100% FOCUSED ON MICROSOFT DYNAMICS CRM

WELCOME

Why go Mobile with CRM 2016

Nikita Polyakov

Mobility & Portals Practice Director

About PowerObjects

POWER OBJECTS
An HCL Company

- **Founded in 1993 – 300+ Employees**
- **Over 850 CRM Customers Worldwide**
- **We have been 100% focused on CRM since 2008**
- **Largest Microsoft CRM Practice & Largest Support Desk in the world**
- **We have one of the most widely visited Dynamics CRM websites in the world – including our blog and our free online Dynamics CRM guidebook: The CRM Book**

Microsoft Awards & Recognition

2015 Cloud Customer Relationship Management Partner of the Year

2014 Microsoft Customer Relationship Management Award Finalist

2014 Customer Excellence Award for Cloud Transformation

2013 Microsoft Dynamics CRM Partner of the Year

2013/2011 Inner Circle for Microsoft Dynamics

2012 Microsoft Dynamics CRM Partner of the Year

2009/2010/2011 Presidents Club for Microsoft Dynamics

Minneapolis | Atlanta | Chicago | Cincinnati | Dallas | New York | Omaha | Philadelphia | San Francisco | Seattle | Toronto

Our Speaker:

Nikita Polyakov
PowerObjects
Practice Director, Mobility & Portals

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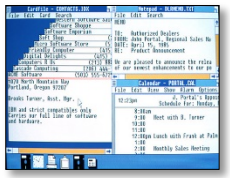
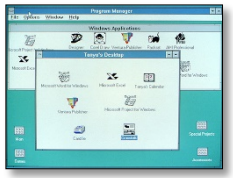
Evolving Times in Customers World

Consumers have more information to make informed decisions at the fingertips…

	1980	1990	2000	2015
Technology				
Cell Phones				
Automobiles				

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Mobility is beyond the new normal

- **60%**
  of employees bring their own devices to work (BYOD)

- **>60%**
  will opt for mobile customer service apps as first option

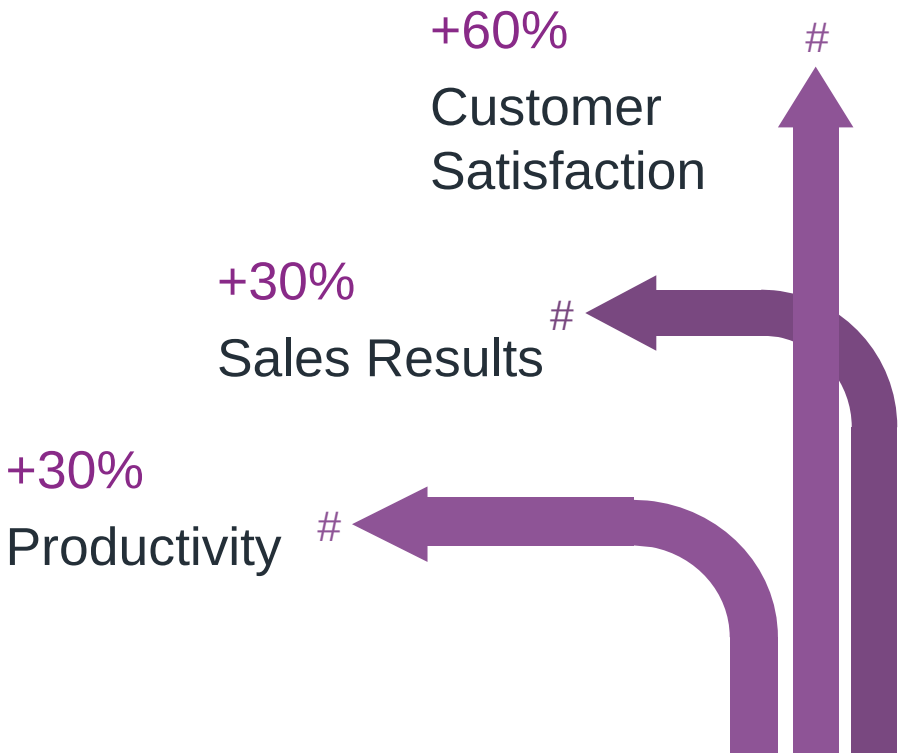
- **>1.4 Billion**
  smartphones by 2016

- **4**
  average number of devices used by consumers everyday

- **220**
  average number of times a person checks their phone each day

- **>212**
  connected devices (IoT) by 2020

Adding Mobile in your Business Yields Results



according to Forrester Research

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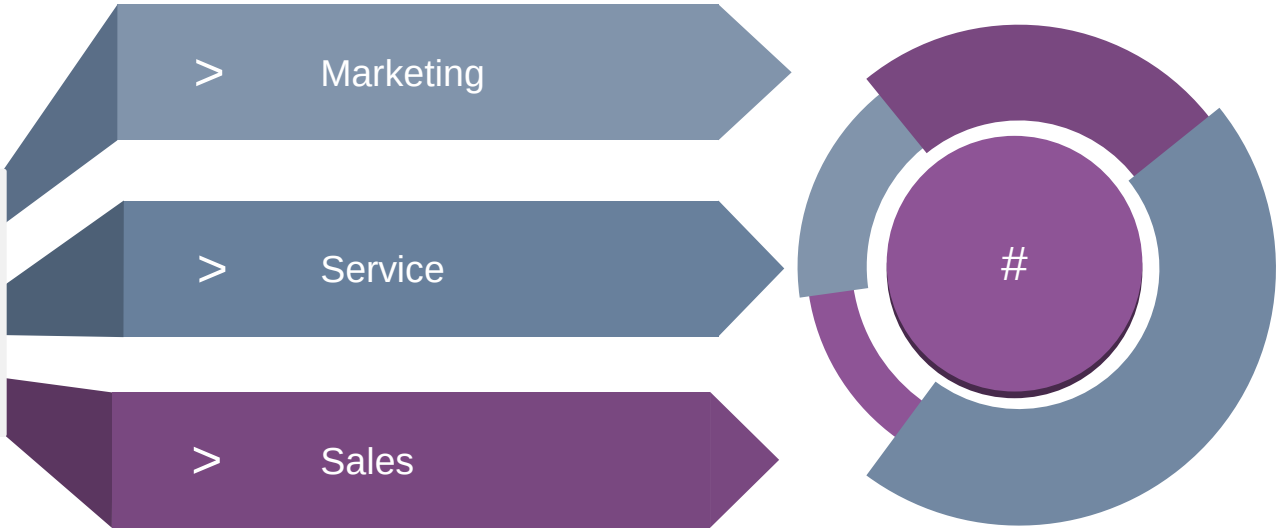
Microsoft Dynamics CRM 2016
Intelligent Customer Engagement

Our Mobile CRM Users

Common CRM User Categories



Salespeople are under tremendous pressure

Approximately

70%

of sales reps consider their jobs to be highly complex

Reps spend more than

67%

of their time on non-selling activities

Workers lose

40%

of their productivity when they switch tasks

Microsoft & CSO Insights, How to Build a World-Class Sales Organization, 2015
CEB, Why You're Losing Competitive Advantage, 2015
Microsoft's Sell In The Now - How to make your sales team more productive

The Seller Challenges

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So…Why Mobility?

