



## Microsoft Dynamics CRM Online and Microsoft Office 365: The Power of Cloud Productivity

Equipping people with collaborative tools that are easy to use, easy to access, and work well together drives their productivity. Microsoft Dynamics® CRM Online and Microsoft® Office 365 pair together to unlock this power of productivity. The results are enriched customer relationships, streamlined business processes, and improved communication and collaboration across the enterprise.

Microsoft Dynamics CRM Online provides a powerful and easy-to-use customer relationship management (CRM) solution delivered through the cloud, to help organizations improve marketing effectiveness, boost sales, and enrich customer

service interactions quickly and cost-effectively.

Microsoft Office 365 delivers familiar Microsoft Office solutions via the cloud so that you can access email, contacts, documents, shared calendars, presence information, web meetings, team sites, and more—anytime, anywhere.

The synergy provided by deploying these two solutions alongside one another delivers true cloud-based

productivity by leveraging the natural integration points of Microsoft Dynamics CRM Online and Office 365.

- **Familiar:** Empower users through natural, productive, and insightful experiences that span CRM and Office applications.
- **Intelligent:** Facilitate informed decisions and operational efficiencies through real-time analytics and streamlined business processes across the business spectrum.
- **Connected:** Maximize the value of business relationships and systems by connecting people, processes, and ecosystems across Microsoft Dynamics CRM Online and Office 365.
- **Integrated:** Boost the efficiency of integrated information-sharing and collaboration solutions including the Microsoft SharePoint®, Microsoft Exchange Server, and Microsoft Lync™ Server components of Office 365.

### Increase business productivity with familiar, intelligent, and connected tools.

Access the combined offerings of Office 365 and Microsoft Dynamics CRM while online and mobile from just a web browser. For Office users, the familiarity of Microsoft Outlook® becomes the primary interface for Microsoft Dynamics CRM.

### Maximize efficiency through team communication and collaboration.

- Use the integration of Office 365 and Microsoft Dynamics CRM Online to create customer, opportunity, and competitive-specific SharePoint sites.
- Empower users to work collaboratively on key business documents.
- Easily share critical customer information and history across the organization.

### Reduce costs and increase agility with the cloud.

- Mitigate the overhead of administering servers in support of critical business applications by moving to the cloud.
- Benefit from automatic upgrades across Microsoft Dynamics CRM and Office 365 to drive productivity.
- Scale the solution up or down in response to business demands and seasonality.

# Microsoft Dynamics CRM Online: Made Better with Microsoft Office 365

Combine familiar Microsoft Office applications with a powerful CRM solution to improve marketing effectiveness, boost sales, and enrich customer service interactions. Microsoft Dynamics CRM equips business professionals with access to customer information through a familiar Microsoft Outlook experience, which helps ensure rapid user adoption and fast results.

And with Microsoft Dynamics CRM Online, you get the same powerful CRM software delivered as a cloud service from Microsoft, enabling affordable, scalable, reliable access, and a financially backed Service Level Agreement (SLA). Best of all, Microsoft Dynamics CRM Online amplifies and accelerates the value of your Office 365 investment.

## CRM THAT IS NATURAL AND PERSONAL

Provide your staff with software that empowers them through natural, productive, and insightful experiences. Microsoft Dynamics CRM gives your user a native Outlook client (included in select Office 365 subscriptions) that provides CRM capabilities through an interface that is easy to customize to their unique needs.

## INFORMATION THAT IS INSIGHTFUL AND ACTIONABLE

Achieve business insight and make better-informed decisions using real-time analytics that put information at your fingertips. Microsoft Dynamics CRM together with the collaboration capabilities of Office 365 (SharePoint and Exchange) helps everyone across the organization make better use of information with analytics and visualizations that fit into the context of your people's everyday work and helps drive better decisions.

## AN ORGANIZATION THAT IS COLLABORATIVE AND UNITED

Build connections across people, processes, and ecosystems, allowing your business to maximize the value of its relationships and systems. Microsoft Dynamics CRM provides collaborative, team-based CRM capabilities tightly integrated with the communications and document management tools of Office 365.

