



MICROSOFT DYNAMICS CRM
Roadmap

Microsoft Dynamics CRM December 2012 Service Update Release Preview Guide

November 2012





NOTE: The guidance included in this document reflects current release objectives as of November 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.

INTRODUCTION

Microsoft Corp. continues to bring new innovation 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. Currently there are four releases in planning and development. The next release is the December 2012 Service Update followed by releases code-named based on stars or star constellations: "Orion," "Leo" and "Vega."

CHARTER

Our charter is to reimagine business applications and drive innovation. In so doing Microsoft is the strongest unifier of Microsoft technologies in the business applications space and specifically CRM. We reinforce our charter by adhering to the following principles: proactivity, productivity, ubiquity and flexibility. These principles guide our investments.

	CRM should be an enabler that detects trends, facilitates decisions and suggests actions that lead to successful outcomes
	Deliver delightful user experiences that promote end-user productivity and demonstrate the rich, "better together" value of Microsoft technologies
	Seamless experiences across sales, service, marketing and custom processes regardless of the choice of device, browser and location
	Sustaining the "Power of Choice" and the ability to utilize cloud, on-premises and hybrid CRM deployments as a key point of customer value and flexibility

INVESTMENT AREAS

Microsoft consistently focuses its investments in Microsoft Dynamics CRM across three key pillars of applications, experiences and platform:

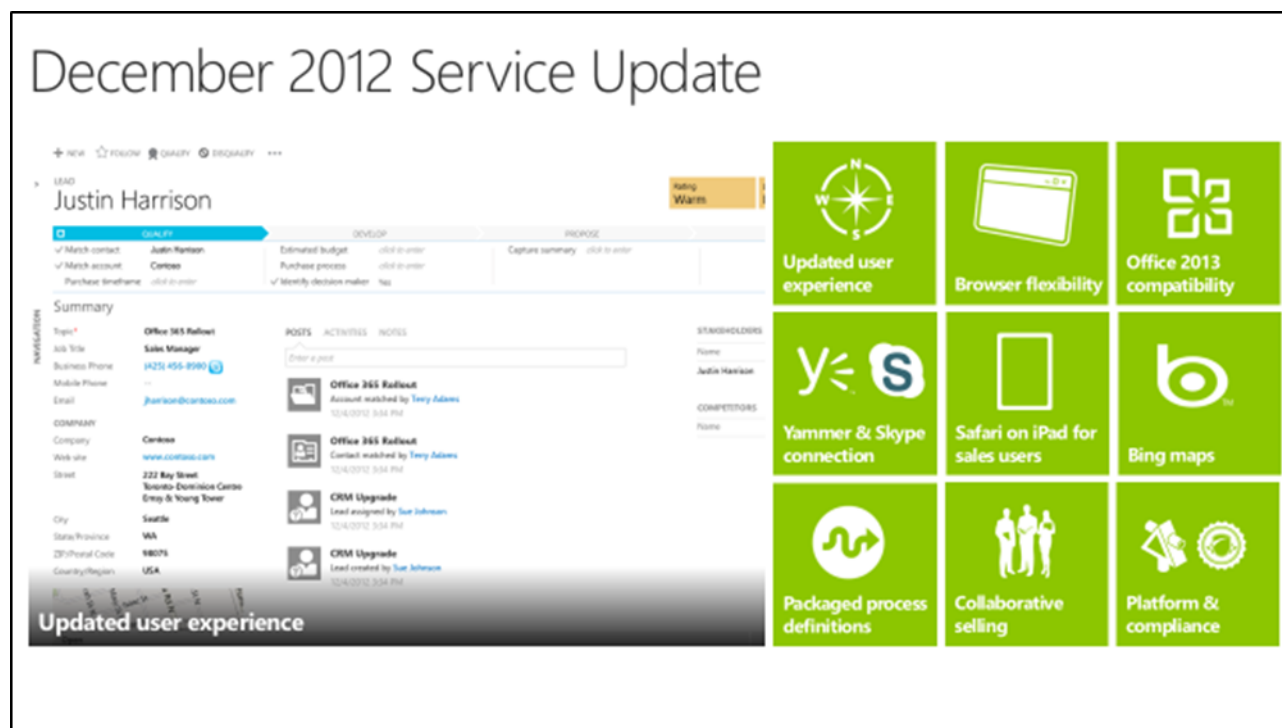
APPLICATIONS	<ul style="list-style-type: none">▪ Marketing, Sales and Customer Service▪ Industry▪ Extended CRM
EXPERIENCES	<ul style="list-style-type: none">▪ User▪ Process▪ Productivity▪ Browser▪ Social Collaboration▪ Mobile
PLATFORM	<ul style="list-style-type: none">▪ Architecture<ul style="list-style-type: none">▪ Communications Framework▪ Business Applications Services▪ Deployment & Administration▪ Compliance, Security & Identity▪ Analytics & Big Data▪ Integration & Extensibility▪ Enabling Technologies<ul style="list-style-type: none">▪ Microsoft Office and Office 365▪ SharePoint▪ Developer Tools▪ SQL Server▪ Windows & Windows Azure

