



# 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

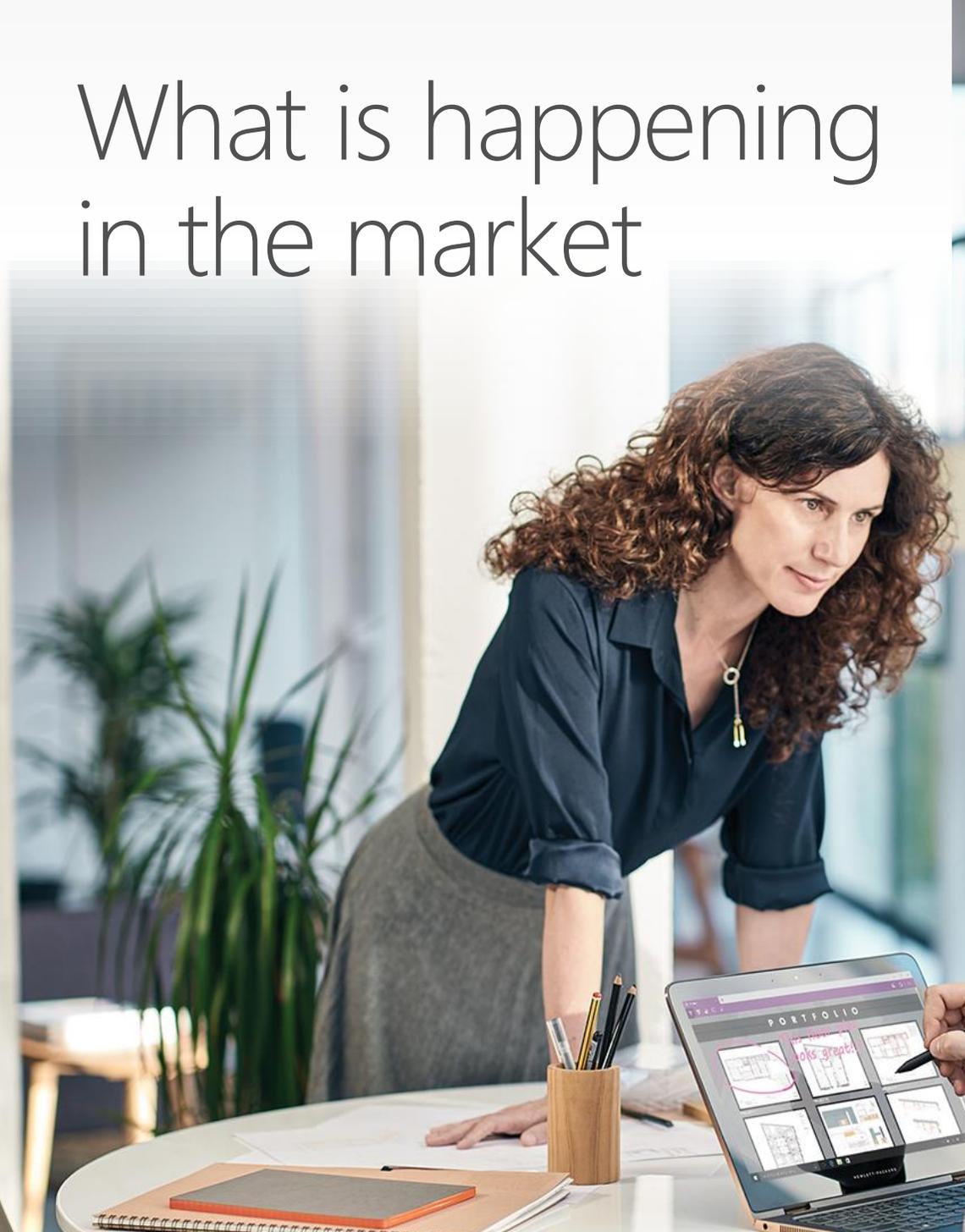
*By 2017, 50% of all IT spending will be outside of IT and the CIO's control. (Gartner)*

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

# 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



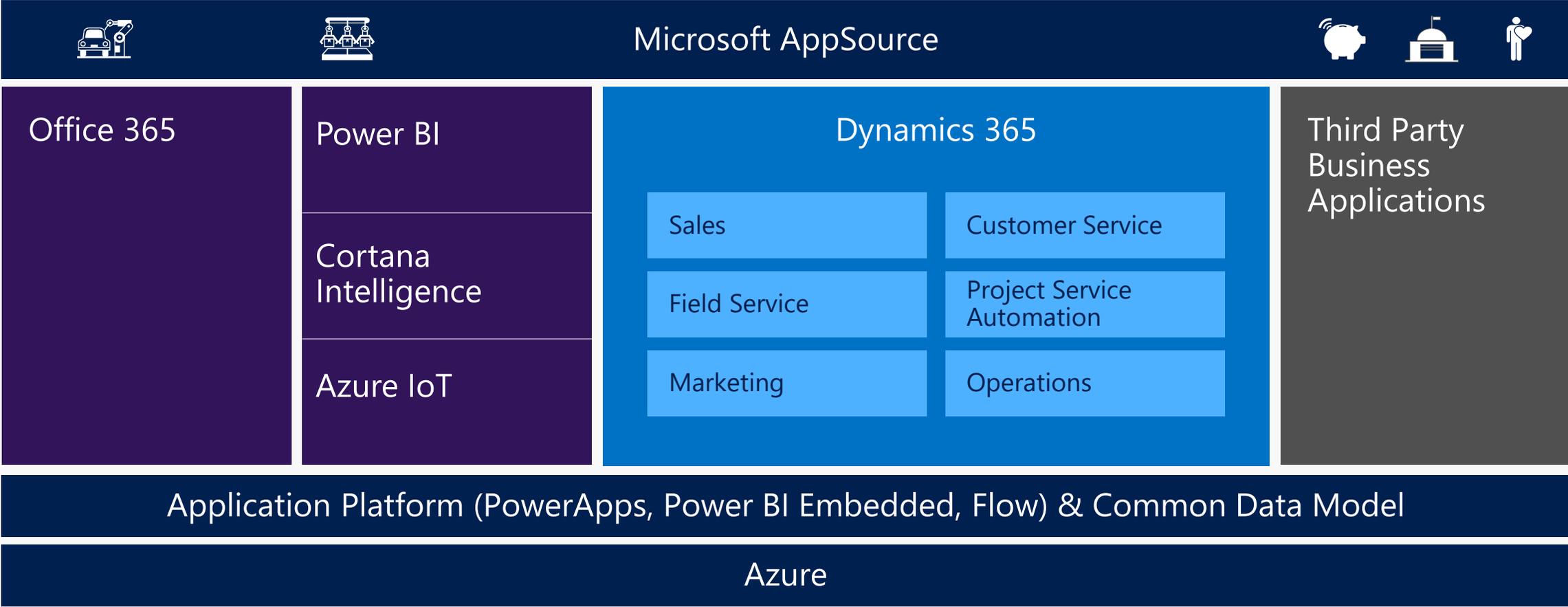
Guide employees to  
optimal outcomes with  
intelligence embedded  
in processes