Examples of Why Mobile

Move Business Faster

Delaying order placement to return to PC a thing of a past
CRM Automation + Mobile entry and triggers = huge speed

Make Better Decisions

Focus on best business equipped with real time data
Be informed by having all of the information on any device with you
Access Documents and Content anywhere

Do More

Ease of use on my device of choice allows me to enter more data
Remind myself to do more activities
Enter activities while completing others
Work offline

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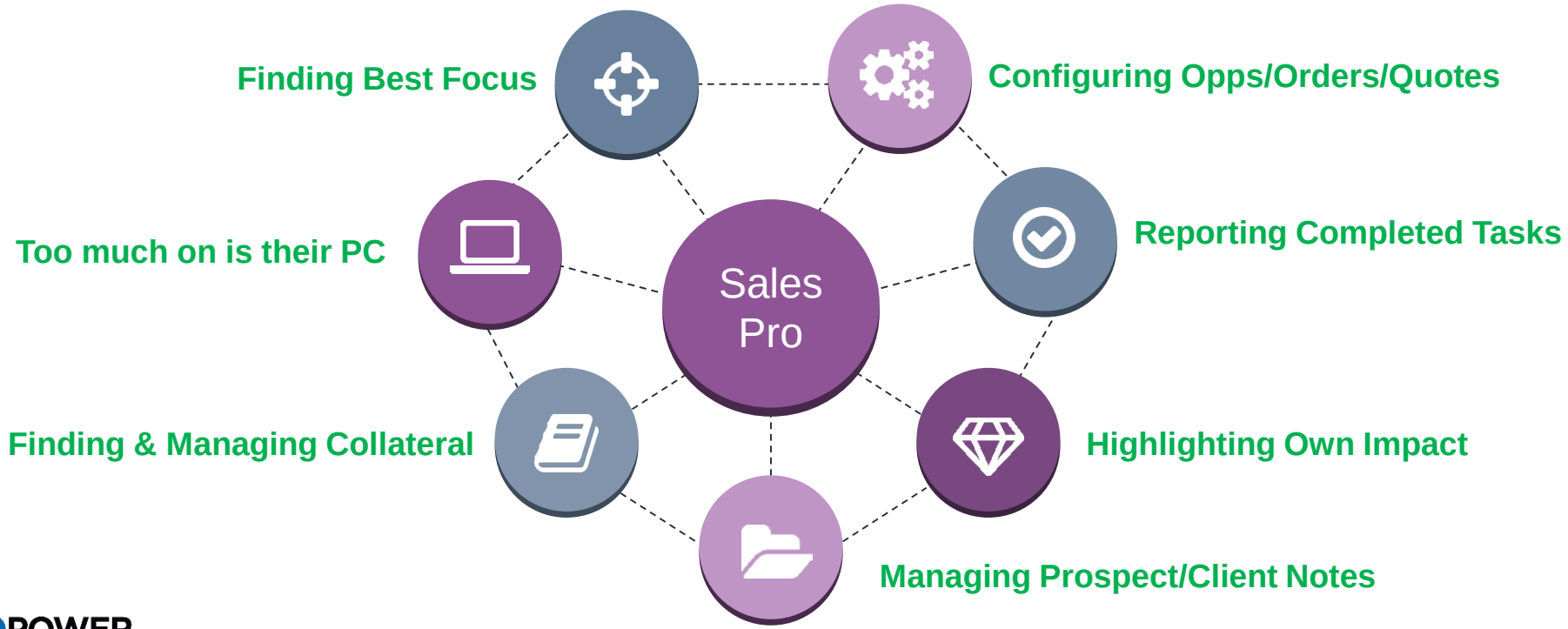
The Seller Challenges Addressed via Mobile CRM



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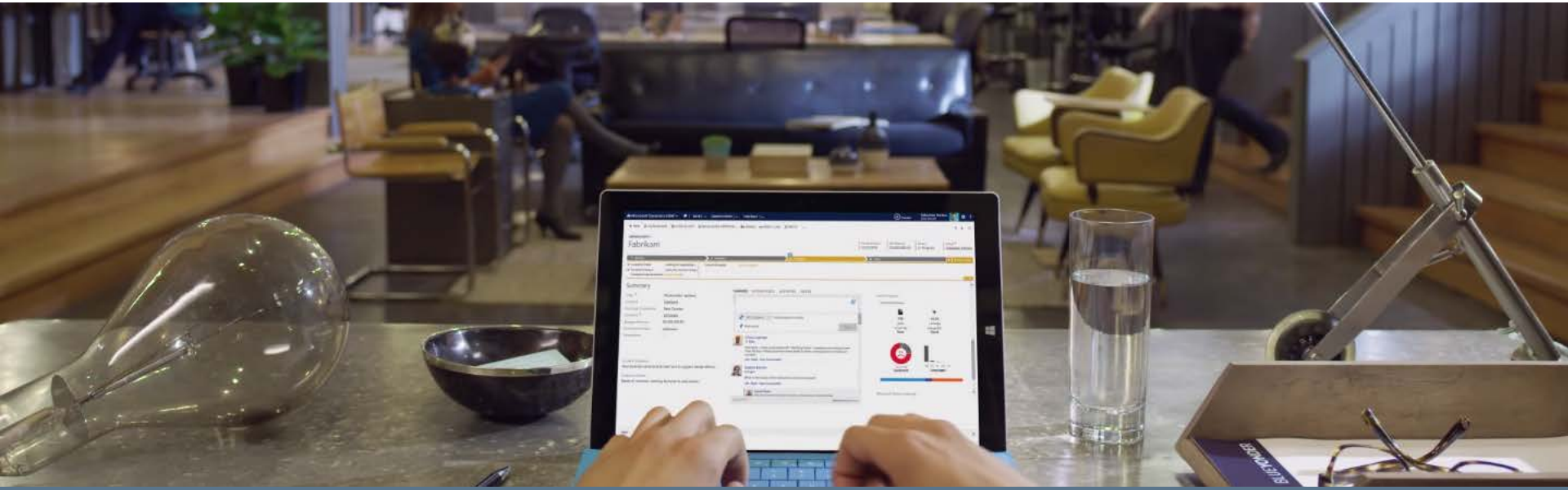
Microsoft Dynamics CRM 2016 Enables Mobile Experiences