The December 2012 Service Update contains a number of exciting innovations and capabilities across our stated areas of investment: applications, experiences and platform. This document is organized to highlight specific

investments included in the December 2012 Service Update for Microsoft Dynamics CRM Online. This release begins in mid-December 2012 and will continue through January 2013.

KEY INVESTMENT OVERVIEW

The following diagram summarizes the investments that will be delivered in the Microsoft Dynamics CRM December 2012 Service Update.



APPLICATION INVESTMENTS

The December 2012 Service Update will introduce new capabilities in sales and service applications to drive successful sales and customer service effectiveness through pre-defined and configurable processes and enhanced collaborative selling.

NEW PRE-DEFINED AND CONFIGURABLE SALES AND SERVICE PROCESSES

To accelerate time to value the December 2012 Service Update will include three pre-defined integrated sales and service process definitions for lead, opportunity and case management. These processes, based on industry best practices, provide sales and service professionals with insights and guidance to prioritize actions to close more deals faster and turn customers into fans. Each business process consists of stages and steps.

Think of **stages** as “gates” that a process goes through to lead to a successful business outcome and **steps** as recommended actions to take or a piece of information to record. For example, in a lead management process there is typically a need to search for that person in CRM to see if they are already known as a contact. Likewise, in a customer service context the first questions asked are focused on the identity of the customer and whether this is a new or existing issue they’re calling about.

The December 2012 Service Update will provide several pre-defined steps such as locate existing contact and account — these steps help preserve data cleanliness in your CRM system. This reinforces Microsoft's principles of proactivity. A stage can consist of one or many steps. A process can easily be configured to add or remove stages and steps according to your specific processes. This reinforces our principle of productivity.



Process Control Customization Tool - Sales

STAGES +	STEPS +	Fields
QUALIFY	<ul style="list-style-type: none"> Identify Contact Identify Account Purchase Timeframe Estimated Budget Purchase Process Identify Decision Maker Capture Summary 	<ul style="list-style-type: none"> Contact Account Purchase Timeframe Budget Amount Purchase Process Decision Maker? Description
DEVELOP	<ul style="list-style-type: none"> Customer Need Proposed Solution Identify Customer Contacts Identify Competitors 	<ul style="list-style-type: none"> Customer Need Proposed Solution Identify Customer Contacts Identify Competitors
PROPOSE	<ul style="list-style-type: none"> Identify Pursuit Team Develop Proposal Complete Internal Review Present Proposal 	<ul style="list-style-type: none"> Identify Pursuit Team Develop Proposal Complete Internal Review Presented Proposal
CLOSE	<ul style="list-style-type: none"> Complete Final Proposal 	<ul style="list-style-type: none"> Final Proposal Ready

COLLABORATIVE SELLING

The December 2012 Service Update will provide additional capabilities to track and manage stakeholders, competitors, and sales teams for leads, opportunities, contacts and accounts. It makes it simpler to understand at a glance who is connected to an opportunity or lead and their specific role as a team member or influencer. This combined with Skype and Yammer integration provides new capabilities that streamline and add social collaboration to the creation of important deliverables required during the sales cycle such as proposals and presentations.

STAKEHOLDERS

Name	Role
 Jim Glynn (sample)	Influencer
 Maria Campbell (sample)	Decision Maker

EXPERIENCES INVESTMENTS

Microsoft Dynamics CRM is investing in capabilities that deliver modern, familiar and compelling user experiences. Our key focus is user adoption: building applications and experiences where users recognize value, opportunity and insight immediately — either on the road or in the office.

The December 2012 Service Update provides the flexibility to consume Microsoft Dynamics CRM through multiple Web browsers on both Windows PCs and Apple Macintosh computers. This update showcases Microsoft interoperability with non-Microsoft platforms and alignment with industry standards to promote choice.

