MICROSOFT DYNAMICS CRM

Roadmap

Release Preview Guide

Q2 2012 Service Update

February, 2012

EXECUTIVE SUMMARY

Microsoft continues to bring new innovations and significant value in customer relationship management (CRM) software with Microsoft Dynamics® CRM, a productive and flexible CRM solution that enables dynamic businesses to transform the way they find, win and retain customers.

This Release Preview Guide outlines the next set of Microsoft Dynamics CRM innovation to be released in the Q2 2012 service update. This continues our journey of rapid innovation with Microsoft Dynamics CRM and marks the second release under our agile release cadence. The improved agility helps Microsoft Dynamics CRM to quickly address customer demands and align with industry trends.

We encourage you to read the whitepaper to preview new and improved capabilities in Microsoft Dynamics CRM that will boost productivity for your organization. We believe you'll agree that Microsoft Dynamics CRM is well-positioned to provide tremendous value to organizations of all sizes and industries going forward.

The Microsoft Dynamics CRM Team

NOTE: The guidance included in this document reflects current release objectives as of February 2012. This document is not intended to be a detailed specification and individual scenarios or features may be added, amended or deprioritized based on market dynamics and customer demand.

BACKGROUND

Microsoft Dynamics CRM is available to customers through a range of purchase models using either an on-premises or cloud-based deployment.

Microsoft Dynamics CRM Online was initially launched in May 2008, and received service updates in September 2008, March 2009, November 2009, March 2010, January 2011 and November 2011. The current version of the on-premises offering is Microsoft Dynamics CRM 2011 which is the fifth major release of the product.

IMPROVED AGILITY

The upcoming Microsoft Dynamics CRM Q2 2012 service update represents our commitment to improved agility where additional capabilities for Microsoft Dynamics CRM (both Online and On-premises) are delivered approximately twice yearly with releases targeted for Spring (Q2) and Fall (Q4) of each calendar year. These new capabilities provide better productivity and enhanced experiences for organizations using Microsoft Dynamics CRM. The functionality detailed in this guide however, is completely optional for existing customers depending on their business needs.

KEY NEW CAPABILITIES

The following diagram summarizes the investments that will be delivered in the Microsoft Dynamics CRM Q2 2012 service update.

Figure 1: Q2 2012 Service Update Investment Areas

CRM ANYWHERE

Today's businesses use a wide variety of technology platforms and form factors across many different locations. Microsoft is deeply committed to a rich application experience for users wherever they are. The Microsoft Dynamics CRM Q2 2012 service update provides the flexibility to consume Microsoft Dynamics CRM through the most popular web browsers running on both PC and Apple Macintosh computers. It also delivers a range of rich device-specific applications for popular mobile devices that keeps the user informed and productive when they are out of the office. This update showcases our interoperability with non-Microsoft platforms and alignment with industry standards to promote choice. Flexibility of device and browser, coupled with the productivity features of Microsoft Dynamics CRM, enables individuals to access the right information at the right time on the right device.

MICROSOFT DYNAMICS CRM MOBILE

The Microsoft Dynamics CRM Q2 21012 service update brings a new cloud based mobile CRM service called Microsoft Dynamics CRM Mobile to customers of Microsoft Dynamics CRM. As part of this new mobile solution, Microsoft will provide a full range of rich native CRM applications (apps) for the most popular smartphones and tablets. These new applications allow a sales, service or marketing professional to access Microsoft Dynamics CRM both Online and On-premises. These apps allow organizations and individuals to be productive with their device of choice thereby enabling them to manage customer relationships anywhere.

It is common for sales, service and marketing professionals to use a variety of devices e.g. a sales person might have both a phone and a tablet device from which they need to access their CRM data and processes. With Microsoft Dynamics CRM Mobile, each licensed mobile user can access Microsoft Dynamics CRM from up to three different mobile devices. Microsoft Dynamics CRM Mobile will also offer an offline mode on most devices[*] so that Microsoft Dynamics CRM can be accessed even when there is lack of Internet connectivity.

