



Introduction

Microsoft has brought mainstream support for Dynamics CRM 2011 to an end and this will be closely followed by end of support for Dynamics CRM 2013.

End of support announcements can be met with uncertainty about the impacts they might have on your business. This whitepaper addresses the challenges and risks associated with running a key business function on an unsupported software product. In addition, it discusses how businesses benefit from upgrading to a new and fully supported release.

You may remember, when your organisation selected Dynamics CRM as your CRM system and how, at the time, it was the latest technology. Your new system likely replaced an outdated system or perhaps even a complex series of spreadsheets. Your reasons for moving to Dynamics CRM would have been for more functionality, greater productivity and better reporting. It may be hard to admit but could Dynamics CRM be that outdated system that now needs replacing?

VERSION	LIFECYCLE START DATE	MAINSTREAM SUPPORT END DATE	EXTENDED SUPPORT END DATE
Dynamics CRM 4.0	29th Feb 2008	9th Sep 2013	10th Oct 2018
Dynamics CRM 2011	18th May 2011	12th Jul 2016	13th Jul 2021
Dynamics CRM 2013	12th Jan 2014	8th Jan 2019	9th Jan 2024
Dynamics CRM 2015	11th Feb 2015	14th Jan 2020	14th Jan 2025
Dynamics CRM Online	Dec 2015	Retired on the 1st of November 2016 and all customers migrated to Dynamics 365	

GUIDE OUTLINE

1. Risks of change
2. Benefits of upgrading
3. Your options
4. Prices and licenses

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SECTION 1

Risks of change

Microsoft has stopped issuing new fixes and making changes to Dynamics CRM 2011 and will shortly be doing the same with Dynamics CRM 2013. Some might be inclined to assume that there is little risk associated with a system which has been running successfully for several years, even if it is no longer supported. After all, surely all bugs have been found by now? So what could possibly go wrong? There are however major risks involved and unfortunately, they are very real.

With older versions of CRM it isn't as easy to integrate with digital channels such as outlook and LinkedIn and drive efficiencies, including helping you work with your marketing team to nurture leads and never drop an opportunity. Not having this integration puts your team at a disadvantage.

Change, as we all know, is inevitable. Consider recent changes to data protection regulations with GDPR coming into place. GDPR increases the need of having a great CRM solution. As part of GDPR, you need a single source of truth on personal data, for most organisations, this is their CRM system. Having clear audit capability, contact preferences, role based security, data expiry and other features is now expected as standard.

The changing technology environment: a system like Dynamics CRM might work well in the original environment it was tested in but with Windows, Office, Internet Explorer and almost every other system it relies on are changing, without proper testing and updates any of these changes could easily impact the stability and performance of Dynamics CRM.

Businesses' evolving needs puts great emphasis on how you sell. Can your CRM be easily updated to represent new markets, new personas, new sales processes? How does your CRM help you sell? Does it have the ability to make recommendations and support you as an organisation?

How does it support your sales team when they aren't in the office? Does it offer the ability to provide real time access on any device? The average business person carries more than 3 devices, does your system work in a way that suits them?

If you think your business would struggle to update your CRM to keep pace with all the changes facing it then it is likely time to upgrade.



SECTION 2

Benefits of upgrading

When thinking about upgrading there are three success criteria: user adoption, productivity and cost. How your new system delivers against these three metrics ultimately decides the ROI of the project.

New Functionality

Microsoft has added a host of new features to its CRM offering over the years, especially since the launch of Dynamics 365.

- » **New Outlook Application** – allowing you to track conversations and add contacts directly from Outlook.
- » **Learning Path** – a built in training tool that can offer task recording or relevant information at each step in a process.
- » **Connected field service** – enable you to empower your employees on the go with the right level of information and support to deliver on the road for your customers.
- » **Project service automation** – take your sales opportunities and turn them into projects. Identify the resources you require, and a number of other project management tools to manage projects effectively.
- » **Gamification** - enable employees to participate in individual and team-based competitions that motivate them to achieve certain pre-defined KPI's by offering prizes, awards, privileges, and recognition.
- » **LinkedIn** – full integration available via LinkedIn Sales Navigator to provide you more information, routes to market and relevant connections for your prospects.
- » **Improved connectors** - logic apps and Microsoft cognitive links available.
- » **Power BI** – taking your dashboards and reporting beyond static graphs. This gives you more power and flexibility to drill down into your data to gain better insights and forecasts.
- » **Customer Portal** - a completely new portal that can be used to capture requests and interact with your customers, integrating straight into your CRM.



Benefits of moving to the cloud

For users of Dynamics 2011 and 2013 there are a range of benefits in moving to Dynamics 365 that are linked to you making the move to the cloud. Your sales team is active and on the move, your CRM should go where they go.

- » Anytime, any device access
- » Built-in intelligence
- » Microsoft upgrade the platform on a regular basis so you are always on the latest version
- » No extra costs - everything, including hosting, is included
- » You make it easier to connect your CRM to a wide range of other solutions. Dynamics 365 comes with a range of connector and third party applications that can easily extend your capability.



SECTION 3

Your options

For existing users of Microsoft Dynamics CRM, you have two options available. You can upgrade to a new solution or continue using the non-supported system.

