

CRMUG[®]

Magazine



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Microsoft Partner
sign@assuresign.com



FROM THE
director

USING BUSINESS INTELLIGENCE WISELY

TONY STEIN

We live in a world of analytical intelligence and various pieces of data thrown at us from every medium and news source, social media source, and so-called expert out there. This quantitative bombardment is abundant and sometimes so heavy it saturates and burdens our thinking to the point that numbers are just numbers. What impact do they really have anyway?

But wait, hold the phone! What about your customer data? Any leader, especially business owners, should be frothing at the mouth (like my 5-year-old son in his quest for a Dairy Queen® treat) to have the most important data available to them across marketing, sales, and service. If there is any business or analytical intelligence that should be held close to the vest, it's that of our customer data. I would dare argue it's as important – if not more important – than your financial data. Without a true understanding and empathetic pulse on your customers, your financials will ultimately be a byproduct and reflection of your relationship with them.

This brings us to analytics and business intelligence in Microsoft Dynamics® CRM, our theme for this edition of the CRMUG® Magazine. So what can you do in Microsoft Dynamics CRM? How do you serve up these fancy new dashboards and reports? We are excited to share the insights and examples from industry experts, fellow Users, and Partners of Microsoft Dynamics CRM in this edition.

Here within CRMUG, we are getting our own hands dirty as we recently upgraded our environment to Microsoft Dynamics CRM 2011. I'm excited to see how Analytics in Microsoft Dynamics CRM 2011 can help us better serve all of you. The CRMUG community has doubled in membership over the past year, and we are striving to better understand our Members' needs and interests. Clean data, User adoption, and other concepts, of course, influence the outcome of this business intelligence, but that very insight will allow us to better market to Members and deliver programming, events, and CRMUG Academy training classes more suited to what you want.

We hope to deliver what you want and what you'll find highly valuable as we prepare more than 70 different breakout sessions and value-added knowledge sharing opportunities for our upcoming CRMUG Summit conference. We are going to dive deep into technical/developer, business User, and system administrative topics. It's shaping up to be another record-breaking CRMUG Summit in Seattle in October. I hope you'll meet us there!

I welcome, thank, and encourage all of you as CRMUG Members to continue to foster a community attitude of connecting, learning, and sharing with one another so that we may all benefit in our use of Microsoft Dynamics CRM. Thanks to all involved.

Have a great fall. See you at CRMUG Summit 2012!

Sincerely,

Tony Stein
CRMUG Director



NEWS

Community News

CONTECH ANNOUNCES NEW OWNERSHIP STRUCTURE AND NEW CORPORATE NAME

Contech Engineered Solutions LLC (formerly Contech Construction Products Inc.), a leading provider of innovative engineering and site solutions for the residential, commercial, and infrastructure markets, recently announced several positive developments that position the Company for the future. Contech, located in West Chester, Ohio, has new ownership in place; equity investors include Anchorage Capital Group, LLC, Littlejohn & Co., LLC, Tennenbaum Capital Partners, LLC, and Farallon Capital Management, L.L.C. These investors have worked with Contech, its equity partners, and its senior lenders to recapitalize the company and secure long-term financing. The company also announced that as a result of its growth in new markets and geographies, and the build-out of its product lines for the residential, commercial, and infrastructure markets, it has changed its corporate name to Contech Engineered Solutions LLC, effective immediately.

“We believe this new name more accurately reflects who we are today. We do more than just provide construction products; we provide innovative engineering and site solutions for world-class customers. We remain laser-focused on delivering the best customer experience while providing the market with sustainable site solutions. Our commitment to go beyond customers’ expectations with excellent product quality and reliability, combined with superior ongoing service and support, is the Contech difference,” said Ron Keating, Contech’s president and chief executive officer.

JONES LANG LASALLE EXTENDS GLOBAL STRATEGIC ALLIANCE WITH PROCTER & GAMBLE AS COMMERCIAL FACILITIES SERVICES PARTNER

Jones Lang LaSalle (NYSE: JLL) of Chicago announced that it is extending its global strategic alliance relationship with Procter & Gamble (NYSE: PG) following Procter & Gamble’s competitive selection process to select a commercial facilities service partner. The new five-year agreement encompasses integrated facility management, project development, construction management, and strategic occupancy planning services for Procter & Gamble’s owned and leased corporate facilities portfolio. The P&G corporate portfolio includes several million square feet of offices and technical facilities in more than 60 countries on six continents including North America, South America, Europe, Africa, Asia, and Australia.

“We are excited to continue our partnership with Jones Lang LaSalle,” said Lydia Jacobs-Horton, director, global facilities & real estate, Procter & Gamble. “We value the quality of their services and appreciate their collaborative approach to our relationship. Jones Lang LaSalle is an industry leader that will continue to help us innovate, achieve efficiencies, and meet our changing business needs globally.”

Selection factors also included Jones Lang LaSalle’s track record

of strong delivery, its flexible global service model, and dedication to using facilities and real estate investments as a competitive advantage for P&G. Since the business relationship started in 2003, the two companies have together pioneered service delivery approaches and technology-supported platforms that consistently improve upon industry best practices and continuously increase real estate’s contribution to the achievement of corporate goals and objectives.

MOOG PITCH CONTROL AND BLADE SENSING SYSTEMS HIGHLIGHT RELIABILITY AT AWEA WINDPOWER CONFERENCE AND EXHIBITION 2012

Moog Industrial Group of Blacksburg, Virginia brought its high-performance technologies for controlling and monitoring wind turbine blades to the Windpower 2012 Conference and Exhibition in Atlanta, Georgia (June 3 – 6) to help wind turbine makers and operators boost reliability, safety, and efficiency.

PLANTE MORAN RECOGNIZED AS NATIONAL TOP WORKPLACE BY WORKPLACE DYNAMICS

Plante Moran, PLLC, the nation’s 12th largest public accounting and business advisory firm, continues to add to its workplace awards with recent recognition on the 2011 Top Ten list of the National Top Workplaces.

According to the Detroit Free Press, which announced the award, the 2011 Top 10 list was compiled by WorkplaceDynamics, which designs and conducts annual employee satisfaction surveys for the Detroit Free Press and 29 other major newspapers in the country. America’s Top 10 Workplaces is based on these employee surveys and involves companies that participate in the Free Press’ annual Top Workplaces competition and similar competitions in other states. Plante Moran was ranked seventh out of 805 companies considered and is a multiple winner of the annual Detroit Free Press top workplace awards.

Plante Moran, located in Southfield, Michigan, has a variety of staff-friendly programs that keep morale high and turnover rates low for the public accounting profession. Longstanding programs such as Saturday childcare during tax season, flex-time and part-time schedules, paid time off for volunteerism, and unexpected bonuses such as an extra day off during the 2011 holiday season keep staff infused with the Plante Moran spirit and focused on providing outstanding client service.

“We are very pleased to accept this Top Workplace award because it affirms that we continue to place the proper emphasis on nurturing our staff,” said Gordon Krater, Plante Moran managing partner. “These awards can also engage other employers in creating a thriving workplace culture and that is a positive for all Michigan businesses.”

ROTHSTEIN KASS NAMED A BEST PUBLIC ACCOUNTING FIRM FOR WOMEN BY 2012 ACCOUNTING MOVE PROJECT

Rothstein Kass (www.rkco.com), a leading national professional services provider located in Roseland, New Jersey, has been named one of the “Best Public Accounting Firms for Women” by the American Society of Women Accountants and American Woman’s Society of Certified Public Accountants as part of the 2012 Accounting MOVE Project. The list of the top 10 firms was compiled from the 29 firms that took part in the third cycle of the MOVE project. Rothstein Kass was also featured on the list in 2011.

“It is an honor to be named one of the ‘Best Public Accounting Firms for Women,’ as we have always focused on providing women with the opportunities and tools for success through LIFE (leadership, inspiration, family, empowerment), our women’s initiative,” said Rosalie Mandel, principal-in-charge of the Rothstein Kass LIFE program. “In the last year alone, we have seen the percentage of women in upper middle management positions at the firm rise 10 percent. Through our various programs, touching on every area from

mentorship to networking, we are continuously developing ways to empower women in the workforce.”

All firms were ranked based on the “range, depth, and success of programs and workplace culture proven to remove barriers to women’s success, especially at midlevel and above” and scored using the trademarked MOVE parity scale, which focuses on four essential factors for the advancement of women: money, opportunities, vital supports for work/life, and entrepreneurship.

