Microsoft Dynamics™ CRM 3.0

Small Business Edition

Redefine your customer relationships with the complete, affordable customer relationship management (CRM) solution for growing businesses.

In today's complex business world, competitive advantage is harder to achieve—and even more difficult to maintain—than it ever has been before. In a time of instant global communication and ubiquitous information, the ability to respond with speed, knowledge, and confidence to the ever-shifting needs of your customers and the ever-changing strategies of your competitors is critical. No matter what size your company is, success depends on whether you can gain a deeper understanding of your customers and your markets and then pursue the opportunities that emerge at every stage of the customer life cycle.

Microsoft Dynamics™ CRM 3.0 Small Business Edition, formerly known as Microsoft® Business Solutions CRM, is a complete customer relationship management solution that enables businesses to consolidate all of the customer information they collect in a single location so they can create 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 Small Business Edition delivers a fast, flexible, and affordable solution to help you drive consistent, measurable improvements in every business process that touches your customers.

Built to take advantage of Microsoft Windows® Small Business Server 2003 Premium Edition, Microsoft CRM 3.0 Small Business Edition provides increased security features that help safeguard customer information and your business data. Designed for fast implementation and streamlined maintenance, it lets you focus your time on customers rather than your IT infrastructure and speeds return on your IT investment. Utilizing familiar tools and technologies including Microsoft Office and Microsoft Office Outlook®, Microsoft CRM 3.0 Small Business Edition will enable your company to build closer relationships with customers and help you achieve new levels of profitability.

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

Real-World Technology for Real-World Business

WORKS THE WAY YOU DO

Microsoft CRM 3.0 Small Business Edition integrates directly into Outlook and other Microsoft Office applications, enabling you to work within the familiar, comfortable Outlook environment. The result: everyone in your company will quickly be able to begin using the tools it offers for managing sales, service, 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 take advantage of the tools and information you need no matter where you are.
- **Improve productivity through automation** using built-in intelligence that simplifies and automates everyday tasks.
- **Personalize your experience** by creating a workplace profile that delivers instant access to the customer information and activities you 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 Small Business Edition is a flexible solution that can be easily customized to your company's needs today, while providing a platform that will grow as your business expands.

- **Meet your company's specific business requirements** by tailoring Microsoft CRM 3.0 Small Business Edition to match your unique business situation. Use intuitive, Web-based design tools to modify application forms, data fields, and relationships.

- **Streamline business processes** through process automation that transforms repetitive work tasks into powerful business workflow.
- **Integrate applications and information** using Web services to create seamless links across systems and platforms.
- **Measure the success of your business processes** with powerful tracking and analytic tools that help you monitor your business and make better decisions more quickly.

WORKS THE WAY TECHNOLOGY SHOULD

Microsoft CRM 3.0 Small Business Edition takes advantage of Windows Small Business Server 2003 Premium Edition to provide greater reliability and performance, improved management, and better security, while delivering capabilities that will let you focus on building better relationships with your customers rather than worrying about running your CRM solution.

- **Protect the security of customer information** with a security-enhanced platform built on Windows Small Business Server 2003 Premium Edition that is 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.
- **Run your business with confidence** that your CRM solution is always available. Built on proven Microsoft technologies, Microsoft CRM 3.0 Small Business Edition offers increased levels of dependability and reliability.

The value of a CRM solution depends on how quickly it is embraced by the people who will use it. Microsoft CRM 3.0 Small Business Edition was created specifically to ensure that you and your employees can take full advantage of all of its features with minimal training. And because it was designed to be simple to deploy and easy to manage, you'll be able devote more time to your customers and less time to running your IT systems.

Business Solutions with Full CRM Coverage

SALES: CREATING DEMAND AND GENERATING NEW BUSINESS

No matter how simple or complex your sales processes are, Microsoft CRM 3.0 Small Business Edition provides easy-to-use features and capabilities to help you improve the way you target new customers, manage marketing campaigns, and drive sales activities.

- **Increase your sales pipeline** with qualified sales leads and opportunities by taking advantage of analytics and embedded coaching to maximize opportunities to cross-sell products and services.
- **Arrive prepared** for important customer meetings by accessing sales opportunities and service histories for each appointment.
- **Maximize your sales strategies** through centralized, coordinated sales processes, including scripts and other activities.
- **Unify customer interactions** by automatically capturing e-mail discussion threads and other responses 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, companies are awash in customer data. Success requires the ability to transform that information into clear, actionable knowledge and respond quickly to changing customer needs and preferences. With Microsoft CRM 3.0 Small Business Edition, you can have instant access to complete customer information no matter where it is stored, along with the tools you need to turn that information into action.

- **Create a single view** of each customer based on every piece of information you collect, all stored in a single secure location that is accessible across your company.

- **Understand what your customers are telling you** with reporting and analysis tools built on Microsoft SQL Server™ Reporting Services that give you the precise customer knowledge you need to make sound decisions quickly.
- **Execute smarter marketing campaigns** using intelligent list and segmentation tools that let you reach prospective customers more effectively.
- **Know which marketing efforts generate results** by tracking response rates, measuring interest levels, and monitoring costs for every campaign and activity.

SERVICE: PROVIDE MORE VALUE TO YOUR CUSTOMERS

Every time you interact with a customer, it is an opportunity to strengthen their loyalty to your business 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 Small Business Edition helps 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. Automatic escalation and routing helps ensure that service requests are sent to the appropriate people.
- **Schedule and dispatch service resources** by finding professionals who can help you deliver the right services. Use centralized scheduling and dispatching to schedule resources and coordinate services.

MICROSOFT CRM 3.0 SMALL BUSINESS EDITION 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 help ensure opportunities are tracked and closed consistently and efficiently.
	Pipeline optimization	Use analytical tools to provide sales people with qualified sales leads and opportunities.
	Fax integration	Increase productivity within your company by enabling your employees to create, send, and receive faxes right from their desktop.
	Quotes	Create accurate quotes using a full-featured product catalog that supports complex pricing levels, units of measure, and discounts.
	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.
	Service scheduling	Manage and schedule even complex services with ease. Understand resource and equipment allocations, utilizations, and effectiveness.
	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.
	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.
	Marketing 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 Small Business Server 2003 Premium Edition

LEARN MORE ABOUT HOW MICROSOFT CRM 3.0 SMALL BUSINESS EDITION CAN HELP YOU BUILD PROFITABLE RELATIONSHIPS WITH YOUR CUSTOMERS: www.microsoft.com/crm