## DRIVE SALES EFFICIENCY

Streamline approvals, automate manual tasks, and enforce best practices across the sales organization. With powerful workflows, guided sales dialogs, and streamlined goal tracking, Microsoft Dynamics CRM helps your sales organization consistently implement best practices and streamline the sales process.

Start a 30-day free trial of Microsoft Dynamics CRM Online today:

[crm.dynamics.com/trial-overview.aspx](http://crm.dynamics.com/trial-overview.aspx)

Find out more about

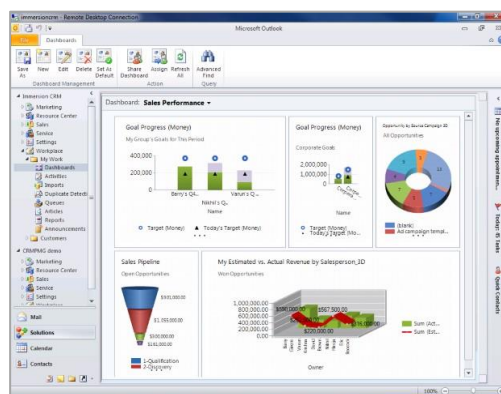
Microsoft Dynamics CRM Online:

[crm.dynamics.com](http://crm.dynamics.com)

Find out more about Microsoft Office 365:

[Office365.microsoft.com](http://Office365.microsoft.com)

*Maximize productivity and adoption with a native Outlook experience and real-time dashboards in Microsoft Dynamics CRM.*



## Select Microsoft Dynamics CRM Online Capabilities

### Marketing

- Directed and mass email capabilities
- Data import and cleansing
- Easy-to-use segmentation tools
- Holistic lead tracking and management
- Powerful campaign planning and execution
- Automated response tracking
- Closed-loop marketing analysis and reporting

### Sales

- "Lead to Cash" visibility
- Sales planning and territory management
- Seamless lead management
- Comprehensive opportunity tracking and management
- Real-time sales forecasts and pipeline reports
- Streamlined sales processes
- Mobile productivity

### Customer Service

- 360-degree customer view
- Knowledge tracking and sharing
- Streamlined case management
- Guided dialogs and call scripts
- Powerful service scheduling
- Streamlined processes and escalations
- Self-service portal capabilities
- Integrated call-center desktop

### Extended CRM

- Drag-and-drop customization
- Contextual analytics
- Robust workflow engine
- Advanced personalization
- System-wide auditing and field-level search
- Role-based forms
- Solutions management console
- Powerful developer tools

# Microsoft Office 365: Made Better with Microsoft Dynamics CRM Online

Be free to work where and when you choose with Microsoft Office 365, extended by the power of Microsoft Dynamics CRM Online.

|                                                            |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
|------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Improved management and control of Microsoft Office</b> | <ul style="list-style-type: none"> <li>Simplified web access to Office, without the need to administer back-end servers.</li> <li>Flexibility in licensing means the right license for every type of user, and the ability to adapt to changing business needs.</li> <li>Massively scalable, highly reliable, easy to access.</li> </ul>                                                                                                                                          |
| <b>New productivity features and capabilities*</b>         | <ul style="list-style-type: none"> <li>New Office Professional Plus 2010 available as a subscription service, including Office Web Apps.</li> <li>New Lync Online combines instant communications and online meetings in a single service and enables "presence" within Microsoft Dynamics CRM Online.</li> <li>Improved SharePoint Online and Exchange Online with new 2010 versions integrated with Microsoft Dynamics CRM Online.</li> <li>Rich browser experience.</li> </ul> |

\*Not all features are available in all subscription plans.

## COMMUNICATION AND COLLABORATION DRIVE PRODUCTIVITY

Office 365 delivers the power of cloud productivity to businesses of all sizes, helping to save time and money, and simplifying cross-application integration across Office 365 and Microsoft Dynamics CRM Online.