SHARE YOUR BIG NEWS WITH THE CRMUG® COMMUNITY

If you have newsworthy events or happenings in your organization that you want to see published in a future issue of the CRMUG Magazine, please submit them to Bob Buresh at bob@crmug.com for consideration. The news can be related to Microsoft Dynamics CRM, CRMUG, awards, accreditations, or recognition for you, your teammates, or organization – the same type of information you might include in your company newsletter or on the news section of your website. Let the community know what’s happening!

Regional Chapter News

COLLABORATING IN CHICAGO

At the May meeting of the CRMUG Chicago Chapter, “collaboration” was one of the hot topics. Michelle Spitzer, director of marketing for the Microsoft Dynamics CRM and Microsoft Dynamics GP User groups, gave an overview of how CRMUG Collaborate, a new collaboration tool, will enable communication regarding Summit, local Chapter meetings, and more. The tool is expected to be available by September.

A Customer presentation was given by Cancer Treatment Centers of America. They have a 65-User call center as well as 400 other Users, and they’re moving to having around 1,000 Users. They are currently migrating to Microsoft Dynamics CRM 2011.

CRMUG Director Tony Stein discussed the success of both Convergence 2012 and PreGame/DayONE. He shared that CRMUG has grown 100 percent in the last year, noting that Microsoft has 33,000 Microsoft Dynamics CRM Customers worldwide, and CRMUG has a roughly a 6.5 percent penetration.

The next meeting is scheduled for Wednesday, September 12 in Downers Grove.

MOVING UP IN MILWAUKEE

The word about CRMUG Milwaukee is definitely spreading. After having 14 attendees at the inaugural meeting on February 24, there were nearly 30 attendees at the May meeting. The group was a great 70/30 Customer/Microsoft Partner split, so as CRM Users were asking questions, there were plenty of CRM experts in the crowd to field requests and provide insight.

Interim Chairman Paul Cielinski started the meeting off with an introduction to CRMUG, facilitated introductions from the audience, and got the session started.

Dennis Weishan, senior vice president at Robert W. Baird & Co., shared how Microsoft Dynamics CRM powers Baird’s team of more

than 1,300 Users. He discussed the upgrade and migration path Baird has taken as well as the evaluation methods they used when choosing Microsoft Dynamics CRM over other popular CRM solutions. Other key insights included how Baird has been able to develop more than an 85 percent utilization rate across all Users and empower their team to create 3.4 million activity records (90,000 activities per month), 11,000 mail merge templates, and 10,000 saved views (just to mention a few of the very impressive statistics coming out of the success story of Microsoft Dynamics CRM at RW Baird)!

Brad Burks, director of sales at ClickDimensions, facilitated a discussion regarding Marketing Automation 2.0. He covered, among other things, best practices related to email marketing, newsletters, forms, drip campaigns, and retargeting ads using Google AdWords.

Cielinski wrapped up the session by covering upcoming CRMUG webinars, CRMUG Summit 2012, and the benefits of becoming a premium Member of CRMUG. He then led breakout sessions where attendees discussed sales and marketing best practices or administrator and configuration best practices. Additionally, two new vice chairpersons were added: Rudy Chavez, CRM project manager at Trek Bicycle Corporation, and Nathan Zuercher, IT manager at Liphatech. Lunch was provided by the ClickDimensions team, and coffee and pastries were provided by Microsoft.

STANDING ROOM ONLY IN MINNESOTA

The momentum continues with 69 people in attendance at a recent CRMUG Twin Cities Chapter meeting. Featured content was outstanding with the one-two punch of the Partner-Customer presentation style:

- » Gretchen Mann from PowerObjects enlightened attendees on how to leverage Microsoft Dynamics CRM for Marketing purposes. If anyone thinks for a minute that marketing is “light”

NEWS

– think again! Gretchen did a great job setting expectations of the value Microsoft Dynamics CRM can bring to marketers so that they spend less time justifying the ROI of their campaigns and more time strategically impacting the target market.

- » Amanda Klein from N'Compass followed Gretchen with real-world reflections on how she leverages Microsoft Dynamics CRM to enhance the company's 10,000 relationships.
- » Biplap Mandal of PowerObjects entertained and educated attendees on best practices for ensuring User adoption. This was excellent guidance for every company.
- » HealthPartners followed by profiling their rollout of Microsoft Dynamics CRM in their CARS project. This is a true model of best practices; it looks like they did everything right!

NETWORKING IN NEBRASKA

The May meeting of the CRMUG Nebraska Chapter greeted about 10 participants including Users from Sioux City and Kansas City. In addition to “regular” issues and topics, Brian Begley of XRM Services discussed several advanced workflow techniques. The group plans another meeting in September.

PROGRESS IN PITTSBURGH

The May meeting of CRMUG Pittsburgh, while lower in attendance than some chapter meetings, provided great insight and tips to those who were there. Manuel Sevilla of Plus Consulting presented an educational workshop titled “Working with Workflows”. The presentation was a hit as “workflows” was a topic requested for future workshops. Other topics for future meetings include Customer-entered ticketing setup/processing, how to use Microsoft Dynamics CRM beyond accounts, contacts, and opportunities, release updates, and “what’s new with Microsoft Dynamics CRM”.

A number of helpful links were shared, including:

- » CustomerSource: <http://www.microsoft.com/dynamics/customer/en-us/access-customersource/default.aspx>
- » Microsoft Dynamics CRM 2011 R8 Release Preview Guide: <http://blogs.msdn.com/b/dynamicscrmonline/archive/2012/02/14/crm-2011-r8-release-preview-guide.aspx>
- » Microsoft Dynamics Café for “Meet the Experts” webcasts and other postings: <http://dynamicscafe.com/>
- » Microsoft Developer Network (MSDN) for Microsoft Dynamics CRM: <http://msdn.microsoft.com/en-us/library/aa496081.aspx> **CRMUG**

Microsoft

Mark your calendar for the Microsoft Dynamics premier event of the year!

CONVERGENCE 2013

March 18-21, 2013
New Orleans, LA

Watch our event website for updates:
www.microsoft.com/dynamics/convergence/neworleans13



EVENTS

The event calendar on www.CRMUG.com and the weekly CRMUG® newsletter are your best sources for the latest CRMUG event information as this list is subject to change. Events are added weekly, so check back often and get registered for the next exciting CRMUG event.

EDUCATIONAL WORKSHOPS/ WEBINARS

- AUGUST 22** – CRMUG Summit 2012 Preview
- AUGUST 30** – CRMUG User Group Information and Orientation
- SEPTEMBER 6** – Electronic Signatures and Microsoft Dynamics CRM
- SEPTEMBER 11** – CRMUG Summit 2012 Academy Preview: Managing Your Contact Lifecycle with Microsoft Dynamics CRM
- SEPTEMBER 12** – CRMUG Summit 2012 Preview
- SEPTEMBER 19** – CRMUG Summit 2012 Academy Preview: Data Integration and Migration with Microsoft Dynamics CRM
- SEPTEMBER 27** – CRMUG User Group Information and Orientation

SPECIAL INTEREST GROUPS (SIGs)

- AUGUST 21** – Microsoft Dynamics CRM Online: Best Practices for the Sales User
- AUGUST 28** – CRM Administration: SQL 2012 and R8
- SEPTEMBER 12** – Financial Services
- SEPTEMBER 13** – Social CRM
- SEPTEMBER 18** – Administration and Development: Agile Methodology
- SEPTEMBER 27** – Microsoft Dynamics CRM Online: CRM Success for Small and Medium Size Businesses – Part 2
- OCTOBER 4** – CRM Administration: ERP and CRM Integration Best Practices

PARTNER SHOWCASE

- SEPTEMBER 20** – Cincom Systems

REGIONAL CHAPTERS

CRMUG's Regional Chapter meetings are scheduled on a quarterly basis, and we're planning meetings in September and December. September meetings confirmed as of press time include:

- SEPTEMBER 13** – Florida (Tampa Bay)
- SEPTEMBER 14** – Wisconsin (Milwaukee)
- SEPTEMBER 18** – Arizona (Phoenix)
- SEPTEMBER 18** – Utah (Salt Lake City)
- SEPTEMBER 19** – New York (New York)
- SEPTEMBER 19** – Colorado (Denver)
- SEPTEMBER 20** – Canada (Toronto, Ontario)
- SEPTEMBER 20** – Canada (Vancouver, British Columbia)
- SEPTEMBER 20** – Canada (Calgary, Alberta)
- SEPTEMBER 27** – Georgia (Atlanta)

If you do not find your location in this list, please reference www.CRMUG.com/member-resources/regional-chapters to see what your local chapter is up to.