Microsoft’s vision for a mobile-first world



Delivering fluid experiences that transcend time, place, context, and device

Access Anywhere

Mobile Productivity

- Right data at the right time on the right device, even offline
- Outcome driven user experience

Build Once, Deploy Anywhere

- Tailored app for tablets (iPad, Android & Windows)
- Simplified phone apps on multiple platforms

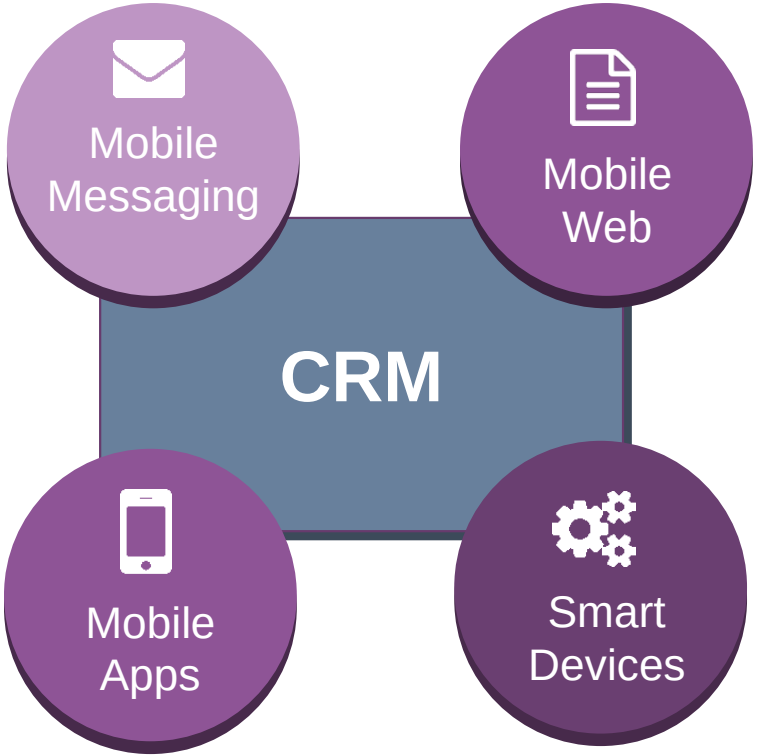
Mobile SDK

- APIs for custom development
- Templates for various mobile platforms including Azure

Secure Data Access

- Mobile Device (MDM) and App (MAM) protection
- Consistent security roles & privileges

Our Mobile Point of View



Enabling Many Mobile Experiences

Mobile Messaging	Bi-directional SMS Messages, Automated Response Systems, Live Agent & Omni-channel
Mobile Web	Mobile Ready: Online Forms, Portals, Support Self-Service & Knowledge Base
Mobile Apps	OOB, Custom or Configurable Tablet & Phone Apps, Push Notifications & Rich Alerting
Smart Wearables	Quick Notifications & Alerts Glance & Go - Micro Experiences (Ex: Apple Watch, Microsoft Band)
Smart Devices	Kiosks & Rewards, IoT Devices Registration & Privacy Opt-in, Post Sales & End of Life scenarios

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Microsoft CRM is at the center of multiple mobile experiences.

Mobile Sales | Microsoft Dynamics CRM

Opportunity Management

Social Selling

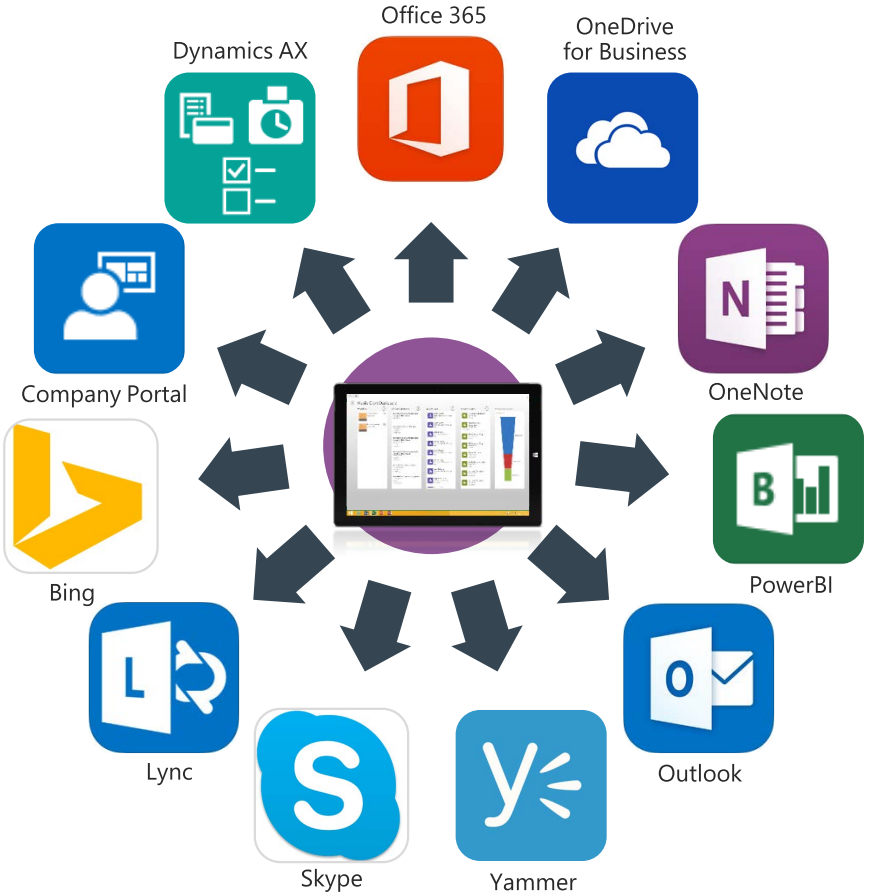
Planning & Management

Content Collaboration

Mobile Sales

Sales Intelligence

Mobile-first Microsoft apps eco-system



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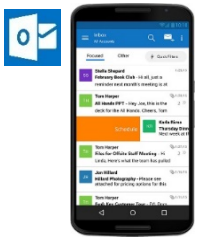
Increase sales productivity with Office 365



