CRM Driven Solutions for Sport & Leisure

GREEN 4 BASICS OF CRM

USER GUIDE

TABLE OF CONTENTS

About this Document....3
Copyright....3
Document Control....3
Contact....3
Introduction....4
What is CRM?....4
Why CRM?....4
Using CRM....5
Outlook Client Vs Internet Explorer Client....5
Outlook Client....5
Internet Explorer client....6
CRM Navigation....7
Navigation Panel (1)....7
Ribbon (2)....8
Work area (3)....8
Views....8
An example of a CRM form:....8
Account and Contact management....9
What is a Contact?....9
What is an Account?....10
Building Relationships....11
Activities....13
My Activities....13
MArketing Lists....15
Reporting....16
Dashboards....16

ABOUT THIS DOCUMENT

This document outlines the basics of CRM.

COPYRIGHT

DOCUMENT CONTROL

Version	Date	Change	Initials
V1.0	21/10/2014	This is a new document	JW/CP

CONTACT

Any correspondence should be addressed to Green 4 Solutions Limited:

Green 4 Solutions Limited
16-17 Midland Court
Central Park
Lutterworth
Leicestershire
LE17 4PN
UK

Phone: +44 (0) 845 508 8149
Email: support@green4solutions.com
Web: www.green4solutions.com

INTRODUCTION

WHAT IS CRM?

Customer Relationship Management (CRM) is a model of managing a company or organisation's customer relationships.

- Microsoft Dynamics CRM is a business software application that allows companies of all sizes to track, manage and report on their customer interactions.

WHY CRM?

Moving to a CRM system brings with it a number of benefits:

- All customer data in a central repository
- Emails/phone calls recorded against contact as activities
- Targeted communications / campaigns
- Achieve a 360-degree view of the customer relationship
- Automate common business processes to reduce manual tasks
- Deliver a more consistent customer experience by streamlining customer interactions
- Enable executives to measure and report on key metrics related to their business so they can make better business decisions

Consider:

- How you will use CRM to gather data
- The impact of the changes CRM will bring
- The benefits using CRM will bring

USING CRM

CRM is a very powerful tool, and how we choose to use it can further benefit the productivity of users. Users can choose to access and navigate through CRM on different platforms. There are two ways of accessing CRM are through Internet Explorer and through Outlook. Which option to use is very much a business decision and the sections below aim to provide examples of scenarios in which a particular user interface may be more suitable than another.

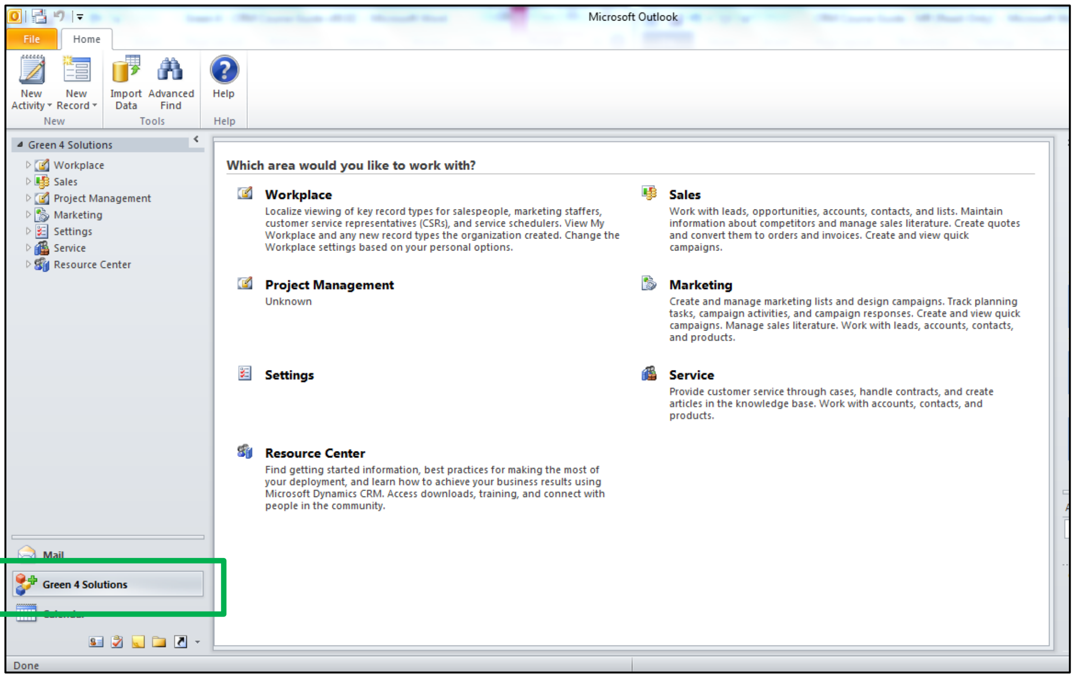
OUTLOOK CLIENT VS INTERNET EXPLORER CLIENT

OUTLOOK CLIENT

Accessing CRM through the Outlook client (sometimes referred to as the Outlook plugin) enables users to view all their key customer data in one place. This is especially beneficial for users that already spend a considerable amount of time in Outlook in a typical working day. The table below describes the key benefits of using the Outlook client.