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 Packaging

# Two Dynamics 365 Editions

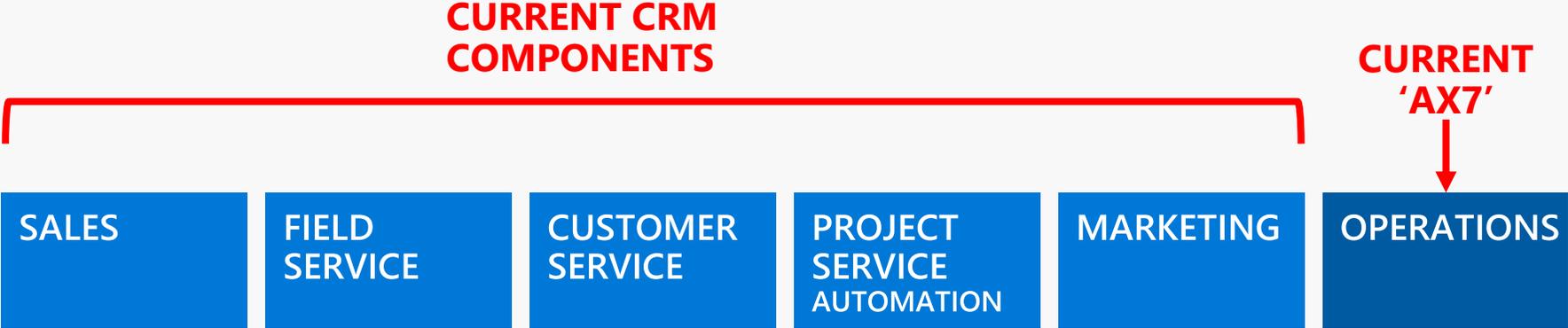
## Business

- 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

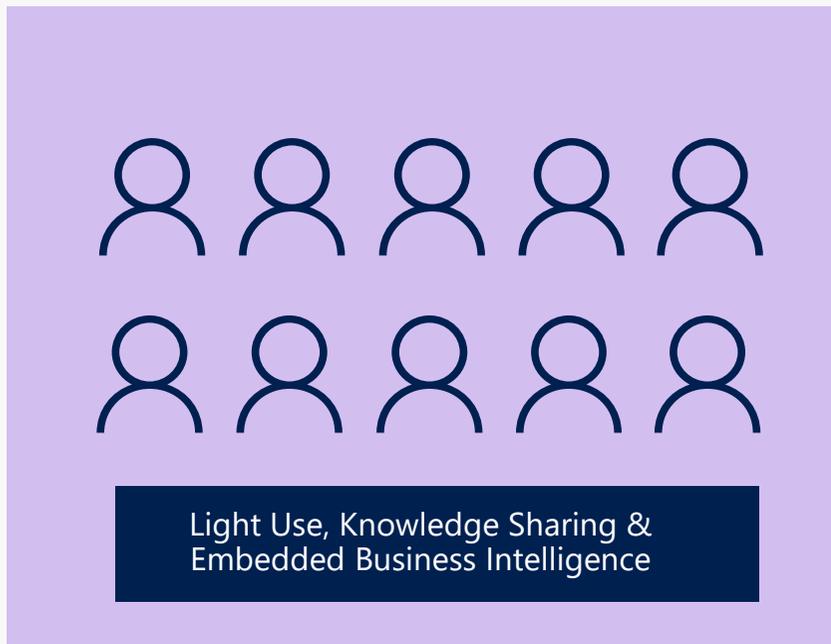


# Microsoft Dynamics 365

Liberating customers from traditional Business Apps Licensing

“light users”

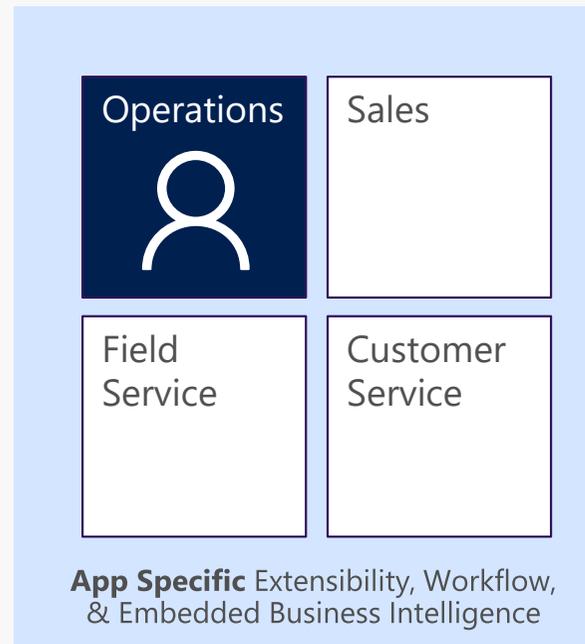
Team Members



“full users”



Apps



Plans



# 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

The screenshot shows a user interface for editing a document titled "Types of Coffee 1.0". At the top, there are navigation tabs: "CONTENT", "SUMMARY", and "RELATIONSHIPS". Below these is a workflow bar with buttons for "AUTHOR", "REVIEW", "UPDATE", "REVIEW", and "PUBLISH". The "AUTHOR" button is currently selected. The main content area is divided into sections: "ARTICLE CONTENT", "Title" (Types of Coffee), "Keywords" (Introduction, types, breeds, bean types, origin, Arabica, Canephora, inventory, stock), "Description" (A simple introduction to the types of coffee we offer here at Fourth Coffee...), and "Content" (Coffee is a magical thing. Pruned short in cultivation, but capable of growing more than 30 feet high...). There is also a "RELATED INFORMATION" sidebar on the right with a "Comment" section and a notification "Article V 1.0 was created".

Types of Coffee 1.0

CONTENT | SUMMARY | RELATIONSHIPS

AUTHOR REVIEW UPDATE REVIEW PUBLISH

ARTICLE CONTENT

Title  
Types of Coffee

Keywords  
Introduction, types, breeds, bean types, origin, Arabica, Canephora, inventory, stock

Description  
A simple introduction to the types of coffee we offer here at Fourth Coffee. This includes a general overview of different beans, as well as an in-depth explanation of what we offer both in-store and online.

Content [Expand Content](#)

Coffee is a magical thing. Pruned short in cultivation, but capable of growing more than 30 feet high, a coffee tree is covered with dark-green, waxy leaves growing opposite each other in pairs. Coffee cherries grow along the tree's branches. It takes nearly a year for a cherry to mature after the flowering of the fragrant, white blossoms. Because it grows in a continuous cycle, it is not unusual to see flowers, green fruit and ripe fruit simultaneously on a single tree. The trees can live as long as 20 - 30 years and are capable of growing in a wide range of climates, as long as there is no harsh fluctuation in temperature. Optimally, they prefer a rich soil and mild temperatures, with frequent rain and shaded sun.

