



Microsoft Dynamics™ CRM 3.0

Professional

Redefine customer relationships with the complete, affordable customer relationship management (CRM) solution for driving measurable improvements across all customer management processes.

In today's complex business world, competitive advantage is harder to achieve—and even more difficult to maintain—than it has ever been before. In a time of instant global communication and ubiquitous information, the ability to develop a deep understanding of your customers and your markets is critical. Success ultimately depends on whether your organization can respond with speed, knowledge, and confidence to the ever-shifting needs of your customers and the ever-changing strategies of your business competitors.

Microsoft Dynamics™ CRM 3.0 Professional, formerly known as Microsoft® Business Solutions CRM, is a complete customer relationship management solution that provides all of 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 3.0 Professional delivers a fast, flexible, and affordable solution that drives consistent, measurable improvements in every business process, enables closer relationships with customers, and helps your company achieve new levels of profitability.

The Microsoft CRM 3.0 Professional user experience has been designed to be a natural extension of Microsoft Office and Outlook®, providing a familiar and intuitive work environment that fosters user adoption and productivity. Because the product is built on the scalable and secure .NET platform and leverages standard tools and technology, including Microsoft SQL Server™, Microsoft BizTalk® Server, and Microsoft Visual Studio®, Microsoft CRM 3.0 Professional allows you to take advantage of your existing IT investments and in-house expertise to minimize your total cost of ownership.

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

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Real-World Technology for Real-World Business

WORKS THE WAY YOU DO

Microsoft CRM 3.0 Professional integrates directly into Outlook and other Microsoft Office applications including Microsoft Office Word, Excel, and PowerPoint®, enabling your employees to work within the familiar, comfortable Outlook environment. The result: everyone in your company will quickly be able to begin using Microsoft CRM 3.0 Professional tools for managing sales, services, and marketing processes.

- **Manage and develop customer relationships** more easily by handling customer management tasks—including sending and managing e-mail, storing business contacts, and managing your appointment calendar—without leaving Outlook.
- **Access customer information anywhere** through enhanced data synchronization and mobility features that will enable your sales, marketing, and service personnel to take advantage of the tools and information they need no matter where they are.
- **Improve productivity through automation** using built-in intelligence that simplifies and automates everyday tasks.
- **Create personalized experiences** through workplace profiles that provide employees with instant access to the customer information and activities they use most.

WORKS THE WAY YOUR BUSINESS DOES

Every company has its own processes, its own culture, and its own way of reaching out to customers. Microsoft CRM 3.0 Professional is a flexible solution that can be quickly customized to your company's current needs while providing a flexible, scalable platform that will grow as your business expands.

- **Meet your company's business requirements** by tailoring Microsoft CRM 3.0 Professional to match your company's specific business situation. Intuitive, Web-based design tools make it easy to modify application forms, data fields, and relationships.
- **Streamline business processes** through process automation that lets your company transform repetitive tasks into powerful, automated business workflow.
- **Integrate applications and information** using Web services to create seamless links across systems and platforms within your company and out to partners and customers.
- **Measure the success of your business processes** with powerful tracking and analytic tools that help sales managers monitor their business and make better decisions more quickly.

WORKS THE WAY TECHNOLOGY SHOULD

Mergers, acquisitions, and years of shifting IT priorities have left many companies struggling with the problem of how to integrate a wide range of often incompatible legacy applications. Microsoft CRM 3.0 Professional was created to enable companies to standardize and consolidate customer information no matter where it is created or stored.

From more reliable installations or upgrades to improved performance, more streamlined deployment and management, and enhanced security, Microsoft CRM 3.0 Professional provides capabilities that will minimize administrative and operational costs and improve user productivity. Designed to provide a highly extensible platform, Microsoft CRM 3.0 Professional can be easily customized to meet the specific processes and requirements of your company's sales, marketing, and service organizations.

- Protect the security of customer information with a fail-safe platform designed to help keep your company's business data safe, secure, and confidential.
- Get up and running quickly with streamlined installation processes and enhanced diagnostic and troubleshooting tools that significantly reduce setup time.
- Achieve faster results when searching across large volumes of customer information with optimized data views and queries.
- Ensure high up-time and availability with fault tolerance and failover protection. Deploy Microsoft CRM within clustered Web, database, and e-mail server environments.
- Monitor the health of your CRM environment with centralized management and notification tools.
- Install Microsoft CRM automatically with or without a local data store. The zero-footprint browser client provides a rich CRM experience with full application capabilities.

The value of a CRM solution depends on how quickly it is embraced by the sales, marketing, and customer service employees who will use it. Microsoft CRM 3.0 Professional was created specifically to ensure that all users can take full advantage of its features with minimal training. And because it provides streamlined installation and management, seamless integration with systems across your company and beyond, and the highest levels of reliability, scalability, and security, it will help your company improve productivity, control costs, and maximize return on investment.

Professional Solutions with Full CRM Coverage

SALES: CREATING DEMAND AND GENERATING NEW BUSINESS

No matter how complex your company's sales processes are, Microsoft CRM 3.0 Professional provides easy-to-use features and capabilities to improve the way your sales and marketing organization targets new customers, manages marketing campaigns, and drives sales activities.