UPDATED USER EXPERIENCE

This is a fresh, intuitive and guided means for users to work through a business process toward a defined outcome. This is a departure from the traditional transactional CRM application to a more process-centric, outcome-oriented and guided experience. This is a deliberate move to focus on outcomes rather than transactions. The updated user experience beginning with the December 2012 Service Update visualizes business processes defined by your organization.

Initially, the updated user experience (UX) will be enabled for sales and service processes but will be broadened in future releases.

Each stage of a process is clearly outlined and makes suggestions on the recommended steps. Users can move forward and backward in a process and as they do they will be presented with a new suggested list of steps.

LEAD

Maria Campbell (sample)

Lead Source Advertisement	Rating Warm	Status Reason New	Owner* First name L
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QUALIFY (Active)	DEVELOP	PROPOSE	CLOSE
<ul style="list-style-type: none"> Existing Contact: Maria Campbell (sample) Existing Account: [] Purchase Timeframe: This Quarter 	<ul style="list-style-type: none"> Estimated Budget: click to enter Purchase Process: click to enter Identify Decision Maker: completed 	Capture Summary: click to enter	

The **updated UX** introduced in the December 2012 Service Update is an exciting and intuitive approach to “flattening” and streamlining the information users are presented with and take action on. The updated UX is an exciting breakthrough in reinforcing Microsoft’s principles of proactivity and productivity by organizing information in a clean, consistent and easy-to-access medium. In addition, addresses for contacts and accounts will be displayed in an embedded contextual map provided by the Microsoft decision engine Bing.

Opportunity: 6 orders of Product SKU J1202 (sample) - Microsoft Dynamics CRM - Windows Internet Explorer

OPPORTUNITY: 6 orders of Product SKU J...

Est. Close Date: 11/27/2012 | Est. Revenue: \$10,000.00 | Status: In Progress | Owner: Reuben K...

QUALIFY	DEVELOP	PROPOSE (Active)	CLOSE	NEXT STAGE
<ul style="list-style-type: none"> Identify Pursuit Team: completed Develop Proposal: completed Complete Internal Review: completed 		<ul style="list-style-type: none"> Present Proposal: completed 		

Summary

Topic: 6 orders of Product SKU J1202

Contact: []

Account: []

Purchase Timeframe: This Year

Currency: US Dollar

Budget Amount: \$30,000.00

Purchase Process: []

Current Situation: Sales dropping among younger customers.

Customer Need: Needs rare offering at an affordable price.

Open

STAKEHOLDERS

Name	Role
Maria Campbell (sample)	Decision Maker
Patrick Smith (sample)	Stakeholder
Susan Burk (sample)	Influencer

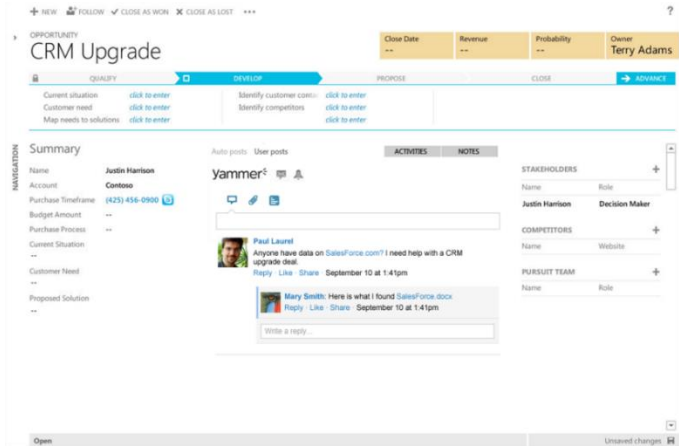
PURSUIT TEAM

Name	Role
Reuben Krigger	Sales Professional

With the December 2012 Service Update, existing customers have the choice to opt-in to the new updated UX forms. Customers who prefer to continue using their existing user interface (referred to as classic forms) can have their system continue to run as is after the December 2012 Service Update is applied. All new customers who sign up for Microsoft Dynamics CRM Online will have the updated UX forms activated by default, but they can choose to use the classic forms by setting a system option. The December 2012 Service Update will provide updated UX forms for Leads, Contacts, Accounts, Opportunities and Cases; over time this will broaden to cover other entities.