ACADEMY TRAINING CLASSES

- SEPTEMBER 20** – Taking Microsoft Dynamics CRM Beyond Accounts and Contacts
- SEPTEMBER 27** – CRM Dashboards for the Non-Developer
- OCTOBER 26** – CRM Administration for the Part-Time Administrator

IN-PERSON EVENTS

- OCTOBER 15** – CRM Partner Connections at Summit 2012, Seattle, Washington
- OCTOBER 15-18** – CRMUG Summit, Seattle, Washington
- MARCH 17** – PreGame, New Orleans, Louisiana
- MARCH 18** – DayONE, New Orleans, Louisiana
- MARCH 18-21** – Convergence, New Orleans, Louisiana

MEET THE *board*

Craig Dewar Microsoft

LOCATION

Bellevue, Washington

EMAIL

Craigde@microsoft.com

TITLE

Director Product Management,
Microsoft Dynamics CRM

INDUSTRY

High-tech

BOARD MEMBER SINCE

2012

MICROSOFT DYNAMICS CRM USER SINCE

2003

Benefits of CRMUG®:

Real-time Customer feedback

What are you most looking forward to at Summit 2012?

Connecting with the community, hearing how they are using the product, and where they would like to see it go.



Dori Lienhard City of Moreno Valley

LOCATION

Moreno Valley, California

EMAIL

Doril@moval.org

TITLE

Enterprise Systems Administrator

INDUSTRY

Local Government

BOARD MEMBER SINCE

2012

MICROSOFT DYNAMICS CRM USER SINCE

2006

Benefits of CRMUG:

With budgets being so tight, particularly those in the public sector, I put even more focus on networking. Drawing on the expertise of other Microsoft Dynamics CRM administrators and developers, I can maximize our ROI. I want new solutions, tested in real-world settings that will improve the productivity of my agency and help us to provide the best service possible to our city council and our citizens. CRMUG provides me with access to experts, training, and a host of benefits you can't find anywhere else.

What are you most looking forward to at Summit 2012?

I look forward to getting to know the CRMUG community. I want to share the knowledge I've gained over the past six years and learn as much as I can.



Gretchen Opferkew PowerObjects

LOCATION

Minneapolis, Minnesota

EMAIL

Gretchen@powerobjects.com

TITLE

Director of Education

INDUSTRY

Microsoft Partner focused 100 percent on service, support, education, and add-ons for Microsoft Dynamics CRM

BOARD MEMBER SINCE

2012

MICROSOFT DYNAMICS CRM USER SINCE

2011

Benefits of CRMUG:

I enjoy participating in the in-person Regional Chapter meetings and Convergence DayONE as well as the virtual meetings and Academy training. When everyone contributes, there is a sense of community in CRMUG. Above and beyond getting our work done, we are humans who are helping each other enjoy what we do.

What are you most looking forward to at Summit 2012?

There will be some introductory content there, but I'm looking forward to getting to a deeper level of knowledge sharing. I work with many Customers who are quite proficient in Microsoft Dynamics CRM, but they are still looking for a place to continue learning. CRMUG Summit is the place.



Jeff Beelman Hitachi Solutions

LOCATION

Cedar Rapids/Iowa City, Iowa

EMAIL

Jbeelman@hotmail.com

TITLE

Senior Manager

INDUSTRY

IT Solutions

BOARD MEMBER SINCE

2012

MICROSOFT DYNAMICS CRM USER SINCE

2005

Benefits of CRMUG:

Without a doubt, the ability to network with other Users and collaborate on implementations and unique challenges. A person can save hours of troubleshooting and process design by visiting the forums, posting questions, and just reading how others solved or implemented specific needs and processes.

What are you most looking forward to at Summit 2012?

Witnessing the enormous growth of the CRMUG community and learning more about what is coming in Microsoft Dynamics CRM and how companies can better leverage their CRM investment.



Marc Wolenik Webfortis

LOCATION

San Francisco, California

EMAIL

Marc@webfortis.com

TITLE

President

INDUSTRY

Wineries, Financial Services, CPG, Non-profit, LMS Solutions

BOARD MEMBER SINCE

2012

MICROSOFT DYNAMICS CRM USER SINCE

2003

Benefits of CRMUG:

Community of Users sharing ideas and best practices

What are you most looking forward to at Summit 2012?

Interaction with Customers and Partners and learning more about how organizations are deploying Microsoft Dynamics CRM and XRM solutions.



Mohammed "Q" Qureshi Nalco, an Ecolab Company

LOCATION

Naperville, Illinois

EMAIL

Mqureshi@nalco.com

TITLE

Microsoft Solutions Architect

INDUSTRY

Diverse range, including food and beverage, healthcare, lodging, education, facility case, government, vehicle care, biofuels, buildings and institutions, chemicals, energy, oil and gas, manufacturing, mining and mineral processing, natural gas processing, pharmaceutical, power generation, primary metals, pulp and paper

BOARD MEMBER SINCE

2012

MICROSOFT DYNAMICS CRM USER SINCE

2003

Benefits of CRMUG:

You do not have to invent the wheel again and again; you can ask the community, and you will find the solution faster. You'll always learn about new features and functionality that can be implemented at your company by attending Regional Chapter meetings. Customer Showcase and educational topics are very informative. CRMUG Academy offers excellent discounted training courses. Above all, I love all the educational webinars presented by Partners, ISVs, and Members.

What are you most looking forward to at Summit 2012?

I treat Summit as mini Convergence focused mainly on Microsoft Dynamics CRM. I'm looking forward to attending various sessions and meeting one-on-one with MVPs and Microsoft product team members. As a Member of the CRMUG board, I'll also be looking to get general feedback from attendees to help improve content and drive more attendance to such events. Partner Solution Expo is also one area where I intend to spend time and have fun.





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marketing automation solution
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WELCOME TO OUR NEW *members*

This quarter we'd like to feature one of our new CRMUG® Members, sharing a little about who they are and what they do. Welcome to Abid Karim of Sybron Dental Specialties!

Sybron Dental Specialties, located in Anaheim, California, develops innovative technologies and manufactures and markets products for the dental and medical professions and is moving to Microsoft Dynamics CRM 2011 this fall. Abid Karim serves as the company's manager of enterprise specialty systems. He says he's looking forward to the training he and his team will benefit from through a Premium membership, especially with the upgrade this fall.

Welcome to CRMUG, Abid and Sybron! Welcome also to the new Members who have invested in CRMUG Premium membership and Partner membership this year! At press time, the group's grand total of Member organizations is 2,351. Each new Member adds value not only to their own organization, but also to the entire CRMUG community as they share their knowledge and experiences. Please note that these organizations have given CRMUG permission to share their name publicly.

PREMIUM MEMBERS ADDED LAST QUARTER

Allmand Bros	Leavitt Machinery	Research and Development Corporation
AllRegs	MAI Wealth Advisors, LLC	United States Bowling Congress
Augsburg Fortress Publishers	Medline Industries	UpStreme
Blue Star Operations Services, LLC	NAfME	USA Funds
Cineplex Inc.	Nicola Wealth Management	Verico Financial Group
HONBLUE	Phoenix Mecano	West Pharmaceutical Services
Hyland Software	ProHealth Care	WITTENSTEIN arena, Inc.
Kodiak Wireline Services Ltd		

PREMIUM PARTNER MEMBERS ADDED LAST QUARTER

Adobe EchoSign	Customer Contact Solutions Nigeria Limited (CCSNL)	Slalom Consulting
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Again, thank you for your contributions, and welcome to CRMUG! If you, too, want to explore the benefits of CRMUG Premium membership and take advantage of membership opportunities, simply visit www.CRMUG.com > Join CRMUG. Our Premium Members are the lifeblood of our organization and enable us to continue to provide valuable networking, educational events, and solution-specific programming.

CRMUG



INCREASING EFFICIENCIES — AND REVENUE

As a former Microsoft employee, Mohammed Qureshi knows better than most the value of a group of seasoned Users when it comes to deploying new technology. It's not exactly surprising, then, that when he joined a new company as a solutions architect, leading the charge on the User group front was not long in the making.