**Coffea arabica -- C. arabica**  
Varieties: Bourbon, Typica, Caturra, Mundo Novo, Tico, San Ramon, Jamaican Blue Mountain

Coffea arabica is descended from the original coffee trees discovered in Ethiopia. These trees produce a fine, mild, aromatic coffee and represent approximately 70 percent of the world's coffee production. On the world market, arabica coffees bring the highest prices. The better arabicas are high grown coffees -- generally grown between 2,000 to 6,000 feet above sea level -- though optimal altitude varies with proximity to the equator. The important factor is that temperatures must remain mild, neither too hot nor too cold, ideally between 59 - 75 degrees, with about 60 inches of rainfall a year. The trees are hearty but a heavy frost will kill them. Arabica trees are costly to cultivate because the terrain tends to be steep and access difficult. Also,

RELATED INFORMATION

Comment

Breve, arabica, cup caramelization affogato instant affogato. Black carajillo, coffee bar crema, carajillo, medium single origin as at doppio. Bar, variety, eu, breve robusta strong shop white lungo.  
Posted by Amanda 1 day ago

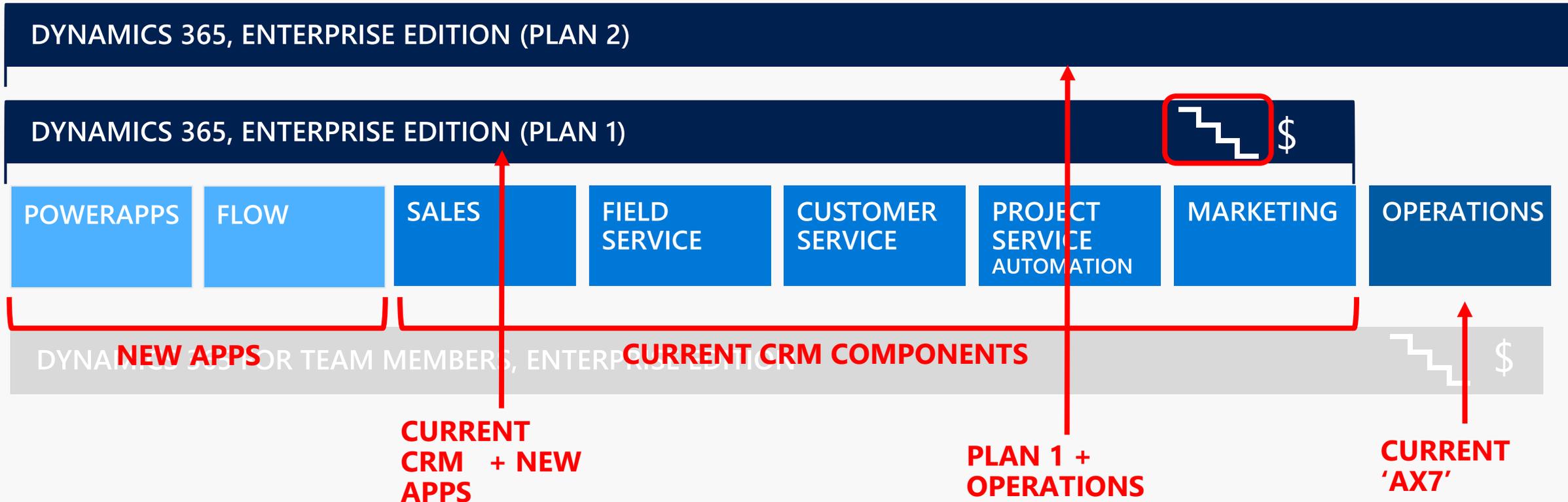
Made the changes, added in something else too regarding the new coffee we got in.

Article V 1.0 was created  
Posted by System 2 days ago

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

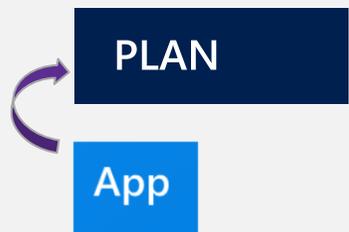
No Additional Licenses Required

# 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

DYNAMICS 365, BUSINESS EDITION (FUTURE PLAN)