SOCIAL EXPERIENCES — COLLABORATION

Organizations are constantly seeking new ways to facilitate simple and effective communication and collaboration for their employees, partners and customers. Enterprise social networks such as **Yammer** provide a powerful yet simple means to achieve this objective. Yammer is a big bet for Microsoft and Microsoft Dynamics CRM. The December 2012 Service Update will deliver the first phase of integrating Yammer as the social layer for Microsoft Dynamics CRM. Microsoft will enable the ability to post messages from Microsoft Dynamics CRM to Yammer and vice versa. These messages can relate to Microsoft Dynamics CRM records and events or even documents. Microsoft Dynamics CRM users can follow leads, accounts, contacts, opportunities and cases that they are interested in or responsible for. Through Yammer, Microsoft Dynamics CRM users can collaborate with colleagues inside their organization or with customers, partners and other stakeholders. In addition, users can participate in social conversations directly within Microsoft Dynamics, through the Yammer web and desktop applications as well as apps running on Microsoft (Windows Phone), Apple (iOS) and Google (Android) mobile devices.

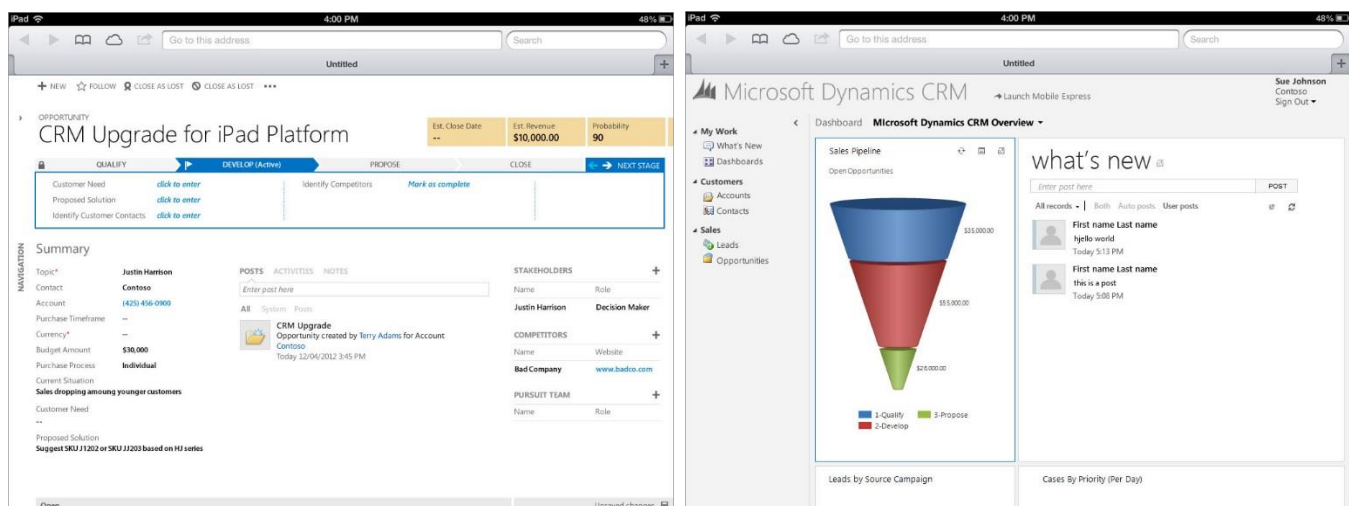


OFFICE 2013 COMPATIBILITY

Continuing our commitment to deliver CRM functionality through familiar productivity tools such as Microsoft Outlook, Word and Excel, Microsoft will provide support for integration with Microsoft Office 2013. The Outlook client will be supported in Microsoft Outlook 2013 providing contextual capabilities directly within the Outlook experience. Word merge for documents and emails will be supported in Microsoft Word 2013, and the powerful ability to export data to Microsoft Excel for analysis and reporting will be supported in Microsoft Excel 2013. This continues our commitment to delivering the right user experience for the hundreds of millions of users who manage their calendars, documents and data analysis in Microsoft Office every day.

BROWSER AND MOBILE EXPERIENCES

To ensure that the broadest range of organizations can derive value from Microsoft Dynamics CRM, Microsoft is expanding the range of browsers supported to include versions of Mozilla Firefox and Google Chrome on Windows PCs. Firefox and Apple Safari will be supported on Macintosh desktop computers. There will also be Safari support on Apple iPad tablets for sales users. This sales experience on iPad adds flexibility for the mobile salesperson.



Browser flexibility will apply to all functions within Microsoft Dynamics CRM for both end users and administrators alike. The list of devices, operating systems and specific browser versions is detailed in the table below.

