Microsoft

Microsoft Worldwide Partner Conference

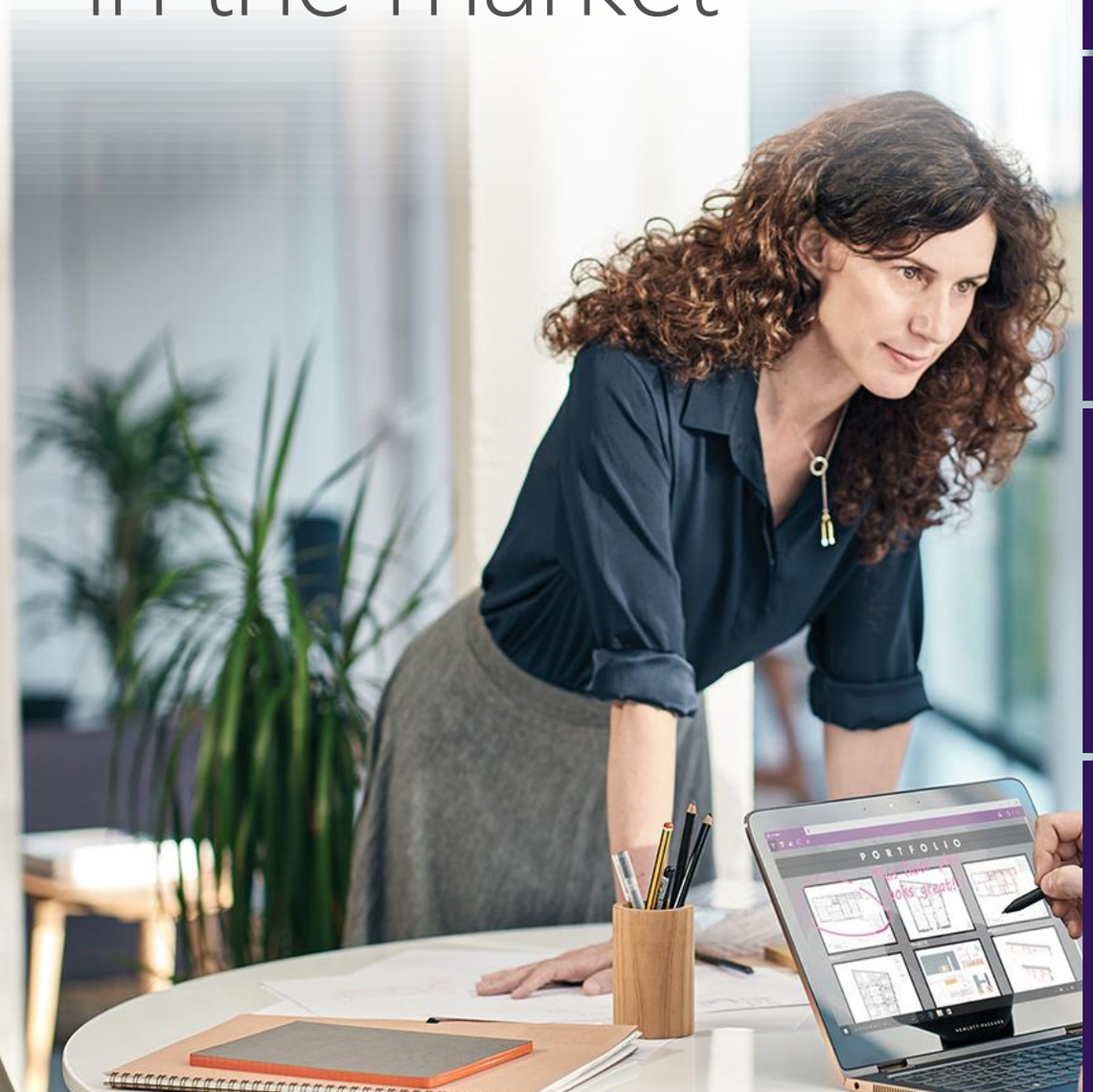
Toronto, Canada
July 10-14, 2016

RENATO LEITE

Dynamics CRMOL PTS
7/29/2016

#WPC16

What is happening in the market



Tipping point around cloud adoption	*52 percent of organizations are confident that cloud apps are as secure as premises-based apps, up from 40 percent a year ago.*
Budget decision-making is shifting from IT to LoB	*By 2017, 50% of all IT spending will be outside of IT and the CIO's control. (Gartner)*
With finite resources, productivity is critical for businesses to scale	*40% of a worker's productive time is lost when switching tasks. This costs the global economy $450B per year.*
Technology innovation is increasing the speed of business	*40 percent of today's F500 companies on the S&P 500 will no longer exist in 10 years.*

Microsoft Dynamics 365

Microsoft Dynamics 365

End-to-end intelligent business applications in the cloud

Start with what you need

Start with the right fit for your business & grow at your own pace in the cloud

Productivity where you need it

Empower employees with productivity tools surfaced in context of processes

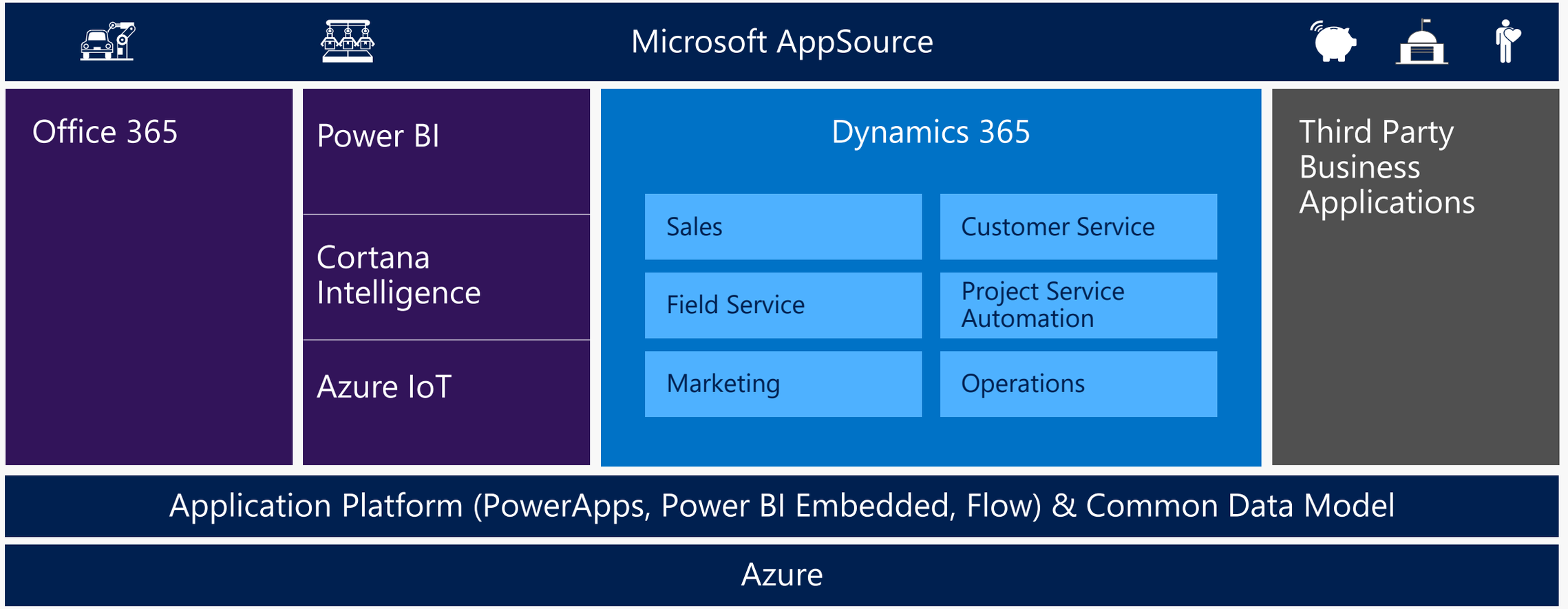
Intelligence built-in

Guide employees to optimal outcomes with intelligence embedded in processes

Ready for growth

Stay nimble & adapt in real-time with flexible, extensible applications & platform

Only Microsoft has all the pieces to deliver an intelligent business cloud



Microsoft Dynamics 365 - Licensing

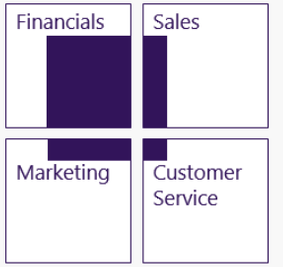
Choice

Business edition

Enterprise edition

Flexible

- Designed to support real world roles
- Customers can license by application or enable users to consume whatever functionality they need – from across our business applications portfolio



Inclusive

Designed to support every employee

Simple

- Easy to understand
- Designed to reduce time spent on licensing discussions
- Make transparency a competitive differentiator