Native apps for devices supported by this offering include:

Form Factor	Device	Operating System
Smartphones		
	Windows Phone	7.5+
	Apple iPhone 3GS+	iOS 5+
	Google Android	2.2+
	RIM Blackberry	6.x and 7.x
Tablets		
	Apple iPad/iPad2	iOS 5+

[*] The initial release of Microsoft Dynamics CRM Mobile for Windows Phone will not support offline data

Microsoft Dynamics CRM

Microsoft Dynamics CRM Mobile offers the user the full breadth of Microsoft Dynamics CRM functionality, including the dashboard capabilities, on the mobile device of their choice. There is no need to load multiple apps onto their device; Microsoft Dynamics CRM Mobile provides a single consistent application experience.

Figure 2: Microsoft Dynamics CRM Mobile app for iPad

Microsoft Dynamics CRM Mobile is centrally managed; administrators can configure the record types, forms, views, offline synchronization rules and navigation structure for the mobile application. These configurations are published only once, regardless of the range of devices that the users employ. This simplifies and streamlines the management of mobile CRM for your organization. To cater for the differing needs of functional groups within your organization, administrators can set up multiple profiles which expose role-specific data and functionality – the result is a mobile experience which is tailored and optimized for each user. Administrators also have the ability to remotely wipe devices of CRM data should a device be lost or stolen or the employee moves to a different organization.

Microsoft Dynamics CRM Mobile will be available to customers at a starting price of $30 per user per month. Organizations have the flexibility to choose whether every user or a smaller group of users are mobile enabled depending on their requirements and budget. Today, Microsoft Dynamics CRM is available internationally in 40 markets and 41 languages. Initially, Microsoft Dynamics CRM Mobile will be offered in 24 markets and 10 languages. Other languages and markets for Microsoft Dynamics CRM Mobile will follow over time.

Markets	Languages
United States	English
United Kingdom, Ireland	English
Canada	English, French
Australia, New Zealand, Singapore	English
France	French
Brazil	Brazilian Portuguese
Japan	Japanese
Belgium	Dutch, French
Switzerland	German, French, Italian
Italy	Italian
Spain, Mexico, Chile, Colombia, Peru	Spanish
Germany, Austria	German
Netherlands	Dutch
Sweden	Swedish
Denmark	Danish

BROWSER FLEXIBILITY

In addition to Microsoft Dynamics CRM Mobile, the Microsoft Dynamics CRM Q2 2012 service update provides the ability for end users to access the Microsoft Dynamics CRM Web Client across all modern Internet browsers on various platforms. This includes browsers such as Internet Explorer, Firefox, Chrome, and Safari running on PC, Apple Macintosh or iPad. The list of devices and specific browser versions that will be supported is as follows:

Platform	Internet Explorer	Firefox	chrome	Safari
Windows 7/Vista/XP	Version 7+	Version 6+	Version 13+	Not Supported
Apple Macintosh OS-X	Not Supported	Version 6+	Not Supported	Version 5.1.1+
iPad 2 (iOS 5.x)	Not Supported	Not Supported	Not Supported	Version 5.1.1+

Microsoft Dynamics CRM

RAPID VIEW FORMS

In many organizations there are groups of users who typically use a CRM system to look up key information about their contacts, accounts, opportunities and cases but have no immediate need to modify that information. For example, many contact center employees or managers primarily use Microsoft Dynamics CRM to review business information before deciding whether any action is required. For these users the optimal experience is to load this information very quickly so they can immediately assess a situation and determine the correct course of action. In order to provide this type of user experience, we're introducing rapid view forms. The rapid view form is a read-only form that can be configured like any other form in Microsoft Dynamics CRM to display any record in the system.

When viewing information in these forms, users can switch to an editing experience with the click of a button. Administrators of Microsoft Dynamics CRM will have the option to set all forms to load in rapid view mode if appropriate for business needs. Individual users will have the personal option to choose the form mode they prefer (Rapid View or Standard Edit).

ENHANCED SOCIAL

Organizations are constantly seeking new ways to facilitate simple and effective communication and collaboration between their employees. Social networks such as Twitter and Facebook provide a very simple micro-blogging user experience to post observations and information as well as ask questions and find expertize. More and more users are demanding these types of social experiences in business applications such as CRM. The Microsoft Dynamics CRM November 2011 Service Update delivered these capabilities through Activity Feeds which introduced micro-blogging and social collaboration capabilities within Microsoft Dynamics CRM. With the upcoming Q2 2012 service update, Activity Feeds will be further enhanced to provide additional functionality and simplified access to relevant feeds.