POWERAPPS

FLOW

FINANCIALS

SALES

MARKETING

DYNAMICS 365 FOR TEAM MEMBERS, BUSINESS EDITION

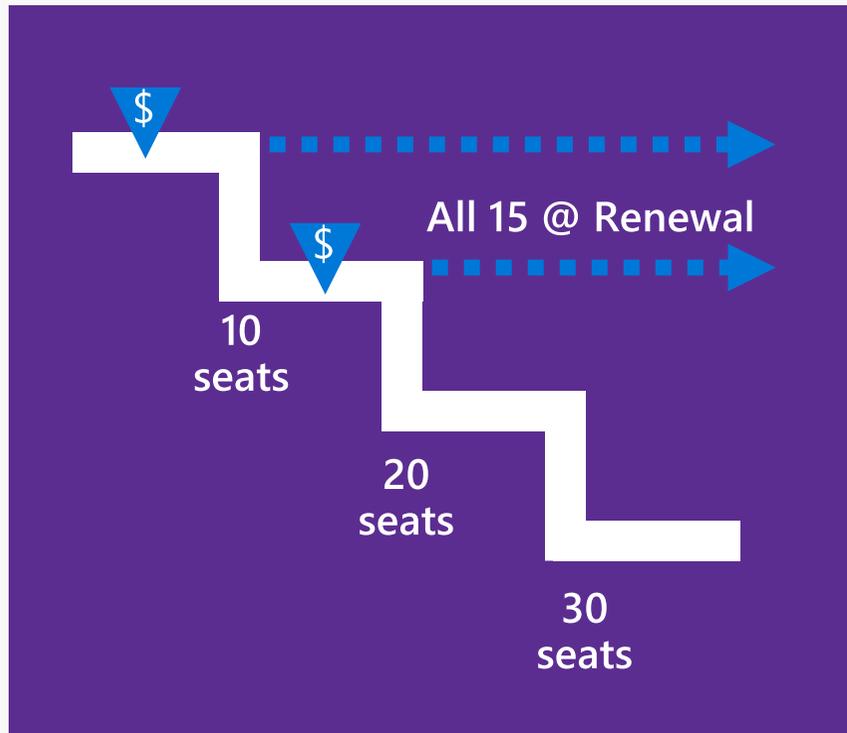
## Fall 2016

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

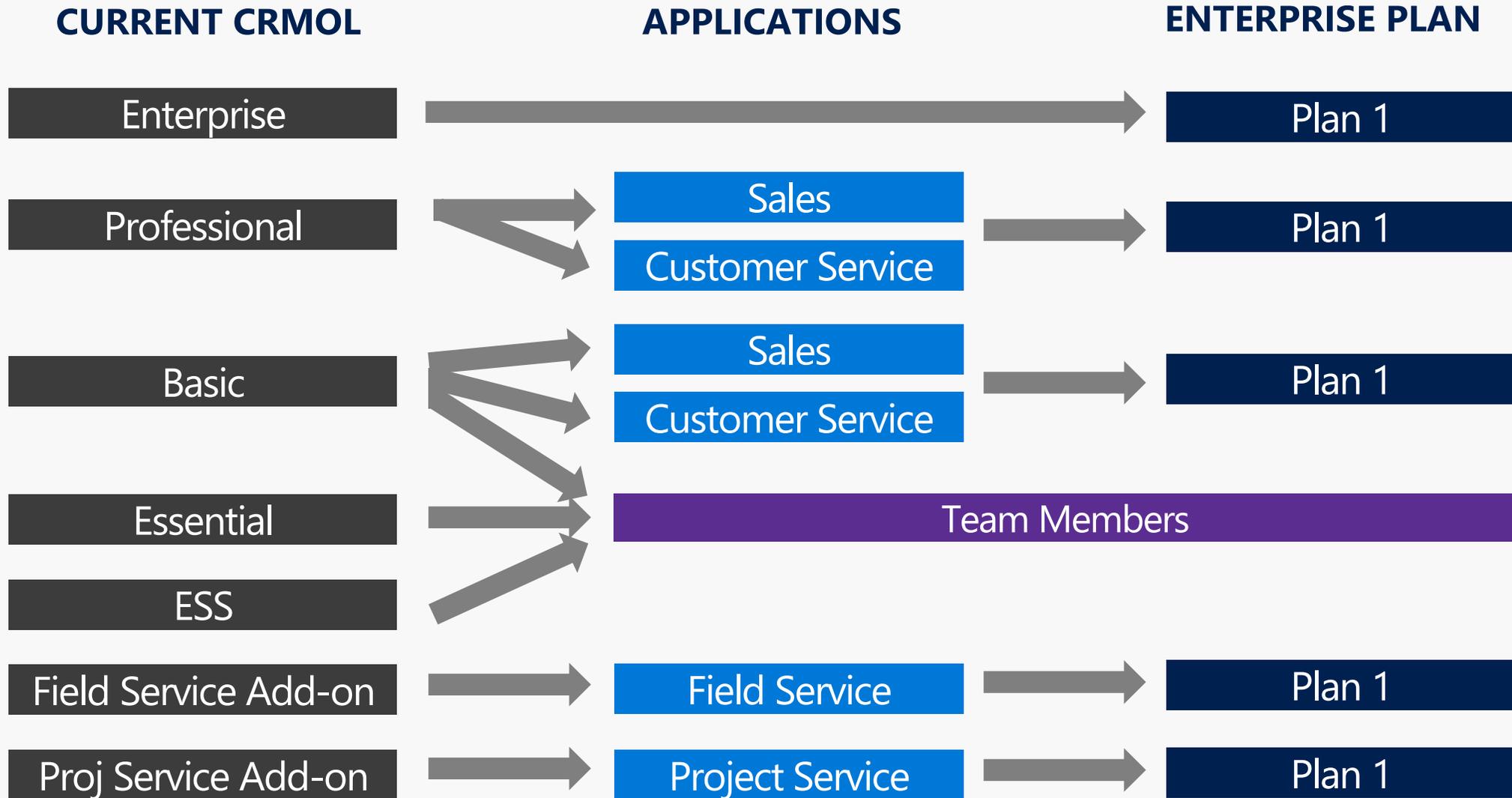
# Channels For Dynamics 365

----- 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?