Microsoft Dynamics 365 Packaging

Two Dynamics 365 Editions

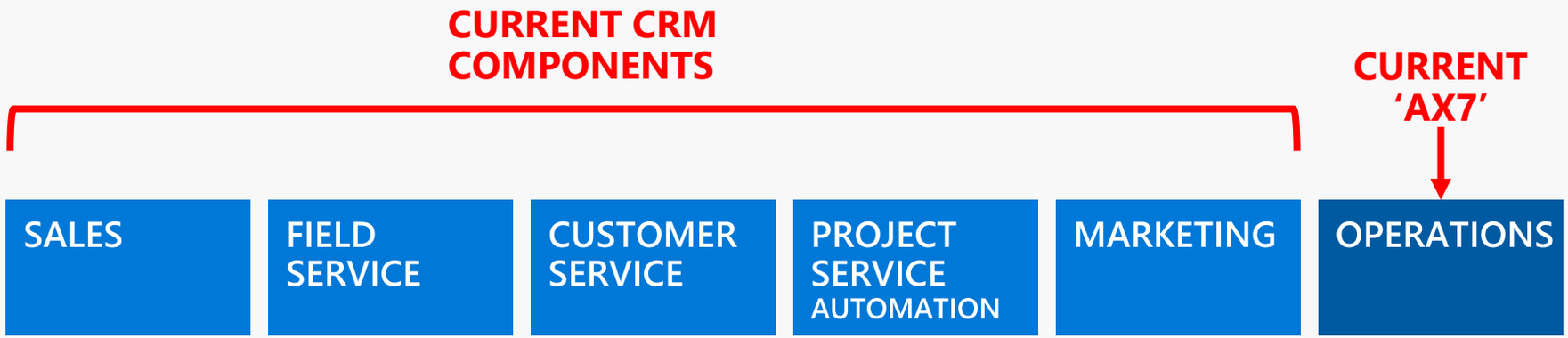
Business

- Optimized for 10-250 Employees
- Comprises Project ‘Madeira’ & Future Sales & Marketing Solutions
- Cloud Only
- Max 300 seats

Enterprise

- Optimized for 250+ Employees
- Comprises AX & CRM
- Dual Use
- Min 20 seats on select offers

Current Skus Mapped To Dynamics 365



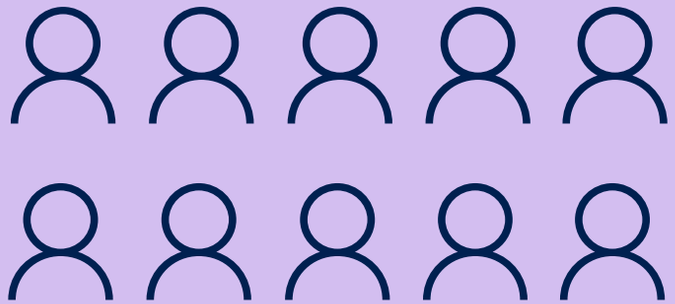
Microsoft Dynamics 365

Liberating customers from traditional Business Apps Licensing

"light users"

"full users"

Team Members

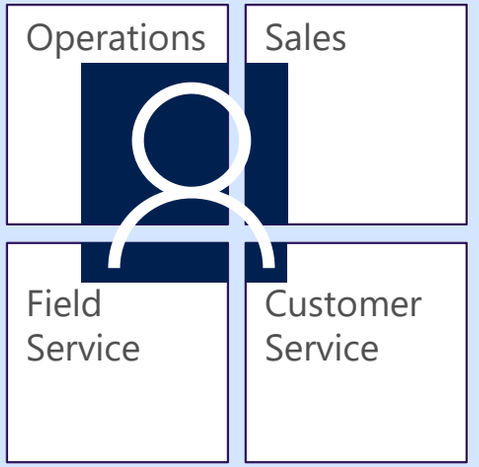


Light Use, Knowledge Sharing & Embedded Business Intelligence

Apps

App Specific Extensibility, Workflow, & Embedded Business Intelligence

Plans



Full Extensibility, Workflow, & Embedded Business Intelligence

Dynamics 365 Packaging

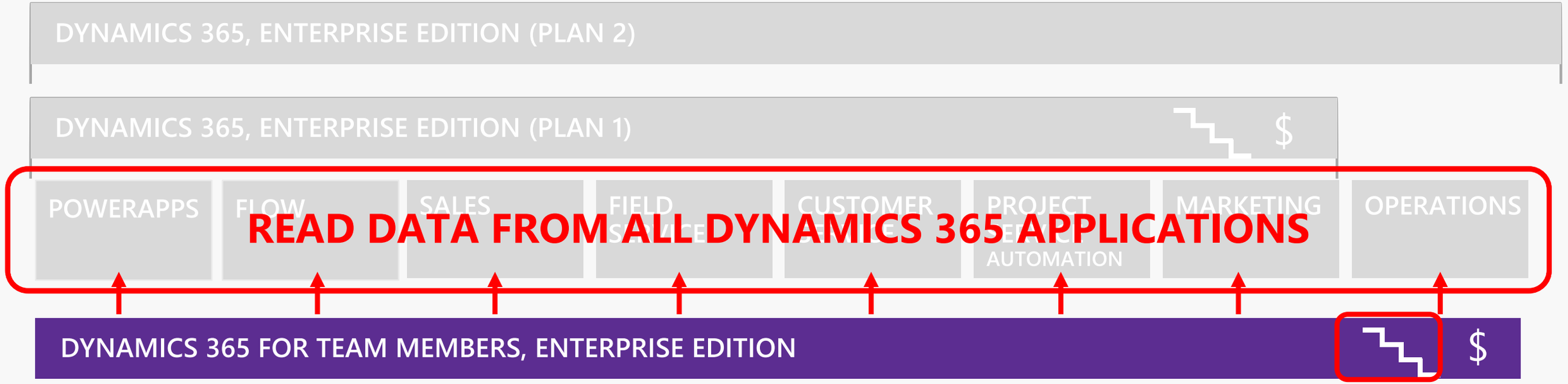
DYNAMICS 365, ENTERPRISE EDITION (PLAN 2)

DYNAMICS 365, ENTERPRISE EDITION (PLAN 1)

POWERAPPS | FLOW | SALES | FIELD SERVICE | CUSTOMER SERVICE | PROJECT SERVICE AUTOMATION | MARKETING | OPERATIONS

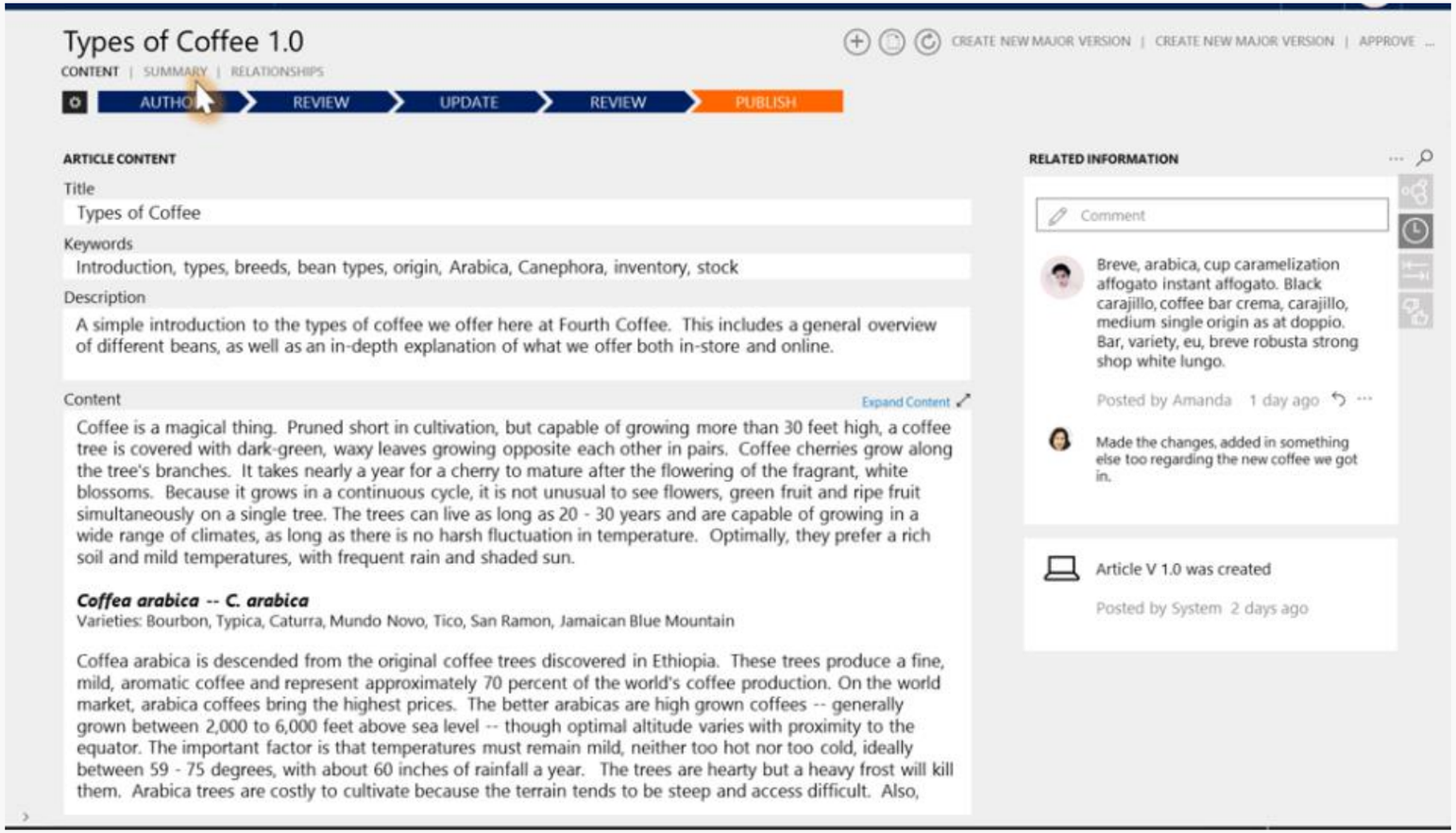
DYNAMICS 365 FOR TEAM MEMBERS, ENTERPRISE EDITION

Team Members Extends Access To Light Users



- **SIMPLE & INCLUSIVE:** One SKU covers ALL light use, and knowledge sharing use rights
- **SHARE INSIGHTS**: Common collaboration tools, business intelligence, and limited PowerApps and Flow
- **LOWER TCO:** Lower per seat price at higher user counts
- **INCLUDED IN ALL APPLICATIONS & PLANS**

