



What's New in Microsoft Dynamics CRM 2011

Power your business productivity

Laser focused on boosting productivity, Microsoft Dynamics® CRM 2011 brings more than 500 enhancements that help drive marketing execution, improved sales performance, and enriched service delivery.

And with Microsoft Dynamics CRM Online you get the same powerful CRM functionality as a flexible Cloud service from Microsoft, available today in 40 markets and 41 languages.

Deliver on the power of productivity with a CRM solution that is:

- **Familiar**—software that empowers people through natural, productive, and insightful experiences.
- **Intelligent**—real-time analytics and streamlined business processes that enable informed decisions and operational efficiencies.
- **Connected**—connections across people, processes, and ecosystems that allow businesses to maximize the value of relationships and systems.

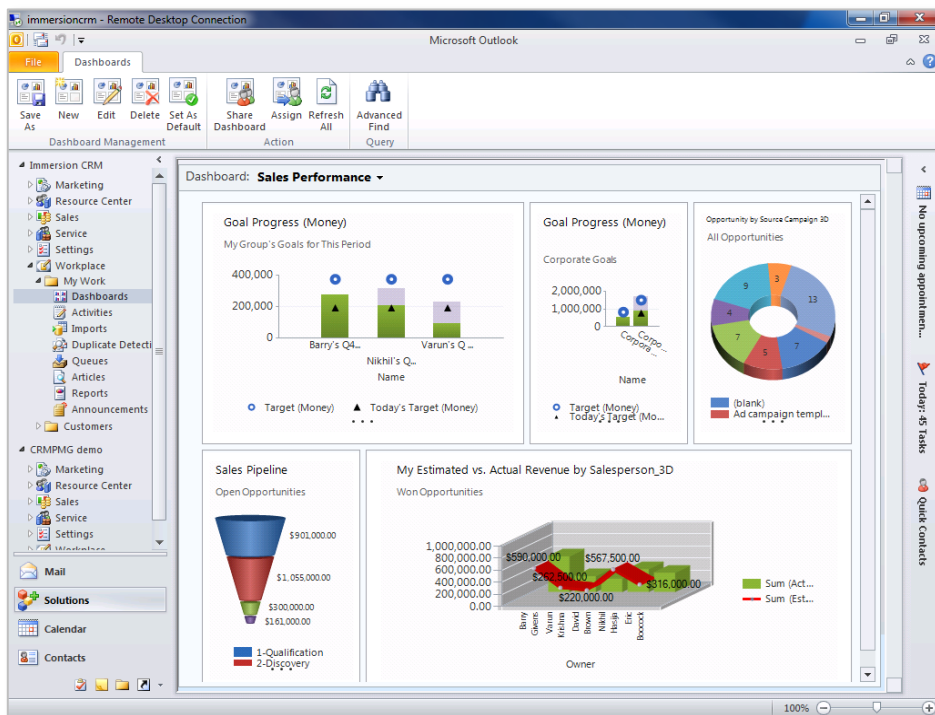
“Microsoft Dynamics CRM 2011 has really allowed us to do more with less, and that’s a driving mantra in this economy. Microsoft Dynamics CRM has enabled us to work smarter, not harder.”

MIKE SCHULTZ
CRM PROGRAM MANAGER
AND IT ARCHITECT
XIOTECH CORPORATION



“After switching to Microsoft Dynamics CRM Online, in just one month we experienced a 75% reduction in our annual subscription cost and increased adoption by 20%. Microsoft Dynamics CRM Online is the best CRM solution in the cloud for us.”

DANIEL HART
SYSTEMS MANAGER
SMEAD MANUFACTURING
COMPANY



Drive productivity and adoption with real-time dashboards in Microsoft Dynamics CRM 2011 that are easy to use and create.

“With Microsoft Dynamics CRM 2011, our business has been able to do more with less. Sales productivity has been increased drastically.”

MICHAEL KAUFMANN
CIO
BINDER



“By replacing our membership software with Microsoft Dynamics CRM 2011, that formerly cumbersome process will go from a month to 2 to 3 days.”

RYAN CONNOLLY
MANAGER, BUSINESS
SYSTEMS
AMERICAN NATIONAL
STANDARDS INSTITUTE



Familiar software that empowers people through natural, productive, and insightful experiences

OFFICE FLUENT UI

Boost worker productivity with CRM capabilities that draw on a familiar Microsoft® Office experience. Reduce the number of clicks and eliminate open windows required to complete common tasks with the new flat UI, CRM Ribbon, expandable forms, and embedded sub-grids.

NEXT GENERATION OUTLOOK CLIENT

Centrally manage every aspect of customer interactions right within Microsoft Outlook for greater productivity. Take full advantage of enhancements in the native Outlook Client such as preview panes, Outlook reminders on CRM records, and personalized views of information.

ROLE-TAILORED FORMS

Help your people quickly connect with relevant information using role-tailored forms (including the ability to have multiple forms per entity) and the one-click-to-customize feature. Additionally, Web and mobile support provides flexibility for everyone, from the executive level to front-line sales and customer care representatives.