Track incoming email

Take notes while visiting a customer

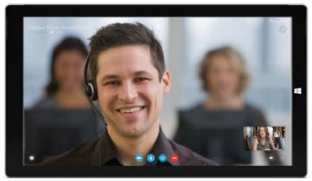
Discover relevant documents

Create proposal

Manage pipeline

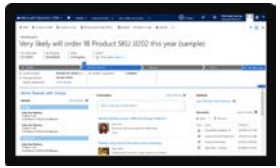
Qualify | Develop | Propose | Close

Follow-up call with lead



Deal updates

Collaborate across organization



Generate quote and share with customer

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Microsoft Dynamics CRM 2016 Out of the Box Mobile Apps

Opportunity management

Account and contact management

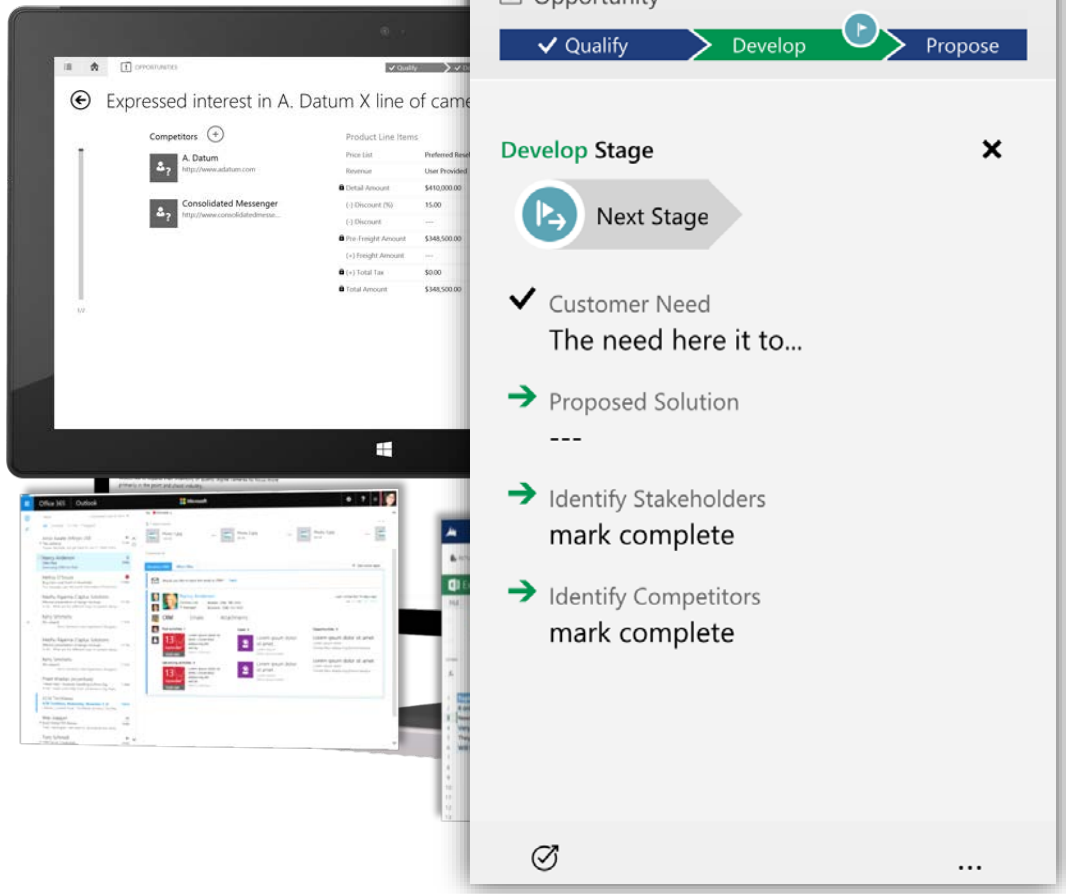
Complete access on par with web experience to management of the basics is table stakes.

Guided selling

Process Flow and Activity management clearly show appropriate next steps while on the og.

Collaboration tools

Mobile availability of Skype for Business, Yammer, Office 365 Groups, and OneNote are available and connected with new App-to-App deep linking.



