

A Non-Developer's Guide to Smarter Sales Processes in Microsoft Dynamics CRM 2015

-

Part 1: Lead Qualification

Jukka Niiranen

2015-05-06





About This Presentation



- These are the slides from a live webcast on MSDynamicsWorld.com, presented on May 6th 2015
- The webcast recording is available on YouTube: <http://bit.ly/crm15salesprocess>
- The topics are covered in more detail in blog posts at <http://survivingcrm.com/>



About Me



- Dynamics CRM consultant from Helsinki
- Working at [Digital Illustrated Finland](#)
- Dynamics CRM addict since 2005
- Frequent blogger & #MSDYNCRM evangelist on social media
 - Blog: survivingcrm.com
 - [@jukkan](#) on Twitter
- Microsoft MVP since 2013
- Focused on improving CRM solution usability & information work efficiency



Jukka Niiranen

[@jukkan](#)

Consultant @ Digital Illustrated
Microsoft Dynamics CRM MVP



Customizing Dynamics CRM as a Non-Developer



- Point & click configuration/customization tools of Dynamics CRM have come a long way
- The ratio of custom code vs. configuration in typical CRM solutions is decreasing
- Solution delivery often requires the creative *combination* of several CRM configuration options
- The goal of this article series is to demonstrate a few scenarios where such combinations are used for delivering new functionality for the CRM sales process



Customization Scenarios Explored in This Series

Part 1

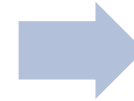
1. Lead qualification

- Streamline data entry for leads on existing accounts & contacts
- Convert leads to influencers instead of new opportunities



2. Opportunity revenue estimation

- Replace opportunity product lines with predefined cost estimate fields
- Calculate opportunity total value from day & rate fields



3. Pipeline development

- Capture opportunity count and revenue per sales stage
- Schedule data snapshots of historical pipeline size

Lead Qualification





The Problem

- In earlier versions of Dynamics CRM it was possible to qualify lead records into an account/contact only
- Starting from CRM 2013 the qualification process changed, together with the introduction of Business Process Flows (BPF)
- Now a qualified lead will always create an open opportunity into the sales pipeline
- There are many valid scenarios where leads shouldn't directly be converted into an opportunity, but no option exists in CRM to configure this behavior



Old Lead Qualification Dialog (before CRM 2013)

Convert Lead

Specify whether to convert this lead into one or more of the following options or to disqualify it.

☒ **Qualify and convert into the following records**

Status

☐ Account

☐ Contact

☐ Opportunity

Potential Customer

Currency

☐ Open newly created records

☐ **Disqualify**

Status

OK Cancel



The Big Switch

← → ↻ support.microsoft.com/en-us/kb/2808201

The Convert Lead dialog box no longer appears during lead qualification in Microsoft Dynamics CRM Online

Article ID: 2808201 - [View products that this article applies to.](#)

*“After applying the latest Product Update related to the December 2012 Service Update for Microsoft Dynamics CRM Online, users may notice that the lead Qualify button no longer presents the Convert Lead dialog box. **This dialog box traditionally allowed users to choose the associated sales records to create during qualify, including Contact, Account, and Opportunity.**”*

⊖ Cause

This functionality is considered by design.



Step 1: Lead Data Entry



+ NEW DELETE QUALIFY DISQUALIFY ADD TO MARKETING LIST ASSIGN SHARE ...



LEAD

Iris Influencer

Lead Source
Seminar

Rating
Warm

Status
Contacted

Owner*
Jukka Niira



Qualify (Active)

Develop

Propose

Close

Next Stage

Existing Contact? [click to enter](#)
Existing Account? [click to enter](#)
Purchase Timeframe [click to enter](#)

Estimated Budget [click to enter](#)
Purchase Process [click to enter](#)
Identify Decision Maker [mark complete](#)

Capture Summary [click to enter](#)

Summary

CONTACT

Topic* **This isn't an opportunity!**
Name* **Iris Influencer**
Job Title **Lead Architect**
Business Phone **+61 661 166 61**
Mobile Phone **--**
Email **iris@wow-architects.com**

COMPANY

Company* **WOW! Architects**
Website **<http://www.wow-architects.com>**
Address **2A Macquarie Street
Sydney NSW 2000
Australia**

POSTS ACTIVITIES NOTES

Enter post here

POST

Both Auto posts User posts



Iris Influencer
Jukka Niiranen created Iris Influencer
On Iris Influencer's wall
Today

STAKEHOLDERS

Name ↑ Role
No stakeholders found.