## CURRENT AX7

Enterprise

Task

Self-serve

Device



## APPLICATIONS

Operations

Team Members

Device



## ENTERPRISE PLAN

Plan 2

# 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.

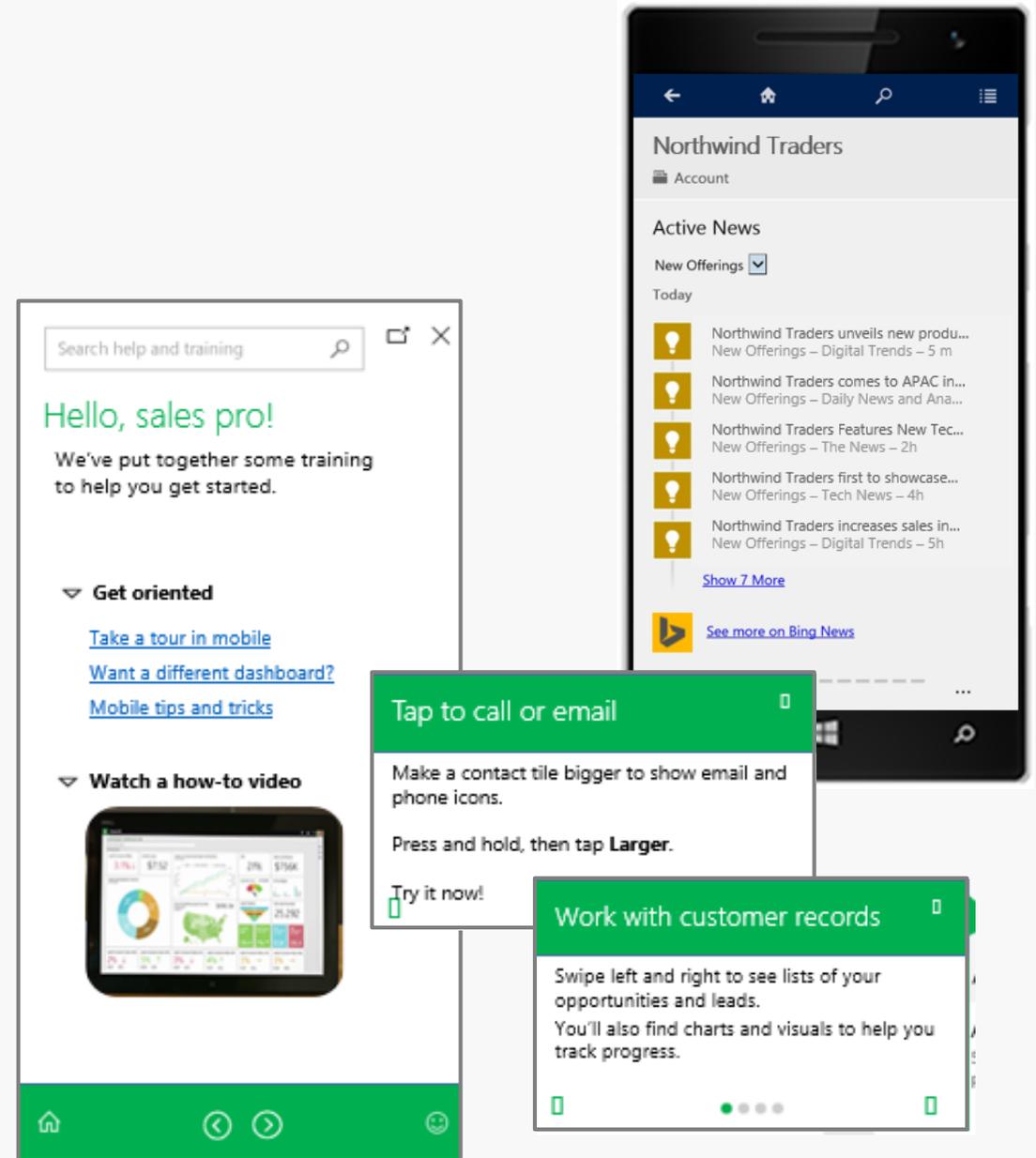
## Predictive intelligence

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

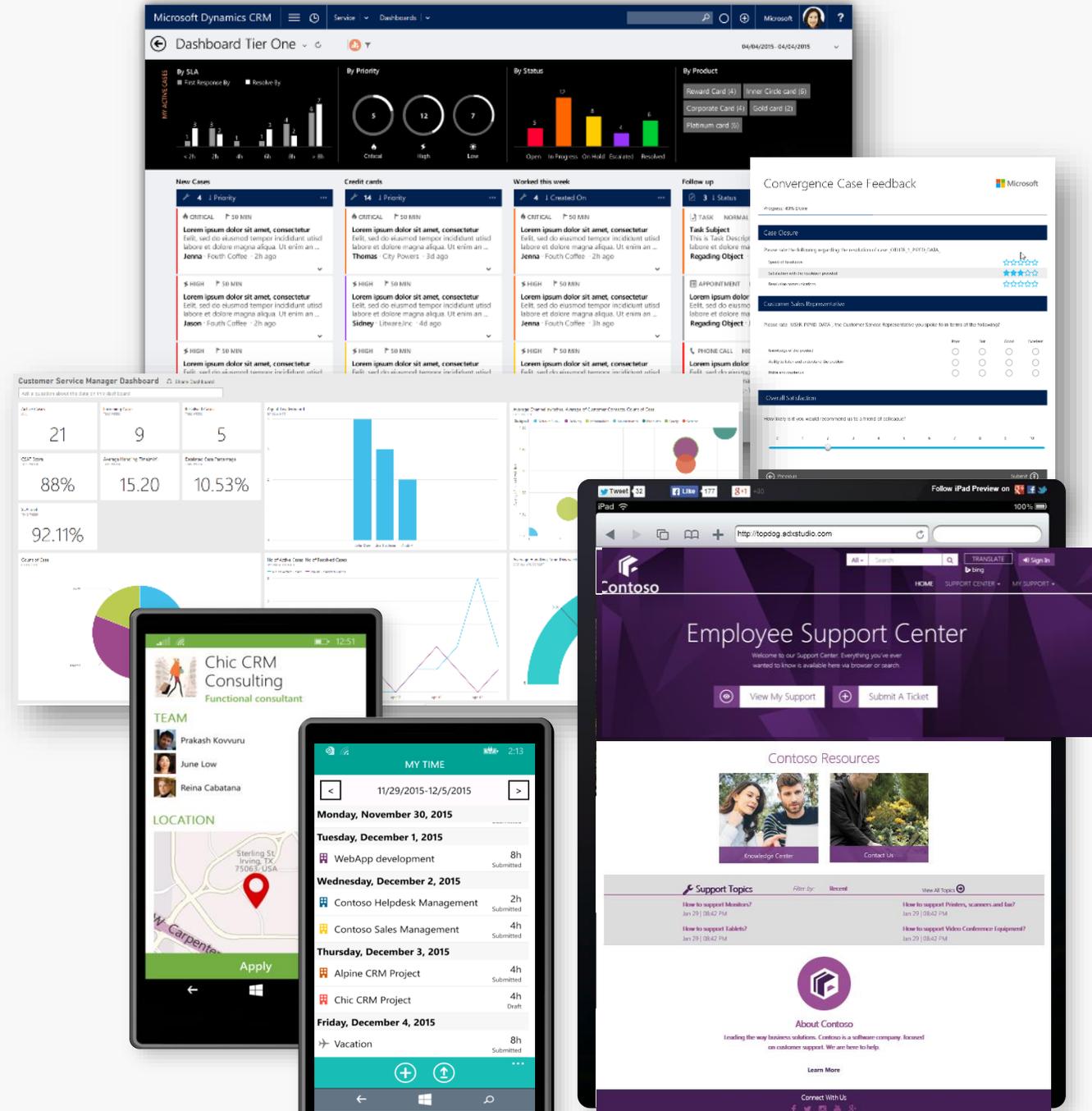
Empower the 84% majority who prefer to find answers on their own through self-service and community options.

## 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

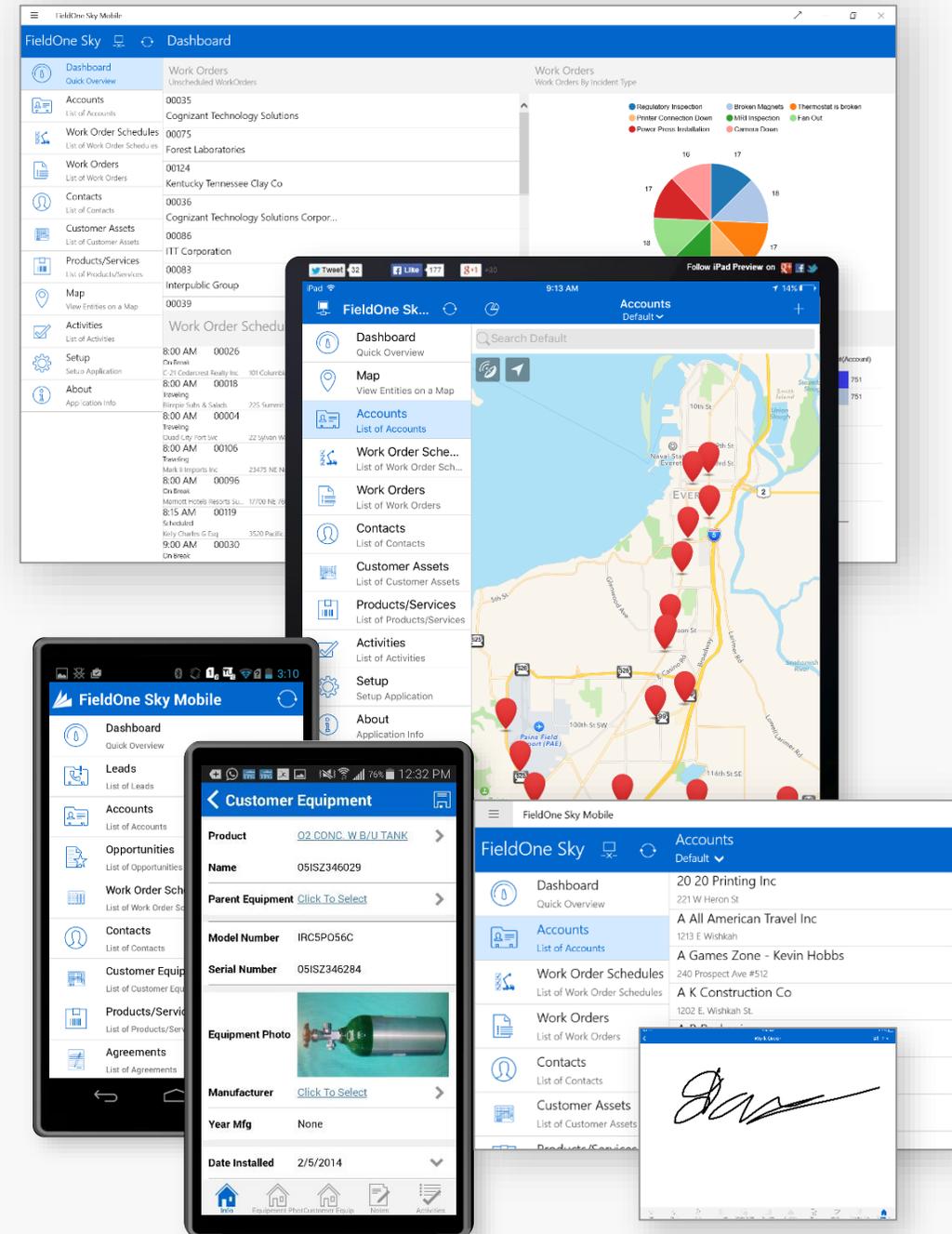
Field and Project services share a resource pool, where the time scheduled for shared resources will be surfaced in each application for visibility.

