



MICROSOFT DYNAMICS CRM:
6 STEPS TO SUCCESSFULLY MANAGING YOUR MICROSOFT DYNAMICS ENVIRONMENT



Targeted towards Dynamics Administrators and IT support, and organizational leadership, this tip sheet contains six actionable strategies to improve management of the Dynamics environment, which will in turn increase ROI and User Adoption.

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ABOUT CRMUG:

User Group for Dynamics 365 & CRM: Bringing D365/CRM Users Together to Exchange Knowledge and Experience Success
D365UG/CRMUG is a community of professionals, like you, using Microsoft Dynamics 365/Microsoft CRM. The user group brings users to the forefront of technology problem solving by allowing them to share their ideas and solutions. Tens of thousands of users call this community home and utilize the following resources to exchange knowledge, exhibit leadership, explore solutions and expand their networks:

- User-led virtual training sessions
- Local User Group Meetings
- Online Q&A Forum
- Advanced workshops (Academy)
- In-Person Conferences and Events

D365UG/CRMUG is an important information source for all users of Microsoft Dynamics 365/Microsoft CRM. Coupled with support we can provide; you will experience success by getting involved with D365UG/CRMUG. The cost-effective organizational membership allows all Microsoft Dynamics users in your organization to get involved and experience the value of a community powered by users, for users.

Join Today



STEPS TO MANAGE YOUR DYNAMICS 365 & CRM ENVIRONMENT

1. Develop a strategic roadmap
2. Plan ahead to balance control and flexibility
3. Create a development backlog
4. Prioritize and groom the backlog
5. Plan a release
6. Communicate changes to users

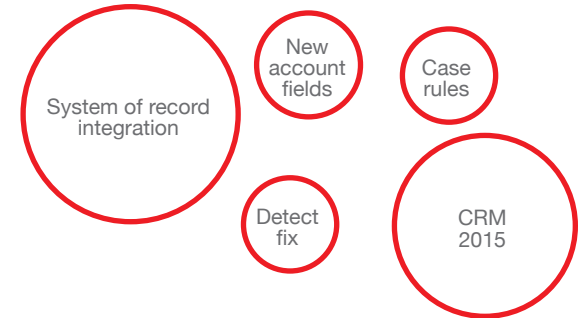
1. DEVELOP A STRATEGIC ROADMAP

- High level priorities for CRM for next 12-18 months
- Sets milestones for the team
- Baseline to measure against
- Use for resource planning and budgeting
- Helps align with integration partners

	SEPT 2011	OCT 2011	NOV 2011	DEC 2011	JAN 2012	FEB 2012
PRODUCT DEVELOPMENT	Optimize Attendance Monthly Email Summary	PAYMENT GATEWAY INTEGRATION	Advanced Reporting: Taxes Integrate transaction data (e.g. Square, cc Processor)	Customize reminder emails for member retention Integrate with QuickBooks	Multiple Login	Scheduling Integrated Online Store
BENEFIT	<ul style="list-style-type: none"> • retention • re-engagement 	<ul style="list-style-type: none"> • new customers • new source of revenue based on % transaction 	<ul style="list-style-type: none"> • retention 	<ul style="list-style-type: none"> • retention • new customers 	<ul style="list-style-type: none"> • retention • new customers 	<ul style="list-style-type: none"> • new customers • larger studios • increase revenue
	MAR 2012	APR 2012	MAY 2012	JUN 2012	JUL 2012	AUG 2012
PRODUCT DEVELOPMENT	MEMBER PORTAL	Payroll capabilities	RETAIL AND INVENTORY TRACKING	Affiliate Marketing via email Promotions	Device Integration (key cards, cc processors)	MOBILE APP
BENEFIT	<ul style="list-style-type: none"> • retention • new cutomers • larger studios 	<ul style="list-style-type: none"> • retention • new cutomers • larger studios 	<ul style="list-style-type: none"> • retention • new cutomers • increased revenue • larger studios 	<ul style="list-style-type: none"> • new cutomers • larger studios, franchises • increased revenue 	<ul style="list-style-type: none"> • retention • new cutomers • larger studios, franchises 	<ul style="list-style-type: none"> • retention • new cutomers • instructor market

2. PLAN AHEAD TO BALANCE CONTROL AND FLEXIBILITY

- Which changes require a release?
- Release = customization publish or backend code change
- Impacts downstream partners
- Lookups: Campaign types, Goal types, Opportunity lost reasons



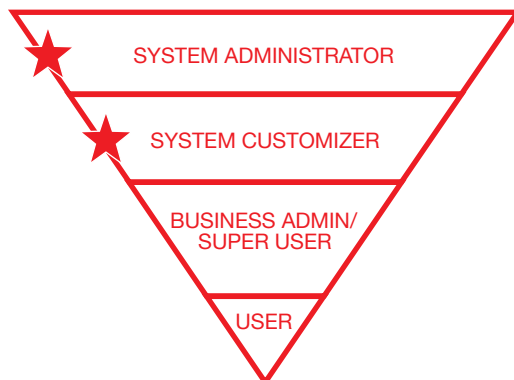
3. CREATE A DEVELOPMENT BACKLOG

- All changes requiring development
 - a. Large roadmap items (needs, vague requirements initially)
 - b. Small enhancements (task-y)
 - c. Defects
- Tools: Excel/Google Docs, Version One, JIRA, Rally Software

