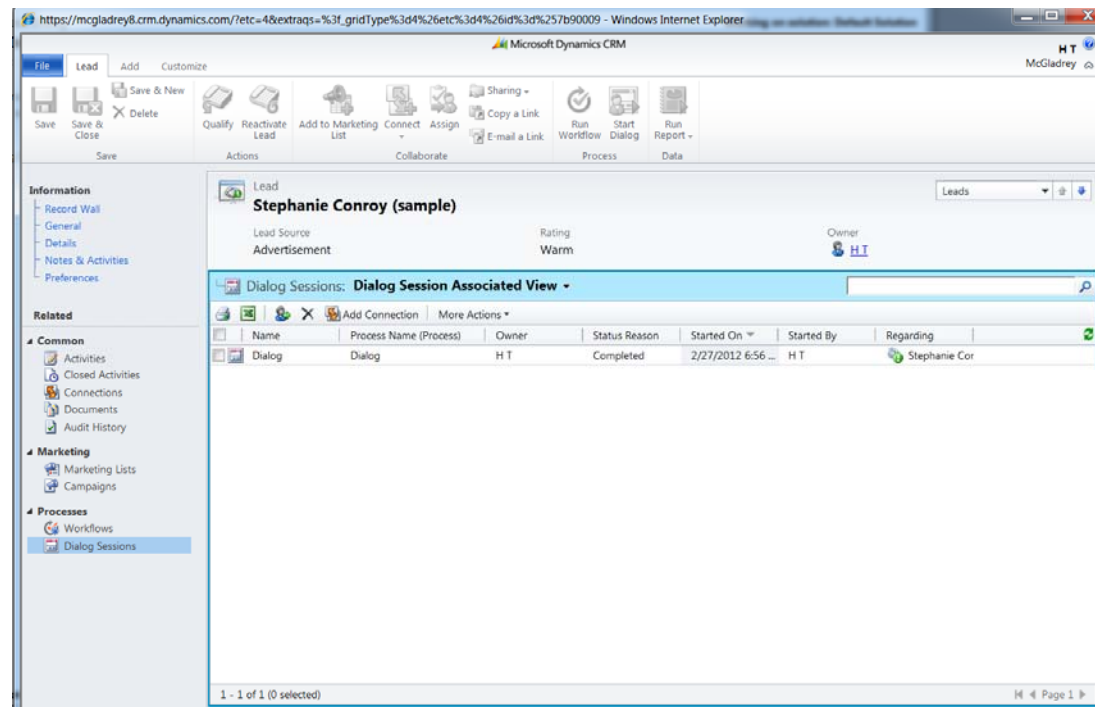
Applications for Dialogs (Continued)

Qualifying Opportunities:

- Create a simplified opportunity form with a dialog to guide representatives through the process of entering an opportunity step-by-step.

Dialog Results

- The Dialog Session records
 - Who ran the dialog
 - What the responses to the questions were
 - When the dialog was ran.



The screenshot displays the Microsoft Dynamics CRM interface for a lead named Stephanie Conroy (sample). The lead source is 'Advertisement' and the rating is 'Warm'. The owner is 'H T'. Below the lead information, a table titled 'Dialog Sessions: Dialog Session Associated View' shows a single record for a completed dialog session.

Name	Process Name (Process)	Owner	Status Reason	Started On	Started By	Regarding
Dialog	Dialog	H T	Completed	2/27/2012 6:56 ...	H T	Stephanie Cor

Leveraging Dialogs in CRM 2011

- Decreases manual processes.
- Maintains consistency of data.
- Reduces processing costs.
- Optimizes business operations.

Q & A

- Submit questions via the Q&A feature. Simply select the Q&A window, type your question into the dialog box, and click the “Ask” button
- The slides and recording of this call will be sent to attendees for today’s program

Hien Tieu (Hin)

856-722-6230

Hien.Tieu@mcgladrey.com



facebook.com/McGladreyTBS



twitter.com/McGladreyTech
twitter.com/McGladreyERP

McGladrey is the brand under which McGladrey & Pullen, LLP serves clients' business needs.

McGladrey & Pullen, LLP is the U.S. member of the RSM International ("RSMI") network of independent accounting, tax and consulting firms. The member firms of RSMI collaborate to provide services to global clients, but are separate and distinct legal entities which cannot obligate each other. Each member firm is responsible only for its own acts and omissions, and not those of any other party.

McGladrey, the McGladrey signatures, The McGladrey Classic logo, *The power of being understood*, *Power comes from being understood* and *Experience the power of being understood* are trademarks of McGladrey & Pullen, LLP.

© 2012 McGladrey & Pullen, LLP. All Rights Reserved.



Assurance ■ Tax ■ Consulting