Nalco, the company he joined, was founded in 1928; in 2011, it merged with Ecolab. Combined, the two companies employ 38,000 people whose work around the world involves delivering programs and services focused on the conservation of clean water, keeping food supplies safe, helping people accomplish more with less energy, and the overall protection and cleaning of environments where people eat, sleep, work, play, and heal. The company's sales for 2011 were \$11 billion.

Obviously, managing customer-related data is important. "The technology used before was not very successful," Qureshi says. "So three years back it was decided to implement Microsoft Dynamics CRM in support of the goal of helping sales reps better serve their customers and, at the same time, streamlining the process under which the sales reps are coached and mentored by their managers. To start with, we implemented account, contact, and opportunity management modules to sales reps in different regions. Then we added case management, technical support requests, and marketing modules along with integration to our SAP system. Making CRM available on mobile devices was hugely successful and popular with field sales folks."

The selection of the new technology was meant to improve upon the old. "There were a lot of spreadsheets where district managers couldn't coach sales reps on targets," Qureshi recalls. "They had no visibility on which accounts were targeted. The old system required that a lot of forms be filled out, and it was very difficult to consolidate data."

With the new technology on the job, those issues are a thing of the past. "There is visibility into the sales reps' calendars, so the district managers know exactly what each and every sales rep is working on," Qureshi says. "That's improved performance, but it's also made it easier to provide effective coaching." The efficiencies also make a deeper

level of collaboration possible via Microsoft SharePoint®, a collaboration platform where account home pages roll up to the district home page, offering a level of visibility previously not possible. "Microsoft SharePoint and Microsoft Dynamics CRM are in synch," Qureshi says.

Currently the solution is used by more than 7,300 employees worldwide, each of whom uses it to perform, on average, three transactions per day. In support of what the company calls its Commercial Excellence Process, the technology has contributed to a \$100 million annual increase in revenue. It is widely regarded for facilitating the execution and coaching of the company's best practices for customer retention and sales growth. One top sales rep, in fact, reports that by maintaining a sales plan within Microsoft Dynamics CRM, the sales for the account have gone from \$40,000 to \$3.5 million and growing.

Recognizing the value of the solution, Qureshi wasted no time not only starting a local CRMUG chapter in Chicago, but also joining the national User group's board. "The goals are to both help increase User group memberships and to figure out how the User groups can best help improve the product," he says. "One of my ideas is that whenever someone signs up for Microsoft Dynamics CRM Live, we can approach them with a personalized offer to join the group. It's a way to let people know that there are people here to help them successfully implement the solution they've just invested in."

On the local level, as the chairman of the Regional Chapter, Qureshi considers the Chicago group one of the best in the country, and his goal is to make sure it stays that way. Even though it's barely two years old, each of the group's five gatherings per year draws more than 50 attendees. Naturally, the meetings are set up to help attendees address CRM-related challenges. "We bring together a tremendous amount of knowledge about the product, how to get the most out of it, the best ways of implementing it," he says, but adding that decidedly non-technical concerns are also addressed at meetings: "In addition to networking, we do a Customer showcase with someone from our region, and we also bring in a representative from Microsoft or an ISV to do a presentation. And they're the ones who pay for our lunch and our drinks." **CRMUG**

COMPANY

Nalco, an Ecolab company

HEADQUARTERS

St. Paul, Minnesota

INTERVIEWEE

Mohammed Qureshi

EMAIL

Mqureshi@nalco.com

WEBSITE

www.ecolab.com and
www.nalco.com

ESTABLISHED

Founded in 1928;
merged with Ecolab in 2011

**NUMBER OF
EMPLOYEES**

38,000

**MICROSOFT DYNAMICS CRM
USER SINCE**

2009

NUMBER OF USERS

More than 7,300

**CRMUG®
MEMBER SINCE**

2010



ACADEMY *career*

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Wade Petty
AVP of Finance
Mortgage Contracting Services

PREDICT THE FUTURE



TODAY

by **Evan Chaki, *Customer Effective*** | illustration **Matt Mastrud**

If you could predict the future, what would you do? Play the lottery and stock market? Stop traffic accidents before they happen? I can predict the future and have done it in the past. Predicting future Customer behavior as well as predicting what products/services a Customer wants is possible. You can predict future revenue and employee performance. The fundamental way to predicting the future is to analyze the past by discovering

trends and actions in current behavior. You can do this beginning today by starting with business intelligence and layering on analytics.

OVERVIEW

Your organization has data in many systems, but you are not able to make actionable decisions on the information because that data is overwhelming and hard to decipher. Sound familiar?

Business intelligence (BI) refers to the process of converting the data from these systems into structured collections based on specific roles, and then providing the collections at the right time to the right Users. Once data has been structured, analysis of the data can begin. The resulting analytics stem from discovering patterns in the BI data that is not easily seen and taking action on that information.

Business intelligence by itself will provide a historical reference of what has happened and what is happening now; you will be driving your business through the rear-view mirror and likely will crash. It is helpful to visualize the past quarter or year, but this leads to retroactively fixing what has already occurred. Analytics allows you to start with the historical information as a baseline and predict the future based on the past and trend patterns in your Customer collections, thus allowing your organization to be proactive with its current Customers in addition to finding new Customers that will be the best fit for your organization. If you want to stop traffic accidents, you need to know where most of the accidents are happening.

When you are ready to start a BI initiative, there are three core components for your organization to embrace: performance improvement, data quality, and visualizations. These three components build on top of each other just as analytics is built on business intelligence.

PERFORMANCE IMPROVEMENT

The first question to ask yourself or business partner is, “What are we trying to improve?” This is the fundamental question. If your organization cannot answer that question, then you will not have a direction for this initiative. If you are struggling to find an answer to this question, look to your senior executives and find out what is most important to them; build your project around their most important performance metrics. Typically senior executives are going to be sales and revenue focused, and those metrics are going to get their attention and garner support for a continuous BI effort.

After you identify the area you want to improve, ask your organization, “What are our goals for this improvement?” This is generally one of the hardest questions to answer, and you may not know what the answer is until you start to measure what is happening today.

The third fundamental question you should ask is, “What is happening today, and how are we going to measure it?” If you have identified a goal and an objective, but they are not measurable, you will not be able to track your progress toward the goal.

DATA QUALITY

Now that you know what needs to be measured and how you will collect the information, the next step is to determine where the data will come from. This may be one system, many systems, or it may be something that will be manually tracked. The data you will be collecting will only be as accurate as the Users entering in the information.

You will need to establish safeguards for your data. If you have another system that will feed your measurement program, review what fields are required in that system, and review where that system gets its data. Without data quality safeguards, your data could be misleading. No matter how big of an initiative your program is in the organization, incorrect data at the beginning will end the project. The business consumers of the BI information will not trust it and will never look at it again.

Initial data quality is critical to the success of User adoption. Once the integrations or systems are feeding into your measurements, you will need to create a process to ensure the data is clean each time the feeds are coming in.

VISUALIZATIONS

Defining your goals and measurements during the performance improvement phase of the initiative allows for focused visualization for the business Users based on their role. There are three visualizations that are commonly used; the first is a dashboard.

A dashboard is a grouping of charts, graphs, lists, and other items that is role-specific. Microsoft Dynamics CRM 2011 has out-of-the-box dashboards, which is a great way to provide business groups what they need. Dashboards will show what is happening, but they will not show where you are versus the goal that you created during the performance improvement phase.

The second visualization is a scorecard. A scorecard will provide insight to activities versus a goal that was set up for each measurement. The scorecard will show you detailed information regarding only the measurements and goals that were defined for each team.

The final visualization that is commonly used is called a key performance indicator (KPI). KPIs are the components in a scorecard and are typically represented as traffic lights or gauges. These types of visualizations are the most powerful for the business Users.

With a KPI, you need to define not only the goal, but also what is an acceptable level and not acceptable. If you have a goal to decrease the number of accidents at intersections by 20 percent each quarter, 20 percent will be the goal and will show as green on the KPI, but 15 percent to 19.9 percent might be represented as yellow. Anything below 15 percent will show as red.

The organization’s executive team will be able to focus on the yellow and red indicators and spend less time on the green indicators. This will allow their time to be allocated to underperforming measurements.

WHAT NOW?

The direction of your business intelligence initiative must align with corporate objectives as well as your long-term CRM strategy. CRM can fill the gap in your organization as a central hub of business information and knowledge. With the dashboard capabilities in Microsoft Dynamics CRM 2011, it is a perfect application to use to drive performance improvement and give the business what it needs to make better, more informed business decisions.