ENHANCED NAVIGATION

Save people time and empower them to be more effective in their work with navigational tools that make it easier to find the right information. Equip users with personal views, the ability to pin records, create lists of recently-used data, conditional formatting and real-time record filtering.

DATA IMPORT AND EXPORT

Maximize the value of data with tools for data import and export, including the improved Data Import Wizard. Export data to Microsoft Excel® with one click, then seamlessly reimport changes from Excel into CRM, allowing your employees to spend less time on managing data and more time on time on using it.

FLEXIBLE ACTIVITIES

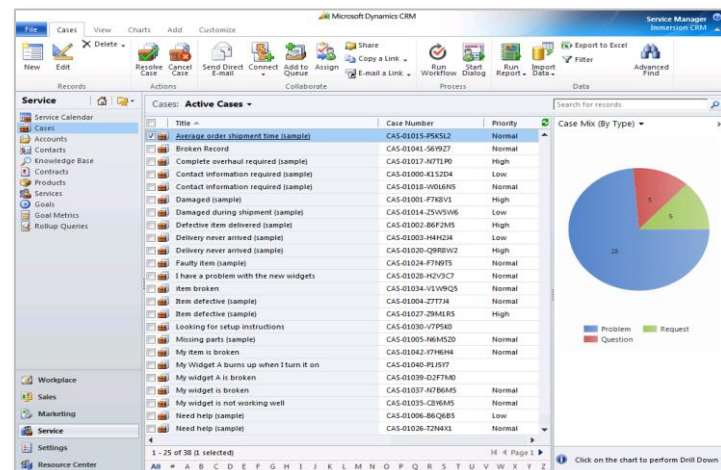
Capture the unique business processes that differentiate you from the competition with custom activities that are easy to create and configure. Capture any activity from on-site repair to product configuration including the relevant tasks, resources, scheduling, and workflows.

PRODUCT AND PRICING IMPROVEMENTS

Improve how you market and sell to your customers with product and pricing enhancements in Microsoft Dynamics CRM 2011. New features such as product kits, write-in products for opportunities, negative prices, and custom currencies give you the flexibility to tailor pricing and marketing offers to your customer base.

PRODUCTIVITY ENHANCEMENTS

Enhance productivity and performance across your organization with a variety of productivity-focused enhancements such as dynamic marketing lists; bulk email attachments; rich-text formatting; and many more.



Streamline productivity using an intuitive user interface that simplifies common tasks and turns data into actionable insight.

“Just by having information in one place and reducing redundant data entry, we’ve been able to book 25-30% more transactions with the same number of employees.”

JIM LEHMER
APPLICATION ARCHITECT
FCS FINANCIAL



“We needed a tool that will change to fit us. Microsoft Dynamics CRM 2011 does that. It’s flexible and migrating is easy. It doesn’t come any simpler than that.”

VICKI FLOWERS
VP OF INFORMATION
SERVICES
MAGMA DESIGN
AUTOMATION



Real-time analytics and streamlined business processes that enable informed decisions

REAL-TIME DASHBOARDS

Improve insight into your business and make more informed decisions using real-time dashboards. Easily track sales pipeline, open cases, and other key metrics in real-time with pre-built dashboards or easily create your own dashboards based on internal data or external data.

GUIDED DIALOGS

Help ensure consistent execution of key business processes such as lead qualification or service case handling with the new Dialog feature. Quickly create tailored call scripts with branch logic and embedded prompts, capture required information, and provide real-time guidance to your prospects and customers.

INLINE VISUALIZATIONS

Instantly hone in on key data points such as top customers, opportunities, or cases with the new Inline Visualization feature. Turn real-time data into rich insight with pre-built visualizations using just a few clicks. Or use the drill-down capability to view the original data source for additional details and context.

CONDITIONAL FORMATTING

Quickly identify the most relevant and valuable data with conditional formatting rules that highlight the information your people need. Enable users to zero-in on key data points, such as high value opportunities or critical service cases via pre-defined formatting rules.

GOAL MANAGEMENT

Spend less time setting up and managing goals and more time on attaining them with the new goal management feature. Easily define, track, manage, and visualize diverse metrics such as lead conversion, sales quotas, and first call resolution for teams and individuals across any time period.

ENHANCED QUEUES

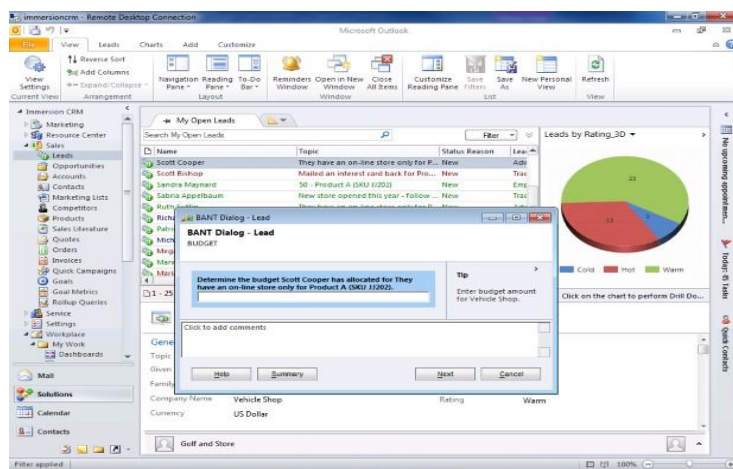
Optimize work state management with robust queuing capabilities that help streamline and track activities. Build queues for any entity in CRM and use them to foster rapid, consistent execution including team and individual queues, check-in/check-out capabilities, and queue routing.