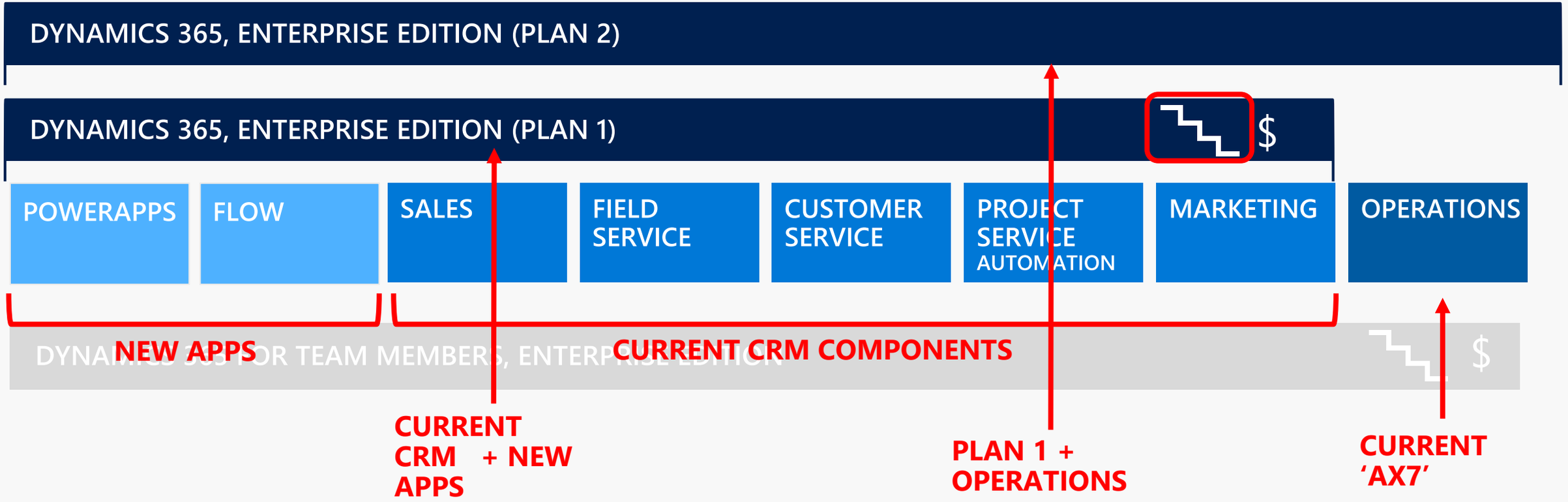
Knowledge Management



Team Members, Enterprise edition gives a user the right to author, review, update, publish

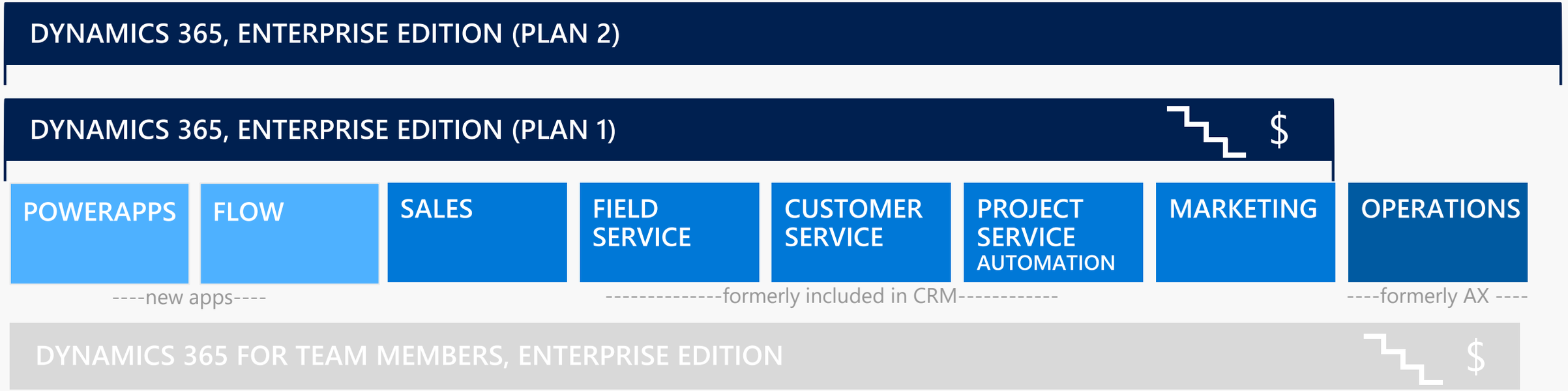
No Additional Licenses Required

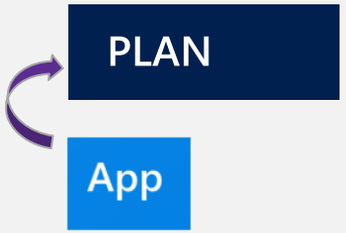
Apps & Plans For Full Users



- **INCREASE INSIGHTS:** Embedded business intelligence with PowerBI
- **EXTENSIBILITY**: Microsoft PowerApps and Flow for in-application data only
- **NO DOUBLE LICENSING:** Included Team Members use rights give read rights to all other apps

Why Plans Over Apps?





3 reasons to choose plans over apps

1. Require flexibility to work in more than one app
2. Leverage full extensibility of PowerApps and Flow
3. Economically more favorable due to tiered pricing

Business Edition For SMBs

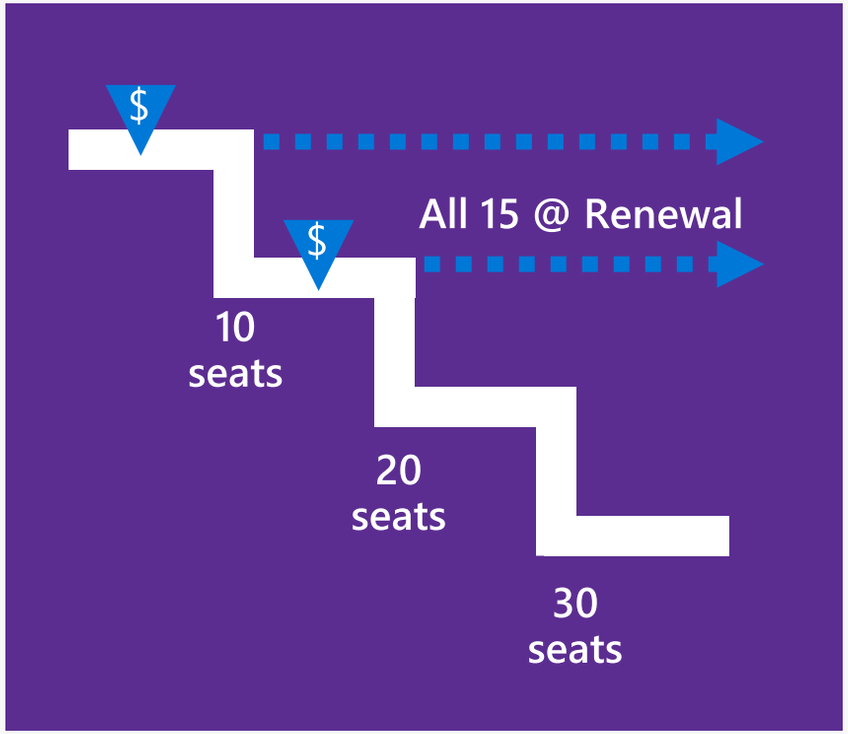
Fall 2016

Dynamics 365 for Financials ('Madeira')
Dynamics 365 for Team Members, Business edition

Future

Dynamics 365 for Sales
Dynamics 365 for Marketing
Dynamics 365, Business edition plan

Discounted Pricing To Customers Who Purchase More Seats Of Select Offers



- ✓ Available on Plan 1, Team Members, Enterprise edition, and (Future) Business Plan
- ✓ Tier qualification for new seat purchased based on total number of qualifying seats at end of the purchase
- ✓ Previously purchased seats remain at their price point until renewal
- ✓ In addition to programmatic discounts

Mix And Match Plans And Apps

Mix and Match

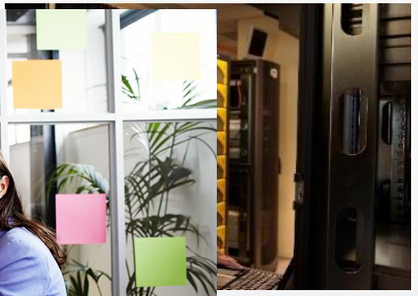
Each user may be licensed only for the functionality they need, across Plans, Apps, and Team Members