Creating a business intelligence initiative is the first step in the process. This will be a collaboration between your IT and business groups. Open communication on the current business issues and goals will help facilitate this first phase.

The BI concept is an initiative, not a project. Projects have start and end dates and a set scope while initiatives are ongoing organizational-wide priorities. This must be an initiative within the organization with buy-in from all levels. Once the business intelligence foundation is available, the next steps will be analytics.

Successfully incorporating these concepts in your business model will mean a significant change in the items you are measuring. You can start by knowing what has happened and what is happening now, and use that information to drive what you want to happen in the future. Your organization will not only be able to predict the future, but you also will be able to shape the future to match your goals and objectives.

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Customer Effective provides a complete range of services to help you maximize your Customer relationships using Microsoft Dynamics CRM. Visit www.customereffective.com for more information.

ERIC BOOCOOCK

SENIOR PRODUCT MARKETING MANAGER

Eric Boocock has been connected to Microsoft Dynamics CRM since version 1.0, when he was as an implementation consultant for a Partner organization. The product has been close at hand through his career progression, from the consultant role to running that Partner's west region, to transitioning to a Microsoft role as a technical specialist for Microsoft Dynamics CRM Online, and on to his current role in product marketing. We caught up with Eric to talk about the work he's doing now and the innovation that's coming for Users.

CRMUG: *You have a pretty unique history with Microsoft Dynamics CRM, first implementing it as a Partner, selling for Microsoft, and now supporting both audiences.*

Eric Boocock (EB): Yes, now I'm working to provide our Microsoft field and Partners with tools to effectively demo and share the great story around this CRM product. The perspective I'm able to bring, having been in those roles, has helped me deliver the high impact content I always wanted.

CRMUG: *What do you like most about your role?*

EB: I get to share my knowledge of upcoming innovation from R&D and experience with Microsoft Dynamics CRM over the years to help our Microsoft field and Partners be more effective in how they sell.

Our mission is to create great stories that help our Customers realize productivity, insight, and connection through tools such as Microsoft Dynamics CRM Online, Microsoft Office 365 (SharePoint Online, Lync Online, and Exchange Online), and Windows Azure. Over the last year I've been working on Demo Builder, a tool that creates trial versions of Microsoft Dynamics CRM Online and Office 365 and

deploys a Microsoft cloud-based demonstration. Instead of just telling a Customer about the features and doing a Microsoft Dynamics CRM demo, Partners are now able to show a full business solution from Microsoft. We've also started to create vertical demos so that a Customer can see how Microsoft Dynamics CRM would work within their particular industry.

CRMUG: *Cool. So a Customer can see a scenario of his/her business on Microsoft Dynamics CRM?*

EB: That's the plan. We've built a scenario that's close to an actual implementation with data, custom dashboards, and workflows that leverages the productivity and collaboration features within Office 365 via Lync and SharePoint Online and Customer and Partner portals running on Windows Azure.

Microsoft Dynamics CRM really comes alive when we bring all those other assets – Lync, SharePoint, and Exchange – together, allowing our field to tell the story of how a User will come into Microsoft Dynamics CRM and immediately gain productivity.

CRMUG: *That sounds like a great project to work on, and one that will really benefit Users. Our theme with this issue is analytics. You could say that Microsoft Dynamics CRM is all about the analytics, but how does the product help Users become more efficient with their reporting?*

EB: The key is getting the data you need, pulling that data in a manner that allows you insight into what's going on, and doing all that in a toolset you know. Microsoft Dynamics CRM 2011 enables you to create personal views – filtered grids of data – so you can see information such as opportunities where you're the owner, estimated close date, etc.

Users really want to see their data visually, and Microsoft Dynamics CRM offers business intelligence (BI) capabilities through reports powered by SQL Reporting Services (SRSS), dashboards, and charts.



Reports have been there since the beginning, but getting a visual portrayal of the data using charts and dashboards is a very rich, very custom way of seeing your information.

These SRS capabilities have always been available, but in the past they required a developer to create advanced reports. Now Users can easily point and click, and drag and drop, to create their own views, reports, charts, and dashboards. This enables Users to work analytically with a role-based view of data rather than by clicking through each record.

CRMUG: *What can Users look forward to down the road as far as big advancements with Microsoft Dynamics CRM?*

EB: There's an inherent set of functionality in the next release of Office, Microsoft Office 2013, that Microsoft Dynamics CRM just gets. For example, PowerPivot is a feature of Excel, and PowerView (termed before as "Project Crescent") is a feature of SQL 2012 Reporting Services. Microsoft Dynamics CRM will be shipping four PowerPivot models for use within Excel and four PowerView reports accessed through the PowerView Add-in for SharePoint. This new BI functionality will change BI completely as it gives Users the ability to see a chart of data, hit "Play", and the chart is animated showing how their data has changed over time.

This is a revolutionary way of presenting data, and with this view you could glean something totally different than what you've seen before. PowerView support for on-premise Microsoft Dynamics CRM Users is coming in the very near future; it's not tied to the Microsoft Dynamics CRM Q4 2012 release.

CRMUG: *Will PowerView support be available to Microsoft Dynamics CRM Online Users as well?*

EB: Yes, the Microsoft Dynamics CRM, Office, and SQL teams are collaborating to deliver functionality that allows PowerView to communicate with Microsoft CRM Online so data can flow back and forth. These new PowerView reports will be surfaced in SharePoint and interact with the Microsoft Dynamics CRM data model.

In addition to these great PowerView reports, we will inherently reap the benefits of new functionality in Office 2013. For example, Outlook 2013 will provide more info from social sites and Microsoft Dynamics CRM data within the Outlook experience. Imagine you receive an email from a Customer and there are five people on the "To" line. In the People Pane, you'll now see who is already in Microsoft Dynamics CRM and who isn't, as well as a button to quickly add them to Microsoft Dynamics CRM. Additional Microsoft Dynamics CRM data by contact can be surfaced such as sales to date, sales pipeline, and last activity, all without actually going into CRM.

This Outlook experience will be consistent across the complementary Outlook Web Access (OWA) and upcoming Mobile Outlook Web Access (MOWA). The initial expectation from Microsoft Dynamics CRM is to provide compatibility of the existing CRM Outlook client with Outlook 2013, and then gradually release more capabilities in subsequent releases.

CRMUG: *What's the greatest User benefit from reporting on data in Microsoft Dynamics CRM?*

EB: Tailoring BI to work for you. The point and click editing capabilities of charts and dashboards allows Users to create visual representations of what's important to them. Beyond the current expectations around just visualizing data, charts in Microsoft Dynamics CRM are inline and interactive, meaning they are presented right beside the Microsoft Dynamics CRM grid of data, and if you click on a portion of a chart, the CRM data is filtered to just that dataset. This brings BI into your daily work patterns allowing Users to work smarter. The data is also coming to you real-time, so that when data changes, the chart changes.

As Users start to leverage the new BI capabilities in PowerView, who knows what will happen. It will be a whole new way to see data.

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THIS NEW
BI
FUNCTIONALITY
WILL CHANGE
BI
COMPLETELY.



Adding Announcements to the Dashboard

by **Stephanie Hancock**

SITUATION: Announcements have been in Microsoft Dynamics CRM for years, but few companies really leveraged them because if Users didn't set their homepage to the announcement screen, they never saw the notices.

SOLUTION: The advent of Dashboards has changed the game by allowing you to bring elements from all over Microsoft Dynamics CRM into one place so that you have a true command center to launch your day from! Adding Announcements to your primary Dashboards in Microsoft Dynamics CRM 2011 allows companies to reduce email clutter by posting relevant information in one place to ensure it is broadcast to all Microsoft Dynamics CRM Users.



When you click on Announcements in the main navigation menu, the URL is the main CRM URL. So, you cannot point to the URL. This is easily fixed using a Web Resource that you can add to any dashboard.

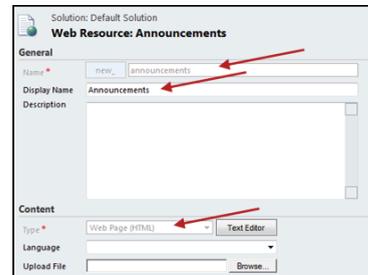
(Note: New announcements are created from Settings > Administration > Announcements.)