We are adding the ability to "Like" and "Unlike" posts in Activity Feeds similar to the concept in Facebook. Activity Feeds will also offer improved filtering capabilities. A user can view a timeline wall of all posts that mention them (the @me filter). Users can also filter posts relating to types of records they follow. For example, a user can create a filter to only show posts related to the Accounts that they follow. Finally, filters can be based on data views configured within Microsoft Dynamics CRM. For example, 'My Direct Reports' view will show all posts related to anyone who reports to me regardless of whether I follow those team members or not. These new filtering capabilities provide a user with even greater flexibility over the information they want to see on their wall. Figure 3 illustrates the new filtering capabilities.

An update to the Mobile Activity Feeds application for Windows Phone 7.5 will also be released to take advantage of the new capabilities provided by Activity Feeds.
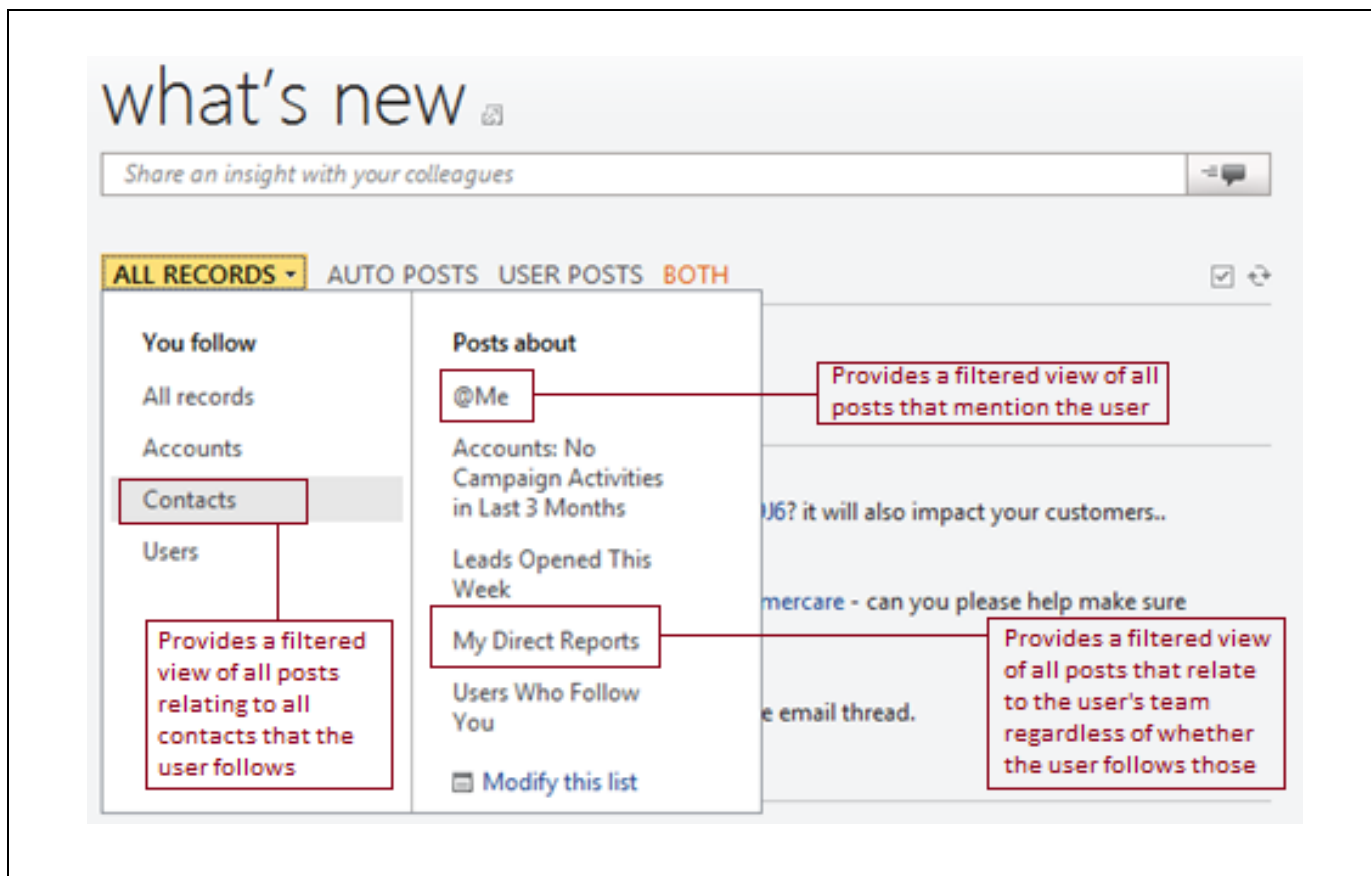
INDUSTRY SOLUTION TEMPLATES