*Includes Team Members functionality

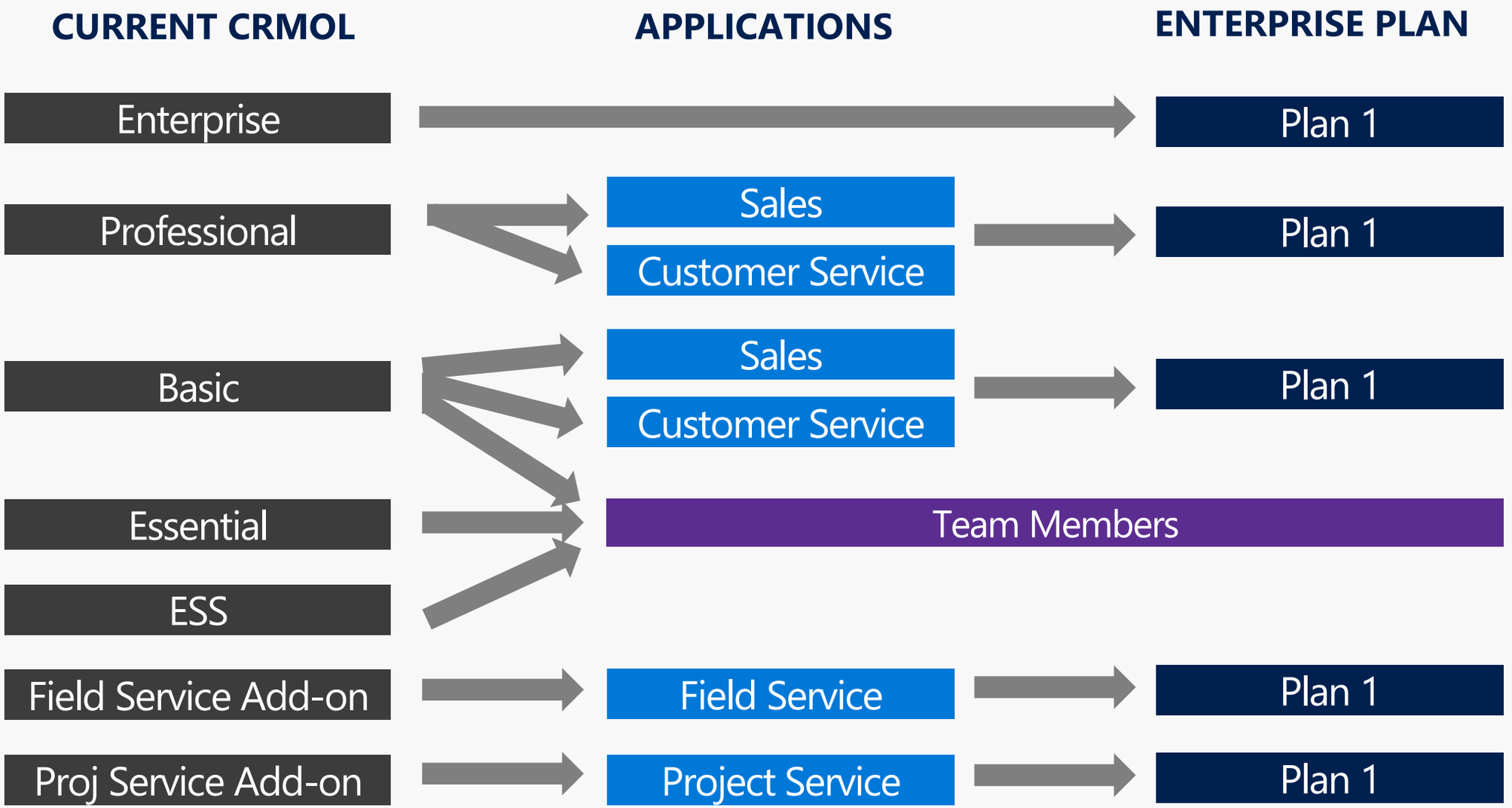
Channels For Dynamics 365

Enterprise edition

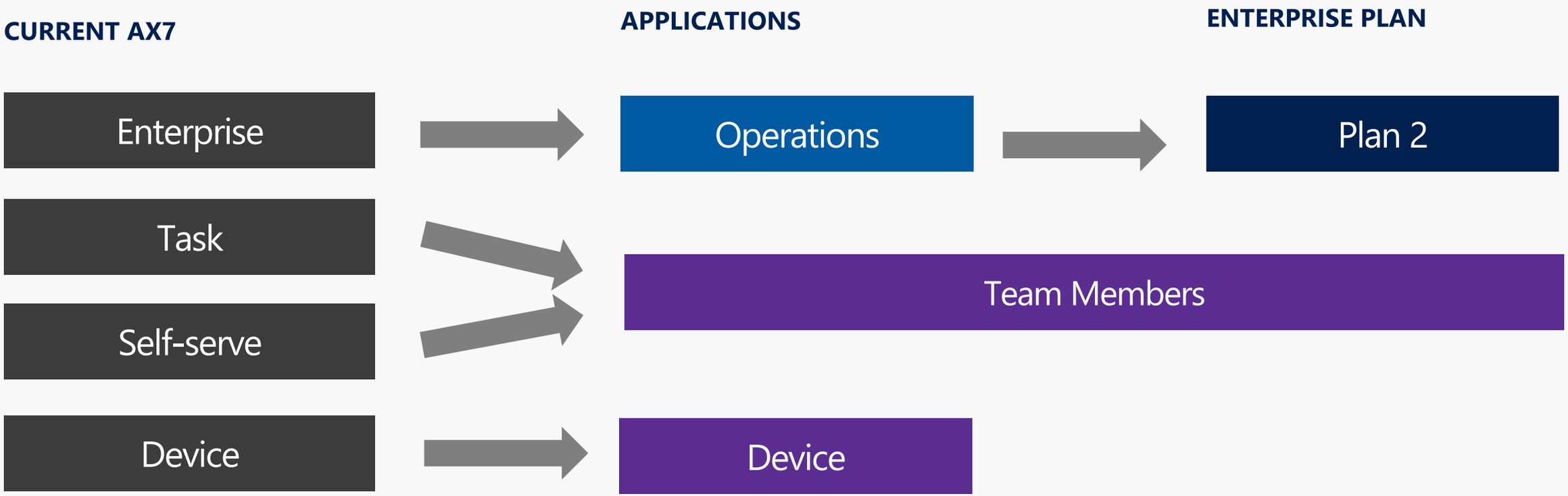
Business edition

	OPERATIONS	CUSTOMER ENGAGEMENT APPS & TEAM MEMBERS	PLAN 1	PLAN 2	FINANCIALS & TEAM MEMBERS
					
EA	•	•			
MPSA	•	•			
Open					
Cloud Solution Provider	•	•	•	•	•
Web Direct (MOSP)		•	•		

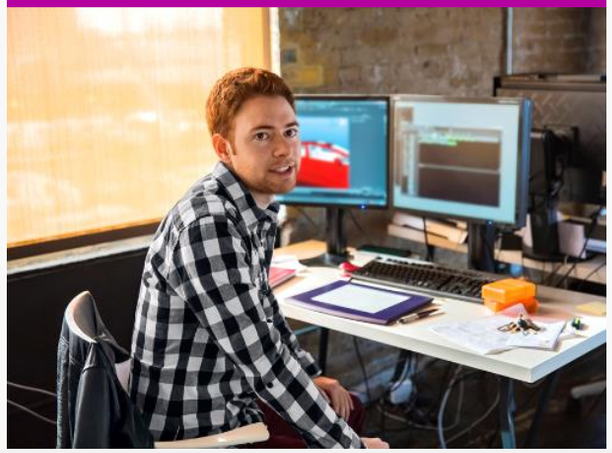
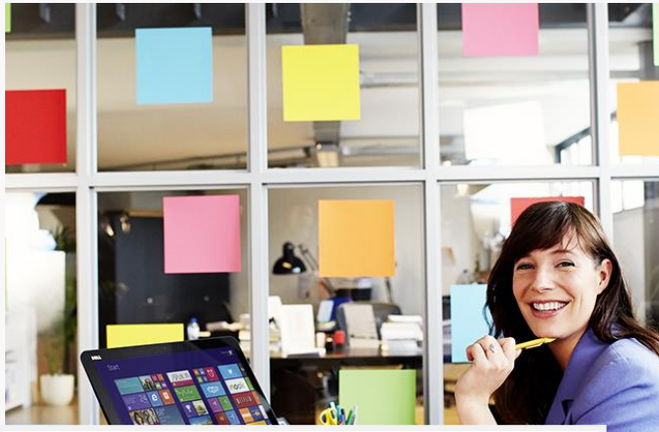
How Does CRMOL Map To Dynamics 365?



How Does 'AX7' Map To Dynamics 365?



What Are The Existing Customer Options?

Online Customers	On Premises Customers		
STAY ON SUBSCRIPTION	**STAY WITH PERPETUAL**	**PERPETUAL + CLOUD ADD-ON**	**MOVE TO SUBSCRIPTION ONLY**
			
Transition options to new SKUs	Keep paying SA or Enhancement	Keep paying SA or Enhancement + cloud add-on SKU	Stop paying SA or Enhancement + From SA SKU
Renewal	Renewal	Act anytime	Anniversary or renewal

Microsoft Dynamics CRM Spring 2016 Wave

Themes for Dynamics CRM Spring 2016 Wave

TRANSFORMATIVE SERVICE

With Field & Project Service:

- Schedule, manage and deliver on-site service.
- Field and Project Service capabilities managed in CRM.
- Optimized, skill-based resourcing for complex, multi-day projects.
- Schedule resources across field service and project-oriented customer engagements.

COMMUNITY ENGAGEMENT

Through portal solutions:

- Engage with customers, partners and employees.
- Integrated CRM experience to manage portal content and design.
- Self-service capabilities for streamlined engagement processes
- Responsive design optimized for mobile, tablet and desktop.

INTELLIGENCE

With Learning Path, ML & PowerBI:

- Learning Path- Personalized, interactive guided tasks and sidebars based on context and role.
- Adaptive learning for intentions and custom tags in social posts.
- Automated triage of social posts.
- Power BI - enhancements for Sales Manager dashboard, introduce Customer Service dashboard

What's new in Sales

Partner portal

Enable partners to build business for shared success with lead distribution, deal registration, account management, and opportunity management.