CREATE A WEB RESOURCE

1. Type the following code into a text editor such as notepad and save it as "announcementsondashboard.htm"

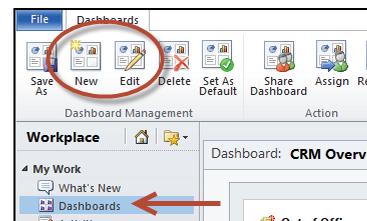
```
<html>
<body>
<script type="text/javascript">window.location.href="/home/homepage/home_news.aspx?pagemode=iframe";</script>
</body>
</html>
```

2. In Microsoft Dynamics CRM, navigate to Settings > Customizations > Customize the System > Web Resources > Click on the new button
3. In the dialog box, enter the name and Display Name "Announcements" and set the Type to Web Page (HTML) and save

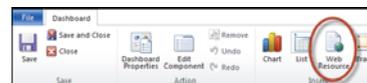


ADD THE WEB RESOURCE TO THE DASHBOARD

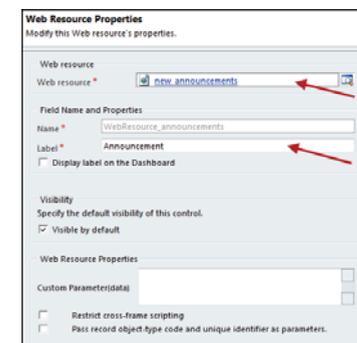
1. Create a new or edit an existing Dashboard



2. In the Edit Dashboard Window, press the Web Resource button



3. In the Web Resources Properties box, search for the new_...announcements resource, provide a Label name and save



SUMMARY: Mixing the functionality of dashboards and announcements in Microsoft Dynamics CRM allows you to update your Users without having to clutter their inboxes with emails.

Stephanie Hancock is regional director of solution delivery for PowerObjects.

Self-service Business Intelligence and Level One Data Analytics in Microsoft Dynamics CRM

by Julie Yack

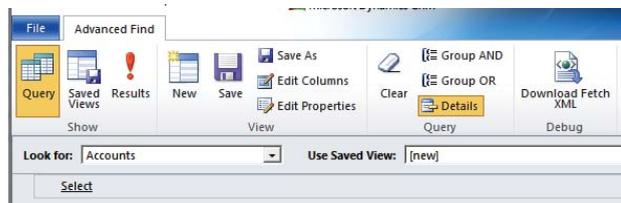
BUSINESS SITUATION: Microsoft Dynamics CRM Users have constantly changing individual business intelligence and data analysis needs. And they need it now.

SOLUTION: Teach them how by using custom views and advanced find.

1. You can launch the Advanced Find from practically any ribbon in Microsoft Dynamics CRM.

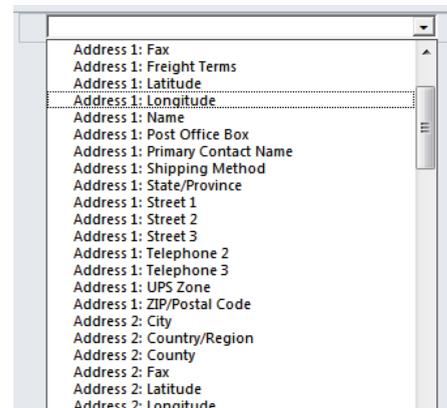


2. From here you can build your data queries, customize your columns in your view, export the query in FetchXML for reporting, name, and save your queries.

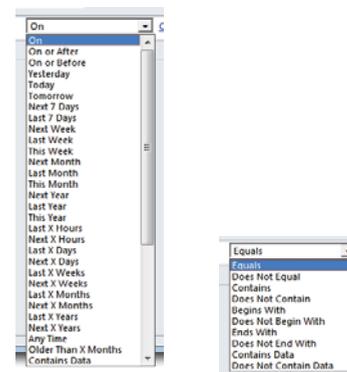


3. The selection will always default to where you came from when you clicked on the Advanced Find icon. For example, had you been looking at a Contact record, the entity selection dropdown would be defaulted to the Contact records and its default view selected. Note: if you click on Advanced Find from a place where it's not supported (from Solutions, for example) the dialog will still open for you but will be defaulted to the top item on the list. In an out-of-the-box Microsoft Dynamics CRM system, that will be Accounts.
4. Let's have a quick look at our query builder. One column selection will trigger the contents of the next column; it will only give you contextual choices, so you will be less likely to build an invalid query. There are many combinations of available columns. Here we'll just see a couple of examples, but after making a few of your own queries, you will sort out the differences easily.

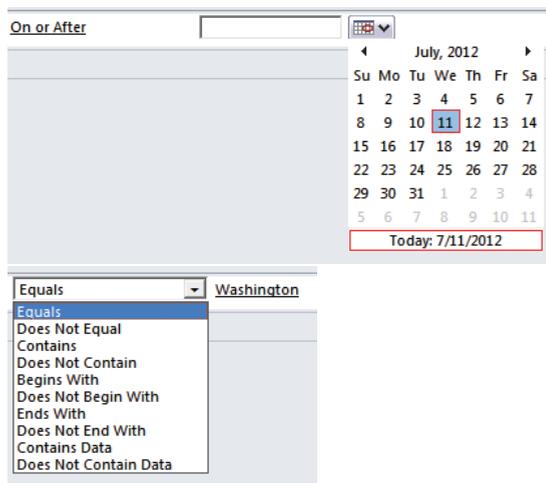
- a. Column 1 is your fields/attributes for that selected entity. All items that allow for Advanced Find will be shown. If you aren't using all of the fields, clean up that setting to make Advanced Find friendlier for your Users.



- b. The next column offers choices to qualify the data you want returned. The values in this dropdown come from the data type of the first item selected, the field. So the first one below is from a date type; the second is driven by the data type of text.



- c. The next column, again driven by the prior one, allows us to add more details for our specific query. From our examples above, look at what our choices would be next.



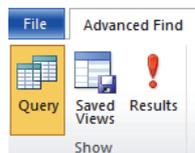
5. For our example, let's just say we need to see all of our accounts in Washington. Our sales rep there has been asking for more help, so we want to keep an eye on the business to know when it might be time to hire a new sales rep. Let's first build the query, and then we build the view in the next step. Using what you learned above, build your query to select accounts from Washington. In practice, you would want to experiment with the best way to make sure you have all instances of the state being Washington, such as accounting for possible abbreviations (and misspellings!), but in our quick example, this should work fine.



6. For the view, the columns that would be important for us might include account name, record owner, maybe communication information, and so on. We will also add a display column to show our basic query. Even though we don't NEED to see state equals Washington, some people just like to see it. In the ribbon, select Edit Columns. This dialog pops up and allows you to add/remove/sort columns that you want to see. You can edit column properties, such as width, by clicking Change Properties, when that column heading is selected.



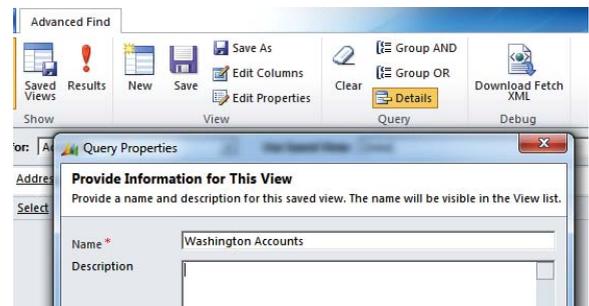
7. Once you've built your query and defined your columns for your view, you are ready to see the results of your query! Click the red exclamation mark in the ribbon to execute the query and display your results.



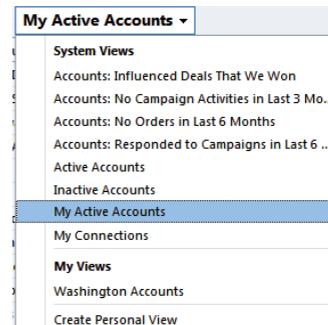
8. From your results grid, you can select any item/combination of items, just as you would in any Microsoft Dynamics CRM grid, and then perform actions. Things such as adding to a Washington marketing list or assigning to a new sales rep would be easily accomplished here. Starting a workflow or dialog from here could also be very useful.



9. Once you are satisfied that your Advanced Find is what you need, click the Advanced Find tab in the ribbon to go back to your save options and select Save As. Give the query a useable name, such as Washington Accounts, then save.



