

# CRM roadmap – the future of customer satisfaction

## Microsoft CRM for little, large and in between

At Microsoft's recent Partner Awards 2013 the company confirmed that it sees Dynamics as a core growth pillar for the New Zealand business over the next three years. *iStart* caught up with Microsoft New Zealand managing director **Paul Muckleston** and his new Dynamics lead **Keir Garrett** to find out more...

There has been quite a lot of change at Microsoft over last 18 months Muckleston told *iStart*. "One of the things that has been revalidated as a really important part of the business for us is Dynamics, both in terms of CRM and what we'd traditionally call the ERP space," he said. Indeed, Microsoft NZ is adding a couple of new sales and pre-sales roles to its Dynamics team and Muckleston plans to continue the business unit's double-digit growth of the past five years.

For Garrett, still new to the Microsoft fold, Microsoft is applying its innovation to its business solutions, with the result being Microsoft Dynamics AX and CRM which are "industry-aligned and enterprise-ready". It has also broadened the capabilities of its Dynamics CRM, particularly in the social media space.

Where once Microsoft's business solutions were aimed squarely at the mid-market, Muckleston and Garrett say they are now suitable for small business right up to the enterprise. This scalability means they are now making the shortlist of some big RFPs and winning. "I think that's a good indicator in terms of where forward business is going to. We are still winning in that mid-business space, but increasingly we are seeing our partners start to win larger customers," said Muckleston.

Garrett added: "We are being more bullish and more confident about bidding on the RFPs given the build-out of the Microsoft solution set. Now we do have full end-to-end ERP solutions, coupled with the CRM. We also have industry-aligned capabilities within that and it's not a modular solution, this is what you buy when you buy Microsoft Dynamics."

## Microsoft Dynamics CRM roadmap

The executive vice president of Microsoft Business Solutions, Kirill Tatarinov, is calling on businesses to adopt a person-to-person engagement approach, a customer-centric view of business that enables people to deliver meaningful and satisfying personal interactions for both customers and employees.

The new version of Dynamics CRM is very different from the traditional customer database paradigm we are accustomed to. Dynamics CRM in the new era is a tool that reaches out to end customers and brings back significantly more information about individuals, using an array of methods including social interactions and customer self-service. Information that previously took companies days and months to capture is now available at the touch of a button.

Dynamics CRM is seeing some stunning growth: it has achieved 38 straight quarters of double-digit growth, and has seen 80 percent growth in Dynamics CRM Online, Microsoft's cloud CRM offering.

In 2013 there were three major product acquisitions, and three major releases of Dynamics CRM. In 2014 things are ramping up even further with eight product releases, and a lot of exciting new innovations planned.

The Q2 release consists of three major areas of enhancements:

- **Leo** release: Introduces Customer Care, making customer service easier and more effective, with new state of the art case management, built in SLA management and a new unified service desk. One anticipated enhancement is the new timer control, a tool that will improve customer case management dramatically. Users will also be able to merge cases and link parent/child cases and take advantage of email-to-case automation, while queues can be made available both privately and publically.
- **Mira** release: Integrates the recently acquired Marketing Pilot, an enterprise-level marketing management platform. This provides much improved campaign management and lead scoring capability. This new release closes the marketing cycle from planning to monitoring activity to analytical reporting.
- **Subra** release: Social listening is introduced following Microsoft's acquisition of Netbreeze a year ago. Social listening gives you the capability to listen for conversations about your products and services on various channels, like Twitter and Facebook, and proactively respond to these through making key data available in your CRM system for triggering appropriate action.

---

---

## Sugar UX roadmap

### Putting the 'i' into CRM

With the launch of its Sugar UX platform, Sugar is rolling out a suite of features that enable more customisable customer relationship management for businesses, and a more intuitive and engaging interface for individual users.

The new platform moves CRM away from the clunky, text-heavy interface to include better visualisation tools, improved user-first design and a much-heralded contextual intelligence. Traditionally, CRM has focused entirely on management tracking and reporting functions. Sugar has taken a different view. While the management and reporting tools are still at the core of the platform, it focuses on features that empower the end user.

### What does this mean?

Sugar UX has the simplified look and feel, mobility, and social aspects of a consumer application, but fuses it with the hard-headed business process optimisation of traditional CRM. The result is a more immersive, intuitive

and ultimately more productive user experience. Visualisation tools in particular make it possible to quickly understand large quantities of customer data.

The improved user experience makes Sugar UX easier to use, but more importantly it makes the platform more productive. When these UX improvements are mashed against the mainstream management and reporting strengths of SugarCRM, the products potency becomes clear.

### Contextual intelligence, improved collaboration

In the pursuit of sales, context is everything, and this is where Sugar has added smarts to CRM.

Contextual intelligence for every contact, company, lead, or opportunity is presented in an easily-consumed, personalised visual format. Information from internal sources like ERP, third party applications and social channels help users to make better decisions.

CRM collaboration with context-sensitive activity streams are embedded in the user interface. Every

record in the system has its own stream, for faster, easier access to the most relevant information. In addition, global streams on a user's home page provide aggregate notifications from other users or updates to records assigned to them enabling a level of collaboration that has not previously been a feature of traditional CRM.

Sugar is also building an advanced tagging mechanism so users can quickly tag records in the system with basic keywords, then easily search and sort them, or export them to be used in targeted marketing campaigns.

### It's simple: Create extraordinary customer relationships

Traditional CRM tools focus on management tracking and reporting. Sugar UX puts the requirements of the customer-facing employees first. The result is a platform that encourages extraordinary customer relationships.

*\*The above information was supplied by SugarCRM - see p38 for more details.*

# We put the "i" in CRM



Explore a new era of CRM that's uniquely focused on the individual.  
Learn how SugarCRM is transforming the customer experience for businesses of every size.

 **SUGARCRM**  
[www.sugarcrm.com](http://www.sugarcrm.com)