Function	Description
Email Tracking	Emails can be directly tracked from the Outlook client, and will be recorded against the contact or account in CRM
Tracking Appointments	Appointments can be tracked directly from the Outlook client and converted into an activity in CRM, allowing the user to effectively manage their appointments with clients.
Single Application User Interface	A key benefit of the Outlook client is that the user is provided with a single application user interface. This means that a user, who regularly utilises Outlook, can remain in this program without having to open multiple windows.
Conditional Formatting	Through the Outlook plugin – data can be further enhanced using the conditional formatting tool. This allows the user to help organise the data available to them.

The diagram below shows the how CRM can be accessed through Outlook, once configured, the name of this will change dependant on the organisation installed:



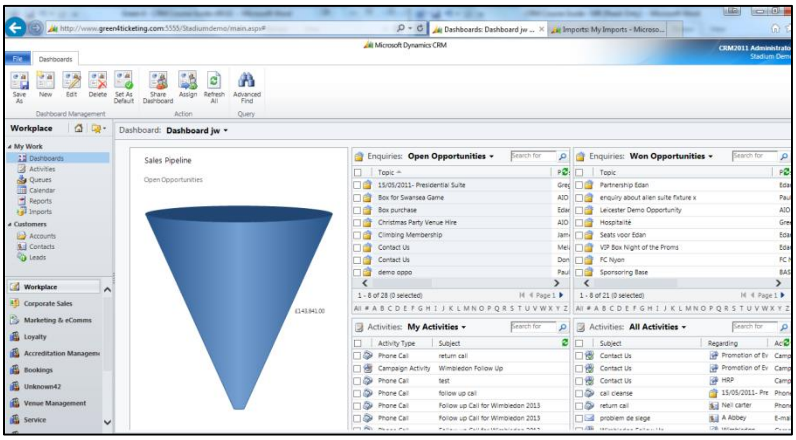
Scenario:

An example of a user, or department that would benefit most by using the CRM Outlook plugin would be Sales. Sales people tend to use Outlook regularly throughout their working day, and the single user interface would therefore be beneficial to them. The ability to synchronise activities, track emails and create new contacts and accounts whilst using Outlook, enables the user to streamline their processes when executing a sales process.

INTERNET EXPLORER CLIENT

Function	Description
Speed	General navigation of the CRM system is a lot quicker through the Internet Explorer client.
Syncing of Data	Data is synchronised more regularly, whereas accessing through the Outlook plugin means that data in the CRM is only intermittently synchronised.
All Green 4 Modules available	All Green 4 modules are available. For example – the Green 4 email marketing tool is only available through the Internet Explorer client.

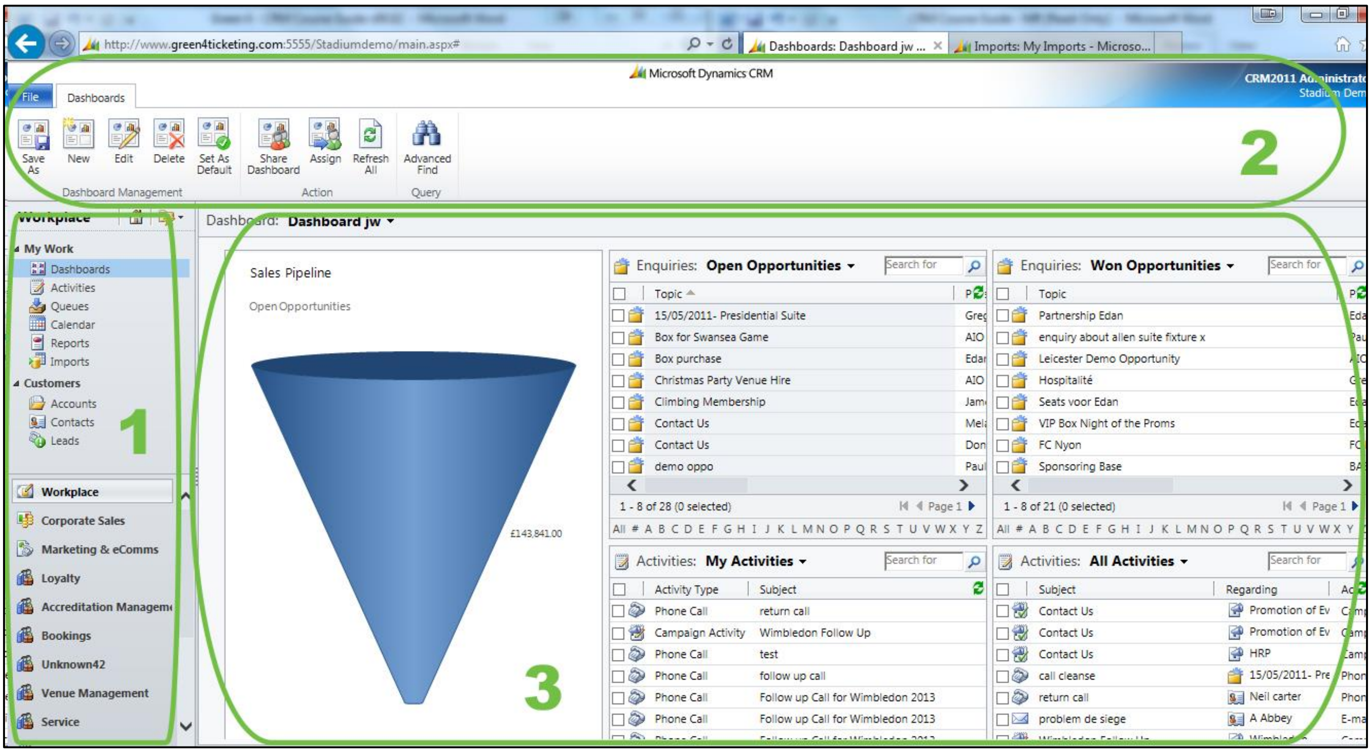
The screenshot below shows how CRM appears when a user logs in through Internet Explorer:



CRM NAVIGATION

Microsoft Dynamics is designed to be used and react in a very similar way to other, maybe more familiar Microsoft software such as Word or Excel.

The image below outlines the key areas of CRM, a description of each area is below:



NAVIGATION PANEL (1)

The navigation panel at on the left hand side allows users to select a relevant tab from the bottom of the list as an area of the system to work in, i.e. marketing. This then provides a list to give a choice of entities directly above where the user can select to work on.

RIBBON (2)

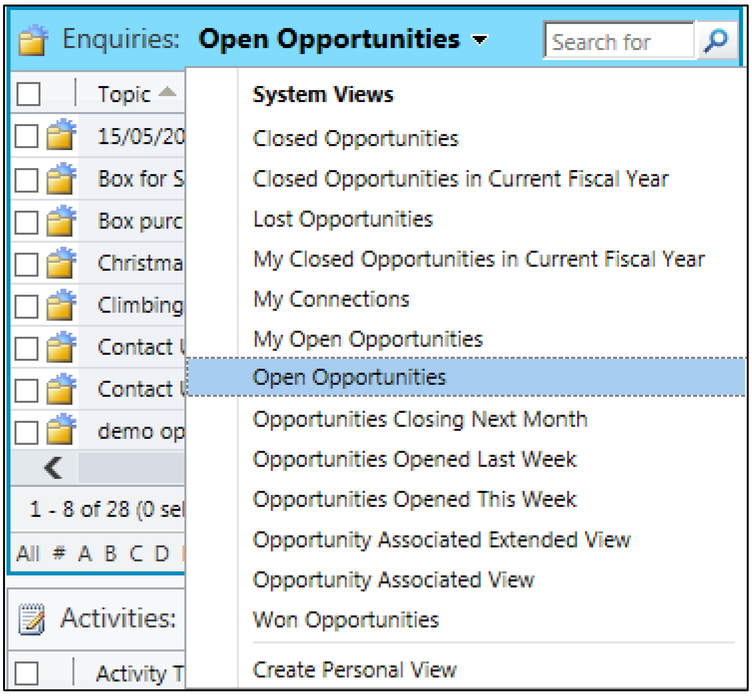
The ribbon includes buttons and tabs to allow users to quickly access system actions within a particular area of CRM. The ribbon will update based upon what area of CRM the user is in. For example, navigating to contacts will display different ribbon buttons and tabs than when you navigate to Marketing lists. The purpose of the ribbon bar is to display the most common activities to users, relative to where they are in the system.

WORK AREA (3)

The work area changes depending on the application the user is working in. The information displayed will change based on what the user has selected from the navigation panel. The information displayed can include a combination of dashboards, views, forms etc.