Platform	Microsoft Internet Explorer	Mozilla Firefox	Google Chrome	Apple Safari
Windows XP***	Version 8	Latest Version*	Latest Version*	Not Supported
Windows Vista***	Version 8 & 9	Latest Version*	Latest Version*	Not Supported
Windows 7	Version 8, 9 & 10**	Latest Version*	Latest Version*	Not Supported
Windows 8	Version 10**	Latest Version*	Latest Version*	Not Supported
Apple OS X 10.7 (Lion)	Not Supported	Not Supported	Not Supported	Latest Version*
Apple OS X 10.8 (Mountain Lion)	Not Supported	Not Supported	Not Supported	Latest Version*
Apple iOS (iPad)	Not Applicable	Not Applicable	Not Applicable	Latest Version****

* Latest versions at time of publication were Firefox 16, Chrome 22 and Safari 6

** Denotes Internet Explorer 10 desktop version, IE10 modern version is **NOT** supported – IE10 on Windows RT is **NOT** supported

*** Internet Explorer 7 will not be supported for Microsoft Dynamics CRM Online

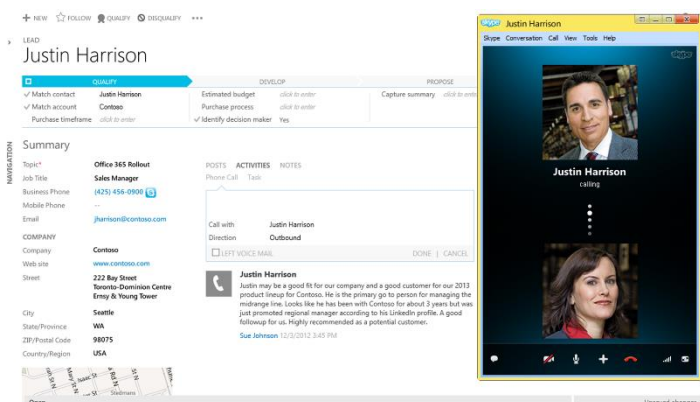
**** Limited to sales users on Microsoft Dynamics CRM Online **ONLY** – Safari on iPad Mini is **NOT** supported

PLATFORM INVESTMENTS

Microsoft Dynamics CRM facilitates the delivery of rapid business value with an agile solution framework that can be easily tailored and configured. The Microsoft Dynamics CRM platform provides a declarative paradigm that ranges from defining the data model to providing integrated persistence, security, API access, user experience and programming paradigms based on a modern open architecture. The December 2012 Service Update will introduce several new investments in our platform capabilities to further our commitment to an open, customizable and extensible online service.

EMBEDDED SKYPE

The December 2012 Service Update introduces the first investments in embedded **Skype** support that facilitates simpler collaboration and engagement between employees and customers. Users will be able to initiate outbound calls (both to phones and Skype to Skype) directly from CRM forms. This adds additional flexibility in embedded communications on top of the Microsoft Lync integration, which is currently supported. With the December 2012 Service Update the Skype application needs to be installed on the user's PC to take advantage of this capability. In future releases this will not be a requirement.



NEW BULK DATA API

The December 2012 Service Update introduces a new bulk data API that allows you to create, update and delete large volumes of records in Microsoft Dynamics CRM Online. This new API adds additional batch capabilities to bundle multiple create, update and delete requests into a single Web service call. For developers this adds additional options to significantly improve the throughput rate of processing large datasets.

TRUSTWORTHY COMPUTING UPDATES

Microsoft continues its commitment to trustworthy computing by complying with the Federal Information Processing Standard (FIPS 140-2).

CUSTOM WORKFLOW ACTIVITIES IN CRM ONLINE

The December 2012 Service Update will enable developers to build custom Microsoft .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

Microsoft has a powerful vision for CRM. It is defining and delivering a connected and forward-looking enterprise — the successful enterprise of the future, an enterprise that connects its employees, partners and customers to what they need, in the right context, using the device and channel they prefer — we call this the Dynamic Business. As Microsoft looks toward the December 2012 Service Update, it is committed to delivering on its Dynamic Business vision with lasting investments across robust applications, great experiences, and platform strength and flexibility.

Microsoft will continue to invest in delivering applications that drive maximum user productivity and process effectiveness across your core sales, service and marketing functions. User adoption remains the key to CRM return on investment; our investments in process-centric and effective user experiences across browsers, Microsoft Office, devices and platforms will ensure users have the right experience in the right context. Underpinning these applications and experiences are new investments in the extensible platform to drive simpler extensibility and deployment options.

It is truly an exciting time to be engaging with Microsoft Dynamics CRM! Microsoft looks 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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