Rich contextual help

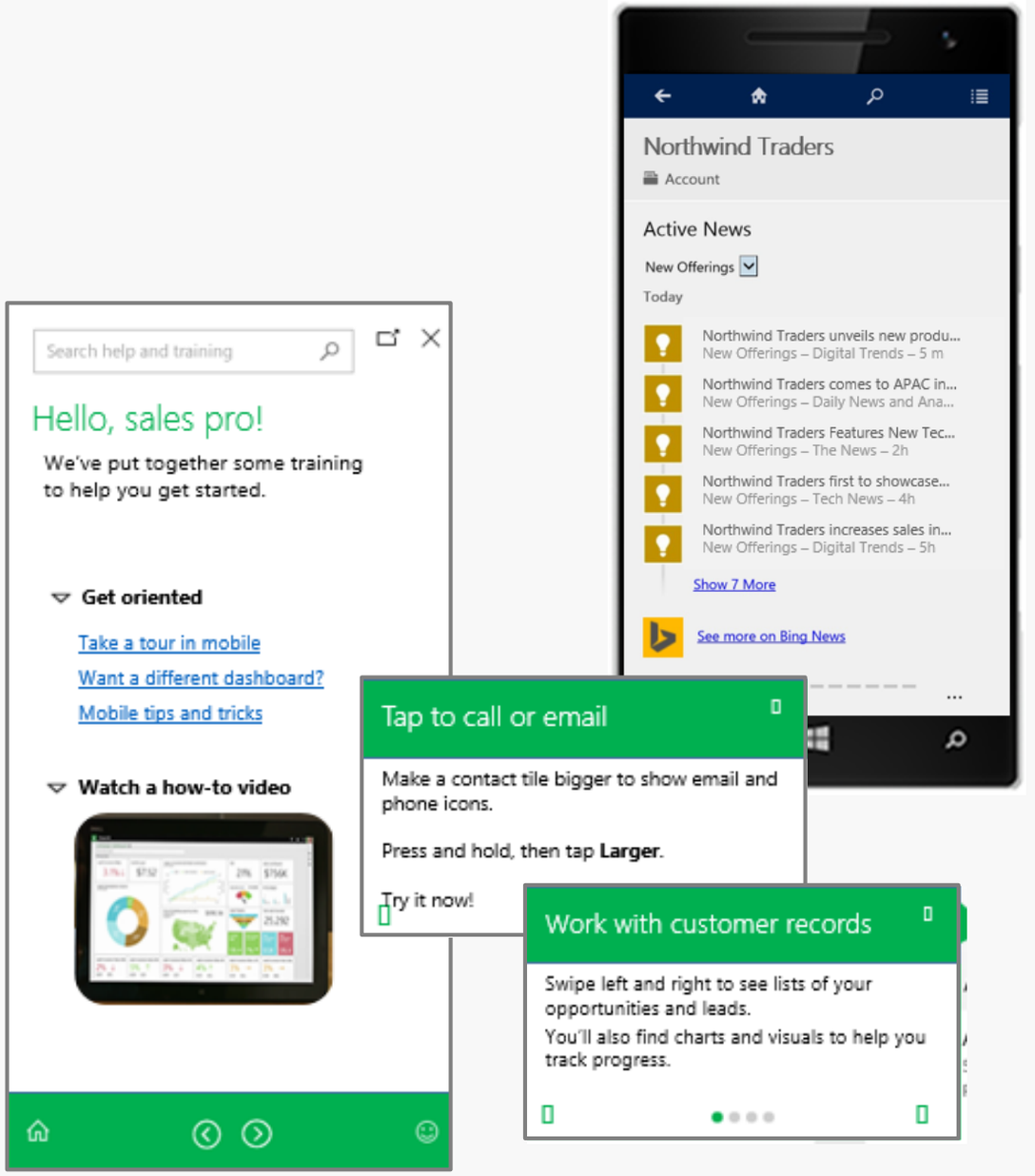
With Learning Path, increase sales user adoption and productivity with rich, context-sensitive guidance for onboarding, what's new, and frequent tasks such as lead management embedded directly in the web and mobile apps.

Predictive intelligence

Sell smarter with cross-sell recommendations* from Cortana Intelligence.

Mobile apps

With Company News Timeline*, stay informed about compelling events for accounts, contacts, opportunities, and leads while on the go.



* Preview

What's new in service

Field service

Maximize effectiveness and customer satisfaction in the field with enhanced scheduling capabilities.

Project service

Control costs and optimize resources with end-to-end support for complex, multi-day professional engagements.

Portal

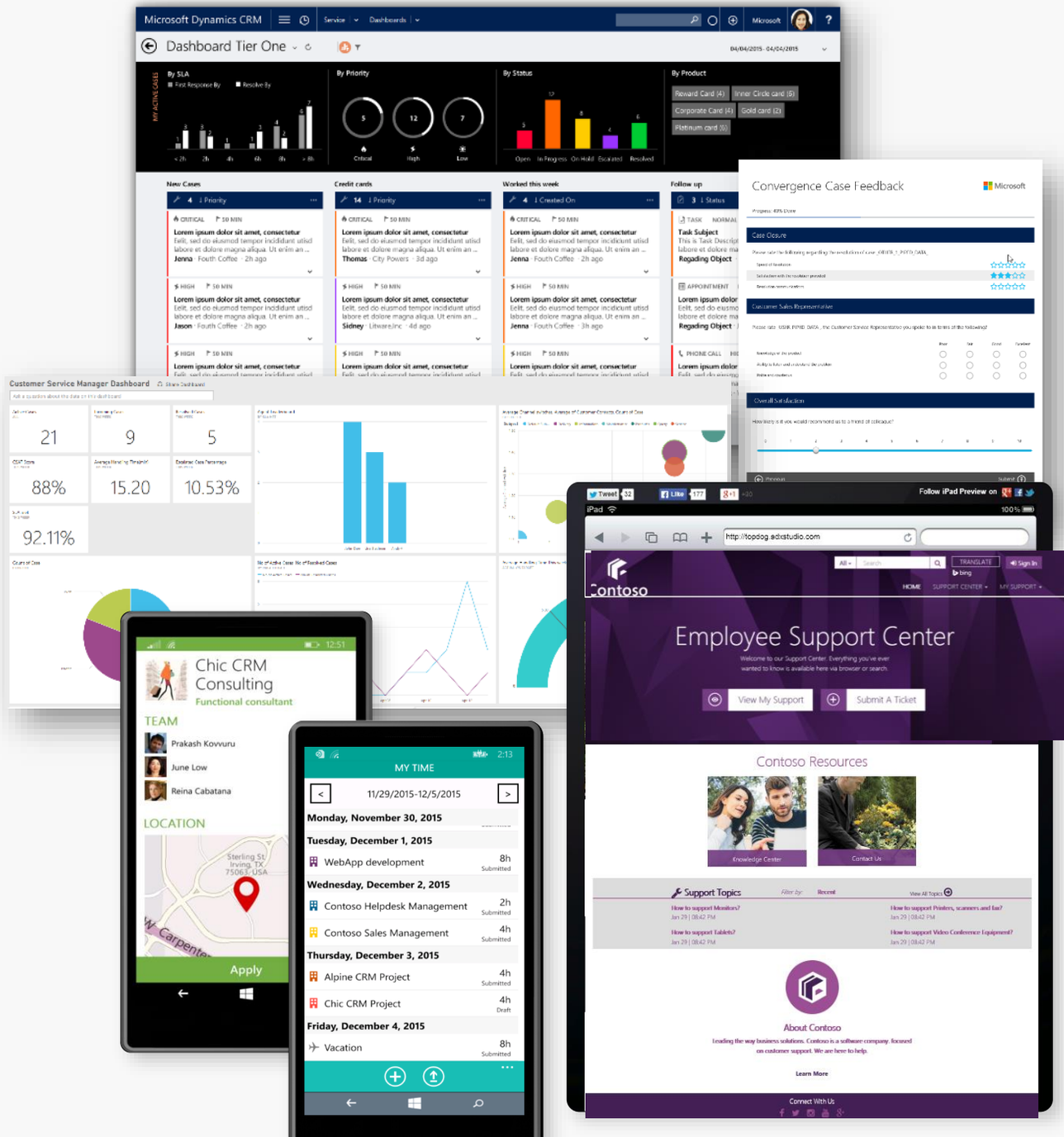
Empower the 84% majority who prefer to find answers on their own through self-service and community options.

Automated social triage

Automatically detect intention in social posts and route as cases into CRM.

Learning path

Accelerate new agent onboarding and socialize new release functionality.



What's new in field service

Characteristics & proficiency ratings

Proficiency and competency levels can be defined and set as requirements in any given work order, ensuring the right tech is scheduled for a particular job.

Detached schedule support

Creates the ability to support time allocation outside of a work order such as lunch or supply provisioning, eliminating empty work orders.