COMPETITORS

Name ↑ Website
No competitors found.

Open



Step 2: Lead Qualification

Microsoft Dynamics CRM

SALES

Leads

Iris Influencer

Create

Enter Search Item

Jukka Niiranen
Org 2

+ NEW

DELETE

QUALIFY

DISQUALIFY

ADD TO MARKETING LIST

ASSIGN

SHARE

...

LEAD

Iris Influencer

Qualify

Create a new opportunity with an account or a contact using information from this lead.
When the lead is converted, it is saved as qualified in the Closed Leads view.

Lead Source
Seminar

Rating
Warm

Status
Contacted

Owner*
Jukka Niira

Qualify (Active)

Develop

Propose

Close

Next Stage

Existing Contact?	click to enter	Estimated Budget	click to enter	Capture Summary	click to enter
Existing Account?	click to enter	Purchase Process	click to enter		
Purchase Timeframe	click to enter	Identify Decision Maker	mark complete		

Summary

CONTACT

Topic*
Name*
Job Title
Business Phone
Mobile Phone
Email

This isn't an opportunity!
Iris Influencer
Lead Architect
+61 661 166 61
--
iris@wow-architects.com

COMPANY

Company+
Website
Address

WOW! Architects
<http://www.wow-architects.com>
2A Macquarie Street
Sydney NSW 2000
Australia

POSTS

ACTIVITIES

NOTES

Enter post here

POST

Both

Auto posts

User posts

Iris Influencer

Jukka Niiranen created Iris Influencer
On Iris Influencer's wall
Today

STAKEHOLDERS

Name ↑

Role

No stakeholders found.

COMPETITORS

Name ↑

Website

No competitors found.

Open



Step 3: New Opportunity



Microsoft Dynamics CRM | SALES | Opportunities | This isn't an opport... | Create | Enter Search Item | Jukka Niiranen Org 2 | Settings | Help

+ NEW | CLOSE AS WON | CLOSE AS LOST | RECALCULATE OPPORTUN... | ASSIGN | EMAIL A LINK | DELETE | ...

OPPORTUNITY

This isn't an opportunity!

Est. Close Date: -- | Est. Revenue: -- | Status: In Progress | Owner: Jukka Niira

Qualify | **Develop (Active)** | Propose | Close | Next Stage

Customer Need	click to enter	Identify Competitors	mark complete
Proposed Solution	click to enter		
Identify Stakeholders	mark complete		

Summary

Topic* **This isn't an opportunity!**

Contact [Iris Influencer](#)

Account [WOW! Architects](#)

Purchase Timeframe --

Currency* [euro](#)

Budget Amount --

Purchase Process --

Process Stage [2-Develop](#)


Description --

Current Situation --


POSTS ACTIVITIES NOTES

Enter post here POST

Both Auto posts User posts




Iris Influencer
Lead: Qualified by Jukka Niiranen and converted to Account WOW! Architects,Contact [Iris Influencer](#),Opportunity This isn't an opportunity!.
On [Iris Influencer's wall](#)
Today



This isn't an opportunity!
Opportunity: Created by Jukka Niiranen for Account WOW! Architects.
On [This isn't an opportunity!'s wall](#)
Today

STAKEHOLDERS

Name ↑	Role
 Iris Influencer	Stakeholder

SALES TEAM



The Solution



- Functionality delivered:
 - Ability to qualify a lead as an influencer, without creating a new opportunity record
 - Ability to associate the qualified lead with an existing opportunity record
- Components used:
 - Branching Business Process Flow
 - Real-time Workflows
 - Business Rules
 - Quick View Forms



Modifying the Business Process Flow

- Turn the standard "Lead to Opportunity Sales Process" into a branching BPF (new in CRM 2015)
- Add a new stage to the very beginning of the BPF: "Identify"
- Add a new option set field on the lead entity: "Lead Type"
 - Option 1: "Prospect (Create Opportunity)"
 - Option 2: "Influencer (No Opportunity)"
- Re-create the necessary stages into each BPF branch
 - Option 1: proceed from lead to opportunity
 - Option 2: stop at the lead entity



The Branches

BUSINESS PROCESS FLOW Lead to Opportunity or Influencer Sales Proc...