BUSINESS AUDITING

Improve operational efficiency and better ensure service level agreement (SLA) compliance with system-wide data auditing. Track, categorize, and audit data in Microsoft Dynamics CRM 2011 at the field or record level, create pre-configured auditing rules, and track key actions/changes in your organization.

FIELD-LEVEL SECURITY

Define who has access to data at the most granular level with field-level security. Create profiles and rules for each piece of data so that you can secure sensitive information and meet data privacy requirements.



Boost your productivity with a native Microsoft Outlook® experience, guided processes, and inline data visualization in Microsoft Dynamics CRM 2011.

“Microsoft Dynamics CRM has greatly sped up our development now, and with the enhancements in 2011, we’ll be able to turn out applications at an even faster pace.”

GEORGE WHITE
CIO
PENNSYLVANIA OFFICE OF
ATTORNEY GENERAL



“Microsoft Dynamics CRM Online 2011 has allowed us to empower employees to find information that wasn’t even available before without involving IT.”

BOB SCHAFBUCH
VP, ENTERPRISE
APPLICATIONS GROUP
INTEGRATED DNA
TECHNOLOGIES



Connections across people, processes, and ecosystems to maximize the value of relationships

CONTEXTUAL DOCUMENT MANAGEMENT

More effectively create, share, and leverage important documents with new document management capabilities built on Microsoft SharePoint Server. Use version control, track changes, and check-in/check-out capabilities to create higher quality marketing campaign collateral, sales quotes, proposals, RFPs, contracts, and more.

CONNECTIONS

Track key influencers and uncover new relationships using the Connections feature. Better identify and leverage any business relationship—such as legal specialist, tax expert, alumni, or former employee—so you can better understand their business impact and build stronger ties.

TEAM MANAGEMENT

Make it easier for teams to work collaboratively on accounts, contracts, opportunities, cases, and more with team-based ownership of records in CRM. Create team-based security roles, activities, and workflows so that your people can be more collaborative and effective in their work.

SOCIAL MEDIA CAPABILITIES

Help find new leads, identify new connections, and understand the online influence of key individuals with the Social Connector for Microsoft Office. Track connections on social networking sites like LinkedIn, and Facebook, and use that information to drive successful business outcomes.

DECLARATIVE DESIGN

Speed development and improve industry fit with declarative tools that operate at a high level of abstraction for greater simplicity. Drag-and-drop customization tools and the new navigation editor make it easier to tailor your CRM solution and in turn allow you to focus on value-add activities.

MICROSOFT DYNAMICS MARKETPLACE

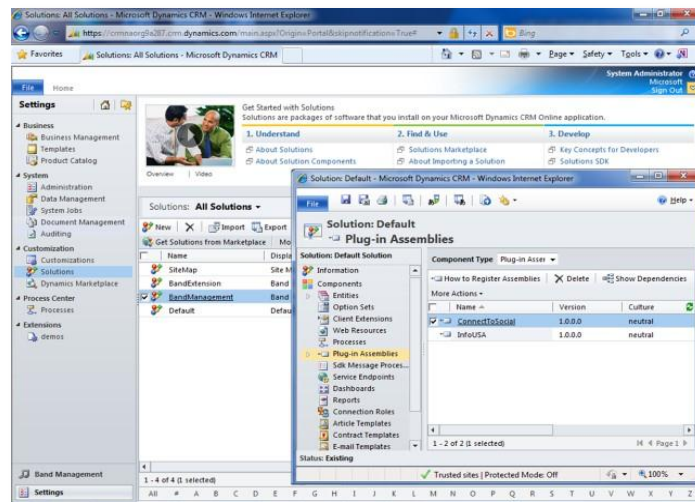
Quickly discover valuable applications and professional service solutions through a centralized online repository and enhance the value of your Microsoft Dynamics CRM implementation. Find value-add and industry-specific solutions that can help take your Microsoft Dynamics CRM implementation to the next level.

SOLUTIONS MANAGEMENT

More efficiently install, track, and manage valuable solutions through a centralized management console. Take better advantage of third-party and partner-built solutions for Microsoft Dynamics CRM so you can increase the relevance and value of your CRM implementation.

DEVELOPER TOOLS

Quickly create custom solutions or improve integration to other systems using familiar Microsoft developer tools such as Microsoft Visual Studio®, Windows® Communication Foundation (WCF), Web resources, and Microsoft .NET 4.0.



Import, export, track, and manage your add-in solutions through a centralized management console that works directly within Microsoft Dynamics CRM 2011.