- **Increase your sales pipeline** with qualified sales leads and opportunities. Take advantage of analytics and embedded coaching to maximize opportunities to cross-sell products and services.
- **Maximize your sales strategy** through centralized, coordinated sales processes, including scripts and other activities.
- **Help your sales force arrive prepared** for important customer meetings by accessing sales opportunities and service histories for each customer.
- **Unify customer e-mail and responses** by automatically capturing discussion threads as part of each customer's history record.

MARKETING: BETTER DECISION-MAKING AND A CLEARER VIEW OF YOUR 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 3.0 Professional, your sales and marketing organization will have instant access to complete customer information no matter where it is stored, along with the tools needed to turn that information into action.

- **Create a single view** of each customer based on every piece of information your company collects, all stored in a single location that is accessible across sales, marketing, and customer services organizations.

- **Focus your marketing efforts** using intelligent list and segmentation tools to reach prospective customers more effectively.
- **Execute smarter marketing campaigns** with powerful new analytic tools found in SQL Server, including data mining and business intelligence capabilities. Take advantage of new features that make it easy to create templates based on successful campaigns.
- **Understand what your customers are telling you** with reporting and analysis tools built on SQL Server Reporting Services that provide the precise customer knowledge your company needs to respond quickly to customer demands and changes in the marketplace.

SERVICE: PROVIDE MORE VALUE TO YOUR CUSTOMERS

Every time someone in your organization interacts with a customer, it is an opportunity to strengthen that customer's loyalty to your company by providing high levels of personalized service. Because it can help you offer your customers targeted, relevant information about the products and services that they are interested in, Microsoft CRM 3.0 Professional can help you take advantage of opportunities to enhance customer relationships while giving your company the ability to maximize both up-sell and cross-sell.

- **Respond faster to service issues** by delivering the right answers to customers in real-time. Take advantage of the integrated Microsoft CRM knowledge base for instant access to manuals, frequently asked questions, and troubleshooting tips.
- **Resolve customer issues** according to desired service levels. New features for automatic escalation and routing ensure that service requests are sent to the appropriate people.
- **Schedule and dispatch service resources** using new features that make it easy to find professionals who can deliver the right services. Use centralized scheduling and dispatching to manage resources and coordinate services.



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MICROSOFT CRM 3.0 PROFESSIONAL MODULES

Sales	Opportunity management	Convert leads to opportunities and track throughout the sales cycle with customizable workflow rules
	Sales process management	Use customizable workflow rules and selling methodologies to ensure opportunities are tracked and closed consistently and efficiently.
	Quotes	Create accurate quotes using a full-featured product catalog that supports complex pricing levels, units of measure, and discounts.
	Fax integration	Increase productivity within your company by enabling your employees to create, send, and receive faxes right from their desktop.
	Order management	Convert quotes to orders that can be modified and saved until they are ready to be billed as invoices.
	Sales force management	Measure employee sales performance and credit opportunities against a salesperson's quota as they are closed.
	Sales literature	Create, manage, and distribute sales and marketing materials, including brochures, white papers, competitor information, and more.
	Direct e-mail	Increase sales productivity by selecting customers based on common characteristics, then use templates to send customized e-mails with special offers.
Customer Service	Case management	Create, assign, and manage customer service requests for each case from a central location.
	Complete view of customer information	View all customer information to better understand specific customer needs and answer account-related questions.
	Automated routing and queuing	Use customizable workflow rules to automatically route service requests.
	Auto-response e-mail:	Use customizable templates and workflow rules to generate and send auto-response e-mails to customer requests.
	E-mail management	Maintain an accurate record of customer communications with automated tracking of customer e-mails that associates e-mails with appropriate customer records.
	Service scheduling	Manage and schedule even complex services with ease. Understand resource and equipment allocations, utilizations, and effectiveness.
	Searchable knowledge base	Publish support articles and other relevant support information to a searchable knowledge base.
	Service contracts	Create and maintain service contracts and update contract information automatically when a support case is resolved.
Marketing	Marketing campaigns	Plan marketing campaign strategy based on budgets and expenses, promotion codes, target products, marketing collateral, and more.
	Create lists	Create and manage lists for specific campaigns or for future use by any campaign. Create lists using existing customer information or importing contact information from various sources into a single repository.
	Qualify lists	Query lists to locate accounts that meet specific criteria.
	Campaign templates	Create a campaign and re-use it as a template for future campaigns.
	Campaign execution	Track campaign activities, import leads, convert leads to opportunities, view cost and performance data, and more.
	Track marketing information	View campaign performance reports; assess campaign success based on opportunities, cost versus payoff, and other criteria; and analyze marketing results.

SYSTEM REQUIREMENTS:

- Microsoft Windows® 2000 Server with Service Pack 2 or Microsoft Windows Server™ 2003 with Service Pack 1
- Microsoft SQL Server 2000 with Service Pack 4 or Microsoft SQL Server 2005
- Microsoft Exchange 2000 Server or Microsoft Exchange Server 2003

LEARN MORE ABOUT HOW MICROSOFT CRM 3.0 PROFESSIONAL CAN HELP YOUR COMPANY BUILD PROFITABLE RELATIONSHIPS WITH YOUR CUSTOMERS: www.microsoft.com/crm