## 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



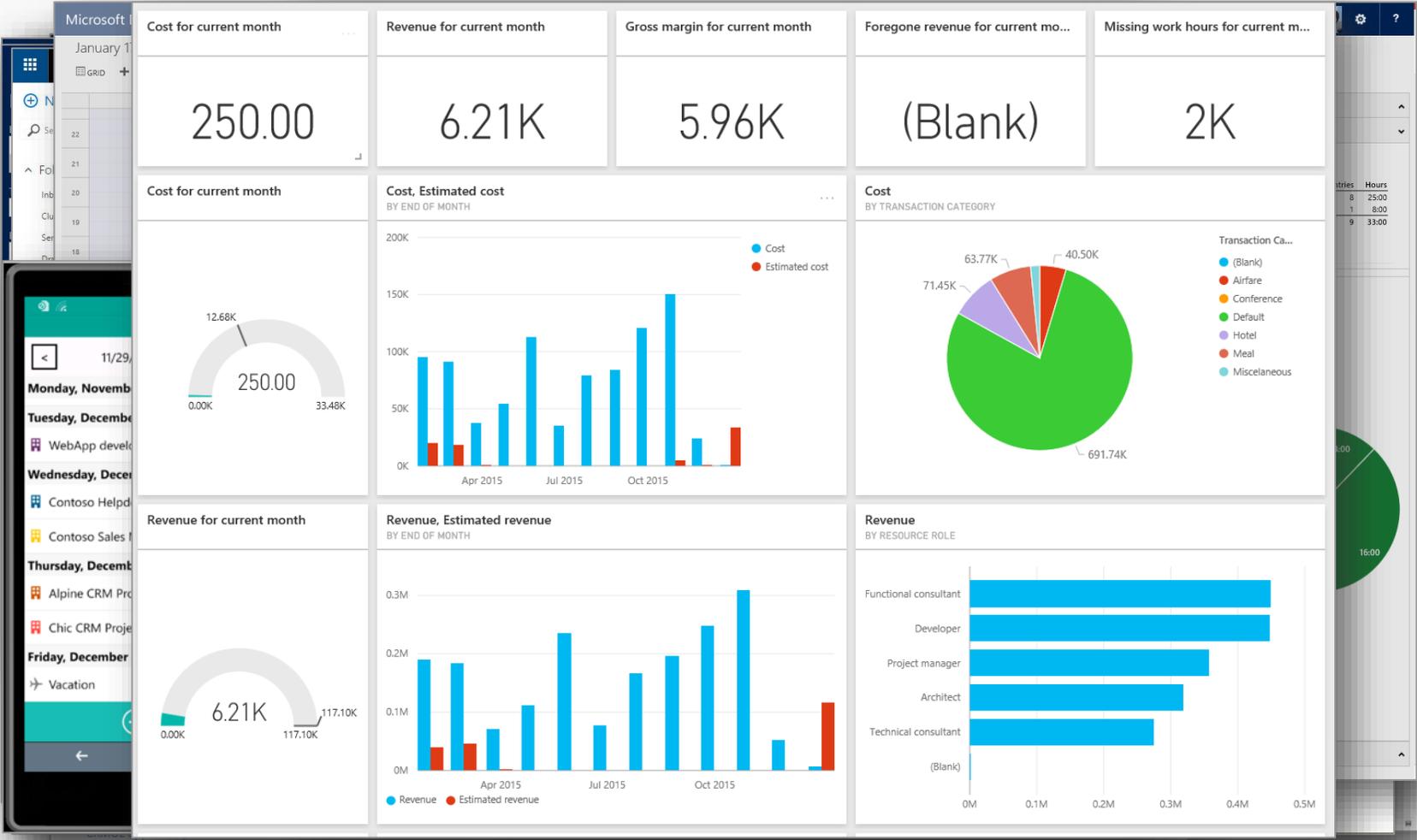
Project  
Manager



Project  
Manager



End  
Customer



# 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

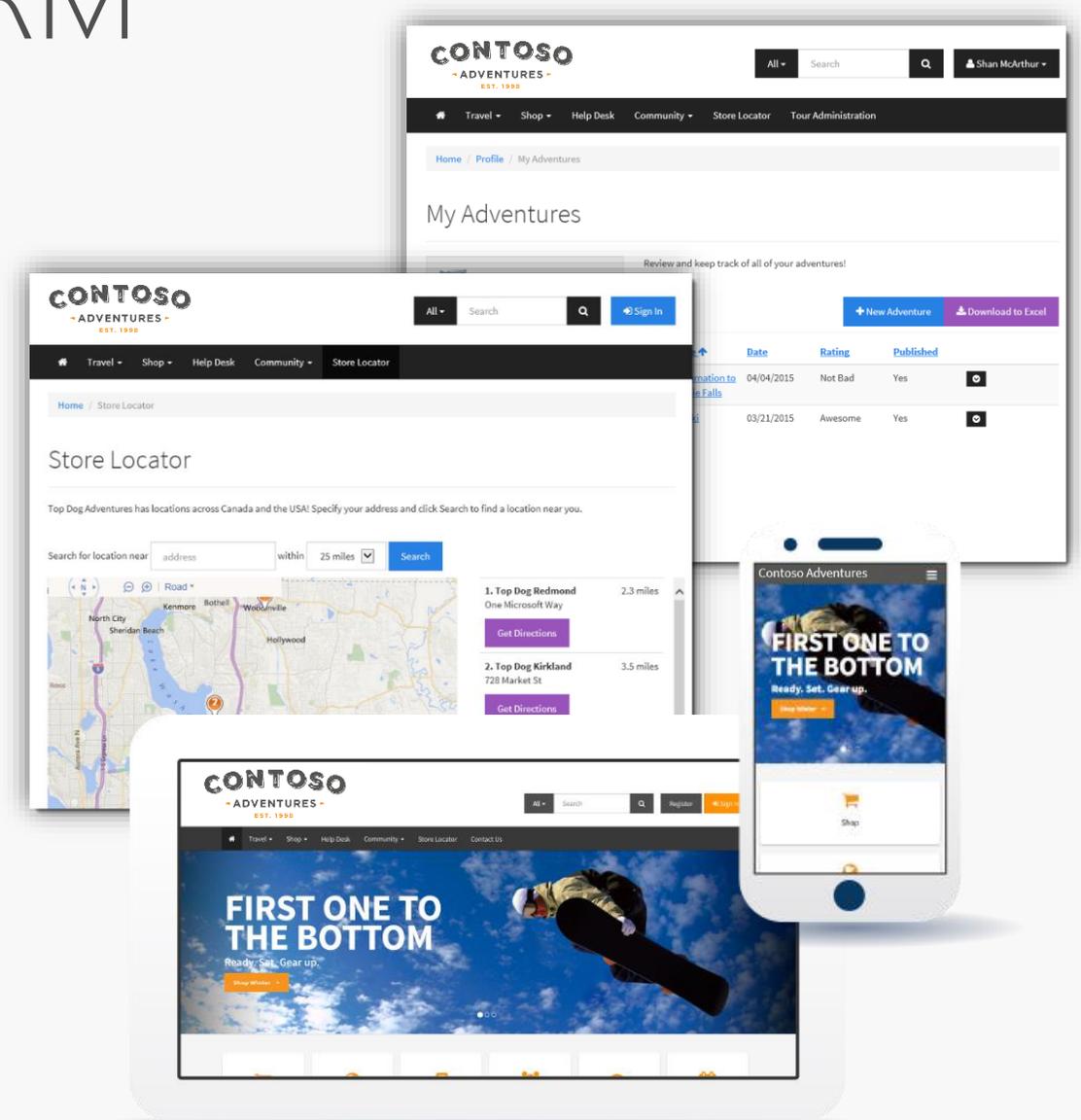
Grow a dynamic environment of peer-to-peer knowledge and support between end users, experts and staff to build deeper relationships and brand champions.

## 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

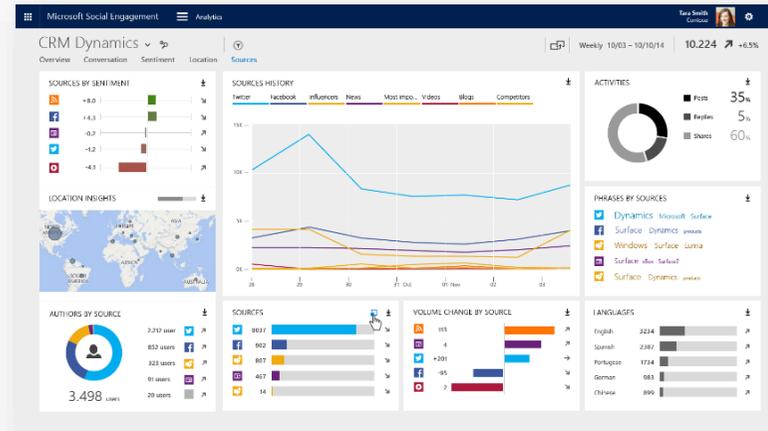
Automatically detect intention in social posts and triage/route them as cases or leads into CRM.

## Customization

Leverage social data in other applications through Azure Event Hubs.

## Sentiment & UI

3 additional sentiment languages:  
Chinese, Japanese, Arabic.



The screenshot shows a social media profile for Nokia USA (@NokiaUS). The profile includes the Nokia logo, the name 'Nokia USA', the handle '@NokiaUS', the location 'Sunnyvale, CA', and the website 'company.nokia.com'. Below the profile information, there is a bio: 'Are you ready for a new world of technology? News and updates from Nokia.' and a list of people being followed, including 