Details ▾

Stage Name *	Step Name	Value	Required
Identify	Existing Contact?	Existing Contact?	<input type="checkbox"/>
Entity *	Existing Account?	Existing Account?	<input type="checkbox"/>
Lead	Lead Type	Lead Type	<input checked="" type="checkbox"/>
Stage Category	Description	Description	<input type="checkbox"/>
Identify			

+ Insert stage after branch + Add branch

If Lead Type equals "Influencer (No Opportunity)"



+ Insert stage

Stage Name *	Step Name	Value	Required
Create Influencer	Link to Opportunity	Existing Opportunity	<input type="checkbox"/>
Entity *	Qualify Influencer	Qualify Influencer	<input type="checkbox"/>
Lead			
Relationship			
Select relationships			
Stage Category			
Create Influencer			

+ Insert stage + Add branch

Else (click to convert to else if)



+ Insert stage

Stage Name *	Step Name	Value	Required
Qualify	Purchase Timeframe	Purchase Timeframe	<input type="checkbox"/>
Entity *	Budget Amount	Budget Amount	<input type="checkbox"/>
Lead	Purchase Process	Purchase Process	<input type="checkbox"/>
Relationship	Identify Decision Maker	Decision Maker?	<input type="checkbox"/>
Select relationships			
Stage Category			
1-Qualify			

+ Insert stage + Add branch

Stage Name *	Step Name	Value	Required
Develop	Customer Need	Customer Need	<input type="checkbox"/>
Entity *	Proposed Solution	Proposed Solution	<input type="checkbox"/>
Opportunity			

If Lead Type equals "Influencer (No Opportunity)"



+ Insert stage

Stage Name *
Create Influencer

Else (click to convert to else if)



+ Insert stage

Stage Name *
Qualify



Real-time Workflow



- Clicking the Qualify button on the lead form will always create a new opportunity record
- Merely changing the lead record status to "Qualified" via a server-side process however does *not* trigger this action
- The workaround we'll use:
 - Create a new two-option field "Qualify Influencer", add it to BPF stage, use as a workflow trigger
 - Add a new real-time workflow process that runs when this trigger field is set to "Yes"



Real-time Workflow (2)

- Workflow conditions
 - Check if the lead is associated with an existing account and/or contact
- Workflow actions
 - Create the necessary new records in the workflow steps & link them to the originating lead
 - If you want to associate the lead to an existing opportunity as a stakeholder, first add a new custom relationship between lead & opportunity entities (N:1). Then create a new Connection record between the selected opportunity and the new contact in WF
 - Finally, change the lead status to "Qualified"



The Logic (1)

▼ Check if "Qualify Influencer" trigger field has been set to "Yes"

If Lead:Status equals [Open] AND Lead:Qualify Influencer equals [Yes], then:

▼ See if lead is linked to an existing account

If Lead:Parent Account for lead does not contain data, then:

● Create new account

Create: Account [View properties](#)

● Set new account as parent account for the lead

Update: Lead [View properties](#)

▼ See if lead is linked to an existing contact

If Lead:Parent Contact for lead does not contain data, then:

● Create new contact

Create: Contact [View properties](#)

▼ Check whether the contact should be linked to an existing account or the newly created account

If Lead:Parent Account for lead contains data, then:

● Set contact parent account

Update: Create new contact (Contact) [View properties](#)

Otherwise, if Create new account (Account):Account contains data, then:

● Set contact parent account

Update: Create new contact (Contact) [View properties](#)

On lead record change event, proceed if trigger field is set to "Yes"

Check if existing account / contact fields are populated

If not, create new records and link to other records



The Logic (2)

▼ Create a new influencer connection if existing opportunity has been selected

If Lead:Existing Opportunity contains data, then:

▼ Check the contact to be associated with the opportunity

If Lead:Parent Contact for lead contains data, then:

● Connect contact with opportunity

Create: Connection [View properties](#)

Otherwise, if Create new contact (Contact):Contact contains data, then:

● Connect contact with opportunity

Create: Connection [View properties](#)

● Close lead as qualified

Change record status to: Lead Qualified

Check if the lead has been linked to an existing opportunity

Create a new Connection between the records

Change the lead record's status to "Qualified"



Quick View Forms & Business Rules



- When linking the lead to existing account/contact there shouldn't be any data entered into lead fields related to them
 - These will be discarded during qualification and present unnecessary data entry options for the user
- How to improve the lead form's usability:
 - Add the lookup fields for existing account/contact directly onto the lead form (by default only in BPF)
 - Use Business Rules to hide the detail fields if existing account/contact has been selected
 - Display Quick View Forms of the existing account/contact records on the lead form to provide overview of existing record data



Quick View Forms & Business Rules (2)

- Use case:
 1. User creates a new lead record
 2. User links the lead to existing account record
 3. Business Rule hides other account fields
 4. Quick View Form displays the account summary
- Note: this also works as a verification of lead qualification process success indicator after a new account/contact is generated for the lead



Form Designer

Solution: Solution 1
Form: Lead

Summary

LEAD DETAILS

Topic*

Type

Description

COMPANY

Existing Account?

