

Introducing Microsoft® CRM 3.0

Build lasting customer relationships across sales, marketing and customer service with an affordable, easy-to-use CRM solution from Microsoft.

This version of Microsoft CRM includes:

- Native Microsoft Office Outlook® experience for managing sales, service and marketing business processes.
- Enhanced reporting and analysis tools with Microsoft SQL Server® Reporting Services.
- Innovative and intuitive business design and customization tools.
- Simplified deployment and management tools for IT professionals.

Standardize customer communications and business processes with familiar Microsoft technology that works the way your users work, adapts to the way you do business, and works the way IT expects it to.

Works the way you work:

An easier way to manage and develop customer relationships

Use Microsoft CRM for Microsoft Office Outlook® to send and manage e-mail, store business contacts and manage your appointment calendar without having to switch between applications.



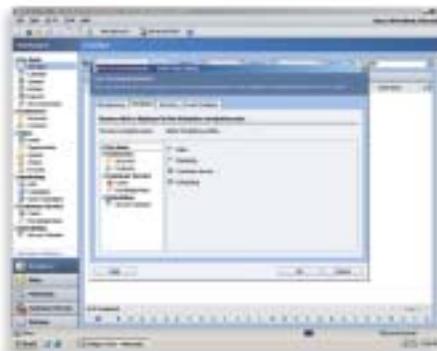
Manage customer communications and business relationships within Microsoft CRM's native Microsoft Outlook Experience

- **Centralize customer information.** Keep customer information in a single place. Establish a single view of customer relationships across your organization.
- **Schedule appointments and meetings.** Arrive prepared for important customer meetings. Access sales opportunities, campaign offers and customer service history within each appointment.
- **Unify customer e-mail and responses.** Say good-bye to "copy and paste" for integrating your inbox and CRM e-mail. Automatically capture entire discussion threads within your customer history records.

My work, my way

Microsoft CRM delivers a personalized, configurable workspace that helps users make more informed business decisions with dynamic analysis and reporting tools.

- **Configure my workplace.** Access the information you use most often. Select the workplace profile that delivers instant-access to your customer information and activities.



Personalize your work environment according to the ways that you interact with customers.

- **Take your customers everywhere.** Don't lose a step when working away from the office. Enhanced data synchro-

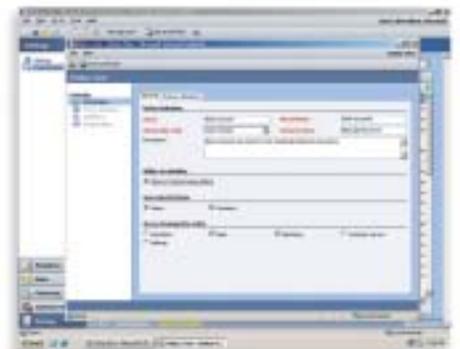
nization provides full access to your sales and customer service information on your laptop or mobile device.

Works the way your business does:

Designed for your business

Microsoft CRM provides organizations with a flexible and customizable platform that can be configured to meet your unique business needs.

- **Customize quickly and easily.** Tailor to meet your unique business requirements without writing a single line of code. Modify application forms, data fields, relationships and add entire new system objects with intuitive, web-based design tools.



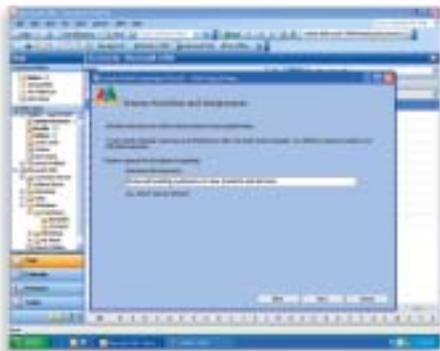
Use intuitive business design tools to customize your Microsoft CRM system.