VIEWS

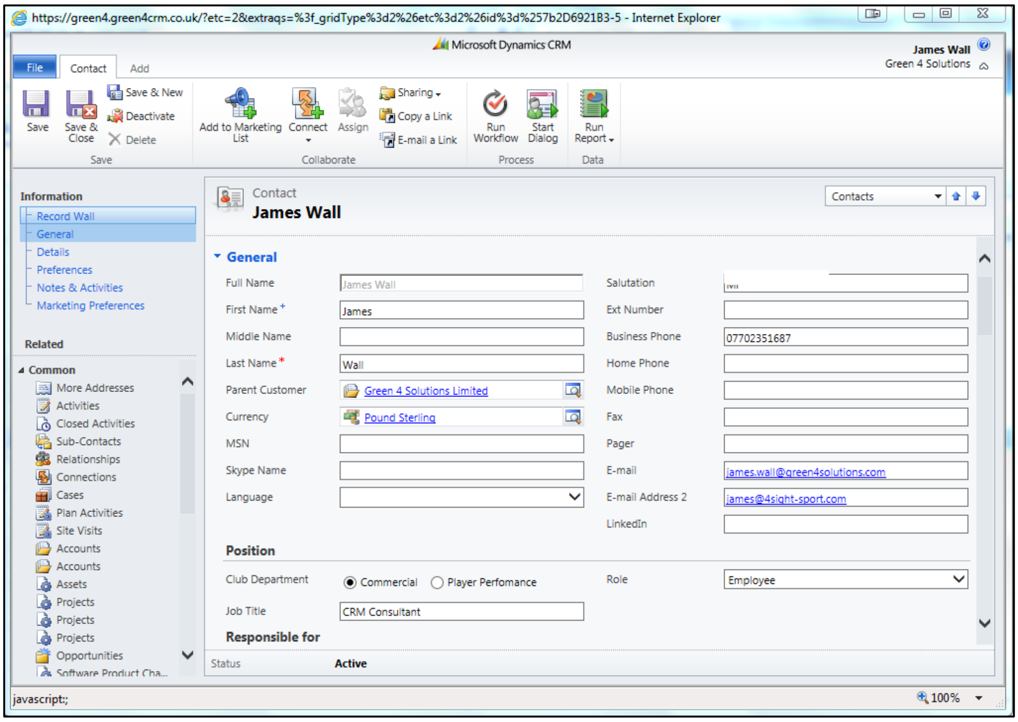
A view is a filter that can be applied to a list of records. Users can create and choose different views that contain all activities of a particular type. This allows users to change what data is displayed whilst working in different areas, allowing the user to quickly monitor information relevant to their role. The screen shot below provides an example of how different views can be selected:



FORMS

When a record is opened in CRM (i.e. a contact or account) an additional 'Form' is opened with more detailed content regarding the entity selected. The form functions in a similar way to the basic CRM interface and includes navigation panels and the ribbon.

An example of a CRM form:



ACCOUNT AND CONTACT MANAGEMENT

WHAT IS A CONTACT?

The official Microsoft definition…

A person who represents a customer or potential customer, or an individual related to an account

Examples:

- An individual who has bought tickets from you
- An individual who has signed up for your club's e-newsletter
- The person you contact to discuss a local company sponsoring the team
- The school teacher you contact to discuss a school visit

Below is a step by step guide to creating a new contact:

1. Select **Workplace** from the bottom of the **Navigation Panel**.
2. In the **Workplace** area of Microsoft CRM, select **Contacts**.
3. The **Contact View** will be displayed. Select **New** on the ribbon.
4. A **Contact Form** will be displayed. Enter all mandatory fields (all fields with a red asterisk). Any fields marked with a blue cross are recommended fields and do not have to be completed (a warning box may appear).
5. Click **Save and Close** on the ribbon. The new contact is now saved in **CRM**.

Contacts as well as accounts are central to both organisations and CRM and used in conjunction with one another to create a 360 degree view of the customer. This data is vitally important to enable businesses to improve the quality and satisfaction of every customer interaction, maximising profitability of customer relationships.

It is therefore vitally important that the contact form is kept as up to date as possible. Organisations should have clear processes in place that provide users with an understanding of what data is required and the reasons why. All interactions with a contact should be tracked against it using activities and notes, and any opportunity to enhance contact data should be taken.

Below are some examples of when the quality of contact data is vital to different areas of a business.

1) A salesperson needs to contact a prospective client for Matchday hospitality. Prior to contact the user should check the contact form to review previous notes or closed activities. This is to ensure that any complaints or important information isn't overlooked; as well as helping the salesperson have a better chance of selling hospitality.

2) A marketing manager wants to communicate via email with all fans that have purchased a ticket for this weekend's game. If at the time of the sale, the ticket office assistant only took minimal contact information (i.e. last name and postal address), the marketing manager would not be able to communicate with this fan by email, and the message, that may have been vital in retaining the fans support, will be lost.

WHAT IS AN ACCOUNT?

The official Microsoft definition…

> *Organisation or business to which the salesperson tries to sell a product or service. The company billed in business transactions.*

Examples:

- The school who has provided team mascots
- The Company who have hired a hospitality suite for match day
- The charity who you are supporting through community projects

Below is a step by step guide to creating a new account:

1. In the **Workplace** area of Microsoft CRM, select **Accounts**.
2. The **Account View** will be displayed. Select **New** on the ribbon.
3. An **Account Form** will be displayed. Enter all mandatory fields (all fields with a red asterisk). Any fields marked with a blue cross are recommended fields and do not have to be completed (a warning box may appear).
4. Click **Save and Close** on the ribbon. The new contact is now saved in **CRM**.