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Social selling

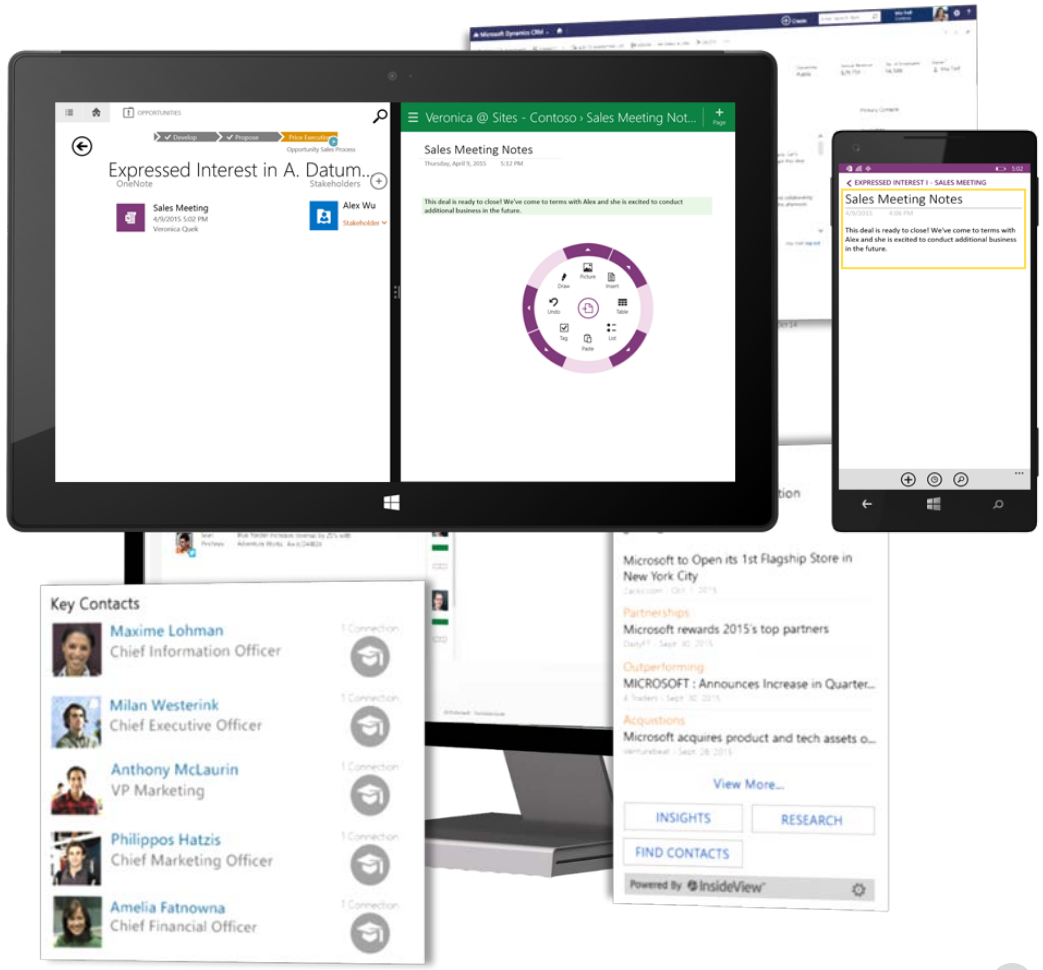
Buying signals

Find more leads by using social to identify and act on buying signals and create leads based on social posts, with Microsoft Social Engagement.

Automating triggers can send notification to users via mobile SMS to alert them of these activities.

Team Selling

Have a omnipresent white board for ideas and tracking customer information all in one place on any device with OneNote.



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Planning and management

Performance management

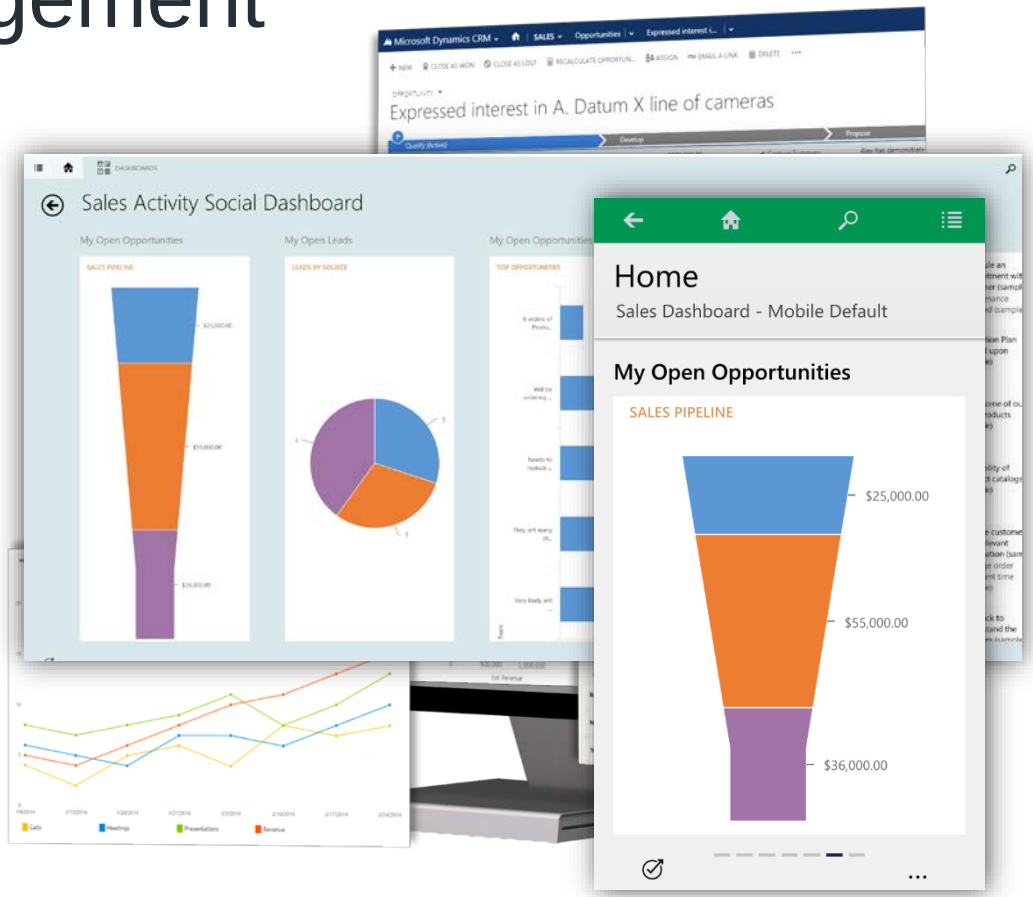
Personal Dashboards and Views are available to turn on for Mobile visibility, allowing personalization of the mobile tool, just like web!

Gamification

Mobile provides easy access to CRM so Sales users have less barriers to participate without getting to full web experience.

Business process management

Complete business process and business rules are fully functional while in CRM Mobile Apps. All of the back end server-side business logic processes execute just like they would. When offline those processes execute at the time of go online event.