Story ID	Title
B-06467	System of Record Integration
B-06881	Admin Tools enhancements
B-10123	New custom screen for accounts
B-10124	New calculated account flag
B-10073	CRM 2015 Upgrade - Technical Story
B-10117	Database server upgrade
B-10118	SOR 2 major change
B-09600	New integration for account details
B-06770	New "Lead" Client Type - replacing Leads entity
B-03740	SOR 3 data pull

4. PRIORITIZE AND GROOM THE BACKLOG

- Highest priority items to the top.
- Rocks and sand prioritized together. Releases need a balance of both.



Story ID	Priority	Title
B-06467	1	SOR Integration
B-06881	2	Admin Tools enhancements
B-10123	3	New custom screen for accounts
B-10124	4	New calculated account flag
B-10073	5	CRM 2015 Upgrade - Technical Story
B-10117	6	Database server upgrade
B-10118	7	SOR 2 major change
B-09600	8	New integration for account details
B-06770	9	New "Lead" Client Type - replacing Leads entity
B-03740	10	SOR 3 data pull
B-09297	11	Account merge enhancement
B-09745	12	Data extract enhancement
D-06989	13	Defect 1877 - Account error message fix
B-08176	14	Activity view changes
B-09624	15	Improve performance
B-09277	16	Custom web service change
B-09566	17	Contact field addition
B-09944	18	Opportunity field addition
B-05180	19	Pipeline Cloning

5. PLAN A RELEASE

- Select candidates for the release based on priority
- Development calculates resource capacity for the release
- Development provides estimates for each release candidate
- Business “shops” from the list of release candidates, spending the capacity

Story ID	Priority	Title	CRM	Integration	QA	Iteration
B-06467	1	SOR Integration	5.0	3.0	5.0	1
B-06881	2	Admin Tools enhancements	8.0	0.0	5.0	1
B-10123	3	New custom screen for accounts	5.0	0.0	4.0	2
B-10124	4	New calculated account flag	2.0	0.5	2.0	1
B-10073	5	CRM 2015 Upgrade - Technical Story	5.0	0.0	0.0	1
B-10117	6	Database server upgrade	1.0	4.0	4.0	2
B-10118	7	SOR 2 major change	8.0	10.0	10.0	postpone
B-09600	8	New integration for account details	5.0	5.0	5.0	2
B-06770	9	New "Lead" Client Type - replacing Leads entity	7.0	3.0	7.0	2
B-03740	10	SOR 3 data pull	0.0	4.0	4.0	2
B-09297	11	Account merge enhancement	1.0	0.0	3.0	1
B-09745	12	Data extract enhancement	2.0	2.0	3.0	2
D-06989	13	Defect 1877 - Account error message fix	3.0	0.0	3.0	1
B-08176	14	Activity view changes	0.5	0.0	1.0	1
B-09624	15	Improve performance	2.0	0.0	1.0	1
B-09277	16	Custom web service change	0.0	0.5	1.5	2
B-09566	17	Contact field addition	1.0	0.0	0.0	2
B-09944	18	Opportunity field addition	4.0	0.0	2.5	2
B-05180	19	Pipeline Cloning	5.0	0.0	4.0	postpone
B-09859	20	Remove message about contact during add	1.0	0.0	1.0	2
D-02794	21	Defect 1927 - Bug on account screen when changing status	2.0	0.0	1.0	2
D-07326	22	Defect 1813 - "State/Province should not be required on primary	1.0	0.0	1.0	2
D-02802	23	Defect 2802 - Sales Call views fix - "Associated Sales Calls" not fi	0.5	0.0	0.5	2
		Total	69.0	37.0	68.5	

	CRM	Integration	QA
Capacity for Iteration 1	25.7	9.0	20.3
Totals where In Scope = 1	26.5	8.5	20.0
Iteration 1 Under/Over	-0.8	0.5	0.3
Capacity for Iteration 2	36.8	13.5	34.9
Totals where In Scope = 2	29.5	18.5	34.5
Iteration 2 Under/Over	7.3	-5.0	0.4
Capacity	62.4	22.5	55.2
Totals	56.0	27.0	54.5
Under/Over	6.4	-4.5	0.7

6. COMMUNICATE CHANGES TO USERS

- Release email
 - Briefly describe key changes with small screenshots
- Training calls
 - 1 hour conference calls offered several times over the week
 - Quick demos for new enhancements
- Reference guides and online demos
 - 1-2 page functional quick reference guides (e.g. Navigation guide, Advanced Find, Managing calls and tasks)
 - 1 min Captivate online demos

If you're already enjoying the benefits of a D365UG/CRMUG Membership, click [here](#) to watch this tip as a webinar recording!

For more information on becoming a D365UG/CRMUG Member visit www.crmug.com/join.

D365UG/CRMUG Members benefit from user-led and produced training on Microsoft Dynamics 365 & CRM. In addition, Membership includes valuable networking and collaboration opportunities both virtually and in-person.



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