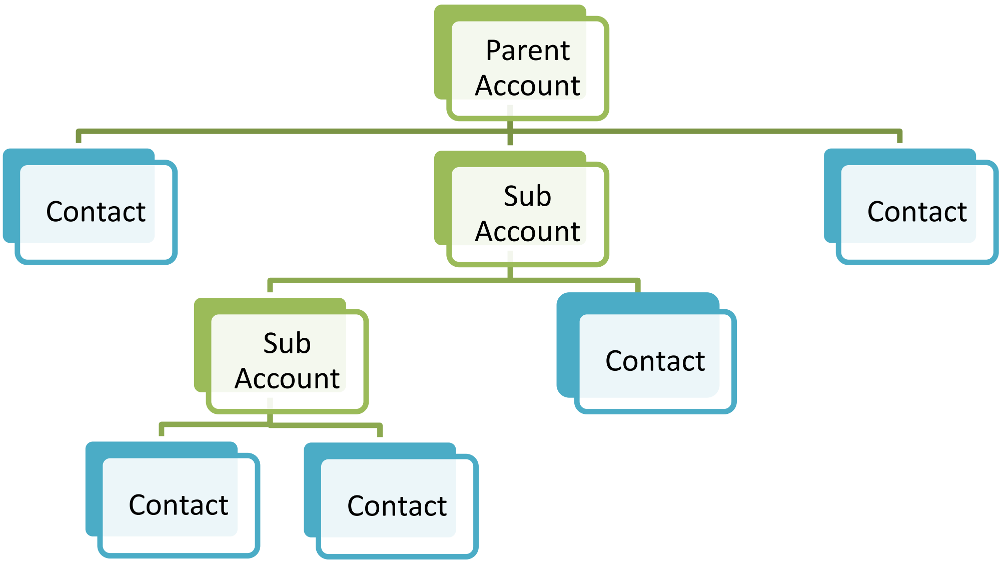
In much the same way as contacts, gathering as much accurate information relating to an account is vital to ensuring an efficient and well informed approach to future interactions and again maximising the profitability of the relationship with an organisation.

BUILDING RELATIONSHIPS

Not every company or organisation is the same, and understanding the relationships and connections within an organisation can benefit sales and customer service. CRM allows users to build relationships between accounts and contacts, therefore allowing you to reflect the real-life relationships your organisation may encounter.

Linking contacts with accounts is vital for effective communication with contacts. For example, a primary contact for an account is likely to be the person who will make the decision regarding a sale, or the person to contact regarding a particular issue. By linking this contact to the account, the end user has all the information in one place and doesn't have to go searching through the system. When opening the 'primary contact', their role is easily visible – allowing the user to understand whether or not the contact is an appropriate recipient for your message.

Below is an example of how contacts may be linked to accounts:



Below is a step by step guide to creating a link between a contact and an account:

1. In the **Workplace** area of Microsoft CRM, select **Contacts**.
2. Select the view '**Active Contacts**´ and search for the relevant contact using the search bar in the top right hand corner of the contact view.
3. Double click on the contact and the **Contact form** should appear.
4. On the **Contact form** there will be a field called 'Parent Customer', click the **look up** button.
5. This will bring up a look up dialog box, allowing you to search for the relevant account you wish to associate the contact with.
6. Search for the account you wish to associate with this contact, select it and click **OK**.
7. You will be automatically returned to the **Contact form**, and the 'Parent Account' field should now have the appropriate account occupied.
8. Click **Save and Close.**

Below is a step by step guide to creating a link between an Account and a Primary Contact:

1. In the **Workplace** area of Microsoft CRM, select **Accounts**.
2. Select the view '**Active Accounts**´ and search for the relevant contact using the search bar in the top right hand corner of the contact view.
3. Double click on the Account and the **Account form** should appear.
4. On the **Account form** there will be a field called 'Primary Contact', click the **look up** button.
5. This will bring up a look up dialog box, allowing you to search for the relevant contact you wish to associate the Contact with.
6. Search for the Contact you wish to associate with this Account, select it and click **OK**.
7. You will be automatically returned to the **Account form**, and the 'Primary Contact' field should now have the appropriate contact occupied.
8. Click **Save and Close.**

To add a contact that isn't the Primary Contact:

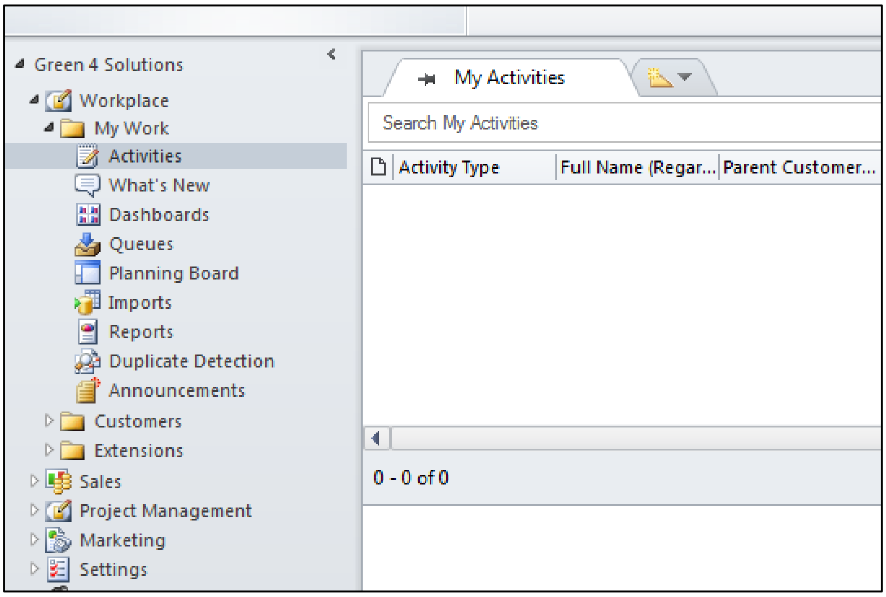
1. On the **Account Form**, select contacts from the navigation panel.
2. On the ribbon select **Add Existing Contact**.
3. A lookup dialog box will appear. Search for the relevant Contact.
4. Select the contact and click **OK.**
5. The contact is now assigned to the Account.