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Mobile Content collaboration

Document authoring

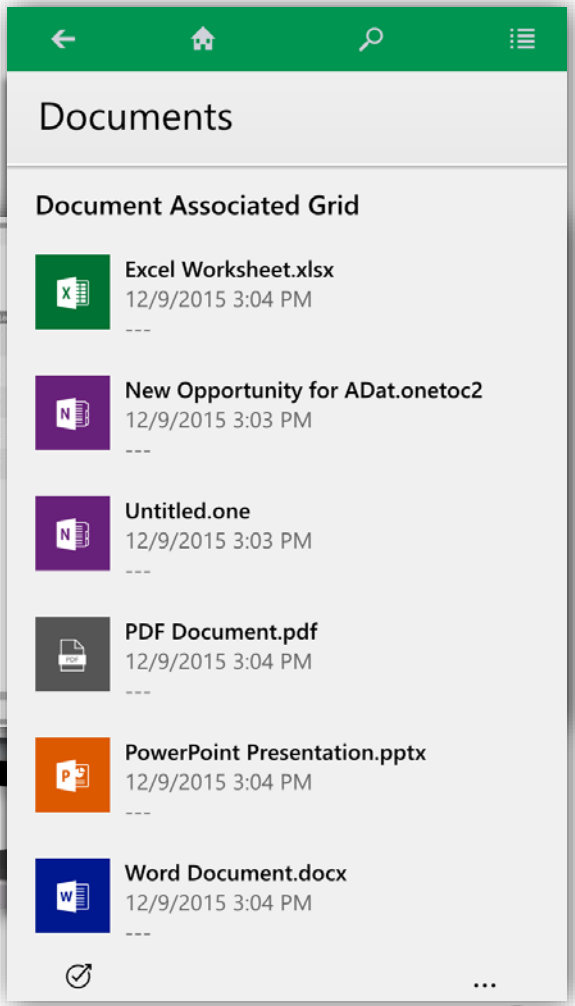
Create personalized sales documents using Word or Excel templates – generating templates on the go via CRM Mobile App like never before!

Document management

Manage contextual CRM documents across SharePoint, Office 365 Groups, and OneDrive for Business are all enable on the go.

Content discovery

Relevant content comes to you with Delve based on what you are working on and who you're working with.



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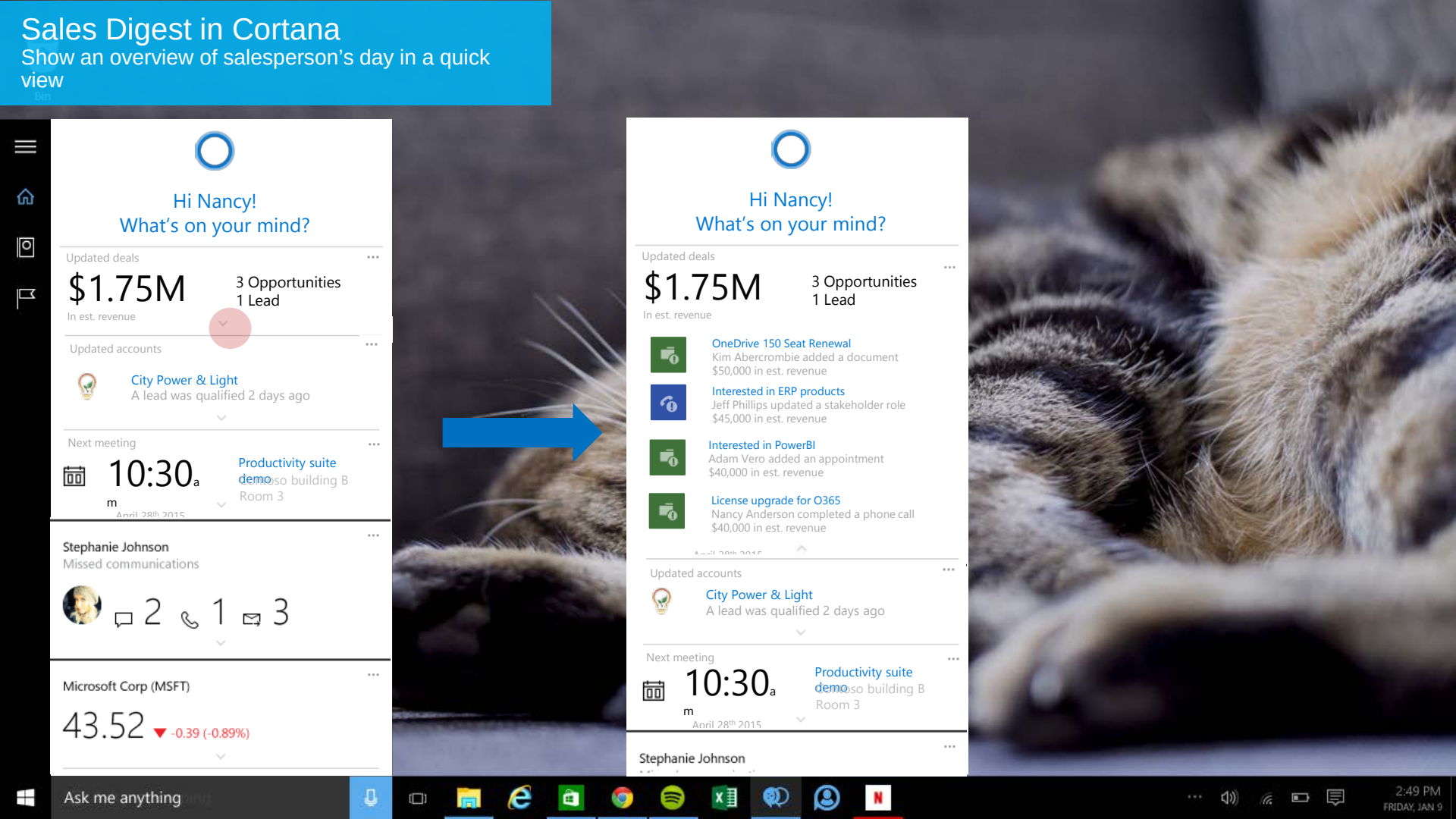
Sales Digest in Cortana

