CRM Evolved

Introducing the Era of
Intelligent Engagement

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Catapult Systems

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Introduction

Digital Transformation, a key focus of successful organizations, proves itself a business imperative, as organizations failing to successfully navigate the transformation are lagging further behind their competitors.

Digital transformation describes the realignment of technology and business models to "engage digital customers at every touch point in the customer lifecycle." (Forbes) It requires that companies refocus their priority on the digital customer and strategically utilize advances in technology such as mobility, data analytics, social media, smart devices, and machine learning to intelligently engage the digital customer. These technology advances set the standard for customer engagement which now requires proactive, personalized customer experiences to engage. Further, this attitude must be applied to the way an organization interacts with its employees as well.

Understanding this imperative, Microsoft Dynamics CRM 2016 was designed and developed to enable organizations to meet the challenge of digital transformation by incorporating these critical technologies and advances in ways that increase business and sales productivity, and at the same time provide a more proactive and personalized experience for the customer and the employee.

With advanced analytics, social media, mobility and productivity enhancements, Dynamics CRM 2016 redefines the customer experience and drastically enhance the user experience. Available Online and On-Premises, it leverages the full power of Microsoft to deliver enhanced customer engagement, increased sales productivity, seamless collaboration, and greater mobile capabilities than ever before.

In a four-part webinar series, What's New in Dynamics CRM 2016, Matt Panzano, Corporate CRM Practice Lead at Catapult Systems, outlined the new features and capabilities under four categories:

- Social
- Mobile
- Sales
- Service

What's New in Dynamics CRM | Social

Social Listening

It can be daunting to keep up with your customers across thousands of blogs, dozens of social media outlets, and unlimited web sites. With billions of Facebook "Likes", over 500 million tweets, and more than 300 hours of video uploaded to Youtube every day, organizations need robust tools to scan, filter and analyze this data to provide your sales and service teams with insights and action items. Dynamics CRM 2016 does this social listening for you, providing information about key influencers who are talking about your company, and offering sophisticated alerts when it detects trends or identifies keywords or phrases that matter to your business.

Intelligent Social

Combining social listening with analytics, Dynamics CRM 2016 offers Intelligent Social. Its adaptive sentiment learns from customers through machine learning, enabling custom sentiment models for your business. Share of voice tracks and measures topics you care about across all social sources, buzz analysis provides insights with rich analytics including location, text mining and tag clouds visualizations. And, possibly best of all, Dynamics CRM 2016 enables social selling, leveraging outlets like Facebook, Twitter, YouTube and more.

Social Engagement

Turning your social listening and analytics into sales, Dynamics CRM offers a social selling app where you can monitor top accounts and competitors. Within CRM, you can improve your social media presence by engaging-replying and publishing- directly to social media with rich multimedia. Leverage CRM for social marketing to strengthen and protect your brand. You can also improve efficiency, productivity, and response time using CRM's new automated triage, capable of detecting potential leads or service cases automatically and alerting the appropriate contact.

Social CRM

CRM provides an end-to-end customer experience. Turn any social post into a CRM action- create a case, lead, account, opportunity or any custom entity. Keep customers happy by identifying key issues and trends early on allows you to proactively address customer service issues even before they occur.

What's New in Dynamics CRM | Mobile

In our ever-changing digital world, mobility must go hand in hand with productivity and engagement. Dynamics CRM 2016 mobile enhancements keep your team connected and productive anywhere, on any device. These enhancements deliver a seamless user experience across mobile devices.

Offline Support

Users now have full mobile offline support with the CRM Mobile apps, enabling productivity even without connectivity. Create, change and delete records offline. Automatic playback synchronizes those changes immediately upon reconnection.

Document Management and App to App linking

In addition, Document Management has improved, allowing users to retrieve and view documents, presentations, emails and spreadsheets in context within the CRM mobile app. In addition, this release offers app deep-linking, enabling direct linking to records, views or dashboards within the mobile app.

Modern, mobile-friendly experience

Ushering in a new era of user-centered design, Dynamics CRM 2016 presents a fresh, modern, mobile-friendly

experience that work across all mobile clients and provide an immersive and engaging interaction. With new UI controls in mobile apps, Business Analysts can now represent the data in a visual and interactive way with features like slider and calendar controls to easily visualize data and date-related CRM information.