Company+

Website

Address

CONTACT PERSON

Existing Contact?

Name

SOCIAL PANE

RELATED RECORDS

Put the Lead Type option set (BPF branch selector) to the top of the form

Drag the Existing Account / Existing Contact fields onto the form

Add a new section "Related Records" and include Quick View Forms of Account, Contact and Opportunity



Business Rules

BUSINESS RULE: Lead

Hide Lead Company fields for existing Account

- IF...THEN
 - CONDITION
 - If **Parent Account for lead** contains data
 - ACTION
 - Hide field **Company Name**
 - Hide field **Website**
 - Hide field **Address 1**
- ELSE
 - CONDITION
 - ACTION
 - Show field **Company Name**
 - Show field **Website**
 - Show field **Address 1**

BUSINESS RULE: Lead

Hide Lead Contact fields for existing Contact

- IF...THEN
 - CONDITION
 - If **Parent Contact for lead** contains data
 - ACTION
 - Hide field **Name**
 - Hide field **Job Title**
 - Hide field **Email**
 - Hide field **Business Phone**
 - Hide field **Mobile Phone**
- ELSE
 - CONDITION
 - ACTION
 - Show field **Name**

Create 2 rules that watch the Existing Account/Contact lookup fields

Hide other related fields from the form if the lookup contains data



Creating a New Lead, Type Prospect (1)

Microsoft Dynamics CRM | SALES | Leads | New Lead | Create | Jukka Niiranen Org 2

SAVE | SAVE & CLOSE | NEW | EDIT PROCESS | FORM EDITOR

LEAD ▾ New Lead

Lead Source: -- | Rating: Warm | Status: New | Owner: Jukka Niira

Identify (Active) | Qualify | Develop | Propose | Close | Next Stage

Existing Contact? [click to enter](#)
Existing Account? [click to enter](#)
✓ Lead Type* Prospect (Create Opportunity) [click to enter](#)

✓ Description They're on Dynamic CRM 2011 and need to catch up to the latest version

Summary

LEAD DETAILS

Topic* Fabrikam's CRM upgrade
Type Prospect (Create Opportunity)
Description They're on Dynamic CRM 2011 and need to catch up to the latest version

COMPANY

Existing Account? fabrik
Company* Fabrikam, Inc. someone4@example.com 555-0153
Website Look Up More Records
Address 1 result + New

CONTACT PERSON

Existing Contact? Open

POSTS

Enter post

Both All

We didn't find any posts.

RELATED RECORDS

POST

Lead Type is set to "Prospect", standard sales process stages are used

Existing Account "Fabrikam" is chosen as the company



Creating a New Lead, Type Prospect (2)

SAVE | SAVE & CLOSE | NEW | EDIT PROCESS | FORM EDITOR

LEAD ▾
New Lead

Lead Source: -- | Rating: Warm | Status: New | Owner: Jukka Niiranen

Identify (Active) | Qualify | Develop | Propose | Close | Next Stage

Existing Contact? [click to enter](#)
Existing Account? [Fabrikam, Inc.](#)
Lead Type* Prospect (Create Opportunity)

Summary

LEAD DETAILS

Topic* Fabrikam's CRM upgrade
Type Prospect (Create Opportunity)
Description They're on Dynamic CRM 2011 and need to catch up to the latest version

COMPANY

Existing Account? [Fabrikam, Inc.](#)

CONTACT PERSON

Existing Contact? --
Name* Mike Mitchell
Job Title IT Manager
Email [mike@fabrikam.com](#)

POSTS ACTIVITIES NOTES

Enter POST
Both We did

After selecting Fabrikam, account details are shown on the Quick View Form

Contact information can still be entered on the lead to create a new contact for chosen account

RELATED RECORDS

Existing Account Details

Account Name* Fabrikam, Inc.
Owner* Jukka Niiranen
Relationship Type --
Account Rating B
City Lynnwood



Converting the Lead to Opportunity

Microsoft Dynamics CRM | SALES | Opportunities | Fabrikam's CRM up... | Create | Enter Search Item | Jukka Niiranen Org 2