Show an overview of salesperson's day in a quick view



Mobile specific improvements

Mobile Task Flows

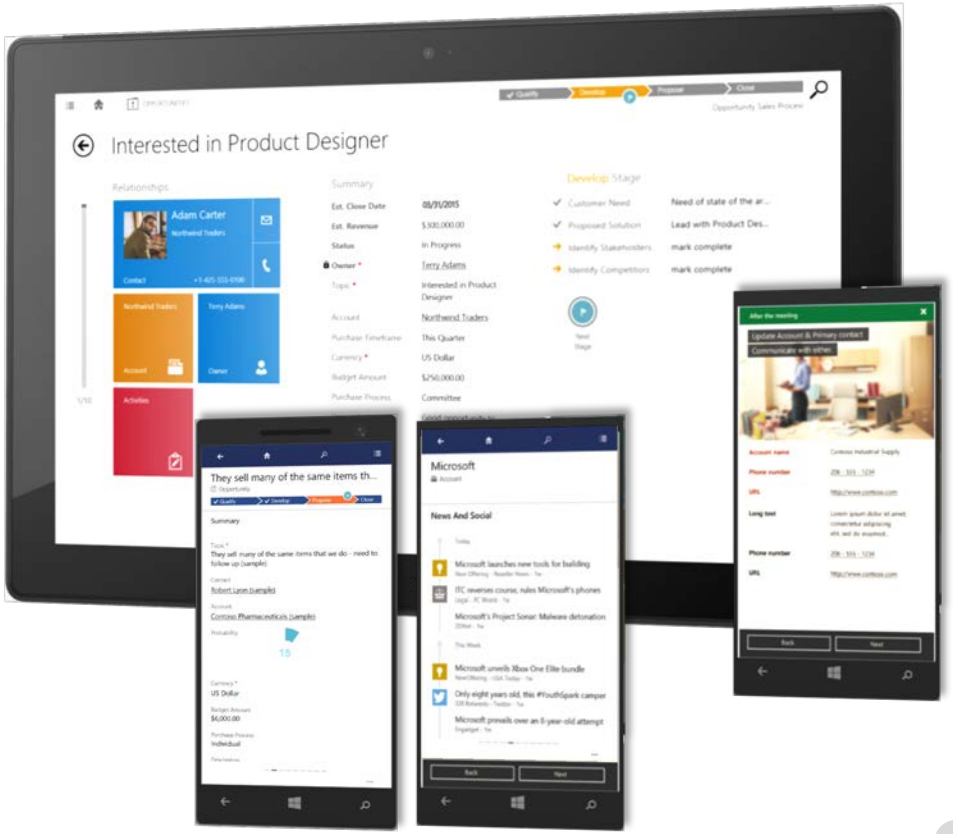
New for CRM 2016 – this Mobile-only experience is task centric, allowing user to focus on contextual task without needing to remember a record type or starting location within the CRM Mobile App.

Voice commands

Quickly manage data using intuitive natural language voice commands to create new records, schedule meetings, set reminders, and find information.

Offline solutions

Get work done anytime, anywhere with mobile apps that work online or offline.



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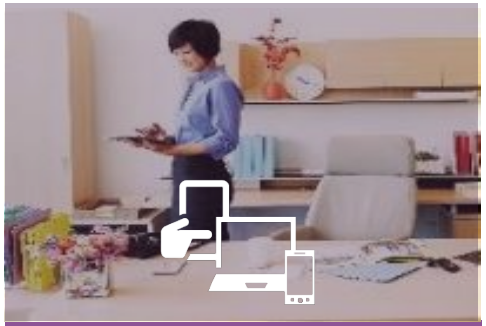
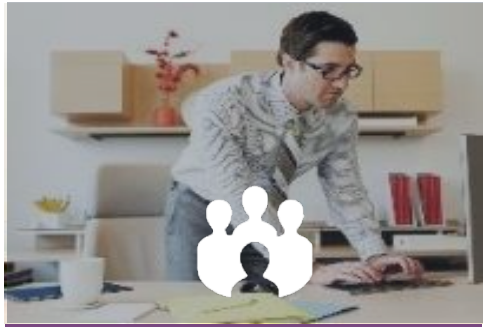
Mobility Themes for Dynamics CRM 2016



Mobile User Productivity

- Digital Assistant Cortana
- Document management
- App-to-App deep linking
- Mobile focus controls
- Task based experiences



Mobile Platform Time to Market

- Mobile client form preview
- Web Resources & IFRAME
- Business Rules & Flows

Enterprise Grade Capabilities

- Consistent & Familiar CRM
- Offline support
- Microsoft Intune and other mobile security suites

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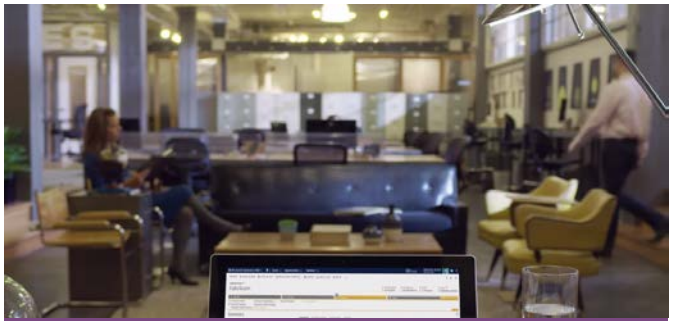
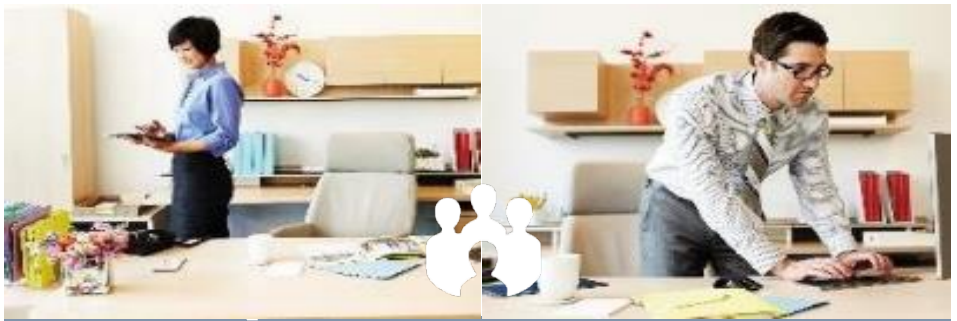
Microsoft Dynamics CRM 2016 Out of the Box Mobile Apps Demo

Why Mobility Matters



Utilize Mobile Moments

- Enable use of mobile moments for work
- Enable quick tasks
- Cortana
- Pin Tiles
- Hybrid App Launchers



Show & Share Docs on the Go

- Documents and visuals are powerful
- Show me, right now, anywhere
- Share Docs with Customers immediately
- No more, I'll send that to you "later"
- Collaborate & take rich Notes with OneNote

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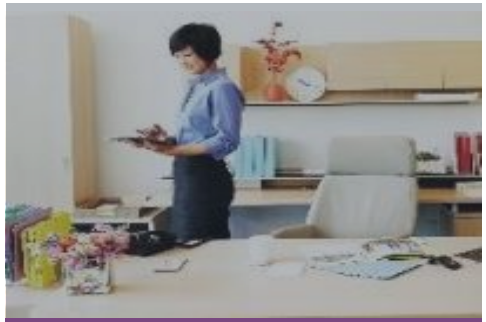
Why Mobility Matters (cont.)