Task-based experiences

Digital transformation, a key focus of successful organizations, proves itself a business imperative.

One of the primary barriers to productivity is distraction. With an abundance of data, constant connection and communication, the challenge to focus on a task is even more difficult. Dynamics CRM 2016 solves this challenge with new task-based experiences. These immersive experiences allow mobile users to surface priorities in order to focus on the tasks they need to perform rather than the records they need to interact with. In this experience, data from multiple entities are brought together into a single experience, based on the task that is need, eliminating the need to visit a variety of involved records. Guiding the user through the complex tasks ensures that the right actions are performed at the right time, as these experiences are supported by platform capabilities like branching logic and business logic.

Compatibility

Mobility is critical to delivering an engaging experiencing for employees and customers. Employees need equal access to their work across all devices in order to offer the best response times and highest levels of productivity. In addition to the enhancements above, Dynamics CRM 2016 has made improvements to the design that allow easier previews and visualizations for those designing forms in CRM, and now delivers IFRAME and web resource support for tablets.

Mobile Application Management

Additional risks and challenges can come along with mobility. Dynamics CRM 2016 is integrated with Microsoft Intune for mobile device management to ensure that enhancing mobile productivity is secure. This allows customer to secure data in BYOD scenarios with Mobile Application Management. With this feature, policy-managed CRM mobile apps offer PIN enforcement, prevent data leakage from device and enforce encryption of app data.

What's New in Dynamics CRM | Sales

The new mobile and social features of Dynamics CRM 2016 transform the way your customers and employees experience and engage. The third aspect of this release is just as critical to digital transformation: utilizing technology to improve sales efficiency and productivity, delivering higher sales, and driving business success. The sales enhancements include:

Predictive intelligence

Dynamics CRM 2016 features predictive intelligence, helping sellers to sell "smarter" by offering up-sell and cross-sell recommendations and trending documents inside CRM. Trending documents are proactively served from Office Delve inside CRM to offer users relevant information right when they need it.

Sales productivity

Capabilities in CRM are seamlessly embedded into productivity tools like Office 365. These familiar and intuitive tools are enhanced with CRM capabilities for a hassle-free experience. CRM for Outlook allows you to track, manage and create contacts and emails within CRM. New templates in Outlook, Word and Excel allow for the simplified, automated creation of sales documents without needing to export data, and can be delivered and accessed across SharePoint, O365 Groups and One Drive. Lastly, with the most advanced Cortana integration ever, sales activities, accounts and opportunities are embedded to allow Cortana to surface the right content at the right time to help your sales team get the job done.

Digital personal assistant

Microsoft Dynamics CRM 2016 provides a digital personal assistant, one more tool to help your employees stay focused, prioritize and manage their multiple responsibilities. The digital personal assistant provides a complete and personalized overview of daily priorities, including key sales activities, accounts, and deals embedded in Cortana.

Information Discovery

OneDrive for Business allows users to store and share contextual content in CRM. While in CRM, get a consolidated view of relevant documents in SharePoint, OneDrive for Business and Office 365 all within the individual CRM record.

Document Generation

With the new Dynamics CRM 2016, users are empowered to easily create beautiful documents based on CRM data without mining and exporting data, designing the documents and populating the data. Now, simply create orders, invoices, product sheets, etc. with the click of a button using pre-built Word and Excel templates.
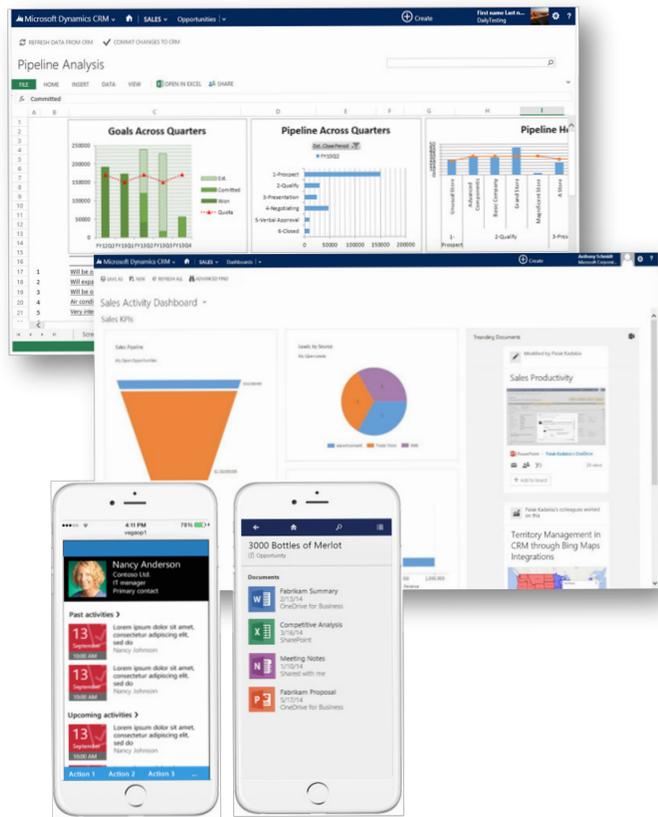
Documents are role-based to ensure users have access only to the content they need.