Shared resources across field & project service

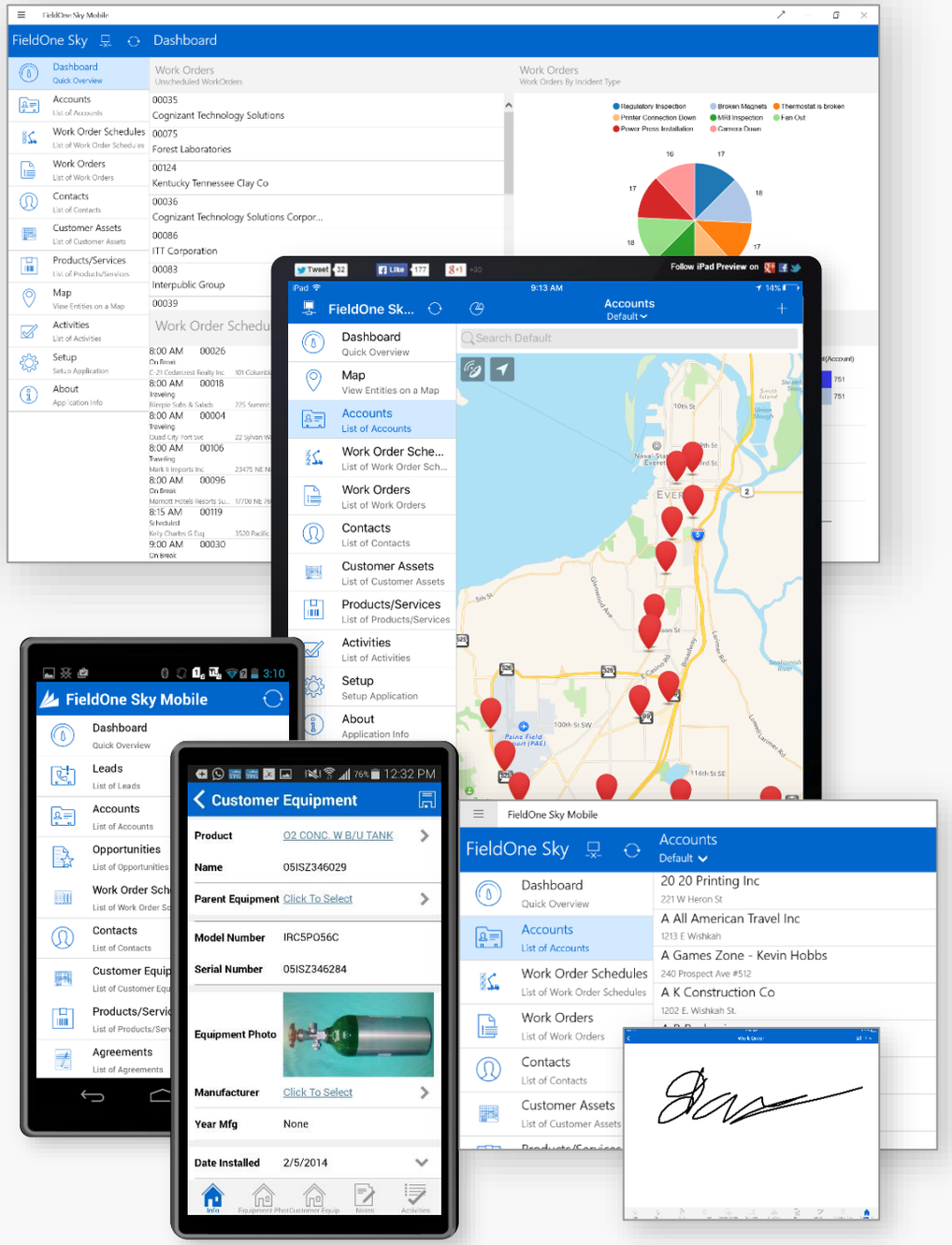
Field and Project services share a resource pool, where the time scheduled for shared resources will be surfaced in each application for visibility.

Out-of-the-box business process

Tight integration and alignment between CRM incident management and work orders means there is a visual workflow, from case creation to completion of the work order.

Mobile enhancements

Drip scheduling enhances and declutters the user experience by displaying fewer upcoming work orders.

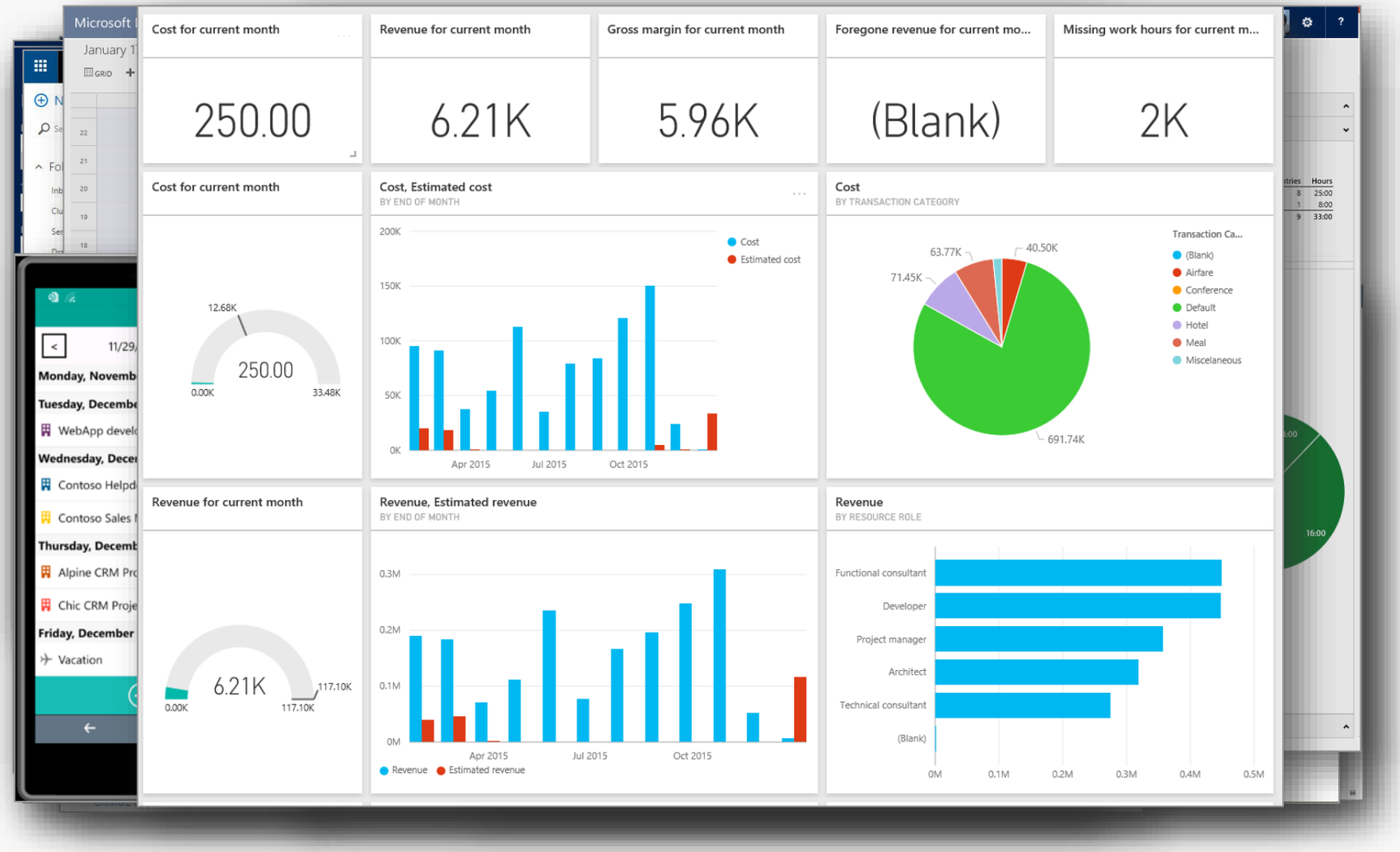


What's new in project service

Resource Manager

Project Manager

End Customer



Opportunity management | Project planning | Resource management | Team collaboration | Time and expenses | Customer billing | Analytics and integration

What's new for portal in CRM

Integration to Dynamics CRM

Portal solutions that extend Microsoft Dynamics CRM into an engagement engine on any device.

Self-Service Portal

Extend the customer experience with powerful self-service capabilities to enable the modern customer and maximize the impact of service agents.

Community Portal

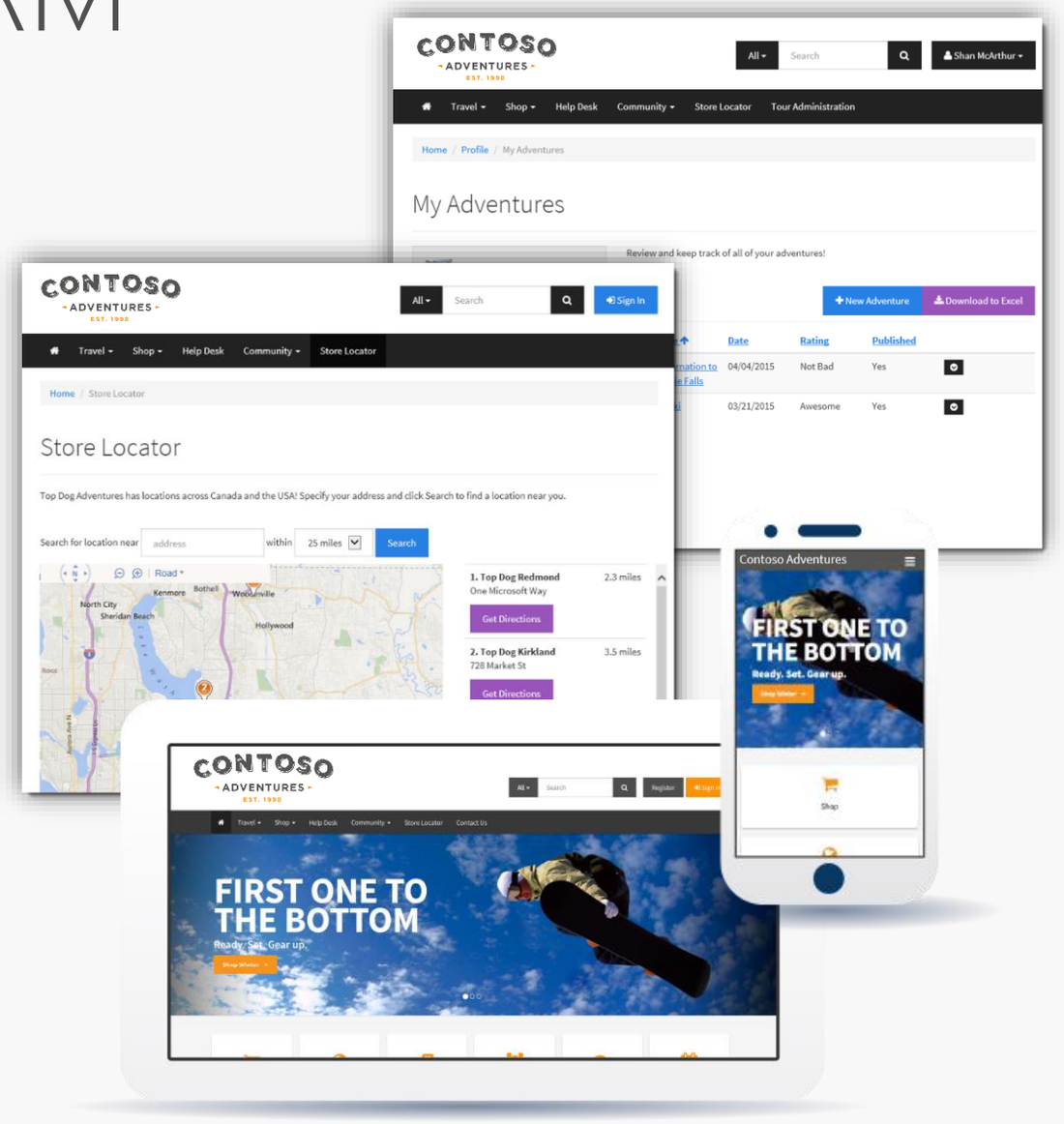
Grow a dynamic environment of peer-to-peer knowledge and support between end users, experts and staff to build deeper relationships and brand champions.