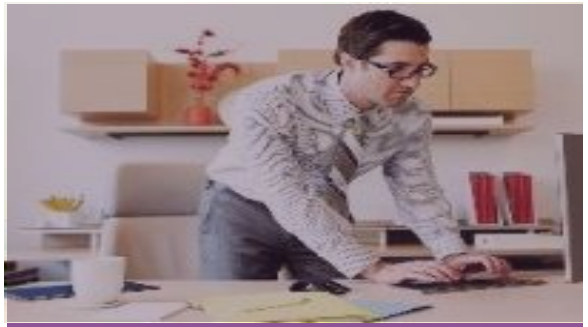


Hybrid App Model Capability

- Strategic Mapping
- Capture Signatures
- Annotate Photos & Images
- Surveys
- Complex Calculations
- CPQ
- Advanced Form Design

Move Business Along Faster

- No more "when I get back to my blank" delays
- Process Approvals for Others
- Place Orders
- Request Quotes
- Work anywhere with Offline
- Create new Tasks offline in any version of CRM



Task Based Experiences

- Guides through easy or often forgotten steps
- "Close Meeting" / "Post Presentation"
- Update Opportunity numbers
- Set follow-up Tasks and Appointments
- Add Notes and Brief via Voice or Pen
- Provide Collateral Feedback
- Close Meeting for Gamification Points

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Custom Controls & Updated UI

Enhanced information visualization

Optimized touch experiences

15 controls provided out of the box

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Offline is here! Dynamics CRM 2016 Online

CRM Mobile Offline Onboarding at Tenant level, powered by Azure

CRM Mobile Offline Configuration Specific to your Users & Business

CRM Mobile Offline App Experience Stays Consistent

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Key Takeaways

Clear advantages

- Documents on the Go
- Feature parity to web CRM

Access for anywhere

- CRM where your users are
- Remove barriers to information

Easy of use

- Color Coding for Familiarity
- Task Based Experiences

Our Point of View for Mobile in Dynamics CRM 2016

- Review your employee needs and enable opportunities
- Start Soon > Find Champions > Adoption
- Consider Hybrid App scenarios
- **Take action** on Mobile user feedback

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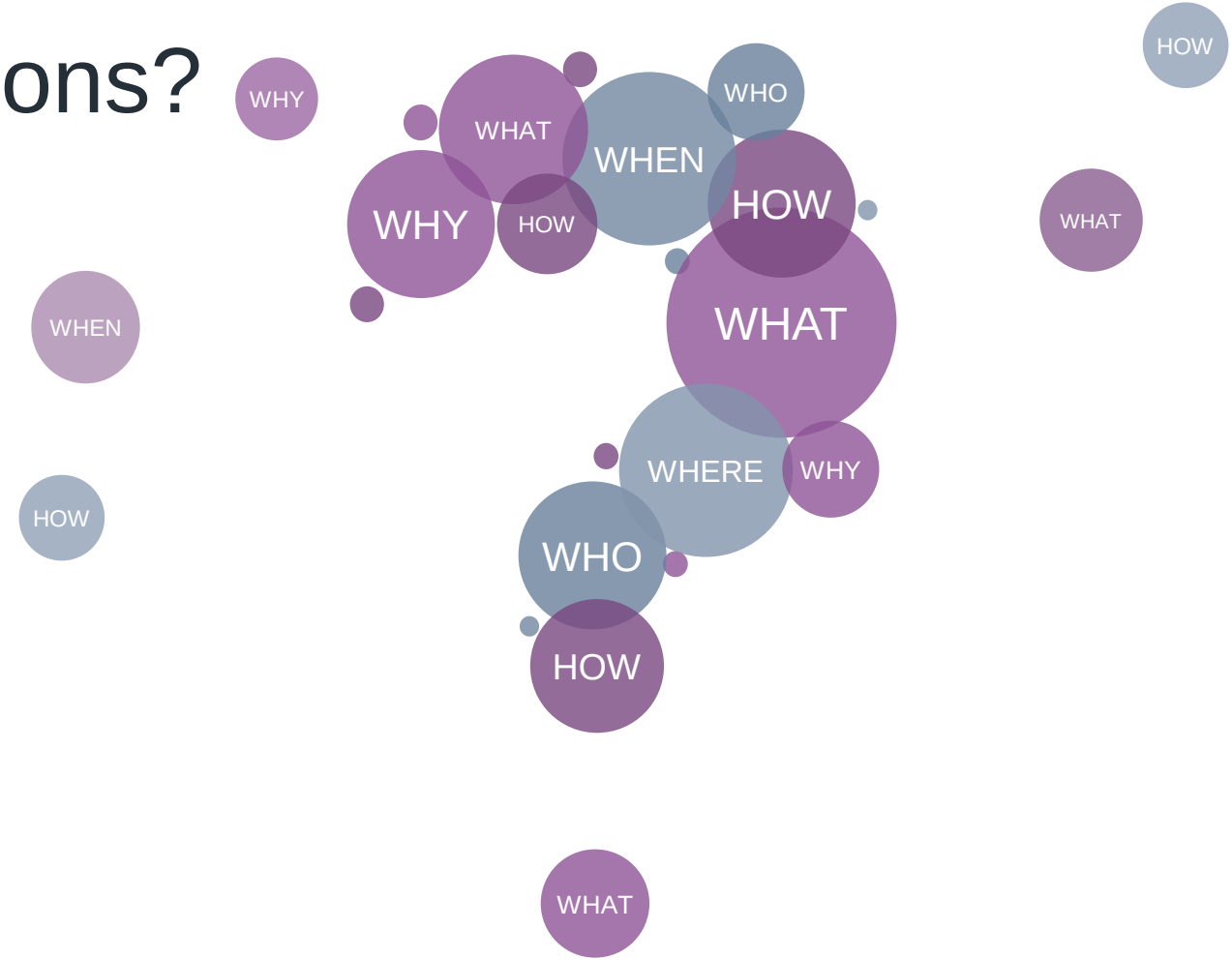
Questions?



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Call to Action:

Request a personalized Demo

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THANK YOU!

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