Across our product range Microsoft Dynamics offers many specific capabilities and solutions for a number of industries including distribution, manufacturing, public sector, retail and services. We are committed to broadening the industry capabilities and relevance of Microsoft Dynamics CRM through our core product as well as our extensive global partner network. For the Q2 2012 service update we will be delivering a range of templates that illustrate Microsoft Dynamics CRM's suitability and flexibility for specific industry needs. Industry solution templates from Microsoft can consist of a number of components including a data model, pre-configured dashboards, workflow processes and sample data. They are published on the Microsoft Dynamics Marketplace from Microsoft Dynamics Labs.

Microsoft Dynamics Labs is an initiative to deliver innovation and enhancements to Microsoft Dynamics CRM customers and partners. It should be noted that these solutions are not core Microsoft Dynamics CRM functionality. Microsoft Dynamics Labs solutions are not supported by Microsoft but there is a global community facilitated by the Microsoft Dynamics Marketplace which allows you to discuss, exchange ideas and answer questions. All the industry templates are built to work with both Microsoft Dynamics CRM Online and On-Premises. The Microsoft Dynamics Marketplace can be accessed at http://dynamics.pinpoint.microsoft.com.

The industry templates that will be released as part of the Microsoft Dynamics CRM Q2 2012 service update include:

Life Annuity Insurance Sales	Showcases sales, marketing, and customer service scenarios designed specifically for insurance agents, brokers, claims managers, underwriters and customer service personnel. This empowers insurance professionals to be more productive and helpful, to improve service delivery, and to enhance marketing performance by identifying and realizing organic growth opportunities
Non-Profit	Provides Non-Profit organizations the ability to manage and improve interactions with donors and volunteers. The template showcases Microsoft Dynamics CRM's capability to manage constituents and donors, track donations, pledges and volunteer hours.
Health Plan Sales	Demonstrates how health plans can easily move their marketing & sales processes online, and manage the customer value lifecycle.
Wealth Management	Showcases how financial organizations can attain greater insight across the household, improve client interactions and more effectively manage the product portfolio.
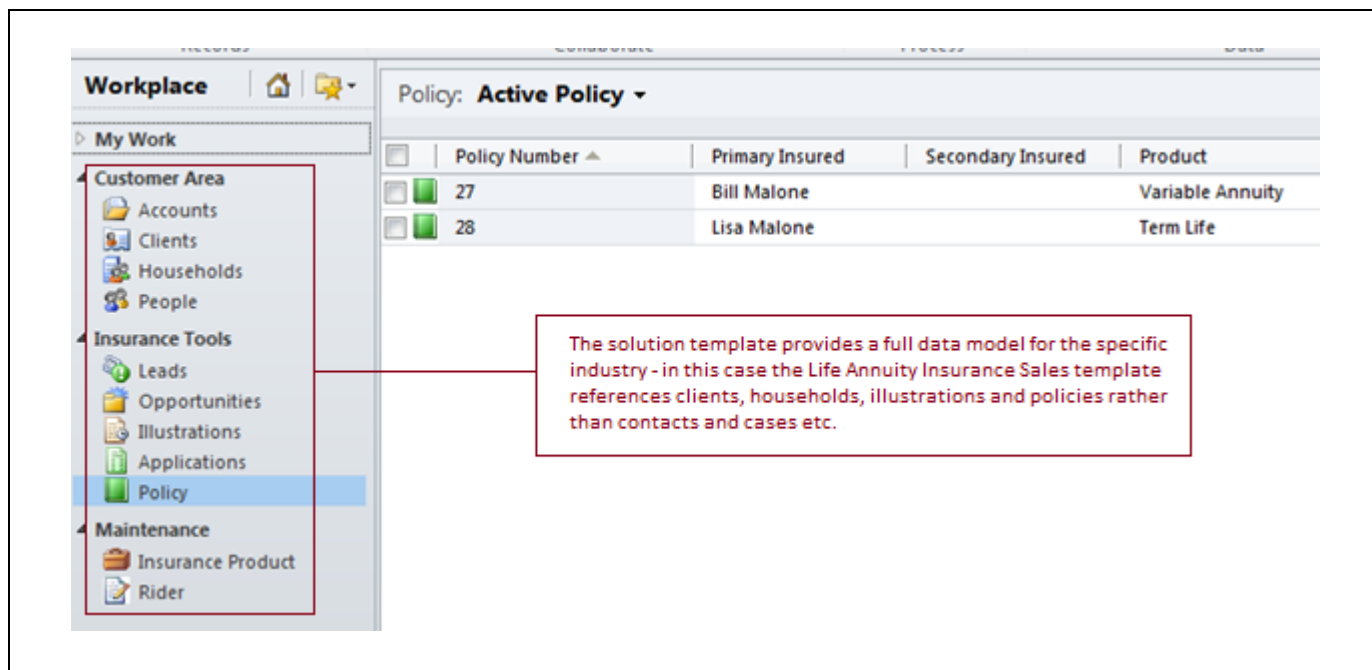
Figure 4: Life Annuity Insurance Sales Template for Microsoft Dynamics CRM