ACTIVITIES

Businesses and organisations interact with their customers through different channels using different techniques. Phone calls, emails, and general tasks are a part of everyday business processes. A key benefit of a CRM system is that everyday interactions can be recorded and tracked against the relevant contact or account. This is done through the Activity Management functionality in CRM. Activities allow users to record and schedule everyday interactions with their clients. These activities can be used to remind a user of a certain task, or to assign an activity to another user. Logging interactions with customers through the activity management tool also allows other users to see the most recent activities assigned to an account or contact, benefitting the user who may be contacting the customer.

MY ACTIVITIES

My activities is the area where a user can find all of the activities assigned to them. My activities will automatically open as soon as Activities is selected from the workplace area of CRM. Below is a screenshot of how my activities can be accessed through the Outlook client:



Below is a step by step guide to creating a new activity:

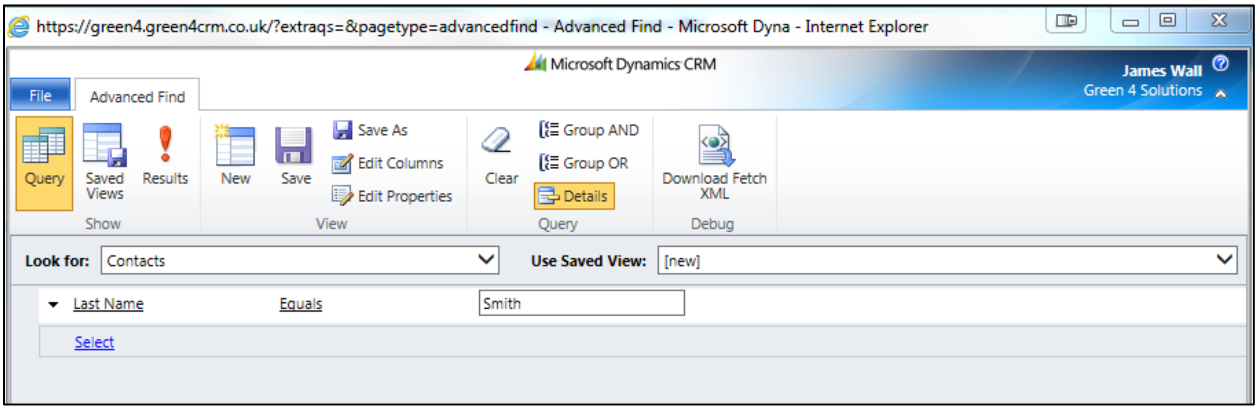
1. Select **Workplace** from the bottom of the navigation pane.
2. In the **Workplace** area of Microsoft CRM, select **Activities**.
3. The **Activities View** will be displayed. On the ribbon will be a number of activity options (Task, email, phone call etc.) Click in the activity you wish to create.
4. An Activity Form relating to your activity type will be displayed. Enter as much information as possible.
5. Click **Save and Close** on the ribbon. The new contact is now saved in CRM.
6. To close an activity as complete, on the **ribbon**, select **Mark Complete**. This will identify the activity as Closed (requiring no further action).
7. To link the activity to a particular contact or account, select the lookup on the **regarding** field.
8. Search for the record you wish to assign the task to. Select the record and click **OK.**
9. This will return you to the **Activity Form**, where you can **Save and Close.**

In much the same way as contacts and accounts, it is important to be as detailed as possible when completing an activity. The activity may be opened by another user who may be communicating with the contact or account that they activity is related to.