10. Close your Advanced Find windows after naming and saving. Navigate to the accounts area of Microsoft Dynamics CRM, and have a look at your views above the grid. You should see the view we just built available to you as a personal view.



SUMMARY: Empowered Users drive your software adoption. Teach them the value of consuming the data in Microsoft Dynamics CRM, and they will be eager to learn how to do it themselves. **CRMUG**

Julie Yack is a founding Partner of Colorado Technology Consultants. She blogs regularly at http://julieyack.blogs.com/my_weblog/.

Make Way! Banners on the Move.



WHAT WOULD YOU NAME THIS PHOTO?

Simply email your submission to Captioncontest@CRMUG.com.
All submissions will be printed in the magazine's next issue.



CONGRATULATIONS!

Congrats to **MICHAEL BAUER** of **AXONOM, INC.** for winning last quarter's contact with his submission of "In Good Hands." Michael – your prize is in the mail!



Enhancing Your **BUSINESS INTELLIGENCE**

by Rosalee Allan, PAML

Microsoft Dynamics CRM is the heartbeat of our organization. We've designed it to capture every touchpoint with clients in order to give us an enterprise-wide view of all activity in our business. We haven't always had this luxury, though, and I'd like to share with you some things to consider for enhancing your organization's business intelligence (BI) practice.

USE THE DATA

Our organization is a full-service laboratory, and we use Microsoft Dynamics CRM pretty much everywhere you can think of – client services, logistics, billing, IT, technical, field sales, and quality assurance. We didn't always have one system for everything and worked for many years on multiple systems. In fact, when we started using Microsoft Dynamics CRM, our only purpose for the software was to address complaint service calls.

Making the decision to track our whole business in Microsoft Dynamics CRM means that we are able to focus on analytical areas to see if we are meeting our goals. When you build up your own Microsoft Dynamics CRM practice, you'll have the ability to analyze your data and be proactive, because the faster you know, the faster you can react.

TAP INTO RESOURCES

Your best resources for information when figuring out how to build your BI capabilities are others who have been there. Attend User Group meetings and keep your ears open for Users who are doing things that are similar to what you want to do. You're not likely to find somebody who is an exact match, but when you do find that similarity, strike up a conversation and see if a site visit is possible. When you see firsthand how others are using Microsoft Dynamics CRM and running a BI practice, it will spark ideas you might not have thought about.

Another resource comes from within your own team. You're not just looking for Microsoft Dynamics CRM or BI experts, but people who can help you to articulate the biggest problems in your organization so that you can target those areas as intelligence that will lead you to the solution.

FIND THE OWNER

I mentioned your team as a resource. That might have elicited some eye rolls if you had a particularly challenging Microsoft Dynamics CRM implementation due to poor team involvement, attitudes, and/or project management.

In order for your BI practice – and your Microsoft Dynamics CRM implementation, for that matter – to be successful, you need to have a project owner. When practice ownership is in question, there will be more challenges to overcome with regard to habitual usage. The quality of your data is directly correlated to User adoption and usage, and you won't be able to build a solid BI practice until your organization is on board. A great way to prod that adoption along is to include reports in your regular team meetings – if they have to report back, they'll figure out quickly that it's easier to stay up to date with entering information into Microsoft Dynamics CRM.

Your project owner also needs to believe in the solution and what it can do for your business. If he or she doesn't, you need to designate a new owner. One thing we did right from the start was project ownership, and we're reaping the benefits now.

AGAIN – USE THE DATA

You have the ability to get information in front of your team every day. BI helps you make decisions, change course, and as mentioned before, react quickly.

We use plasmas in the halls of our office to display data and reports for everyone to see, and this has had a tremendous impact on continued User adoption, business results, and ultimately, Customer satisfaction.

You don't have to literally display the information like us, but getting the data to your team in the form of reports and graphs will show them a full version of the truth, helping them to do their jobs even better while enhancing your business' intelligence. **CRMUG**

Rosalee Allan is the chief operations officer of PAML and owner of her organization's Microsoft Dynamics CRM and business intelligence practices. Rosalee can be reached at Rallan@PAML.com.

wordfind

Below are 25 words that relate to the topics and theme in this issue of CRMUG® Magazine. These words can be found in the grid horizontally, vertically, diagonally, backwards, and forwards. Submit your completed Word Find for a chance to win a gift certificate; simply scan and email your entry to Wordfind@CRMUG.com.

C	R	M	U	C	H	A	P	T	E	R	S	N	U	M	M	O	C	C	U	S	T	O	M	E
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B	E	E	E	C	H	A	C	P	T	R	L	W	O	N	K	C	H	D	L	E	A	R	S	I
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R	C	B	J	D	I	S	D	C	C	U	N	B	S	T	P	R	E	M	I	U	M	L	S	L
S	E	O	E	A	C	A	T	P	A	H	C	Y	I	T	C	E	F	F	E	G	U	M	R	C
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K	F	V	T	N	O	I	S	S	U	C	S	I	D	T	R	A	I	N	I	N	G	G	F	A
C	E	B	S	C	B	W	S	A	C	R	S	R	U	I	F	N	D	M	L	O	P	T	R	P
O	R	E	J	B	O	E	G	I	O	L	L	E	T	N	I	O	A	U	M	M	O	P	K	T
C	E	B	R	O	L	D	L	O	M	O	K	D	E	M	Y	U	S	L	E	D	G	E	O	E
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Good
Leaders

Get
Out

of
the

Way



I've been pretty dense about some pretty important things. Just last week I realized that I was being my own worst enemy in trying to get fellow volunteer committee members to take ownership for action items. When I finally stopped whining about what I thought was their lack of commitment, I asked myself one simple question. "Could it be me?" Turns out, it was.

Before I tell you why, I'm going to take us back in time to the summer of 1973. Led Zeppelin is leading us "Over the Hills and Far Away" while the Carpenters are trying hard to hold on to our collective innocence. I'm 9 years old, wearing an unfortunate outfit involving lime green polyester, and excitedly pedaling my banana-seat bike to the five and dime to purchase a birthday present for my friend Lisa. I thought being one of Lisa's "best friends" gave me special insight into what she might treasure. I picked out an assortment of games and toys, including butterfly stickers and bubble blow. I proudly paid for my glorious gifts with saved quarters and pedaled home to show my mom. She was not impressed. "It all looks chintzy," she said. Crestfallen, I pedaled (more slowly this time) back to the five and dime and chose something I hoped Lisa would like and my mom would deem acceptable – a puka shell necklace and matching bracelet, as I recall. My mom thought it was "too old" for Lisa, as if the shells would somehow send her in search of lipstick and boys in cars. I walked back to the five and dime this time, wanting as much time away from my overly helpful mother as possible. In the end, I "chose" something practical (read: boring) – notebooks and colored markers.

I'm fairly sure my mom has no recollection of this event while I remember every detail. I was embarrassed and humiliated while handing five and dime owner Elsie my third choice as she looked at me over the

counter, eyes filled with a mixture of annoyance and pity. Why couldn't I remember this painful lesson decades later when I, like my mother before me, was being overly helpful with my fellow volunteer committee members? The answer is simple. When we stress, we obsess. We grab hold of everything and everyone around us in a desperate attempt to control every outcome. It's natural. It's sometimes necessary, like in emergency situations. And, it almost always yields unexpected results, like me griping, "I guess the only way to get anything done is to do it myself!"

As the stressed leader of my volunteer committee, I felt the need to micro-manage every detail. I did most of the talking in our meetings, nervously filling every silence with what I thought was helpful guidance. It's no wonder my colleagues were hesitant to raise their hands. I hadn't given them a chance. After realizing I'd been my own worst enemy, I decided that to effectively lead, I needed to get out of the way. At our next meeting, I announced I'd be taking a back-seat role, and we'd need to divide and conquer. Then, I shut up, sat back, and was amazed by the energy, enthusiasm, and accountability that ensued.

The next time you feel like you're the only one pushing the proverbial boulder up the hill, I want you to think of that pigtailed, oddly dressed little girl who was sent back to the store three times. Are you the leader who unintentionally erodes confidence and accountability from your team members? If there's even a chance you might have a case of stress-induced control syndrome (SICS for short), keep these tips in mind.

- » **Sit down and shut up.** Ask someone else to lead meetings or discussions. Listen way more and talk way less. Ask your team members what they think, then wait for them to answer. When team members come into your office asking for your advice, realize they

aren't asking you to fix their problem. They want a sounding board. They want your vote of confidence. Fixing the issue might make you feel better in the moment, but it'll also make your team member feel less capable and more timid.