'crmtteam'. The profile also shows statistics: 30,496 Followers, 4,545 Following, 431 Tweets, and 17 Images. A header picture is visible, and a recent tweet is shown at the bottom, dated 17 Aug, with the text: 'ech take away our ability to innovate and rebel? @nokianetworks' CTO Hossein jatechhuman nokia.ly/1NcaJkd'.

The screenshot shows a social media post from Konstantin Popovchenko, dated 10/10/14 08:00. The post is a video titled 'Microsoft Dynamics CRM helps Grant Thornton member firms deliver better value to clients'. The text of the post reads: 'To distinguish Grant Thornton International Ltd (GTIL) from its larger competitors, its member firms must maintain closer relationships with—and deliver pers...'. Below the post, there is a 'CRM Record Insights' section with an 'OPEN RECORD' button. The record details include: Entity: Case, Instance: Msdemo.crm.dynamics.com, ID: 0123456789, Priority: High, and Owner: Johnathan Doestoevsky. The response date is 4:21 PM, 4/21/2015.

# What's new in marketing

## Email Marketing

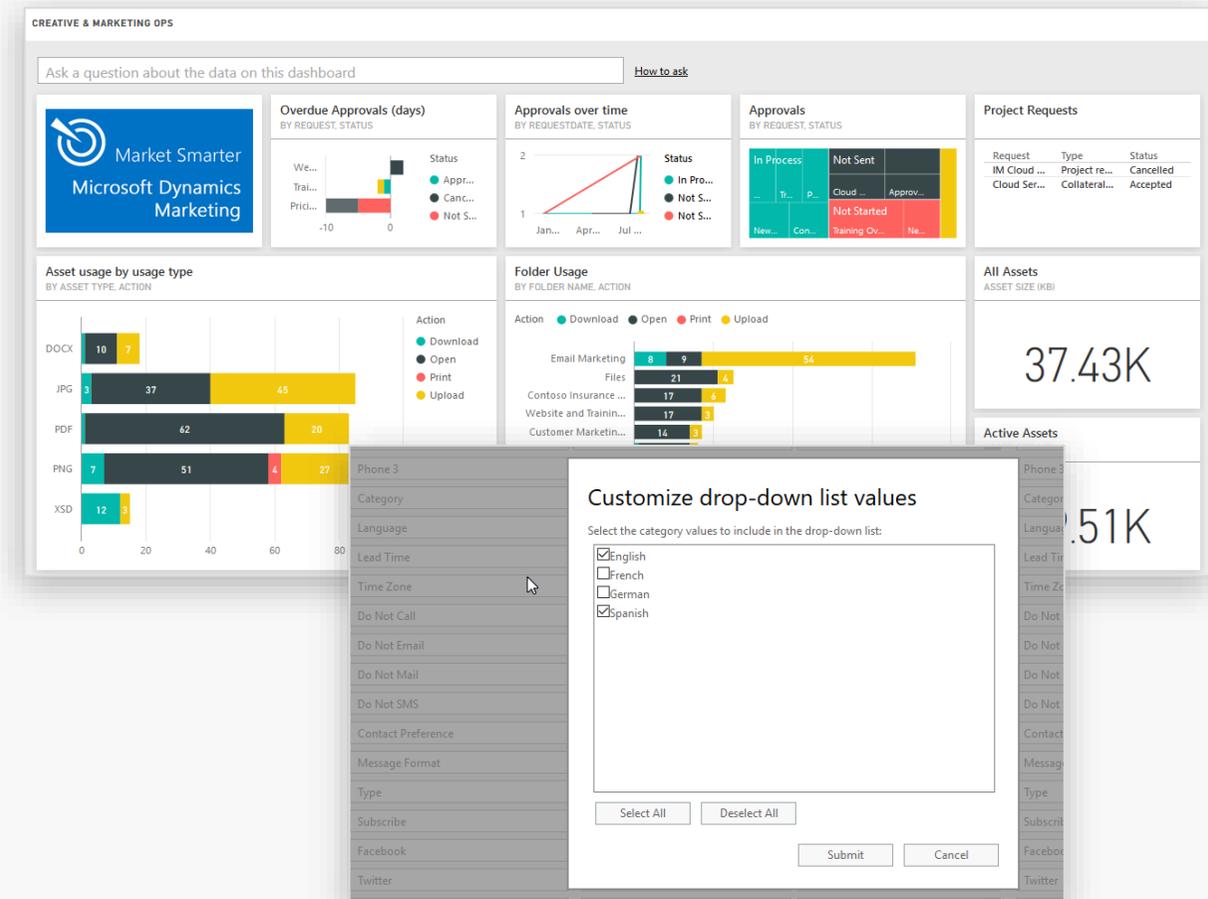
Continue to enhance email marketing service to support large volume senders.