Employee Self-Service Portal

Empower employees with self-service features that provide common tasks and increase efficiency.

Partner Portal

Increase visibility and productivity with your channel. Manage opportunities, communications and resources to drive growth.



What's new in social

Social listening

Listen and analyze posts from Instagram, and boards/forums.

Social center

Share social posts found in social center as a link from your own individual social profile.

Intelligent social

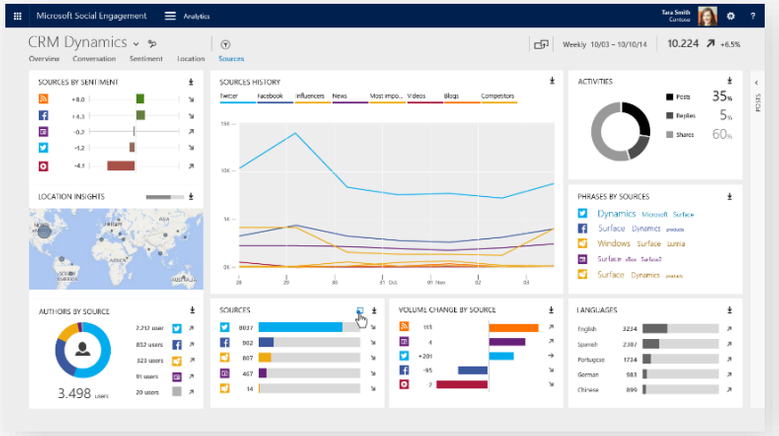
Automatically detect intention in social posts and triage/route them as cases or leads into CRM.

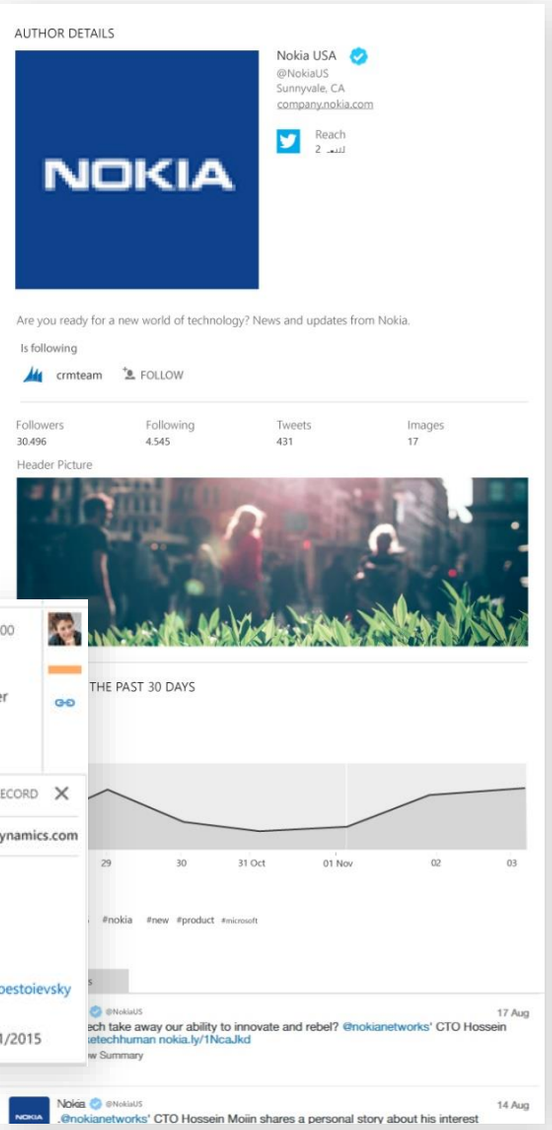
Customization

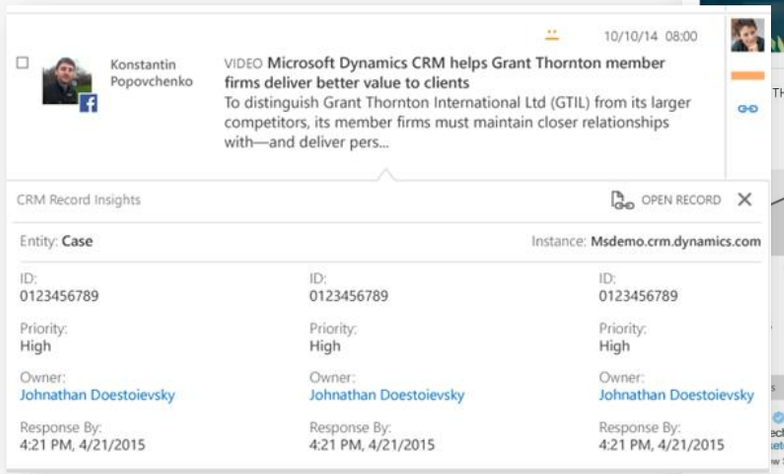
Leverage social data in other applications through Azure Event Hubs.

Sentiment & UI

3 additional sentiment languages:
Chinese, Japanese, Arabic.







What's new in marketing

Email Marketing

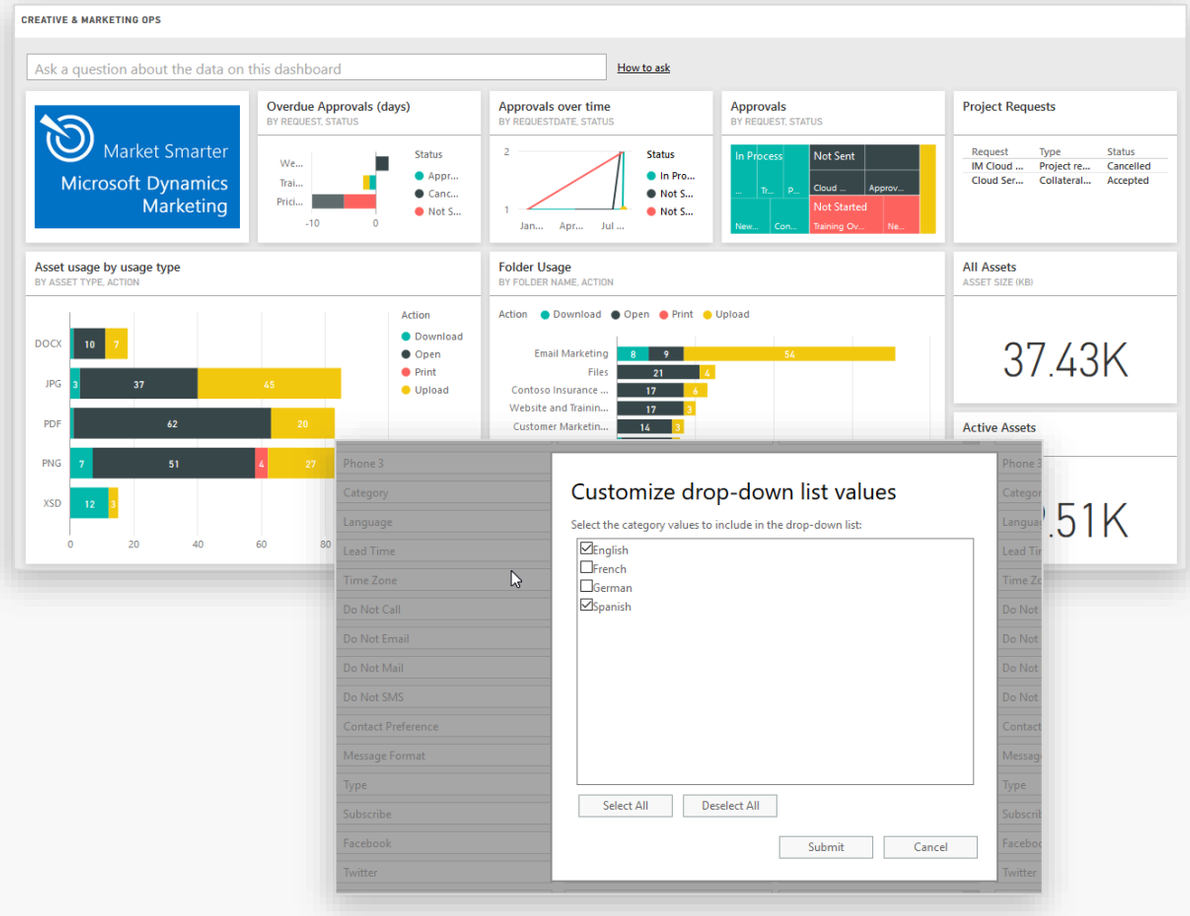
Continue to enhance email marketing service to support large volume senders.