ADVANCED FIND

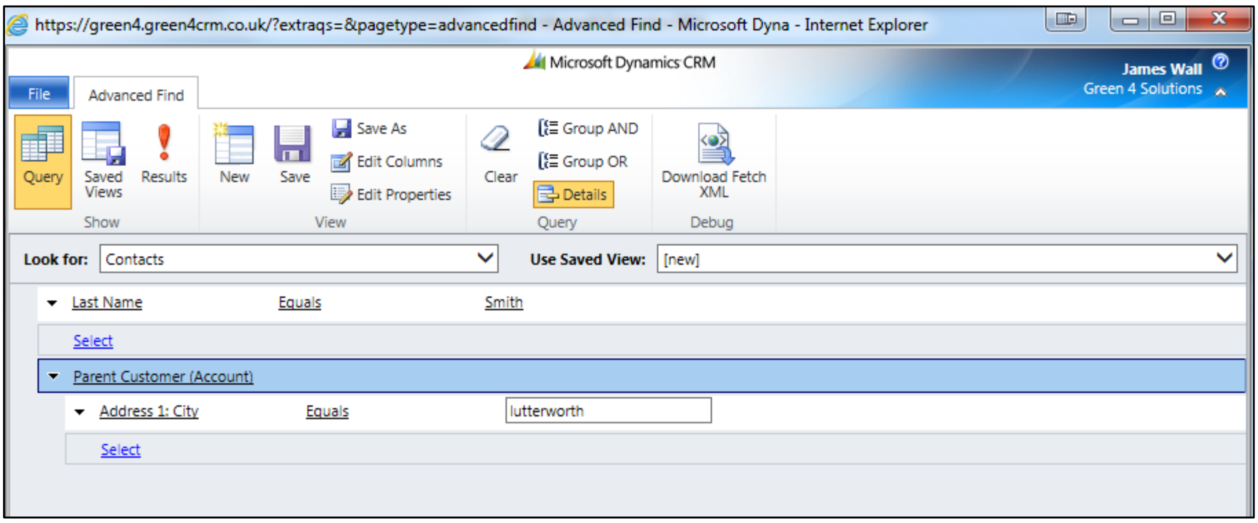
Advanced find is a tool in Microsoft Dynamics allows users to look up data based criteria important to them. The tool allows you to search on multiple fields in the primary record type, as well as multiple fields within a related record. Advanced finds can be saved as views. This means that the criteria used can easily be called upon at a later date as well as shared with other users.

For example, if a user wanted to search for a contact that had the last name 'Smith', they would look for contacts that had the last name 'Smith' and the query would look like this:



This query would return all contacts that had the last name 'Smith'.

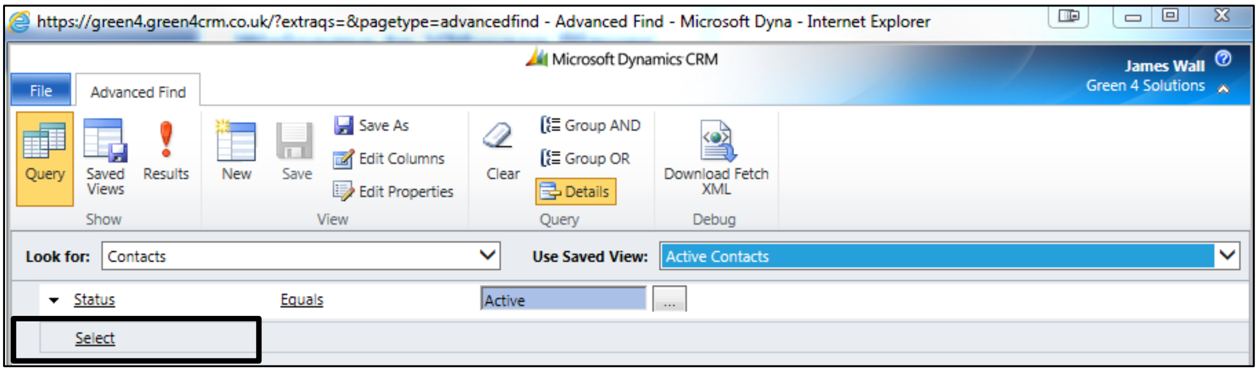
By adding a 'related' field, the user can search the content of a related record form. For example, if a user wanted to find out if any of the contacts were associated with an account where the City field on the account was 'Lutterworth', a related field would need to be added to the query:



By doing this, the advanced find will return all the contacts with last name 'Smith' and by adding the related field – the advanced find will then search on the Account form to return the contacts associated with an account that has a City of 'Lutterworth'. This is possible when the relationship between the two contacts already exists.

To run an Advanced Find in Microsoft CRM:

1. In order to run an advanced find, go to the entity you want to search on (i.e. if its contacts you want to search by, select **Contacts** from the N**avigation Pane**l).
2. Select the **Advanced Find** button on the ribbon.
3. The **Advanced Find** form will be displayed. On the ribbon of the Advance Find Form. From the '**Use saved views'** dropdown, select '**Active Contacts'**, this will ensure we are building a search on active contacts only.
4. In the body of the dialog box will be a drop down with **Select** as a default selection. Click the dropdown and select which data you want to search on (i.e. email address). The view should look like the screenshot below:



5. A new dropdown will appear alongside the first selection, this allows users to define what criteria we want to search that particular field for (i.e. contains data will return all contacts in the CRM system with data in the email address field).
6. Once all criteria has been added, on the ribbon select the **Results** button.
7. This will open a new page in the same form with a list of the contacts returned by those particular criteria.
8. These contacts can be exported to Excel via the **Export to Excel** button on the ribbon or it can be saved as a **View.**