## 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

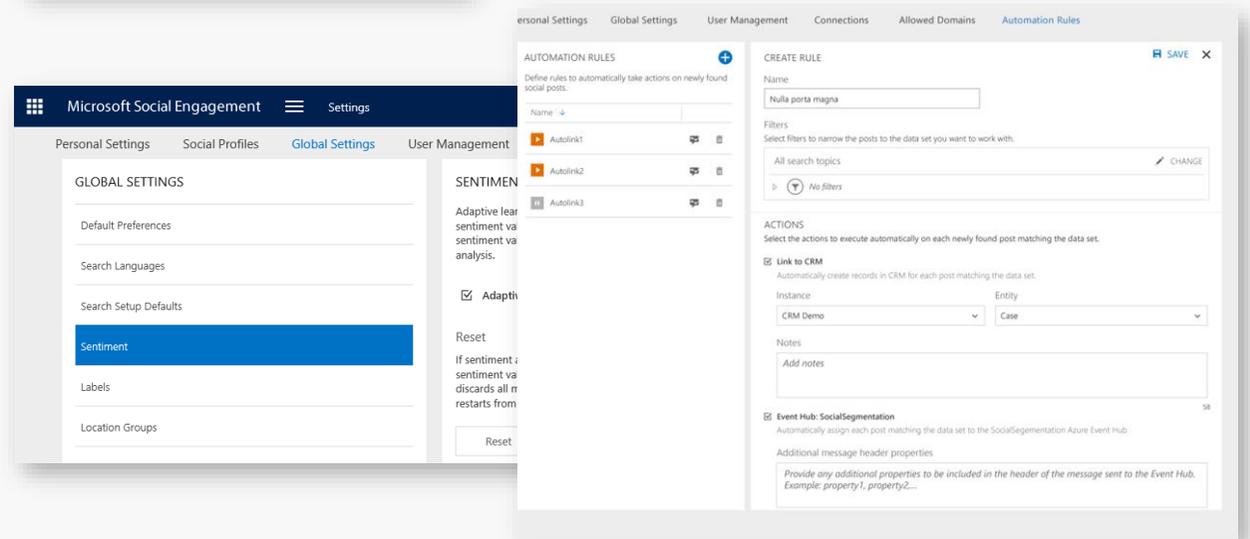
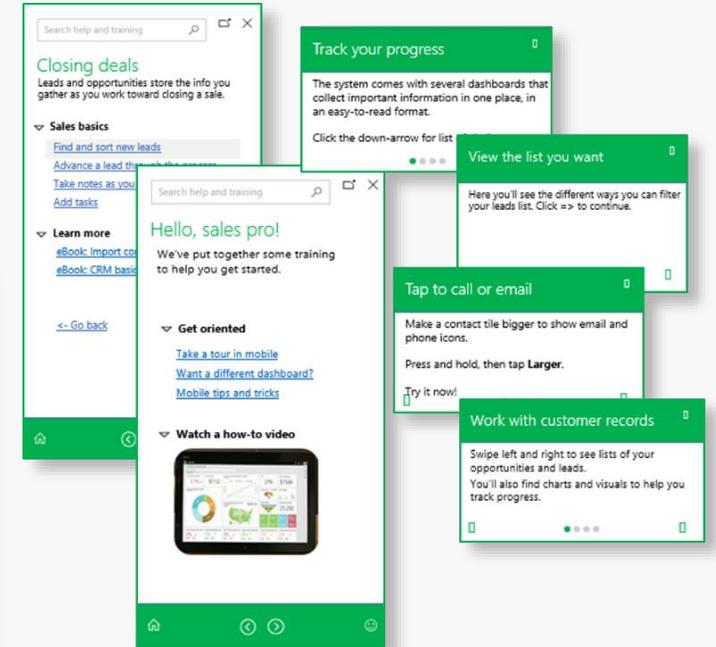
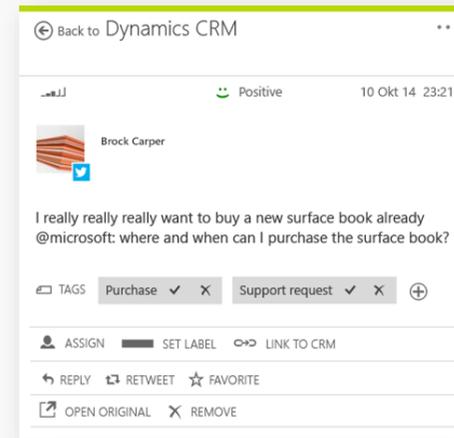
Powered by Azure Machine Learning, enables you to customize sentiment scoring models according to your business or industry needs.

## 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



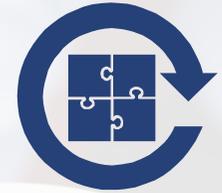
## Intelligence

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



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 out 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

[Reset Filter](#)

[Collapse All](#)

[Expand All](#)

Sales

Service

Marketing

Social

Mobile

Intelligence

App Platform

> 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

## Microsoft Dynamics CRM Spring 2016 Wave Release Preview Guide

Detailing:

- Microsoft Dynamics CRM Online 2016 Update 1
- Microsoft Dynamics Marketing 2016 Update
- Microsoft Social Engagement 2016 Update

**NOTE:**  
The guidance included in this document reflects current release objectives as of March 2016. 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. Please contact your salesperson for more information on the pricing and licensing of features contained in this release preview guide.



Microsoft Dynamics

PRIVATE CLOUD AVAILABILITY

<http://crmroadmap.dynamics.com/>



Thank you!!!