SDK

Enhancements to enable integration to external systems.

Campaign & Lead Management

Enhancements in landing pages, lead scoring, and event management.



What's new in intelligence

Learning Path

Context sensitive guidance to help users navigate the application and perform tasks specific to their role.

Adaptive learning

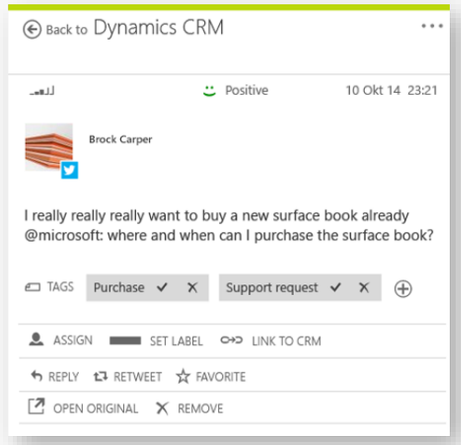
Powered by Azure Machine Learning, enables you to customize sentiment scoring models according to your business or industry needs.

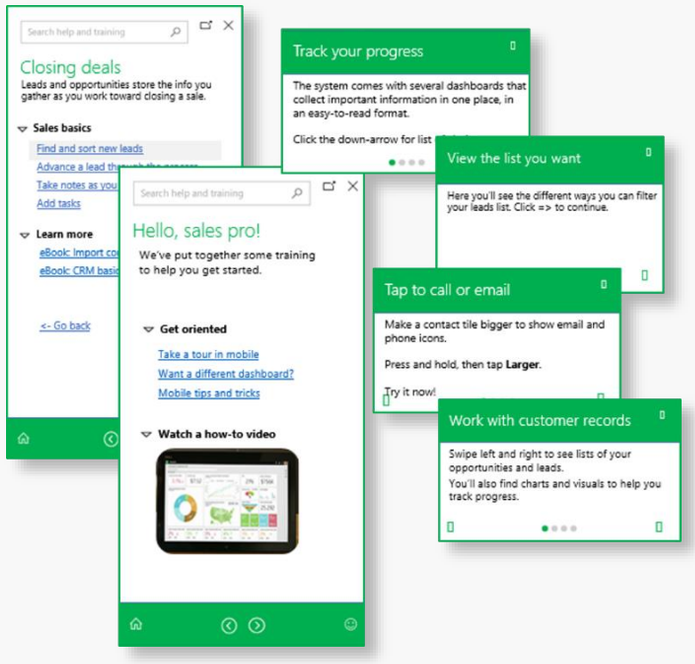
Automated social triage

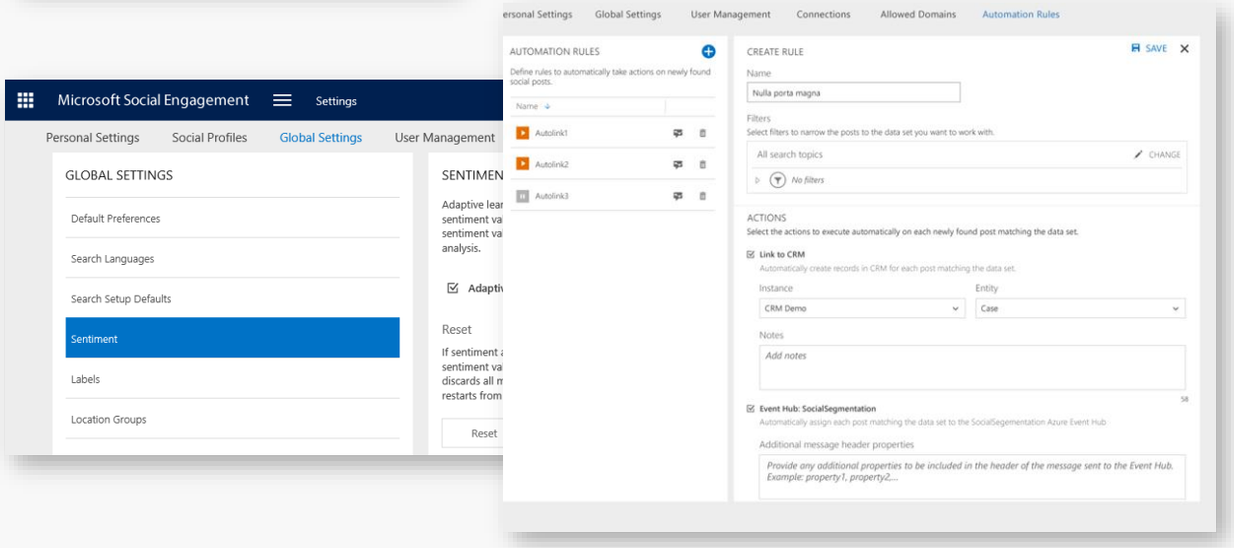
Automatically detect intention in social posts and route as cases or leads into CRM.

Power BI enhancements

An enhanced Sales Manager dashboard and a new Customer Service Manager dashboard in Power BI.







Why Customer Engagement by Microsoft

Guidance

Guide line of business users to achieve outcomes based on best practices

Intelligence

Deliver personalized, proactive and predictive customer experiences built on trust and knowledge over time

Mobility

Enable employees to remain productive no matter where they are or what device they use

One Microsoft

Harness the breadth of Microsoft technologies to deliver exceptional customer experiences

Dynamics CRM Roadmap

Microsoft

Dynamics

Microsoft Dynamics CRM Roadmap

The Dynamics CRM roadmap provides a snapshot of what we're working on in the Dynamics CRM business. Use the roadmap to find o
what we've recently made generally available, released into public preview, are still developing and testing, or are no longer developing

Download the Release Preview Guide | Availability

What's New | In Preview | In Development | Postponed | Previously Released

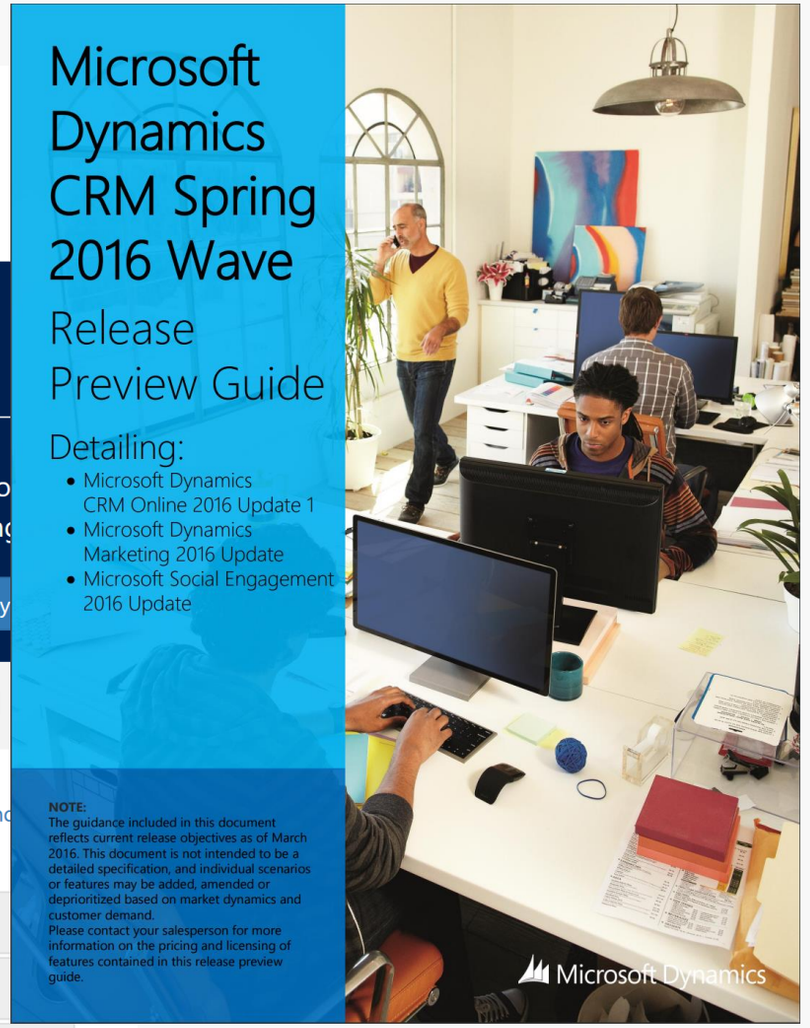
Select Product

- Sales
- Service
- Marketing
- Social
- Mobile
- Intelligence
- App Platform

PRIVATE CLOUD AVAILABILITY

Reset Filter | Collapse All | Expand

- Azure Event Hubs integrated in Microsoft Social Engagement
- Azure service bus integration enhancements
- Community Portal
- Company news timeline for mobile
- Create marketing segments based on email behavior
- Customer field on any entity
- Digital asset management, publishing, and security
- Email marketing editor enhancements



http://crmroadmap.dynamics.com/

Thank you!!!