MICROSOFT SQL SERVER 2012

Microsoft Dynamics CRM is built on the foundation of .NET and Microsoft SQL Server, a trusted platform that continuously leads in industry-relevant TPC-E and TPC-H performance benchmarks. Microsoft is soon to release SQL Server 2012 which takes it to new levels of performance, scalability and business intelligence. Release over release SQL Server is certified by software vendors such as SAP to run some of the industry's most demanding workloads. There are many new capabilities that Microsoft customers can take advantage of including:

- Significantly boost query performance, by up to ~100x for star join and similar queries, using the new ColumnStore Index.
- Support blazing fast queries with dramatic improvements to Full-Text Search that offer serious performance and scale advances.
- Accelerate the performance of I/O intensive workloads by cutting growing volumes of data ~50-60% with compression capabilities.
- Gain consistent performance for concurrent and mixed workloads by defining resource usage across different applications with Resource Governor.
- Analyze query execution plans, capture database activity, optimize indexes and structures, and help ensure consistent query performance with familiar, easy-to-use management tools.
- Enable new scenarios with SQL Azure Data Sync, a cloud service that provides bi-directional data synchronization between databases across datacenter and cloud.
- Gain high scale with support for up to 256 cores – enabling high-performance for very large workloads or consolidation scenarios.

With the Microsoft Dynamics CRM Q2 2012 service update we provide customers with the opportunity to harness the core database engine capabilities of Microsoft SQL server 2012 to leverage its performance and scalability advancements. The innovation from the SQL Server team contributes to our continual expansion and improvement of enterprise class capabilities. Currently SQL Server 2012 is deployed in all Microsoft Dynamics CRM Online data centers to further increase performance and reliability for your mission critical customer data. Customers deploying Microsoft Dynamics CRM on-premises will be able to take advantage of the performance improvements and mission critical capabilities provided by SQL Server 2012. Full details about Microsoft SQL Server 2012 can be found here. In addition to the core capabilities, customers can take advantage of fantastic new self-service BI features provided by SQL Server 2012 Power View.

BUSINESS INTELLIGENCE (BI) INSIGHTS WITH POWER VIEW

Microsoft SQL Server 2012 introduces a new Reporting Services Add-in for Microsoft SharePoint Server 2010 called Power View, previously code-named Project Crescent. Power View is a next-generation BI tool for interactive data exploration, visualization, and presentation. It provides intuitive ad-hoc reporting for business users such as data analysts, business decision makers and information workers. In short, Power View provides better business insights and collaboration for casual and experienced users alike. Power View allows a user to configure reports that connect to Microsoft Excel's PowerPivot or SQL Server Analysis Services (SSAS). Power View

is so much more than just breathtaking end user analytics visualizations and tools, it redefines the data analysis process for business and technical users alike.