- » **Let it go. No take-backs.** When you micro-manage the details, you absolve others of accountability (along with their pride of empowered, autonomous accomplishment). Set guidelines on how often you want to be updated, and then go on with your business. The trust you place in your team members will be more motivating than you can imagine. If things don't go as planned, remember – no take-backs. Provide encouraging coaching, make it clear you trust that the assignment will be completed, and then go on about your business.
- » **Work yourself out of a job.** When I used to tell people I was always trying to work myself out of my job, they often looked at me as if I had two heads. I then went on to explain that I felt my most important job as a leader was to help my team members gain the skills and confidence they needed to take on my current accountabilities. Are there things on your to-do list that you feel strongly can only be done by you? Ask yourself why, and then figure out how you can break them down and pass them around.

In 1973, Bob Marley and the Wailers told us all to "Get Up, Stand Up". Now, I'm telling you that to be a good leader, you need to Sit Down, Shut Up, and Get Out of the Way. Your team members will love it, as will your inner child who is (I hope) not donned in lime green polyester. **CRMUG**

For help getting out of the way as a leader, or to find out why the author seems to be fixated on 1973, contact Tracy Faleide at Tfaleide@hotmail.com.

...I asked myself one simple question. "Could it be me?"
Turns out, it was.

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CRMUG: *Tell me about your company.*

Paul Cielinski (PC): We offer Internet research and CRM process automation technology to our Customers. It started out as a desktop software application that has since become web-based and available within Microsoft Dynamics CRM. We have three offerings that help Customers with various aspects of their Microsoft Dynamics CRM implementation.

CRM Shield standardizes data within Microsoft Dynamics CRM so it's cleaned when a User is entering the information.

Contact Capture is great for marketing and sales professionals as it's an easy way to create leads, contacts, and accounts. This product takes an email signature, spreadsheets, or management page, and creates a CRM record.

Our flagship product, CRM Profiler, installs in Microsoft Dynamics CRM and searches the Internet to make sure your accounts are accurate. Anything posted online that's not behind a firewall is pulled into that account's record, giving you fresh contact information without you having to do the research.

CRMUG: *That's a lot of value to bring to a Microsoft Dynamics CRM User. Do you have a niche size amongst your Customers?*

PC: We have Customers that have tens of thousands of Users and others that have one User. You can purchase our products independently to suit your needs, so we really can add value to any size of a business.

CRMUG: *What do you have coming up for Customers?*

PC: Our last couple of releases have been focused on User experience. For example, CRM Shield can now be applied backwards to clean and standardize data that has already been entered into Microsoft Dynamics CRM. That's a big win for Users to get their data formatted the same way without any manual checks. We're also focusing on making it really easy to download our products and try them out.

CRMUG: *We appreciate having you as an ISV Partner Member of CRMUG. What do you like most about being part of this User Group?*

PC: In addition to creating the CRMUG Milwaukee Chapter and having a thriving community there, we like the opportunity to provide thought leadership in the webinars. We really like the conversations happening around social CRM – what it means, how you start, and what to do if you don't have good data.

CRMUG: *What sets you apart from your competition?*

PC: The core difference is that we're not a database. People love better sales intelligence, and it's the lifeblood of a lot of companies. Our competitors store the data and cache it, so you don't know if it's totally fresh. When you're using CRM Profiler, there is no database, we go in real-time – three minutes or less – and return a snapshot from the Internet. The hours you would spend doing that research are eliminated as our product finds information from blogs, press releases, and LinkedIn, to name a few. With a competitive product you won't receive that time-stamped snapshot from the Internet, and you'd have to research to confirm the data is still accurate before you make the call or send the email.

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CRMUG



<p>COMPANY Broadlook Technologies</p> <p>INTERVIEWEE Paul Cielinski, CRM practice manager</p>	<p>HEADQUARTERS Milwaukee, Wisconsin</p> <p>PHONE 877-977-8080</p> <p>EMAIL Pcielinski@broadlook.com</p>	<p>WEBSITE www.broadlook.com</p> <p>ESTABLISHED 2001</p> <p>CRMUG® PARTNER MEMBER SINCE: 2011</p>
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Welcome to The List from The Partner Channel®! The List is a tool that enables you to quickly and easily find products specific to industries, business process functions and various services provided by third-party companies that extend the Microsoft Dynamics® family of products. The List is updated quarterly and is available as a PDF document at: www.thepartnerchannel.com/the-list

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Look for this icon to identify solutions that have earned the Certified for Microsoft Dynamics accreditation.



Look for **NEW: in front of the names of products/ services that are new to The List.**



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Panatrack, Inc. **GP**

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Ariett Travel, Expense & AP Invoice Automation

Pre-travel Approval, Automated Expense Reporting with Credit Card Integration and AP Invoice Automation. With Document management and mobile apps.

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www.axtension.com/en/applications/
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Optimized accounts payable invoice processing.

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Most secure account payable via EFT, Multi-level approval, remittance info, email notification. Support JPM format, Integrate seamlessly with GP.



Bottomline Technologies AX

www.bottomline.com/transmap_ax

866-551-6934

Transform® AP for Dynamics AX

Integrated AP invoice capture, configurable workflow and storage. Link invoice data directly to AX for automated matching of PO-based invoices plus exception processing with online review and approval.



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www.ExcellIntegrator.com • 260-485-0665

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Allow users to copy & paste Payables transactions from Excel to Dynamics.

Isis, Inc. SL

www.isissoftware.com/enha/isis_sl_

positive_pay.aspx • 804-762-4200

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Perform Positive Pay from Accounts Payable and Payroll to your issuing bank.



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Save time by generating refunds between Accounts Payable and Accounts Receivable or bring balances to zero.

KTL Solutions, Inc. GP

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KTL FastAP

Brings distribution window and payment terms directly to the 1st screen.

Liaison Software Corp**AX GP NAV SL**

www.liaisonsc.com • 714-543-9877 ext. 201

Liaison Messenger EFT

Automate the batch e-mail and faxing of EFT Notifications to Vendors.

Mekorma GP

www.mekorma.com • 888-635-6762

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The most widely-used MICR check printing software for Dynamics GP - with Secure Approval Workflow. Print AP & Payroll checks on blank stock from inside Dynamics GP. Great for managing multiple checkbooks.

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Invoice Approvals and Accruals

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The Validator 1099

Automated vendor TIN validation for accurate 1099 processing.

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www.checkfactory.com • 800-749-2335

Check Factory Visual Series v5 for Dynamics GP and SL

Check Factory Visual Series is a MICR check and forms printing software solution designed to completely replace the need to purchase pre-printed checks and forms. Check Factory works inside Dynamics GP and SL.

Payroll Enhancement**Aatrix Software, Inc. GP**

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Complete eFiling and plain paper printing W-2 & 1099 solution. Unemployment, withholding, & new hire reports for all 50 states are completed automatically from your Microsoft Dynamics GP payroll data ready to eFile.

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www.Greenshades.com

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Our Tax Service is the easiest way to file and pay your payroll taxes.

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Creates Federal State and Local W-2s 940/941s 1099s SUTA returns & more.

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Allow users to copy & paste Payroll transactions from Excel to Dynamics.

Integrity Data GP

www.integrity-data.com

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Proven solutions for US Payroll including leave management, automatic e-mailing of direct deposit statements and W-2's, managing complex payroll posting requirements, configuring overtime rules and more!

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positive_pay.aspx • 804-762-4200

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Transmit your 401K collection data from Payroll electronically to your investment bank.

JAT Computer Consulting, Inc. GP

www.jatnet.com/JPI.htm

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Payroll Toolbox

Over 50 add-ons to enhance CDN and US Payroll; multi-batch processing, vacation audit and more.

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A web-based app that provides employees online access to their pay stubs. Employees can be notified through email when their pay stub is available online. Configuration tool allows control to information.

KTL Solutions, Inc. GP

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Time & labor management solutions optimizing productivity and data integration for payroll, HR & job costing using biometrics, badge, WEB or PC based time clocks. Includes employee manager self service.

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Best fit forecasting & multi-site replenishment solution with DRP, collaboration, promotions, drill down visibility & multiple rollup views.

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Allows you to dynamically define where each segment of the account comes from either the customer, vendor item, system, static, or payment terms.

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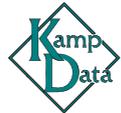
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