What's New in Dynamics CRM | Service

In this increasingly connected world, customers have changed the way they engage with brands, and are seeking customer engagement and a positive experience. Focusing on this vital aspect of success, Microsoft Dynamics CRM 2016 delivers a solution that can provide personalized, contextual interactions throughout the customer journey on any device. With improved knowledge management, integrated survey features that allow for a Voice of the Customer, predictive analytics and the ability to view and filter customer data like never before, organizations can engage customers with ease and agility.

Voice of the Customer

Dynamics CRM 2016 includes a survey designer to enable organizations to collect feedback from customers – utilizing any device. Triggers and rules based on survey responses allow follow up actions to be scheduled automatically, saving precious time. The new enhancement allows you to manage the feedback through Dynamics CRM 2016 and keep survey data in customer case or account history.

Interactive Service Hub

A new online user experience design delivers a tailored, intuitive end-user experience for customer service roles. The application contains a single stream dashboard, multi-stream dashboard and a fresh and intuitive design that allows you to visualize information and take action directly from the dashboard.

Multi-Stream Dashboard

The multiple streams enhancement gives Tier One agents the ability to view several interactive charts at one time. By filtering the data within the interactive charts, users have the ability to get visual snapshots of key metrics, allowing your teams to manage data more efficiently.

Single-stream Dashboard

Alternatively, the interactive service hub also comes with a single-stream dashboard for Tier Two Agents. This stream typically shows a consolidated view of the workload. Similarly to the multi-stream dashboards, single-stream dashboards also come with interactive charts that can be used to filter data. Customizers/Administrators can choose from a variety of layouts to build a dashboard that is most beneficial for their team.

Modern and intuitive design

The unification of customer interaction pulls together all related information, enabling users to be productive and view what's most relevant. "Quick Actions" in search results allow for day-to-day activities to be completed with ease. The Reference Panel is highly configurable, allowing you to choose your relevant data. Agents have full access to customer account, history, cases, eligible entitlements and all other relevant data, ensuring that

your agents are prepared and equipped with the knowledge and information to satisfy your customers.

Knowledge Management

Moving beyond case management, the enhanced knowledge experience in CRM allows organizations to create a multitude of knowledge sources. Users can you can turn customer feedback and issues into knowledge articles that include embedded videos, images, and more. Utilize the built-in review and approve process to verify accuracy and content prior to publishing with automated publishing. Then set auto expiration on a particular version of an image, video, or article. There are enhancements for translating documents into multiple languages to reach a broader audience. Integrated analytics allow CRM to surface relevant information from the knowledge library exactly when you need it.

External Party Access

External Party Access empowers employees, partners and customers to access information, interact at their convenience and even provide self service. By implementing a multi-user type account your customers and partners have access to only their relevant information in CRM with permissions.

Service Intelligence

An interactive Power BI dashboard provides Customer Service Managers with an aggregate view of customer service performance, ensuring your leadership has the monitoring and data capabilities they need to consistently deliver outstanding customer service across the organization.

Unified Service Desk

At the heart of delivering modern service is the Unified Service Desk which provides customer service organizations with a single desktop with access to back-end systems and third party applications. Upgrades and patches can be delivered through Windows Update / System Center. Out of the box integration is now available with any third party systems such as Azure HDInsights.

Enable SLAs on demand

With new service level agreement (SLA) enhancements, apply SLAs to case records manually or automatically based up business logic with workflows or plug-ins. These features allow your company to keep their commitments to their customers easily and consistently.