To save and share an Advance Find view in Microsoft CRM:

1. To save the advanced find as a view. On the **Advanced Find** tab, select **Save As** from the ribbon.
2. Choose an appropriate name and click **OK.** The view will be saved and can be accessed from the dropdown below the ribbon on the Advanced Find dialog.
3. To Share your view with other users, select **Saved Views** from the ribbon of the **Advanced Find** Form.
4. Select the view you wish to share, and select **Share** from the ribbon.
5. A new window will open; select **Add user/team** from the navigational panel on the left of the form.
6. Add the user(s) you wish to share with and click **OK.**
7. Select the relevant permissions you wish the user to have, and click **OK.**

MARKETING LISTS

The Marketing List option allows you to create either a static or dynamic list of contacts, accounts or leads. A dynamic Marketing List will update whenever the data in CRM does. For example, if a dynamic Marketing List is set up with all contacts with an email addresses added, if there was an import of 5,000 additional contacts with email addresses – they would automatically be added to the Marketing List. Static Marketing Lists work in the opposite way, once the group has been created, they will not update, regardless of whether or not the data in CRM does. Dynamic Marketing List cannot be used in conjunction with the Green 4 email marketing module.

Marketing Lists utilise the Advanced Find functionality within CRM:

- Advanced queries can be executed to extract a certain segment of members
- Queries (views) can be saved and shared with other users
- Lookups can be used to add particular members
- Advanced find can be used to remove and evaluate members in the list

A group of contacts in a marketing list can be used in campaigns. For example, a Marketing List may be created with the end goal of targeting these particular contacts with a telesales campaign. The marketing list can be assigned to this campaign and a list of phone calls generated against the contacts. Marketing lists can also be added to email marketing audiences in order to distribute email campaigns. Members captured by the Marketing List can also be exported to Excel, which may be important if the data requires cleansing.

To create a Marketing List in Microsoft CRM:

1. From the bottom region of the Navigation Panel, select **Marketing.**
2. In the **Marketing Area** of Microsoft CRM, select **Marketing Lists**.
3. The Marketing Lists View will be displayed. Select **New** on the ribbon.
4. The Marketing Lists Form will be displayed. Enter a **Name** for the list before selecting the **Member Type** and **Type** of marketing list. Select **Save** on the ribbon.
5. Under **Common** in the **Form Navigation Panel** select **Marketing List Members**.
6. Select **Manage Members** on the ribbon.
7. Use the Manage Members dialog to add members to the list.
8. Once the list is complete, select **Save and Close** on the ribbon.

REPORTING

There are a number of built in reports within CRM that allow users and organisations to build detailed analysis on general performance. Example reports include reporting on the effectiveness of a communication, to measure sales performance, to evaluate the quality of contact or account data, etc. Reporting is vitally important for organisations and provides the ability to feedback on profitability and ROI. Line managers may also wish to run reports to measure performance of their staff.

In addition to the standard CRM reports, reports can be modified and built through the reports wizard. An example of the type of reports that can be used:

- **Contact summary report** – this provides an overview of the quality of the contact data in the system. It will provide a summary of how many contacts have a first name, last name, birthday, email address etc.

DASHBOARDS

To quickly access data relevant to a user's role, dashboards are used to allow easy and quick reference to relevant data. From the dashboard, users can quickly identify and access data relevant to their job role. For example, if you were a sales manager you may wish to have a view that details all open leads, a view that lists all open activities and a chart with estimated revenue.

Dashboards will be displayed immediately after a user logs in to CRM when using the Internet Explorer client, and acts as a type of 'homepage'. It streamlines processes and prevents a user having to search through the CRM system to obtain a list of data that can be displayed in the dashboard. It is suggested that users review their dashboard periodically in order to keep track of any activities that may require their attention.

Views can be created to access certain segments or subsets of data from CRM. These views can then be shared with other users.

To create a new dashboard in Microsoft CRM:

1. From the **Navigation panel** select **Workplace**
2. In the **Workplace area** of Microsoft CRM, select **Dashboards**.
3. The Dashboards view will be displayed, with the default dashboard. Select **New** on the ribbon.
4. The **Dashboard** form will be displayed prompting you to select a layout. Select a suitable layout and click **Create.**
5. Enter a suitable name for the dashboard and click **Save.**
6. You are now able to modify each section of the dashboard, creating custom views for each section.
7. To do this click one of the 4 icons in each section
    a. Chart
    b. List
    c. Web resource
    d. iFrame
8. This will open a new window prompting the user to select the relevant data and format.
9. Once all relevant data is selected, click **OK** to add it to the dashboard, this will return the user to the dashboard form, where the dashboard can be saved and closed.
10. Below the ribbon is a dropdown titled '**Dashboard'.** To access the dashboard in the **Dashboard View s**elect this list and choose your dashboard.
11. To set a dashboard to default, when in the **Dashboard view**. Select **Set As Default** from the ribbon. The dashboard will be automatically selected.