- **Streamline business processes.** Work more efficiently with process automation. Transform repetitive work tasks into powerful business workflow.
- **Integrate across applications.** Bring information together and simplify cross-system processes. Use enhanced web services to integrate across system and platform boundaries giving you a view of your customers.

Create demand and drive business results

Use Microsoft CRM to plan, implement and monitor multi-tiered sales and marketing campaigns that generate new sales for your business.

- **Target your marketing efforts.** Fine tune marketing campaigns and offers that generate the greatest return. Use intelligent list and segmentation tools to effectively reach prospective customers while at the same time reducing ineffective marketing spend.
- **Fuel your sales engine.** Fill your sales pipeline with qualified sales leads and opportunities. Use instant analytics and embedded coaching to cross sell additional products and services to customers.



Use wizard-driven utilities for launching quick sales campaigns across your existing customer base.

- **Measure campaign effectiveness and revenue impact.** Know which offers and marketing efforts generate results. Measure the effectiveness of each campaign activity by tracking response rates, interest levels and closed business from each originating campaign.

Provide value-added service to customers

With Microsoft CRM, businesses can transform everyday service issues into opportunities for enhancing customer relationships.

- **Respond faster to service issues.** Find and deliver the right answers to customers in real-time. Leverage the integrated knowledge base for quick-access to procedure manuals, frequently-asked questions and troubleshooting tips.
- **Escalate un-resolved issues.** Resolve customer issues according to desired

service levels. Automatic escalation and routing rules ensure that complex service requests are routed to appropriate work queues and resources.

- **Schedule and dispatch service resources.** Locate and secure professionals best suited to deliver services for customers. Centralized scheduling and dispatch provides integrated calendar views of available resources.



Find and schedule service professionals from a centralized appointment dashboard.

Works the way IT expects it to:

Easy installation and upgrade

Get your Microsoft CRM system up and running faster with easy installation, upgrade and deployment tools.

- **Fail-safe software installation.** Reduce installation and deployment costs for your CRM system. Ensure a hassle free installation with enhanced component diagnosis and troubleshooting tools.
- **Upgrade customizations, processes and data.** Say good-bye to the "weekend upgrade". Customized forms, schemas, relationships and workflow are automatically upgraded.

High performance and reliability

Deliver increased results when searching, synchronizing and analyzing customer information.

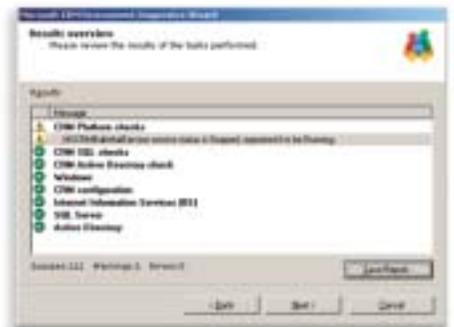
- **Optimized data views and queries.** Quickly find what you are looking for when you need it. Achieve faster results when searching across large volumes of customer information.
- **Filter offline data for synchronization.** Quickly synchronize offline data. Pre-filter datasets for offline usage and access.

- **Failover protection.** Fault tolerance ensures high up-time and availability. Deploy Microsoft CRM within clustered Web, Database and E-mail server environments.

Simple deployment and manageability

Spend less time managing infrastructure and more time delivering business value.

- **Build once, run anywhere.** Design your application on a test system and migrate easily to production systems.
- **Monitor the health of your CRM environment.** Troubleshoot and resolve potential conflicts on your server infrastructure with centralized management and notification tools.



Quickly diagnose potential problems and apply latest service packs across your Microsoft server infrastructure.

- **Zero footprint and zero-touch clients.** Microsoft CRM for Outlook installs automatically, with or without a local data store. Zero footprint browser client provides a rich CRM experience with full application capabilities.

For more information:

Additional product information and details will be made available to customers via www.microsoft.com/crm beginning in late summer 2005.

Additional tools and resources will be made available to partners via <https://partner.microsoft.com/global/productssolutions/business/businesscrm/>

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