+ NEW | CLOSE AS WON | CLOSE AS LOST | RECALCULATE OPPORTUN... | ASSIGN | EMAIL A LINK | DELETE

OPPORTUNITY ▾

Fabrikam's CRM upgrade

Est. Close Date: -- | Est. Revenue: -- | Status: In Progress | Owner: Jukka Niira

Identify | Qualify | **Develop (Active)** | Propose | Close | Next Stage

Customer Need	click to enter	Est. Close Date*	click to enter
Proposed Solution	click to enter	Identify Stakeholders	mark complete
Est. Revenue*	click to enter	Identify Competitors	mark complete

Summary

Topic*	Fabrikam's CRM upgrade
Contact	Mike Mitchell
Account	Fabrikam, Inc.
Purchase Timeframe	--
Currency*	euro
Budget Amount	--
Purchase Process	--
Process Stage	2-Develop
Description	They're on Dynamic CRM 2011 and need to catch up to the latest version
Current Situation	--
Open	

POSTS

Enter post | POST

Both At

Fabrikam's CRM upgrade
Opportunity: Created by Jukka Niiranen for Account Fabrikam, Inc..

STAKEHOLDERS

Name ↑	Role
Mike Mitchell	Stakeholder

SALES TEAM

After clicking Qualify, a new Opportunity record is created and sales process is set to "Develop"

New contact has been added to account and set as stakeholder for the opportunity



Creating a New Lead, Type Influencer (1)



Microsoft Dynamics CRM | SALES | Leads | Lisa Hathaway | Create | Enter Search Item | Jukka Niiranen Org 2

+ NEW | DELETE | QUALIFY | DISQUALIFY | ADD TO MARKETING LIST | ASSIGN | SHARE

LEAD Lisa Hathaway | Lead Source Web | Rating Warm | Status New | Owner Jukka Niiranen

Identify (Active) | Create Influencer | Next Stage

Existing Contact? [click to enter](#)
Existing Account? [Fabrikam, Inc.](#)
Lead Type* Influencer (No Opportunity)

Summary

LEAD DETAILS

Topic*	Attended CRM 2015 webinar
Type	Influencer (No Opportunity)
Description	Lisa mentioned that they have already been talking with us about a CRM upgrade project.

COMPANY

Existing Account?	Fabrikam, Inc.
-------------------	--------------------------------

CONTACT PERSON

Existing Contact?	--
Name*	Lisa Hathaway
Job Title	CRM Manager
Email*	lisa@fabrikam.com

Open

POSTS | Enter post | POST

Both | Auto | Jukka Niiranen created Lisa Hathaway On Lisa Hathaway's wall Today

RELATED RECORDS

Existing Account Details

Account Name*	Fabrikam, Inc.
Owner*	Jukka Niiranen
Relationship Type	--
Account Rating	B
City	Lynnwood

Lead Type is set to "Influencer", sales process stages are updated to reflect this

Using same account, details of another new contact person are added



Creating a New Lead, Type Influencer (2)



Microsoft Dynamics CRM | SALES | Leads | Lisa Hathaway | Create | Enter Search Item | Jukka Niiranen Org 2

+ NEW | DELETE | QUALIFY | DISQUALIFY | ADD TO MARKETING LIST | ASSIGN | SHARE

LEAD | Lisa Hathaway | Lead Source: Web | Rating: Warm | Status: New | Owner: Jukka Niiranen

Identify | **Create Influencer (Active)**

Link to Opportunity | Qualify Influencer

fabrik
☐ Fabrikam's CRM upgrade
Fabrikam, Inc.
[Look Up More Records](#)
1 result

Summary

LEAD DETAILS

Topic*: Attended CRM 2015 webinar
Type: Influencer (No Opportunity)
Description: Lisa mentioned that they have already been talking with us about a CRM upgrade project.