## GET STARTED TODAY

Find out more about Microsoft Office 365 and sign up for a trial account today:  
[Office365.microsoft.com](http://Office365.microsoft.com)

## Select Microsoft Office 365 Innovations

### Microsoft Office Professional Plus

- The complete Office experience with services integration in Office 365
- Microsoft Outlook becomes the primary CRM user interface
- Simplified user setup to preconfigure services
- Always the latest version of the application, including Office Web Apps
- Familiar Office user experience to access services

### Microsoft Exchange Online

- Rich browser experience with new Outlook Web App
- Improved inbox management with conversation view
- Integrated multi-mailbox search and retention policies
- New personal email archiving and compliance capabilities
- Email plus calendar services for Microsoft Dynamics CRM Online

### Microsoft SharePoint

- New personal My Sites to store important documents, and share expertise
- Greatly improved team and project sites
- New extranet sites to share information securely with customers and partners
- New intranet sites to stay up-to-date on news and information
- Simple to create public-facing websites
- Integrated to Microsoft Dynamics CRM Online entities such as account,

### Microsoft Lync Online

- Combines 1:1 text/voice/video chat with multiparty online meetings in a single application and service
- Escalates conversations into impromptu online meetings with audio, video, PowerPoint® upload, and desktop sharing
- Simplified access for external meeting participants
- Contact photos and activity feeds
- Federation with Windows Live® Messenger
- Enables Lync Status across Microsoft Dynamics CRM Online





## The Power of Productivity

Microsoft Dynamics CRM Online and Office 365 provide a familiar and integrated experience that helps reduce training and development time so you see an immediate return on investment (ROI). Integration with Microsoft technology helps mitigate the risk of ongoing integration costs and maximizes your overall investment in Microsoft technology.

### Increase productivity with an integrated Outlook experience.

- Use Microsoft Outlook to send and receive emails that are integrated into Microsoft Dynamics CRM Online and tracked automatically.
- Track emails, contacts, tasks, and appointments in Microsoft Dynamics CRM Online.
- Enable bulk-import of Outlook contacts into Microsoft Dynamics CRM Online.
- Maintain access to Microsoft Dynamics CRM Online data even when operating offline through Outlook and Microsoft Dynamics CRM offline replications.

### Improve collaboration and efficiency with SharePoint Online integration.

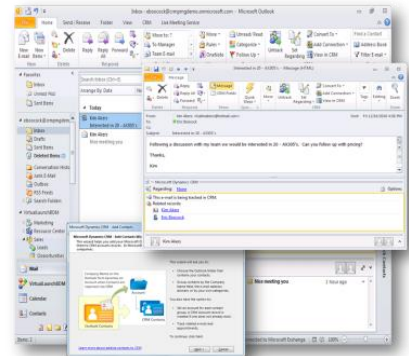
- A SharePoint Online portal site, such as a shared document repository or calendar, can be integrated into the CRM user interface.
- A SharePoint Online portal site for a Microsoft Dynamics CRM Online record (such as account, opportunity, case) can be created in SharePoint from Microsoft Dynamics CRM Online.

### Maximize resource utilization with Lync Online integration.

- Allow a user to know beforehand about the availability of their colleagues or contacts directly in the Microsoft Dynamics CRM Online user interface.
- Track Live Meeting appointments as activities in Microsoft Dynamics CRM Online.
- Build workflows across Microsoft Dynamics CRM Online and Office 365 that reflect Lync Status.

Microsoft Dynamics CRM Online + Office 365 help your organization boost productivity and keep your teams focused on what's most important—your business relationships.

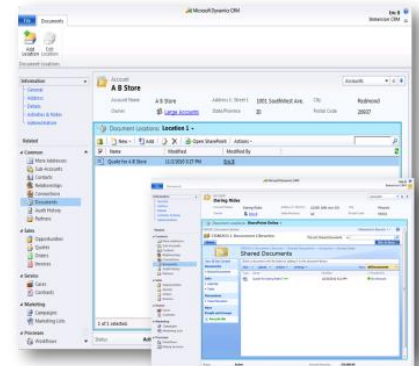
## INSIGHTFUL AND ACTIONABLE



## INTEGRATED



## COLLABORATIVE



*Flexible SharePoint sites keep critical, customer-specific business documents organized and accessible across your organization.*