With the Microsoft Dynamics CRM Q2 2012 service update, we're releasing a set of Microsoft Excel workbooks with pre-defined PowerPivot models and Power View Report templates. These templates will be available in the Microsoft Dynamics Marketplace as a Microsoft Dynamics Labs solution. This release will include the following four templates:

Product Sales Analysis	Customer Care Trends
Sales Pipeline Analysis	Customer Demographics Analysis

The reports offer the ability to filter data in the PowerPivot models as well as visualize patterns and trends using animated charts. Customers can also modify, extend and create new data models and reports based on these templates. Power View further extends our commitment to delivering incredibly simple and powerful end-user BI capabilities in Microsoft Dynamics CRM which provide deep business insight without the reliance on IT resources to unlock the information they need. This marks the first of many investments over several future releases which will harness the Power View capabilities to provide breakthrough insights and collaborative experiences for everyone in your organization.

It should be noted that for the Microsoft Dynamics CRM Q2 2012 service update the Power View reports will be available for On-Premises customers only. Future service updates will expand the reach of Power View to Microsoft Dynamics CRM Online customers.
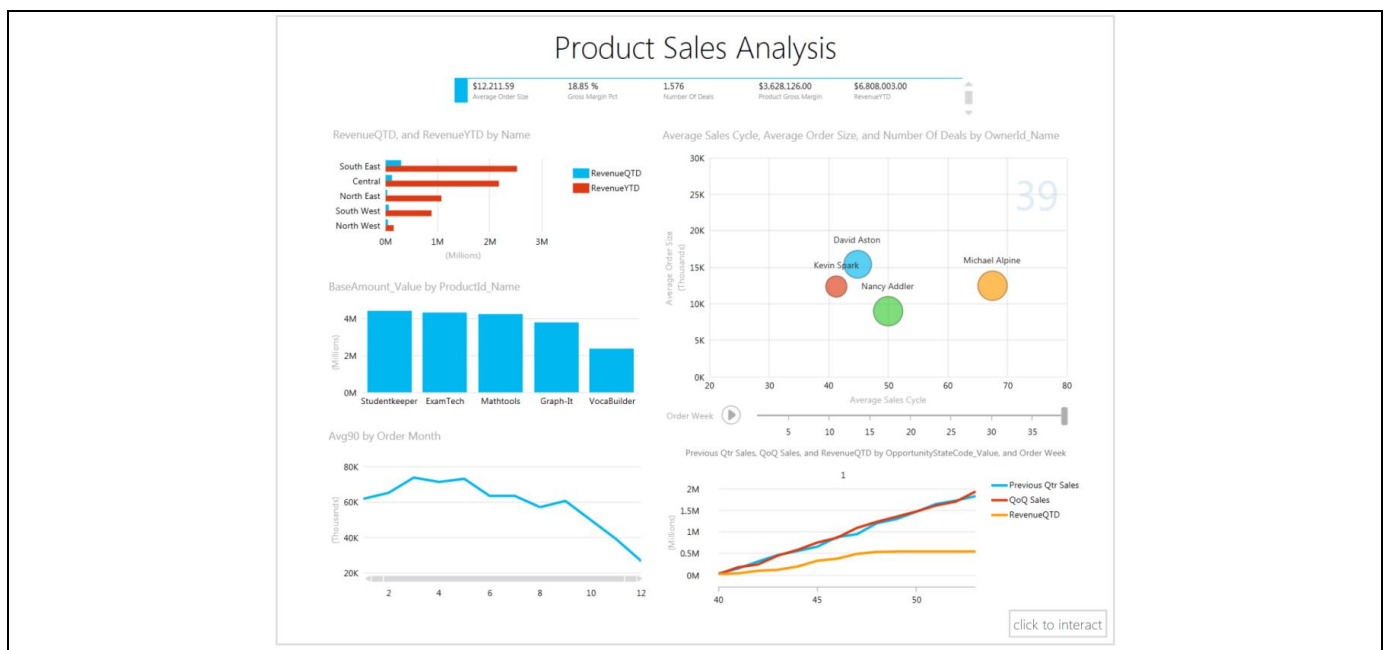