If you decide to stay with the existing system, the key here is to have a support partner that gives you the confidence you need to rely on the system. A partner that delivers the changes and fixes you need to keep your system running, this will become more challenging over time but will extend the life of your CRM.

When thinking about upgrading, your upgrade path leads you towards Microsoft Dynamics 365 and you can decide whether to re-implement or upgrade through the versions to get there. Both have merits depending on your legacy data and any customisations in use.

Dynamics 365 is a cloud based solution that works on a per user per month cost. For that cost you get anytime access on any device, including all your hosting etc.

When thinking about moving to Dynamics 365 there are a couple of decisions to make.

DYNAMICS 365 FOR CUSTOMER ENGAGEMENT

Dynamics 365
for Sales

Dynamics 365
for Customer Service

Dynamics 365
for Marketing

Field Service – Great for people with large mobile workforce
Project service automation – helps you turn opportunities to projects
Social engagement – an intelligent social media tool

Power BI – powerful data visualisation and reporting tool
Flow – the ability to create custom workflows with triggers and actions
PowerApps – the ability to create custom applications without using code
AppSource – a full marketplace of solutions that integrate with all of the above

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Dynamics 365 Customer Engagement

Microsoft's flagship offering is Dynamics 365 for Customer Engagement. This is a package that includes access to many different solutions that all share the same technology and platform. This is effectively 3 modules of the same CRM tool designed for different roles and a number of supporting solutions. All of the solutions sit on the customer engagement platform, using the same database and they share much of the same functionality.

On the other hand, you can choose to simply purchase the solution you need instead of the full package. However, for larger organisations, with more complex needs, the package is the stronger choice as it's not much more expensive.

All of the solutions have:

- » **LinkedIn integration** – LinkedIn is now a Microsoft solution, offering great integration for your Sales team. For enterprise users of LinkedIn Sales Navigator you can integrate this with Sales. There is a package available that includes licenses for Dynamics 365 for Sales and Sales Navigator.
- » **Embedded intelligence** – Automatically get recommendations and guidance at every stage of your sales process to keep you focused on moving deals forward.
- » **Productivity** – The solutions come with a high level of automation and the ability to integrate across the Office 365 range, including Outlook allowing you to easily track email exchanges, Skype calls and more in one central place.

Dynamics 365 for Sales

This is your sales focused CRM solution, for Dynamics CRM users this will be the most familiar application, offering all the capability you get in Dynamics CRM plus more. It is designed to help your sales team to manage relationships and turn them into revenue for your business. The solution offers a number of automated and sales based workflows. It can be used to better understand your customers' needs to help you engage more effectively and win more deals.

Dynamics 365 for Sales offers dashboards that can be configured by role to give you all the insight you need to manage your leads, opportunities and team. Create dynamic revenue projections and monthly sales reports in minutes.

There is a lighter version of this solution available called Dynamics 365 for Sales Professional if you do not need the full capability.

Dynamics 365 for Customer Service

For all things customer service this is the solution for you. It combines your typical CRM with case management capability. With customer expectations rising, customers want, quick, relevant answers on any channel, even on the go. Through automation and intelligence, you can deliver faster, more personalised service and add value to every interaction. This comes with the ability to create business flows for any demand your team might be servicing, each step is clearly documented with instructions and relevant information with SLA's to keep your customer first.



Dynamics 365 for Marketing

This is the newest addition to the Dynamics 365 family. It is a completely new marketing tool that bears no resemblance to the old style marketing lists that some Dynamics CRM users might have seen. It provides full access to all your customer information and excellent tools for marketers. This new product is focused on mapping customer journeys and capturing information to pass to your sales team. It provides capability across email marketing, events management, landing pages, forms and a range of other tools.

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SECTION 4

Prices and Licenses

The pricing is based on a per user per month basis as it's a cloud based subscription service. The only exception to this is Dynamics 365 for Marketing. You can either purchase the Dynamics 365 Customer Engagement plan which gives you access to each of the solutions or you can purchase individual licenses for the applications you need.

You can also purchase team member licensing for employees that require limited access. Team member licensing is available but does require a premium or essential license to accompany it. This provides users with the ability to read and approve, run all reports and employee self-service.

» Dynamics 365 Customer Engagement - £86.70

» Dynamics 365 for Sales (enterprise) - £71.60

» Dynamics 365 for Sales Professional - £49

» Dynamics 365 for Service - £71.60

» Dynamics 365 for Marketing - from £565.60 per organisation per month

Dynamics 365 for Marketing licensing is based at an organisation level and the pricing is tiered depending on the number of contacts you have in your database.

» Microsoft Relationship Sales (Dynamics 365 for Sales + LinkedIn Sales Navigator) - £90.91



About Incremental Group

Incremental Group is working with organisations currently using Dynamics CRM to assess the risk to their business of remaining on an unsupported version of CRM and the business benefits to be derived from upgrading.

This involves one of our highly experienced CRM consultants conducting an Upgrade Readiness Assessment (taking into account customisations and 3rd party modules), highlighting the risks and opportunities for businesses and demonstrating later versions to showcase what benefits can be delivered.

Finally, Incremental Group will objectively prepare a report with a recommendation on the best option for the organisation with an implementation plan to allow a thorough consideration of the next steps.