COMPANY

Existing Account?: [Fabrikam, Inc.](#)

CONTACT PERSON

Existing Contact?: --
Name*: Lisa Hathaway
Job Title: CRM Manager
Email: lia@fabrikam.com

POSTS | POST

RELATED RECORDS

Existing Account Details

Account Name*: **Fabrikam, Inc.**
Owner*: [Jukka Niiranen](#)
Relationship Type: --
Account Rating: B
City: Lynnwood

Open

Process is moved to the "Create Influencer" stage

Lead is linked to the existing Fabrikam opportunity



Creating a New Lead, Type Influencer (3)



Microsoft Dynamics CRM | SALES | Leads | Lisa Hathaway | Create | Enter Search Item | Jukka Niiranen Org 2

+ NEW | DELETE | QUALIFY | DISQUALIFY | ADD TO MARKETING LIST | ASSIGN | SHARE

LEAD ▾
Lisa Hathaway

Lead Source: Web | Rating: Warm | Status: New | Owner: Jukka Niiranen

Identify | Create Influencer (Active)

Link to Opportunity: ✓ | Qualify Influencer: ✓

Fabrikam's CRM upgrade
Yes

Summary

LEAD DETAILS

Topic*	Attended CRM 2015 webinar
Type	Influencer (No Opportunity)
Description	Lisa mentioned that they have already been talking with us about a CRM upgrade project.

COMPANY

Existing Account?	Fabrikam, Inc.
-------------------	----------------

CONTACT PERSON

Existing Contact?	--
Name*	Lisa Hathaway
Job Title	CRM Manager
Email	lisa@fabrikam.com

Open

POSTS | Auto posts | User posts

Enter post | POST

Lisa Hathaway
Jukka Niiranen created Lisa Hathaway
On Lisa Hathaway's wall
Today

RELATED RECORDS

Existing Account Details

Account Name*	Fabrikam, Inc.
Owner*	Jukka Niiranen
Relationship Type	--
Account Rating	B
City	Lynnwood

Existing Opportunity Details

Topic*	Fabrikam's CRM up
--------	-------------------

unsaved changes

Field "Qualify Influencer" is set to "Yes"

Lead record changes are saved by user or by CRM autosave



Creating a New Lead, Type Influencer (4)



Microsoft Dynamics CRM | SALES | Leads | Lisa Hathaway | Create | Enter Search Item | Jukka Niiranen Org 2

+ NEW | DELETE | ASSIGN | SHARE | EMAIL A LINK | FOLLOW | RUN WORKFLOW

LEAD Lisa Hathaway

Lead Source: Web | Rating: Warm | Status: Qualified | Owner: Jukka Niiranen

Identify | Create Influencer (Active)

- Link to Opportunity: Fabrikam's CRM upgrade
- Qualify Influencer: Yes

Summary

LEAD DETAILS

Topic: Attended CRM 2015 webinar
Type: Influencer (No Opportunity)
Description: Lisa mentioned that they have already been talking with us about a CRM upgrade project.

COMPANY

Existing Account: Fabrikam, Inc.

CONTACT PERSON

Existing Contact: Lisa Hathaway

Workflow closes the lead as Qualified

New contact record details are shown on the Quick View Form

RELATED RECORDS

Existing Account Details

Account Name	Fabrikam, Inc.
Owner	Jukka Niiranen
Relationship Type	--
Account Rating	B
City	Lynnwood

Existing Contact Details

Full Name	Lisa Hathaway
Job Title	CRM Manager

Qualified | Read only



Updated Opportunity



OPPORTUNITY

Fabrikam's CRM upgrade

Est. Close Date --

Est. Revenue --

Status In Progress

Owner* Jukka Niiranen

Identify

Qualify

Develop (Active)

Propose

Close

Next Stage

Customer Need	click to enter	Est. Close Date*	click to enter
Proposed Solution	click to enter	Identify Stakeholders	mark complete
Est. Revenue*	click to enter	Identify Competitors	mark complete

Summary

Topic*

Contact Mike Mitchell

Account Fabrikam, Inc.

Purchase Timeframe --

Currency* euro

Budget Amount --

Purchase Process --

Process Stage 2-Develop

Description They're on Dynamic CRM 2011 and need to catch up to the latest version

Current Situation --

POSTS

Both Auto

On Mike Mitchell's wall Today

Fabrikam's CRM upgrade Opportunity: Created by Jukka Niiranen for Account Fabrikam, Inc.. On Fabrikam's CRM upgrade's wall Today

STAKEHOLDERS

Name	Role
Lisa Hathaway	Influencer
Mike Mitchell	Stakeholder

SALES TEAM

New contact has been added as a stakeholder on the existing opportunity record

Final Notes





Next Steps

- Read more articles on Microsoft Dynamics CRM customization best practices at <http://survivingcrm.com/>
- Follow [@jukkan](#) on Twitter for the latest #MSDynCRM related news and tips
- Check out the Dynamics CRM webcasts series at <http://msdynamicsworld.com/webcasts>
- Thanks for viewing these slides & enjoy customizing your Dynamics CRM environment!