Figure 5: Sample Power View Screenshot

CERTIFICATIONS

Microsoft has invested in cloud computing and services as a key strategy for the future of our business. In short, Microsoft provides the most comprehensive solutions for the cloud on earth. Our cloud investments cover productivity platforms like Office 365, cloud computing platforms like Windows Azure and line of business applications like Microsoft Dynamics CRM Online. In order for us to deliver this depth of capability to the widest range of organizations in different industries and geographic regions we invest massively in the certification of our data centers and our software services. For enterprise and public sector customers globally it provides confidence in how their critical data is managed and secured. Whether your requirements are business or regulatory led Microsoft Dynamics CRM applies technical and organizational privacy and security measures that are above and beyond industry best practices for cloud computing.

With the Microsoft Dynamics CRM November 2011 Service Update, we completed our engineering efforts towards compliance on a number of certifications. Since then, the audits and ratification of data center and service certifications has been ongoing. We are proud to announce that for the Q2 2012 service update, we will have achieved the following certifications:

Microsoft Data Centers	Certification
	ISO 27001
	SAS70 Type II
	Sarbanes–Oxley
Microsoft Dynamics CRM Online Service	Safe Harbor
	ISO 27001
	SSAE 16 SOC1 (Type II)
	Data Processing Agreement (DPA)
	EU Model Clauses
	Business Associates Agreement - enables a company to be Health Insurance Portability and Accountability Act (HIPAA) compliant

Future service updates will further expand the range of certifications for Microsoft Dynamics CRM Online customers.

Microsoft Dynamics CRM

PORTAL FRAMEWORK ENHANCEMENTS

The Microsoft Dynamics CRM Q2 service update includes enhancements to the portal framework that powers customer and partner portals connecting to Microsoft Dynamics CRM (both online and on-premises). These portals can be run in your data center or in Windows Azure. The Q2 2012 service update includes the ability for portals to use Microsoft Windows Azure Access Control Service (ACS) for authentication. This empowers organizations to setup various standards-based identity providers such as Facebook, Google, Yahoo, Windows Live ID and ADFS 2.0 for portals that require authenticated sign-on security. This allows portal administrators to be in control of their identity management and relieves organizations from mundane password management. Portals now also support the use of Office 365 and federated identity setup for Microsoft Dynamics CRM Online. Microsoft Dynamics CRM provides a flexible web portal framework that will fit your customers, your business processes and your infrastructure. All portal solutions for Microsoft Dynamics CRM can be downloaded from the Microsoft Dynamics Marketplace.

CUSTOM WORKFLOW ACTIVITIES IN CRM ONLINE

With the Microsoft Dynamics CRM Q2 service update, developers can build custom .NET Workflow activity assemblies for Microsoft Dynamics CRM Online. These custom assemblies can be developed and deployed as part of a Microsoft Dynamics CRM solution package. Once a custom workflow activity has been deployed, it can then be utilized within the workflow engine for business process management. These new capabilities ensure parity in the developer experience between Microsoft Dynamics CRM Online and on-premises. It also empowers organizations to bring external data, custom actions and integrations into their standard CRM business processes.

CONCLUSION

This document outlined the groundbreaking new capabilities offered by Microsoft Dynamics CRM in the upcoming update. As we look towards the next release of Microsoft Dynamics CRM and over the longer term, Microsoft is committed to delivering on our "Dynamic Business" vision and will continue to invest in delivering a solution that:

- Drives maximum user productivity
- Delivers business insight and collaboration irrespective of a person's role within their organization
- Enriches the core sales, service and marketing capabilities of your organization
- Provides a flexible and scalable business solution framework

It is truly an exciting time to be engaging with Microsoft Dynamics CRM! We look forward to keeping you informed of the innovations and exciting capabilities that Microsoft Dynamics CRM will deliver for you now and into the future!

The Microsoft Dynamics CRM Team

Microsoft Dynamics is a line of integrated, adaptable business management solutions that enables you and your people to make business decisions with greater confidence. Microsoft Dynamics works like and with familiar Microsoft software, automating and streamlining financial, customer relationship and supply chain processes in a way that helps you drive business success.

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