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

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Part 1: Lead Qualification

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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
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- Microsoft MVP since 2013
- Focused on improving CRM solution usability & information work efficiency

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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

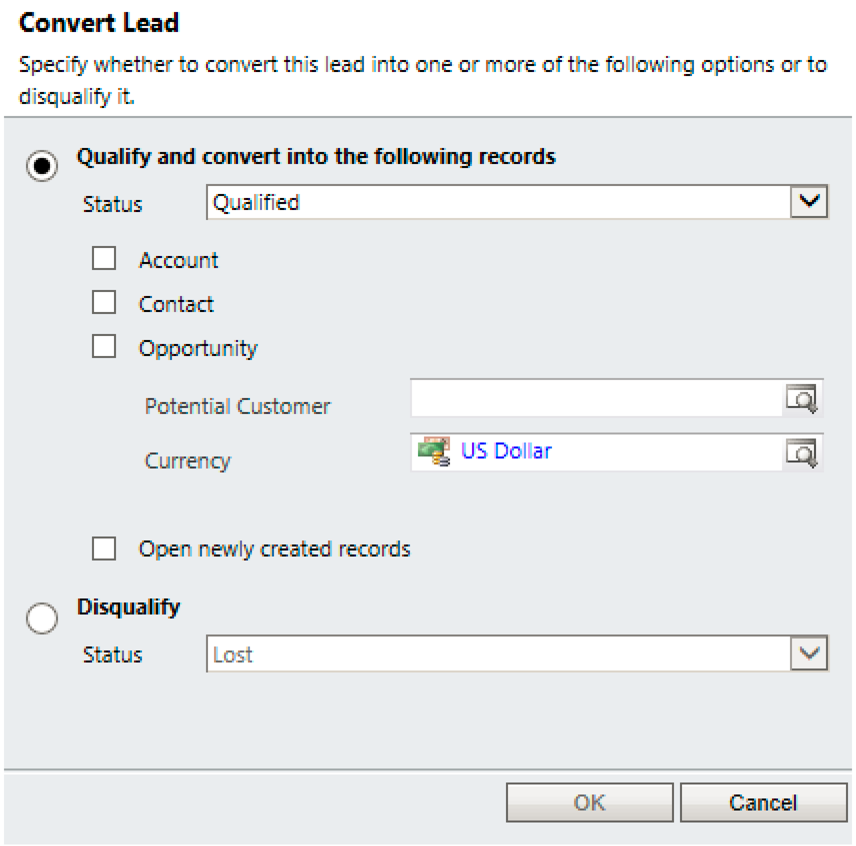
- Capture opportunity count and revenue per sales stage
- Schedule data snapshots of historical pipeline size

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)



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.

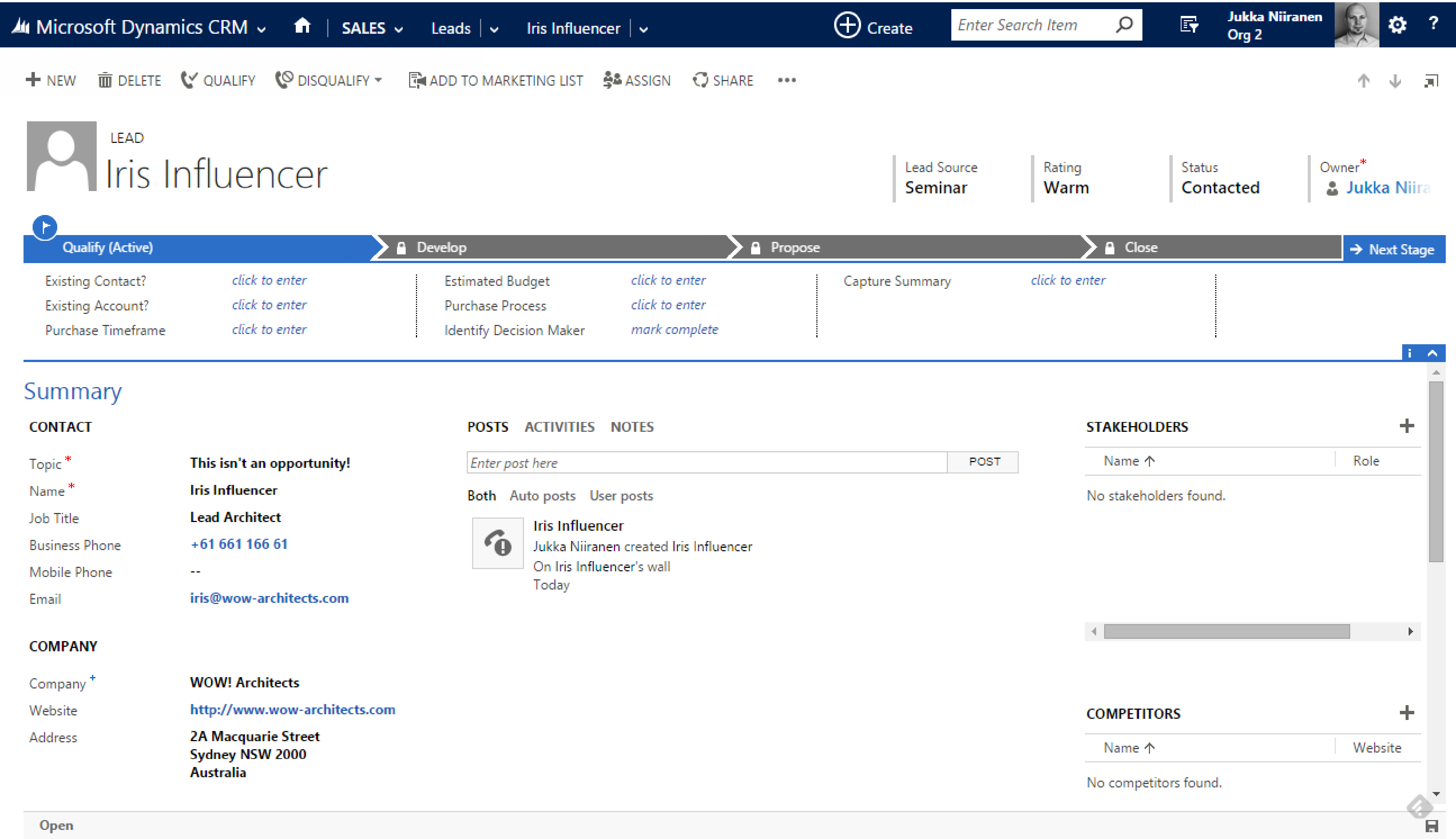
"After applying the latest Product Update related to the December 2012 Service Update for Microsoft Dynamics CRM Online, users may notice that the lead Qualify button no longer presents the Convert Lead dialog box. ***This dialog box traditionally allowed users to choose the associated sales records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

Cause

This functionality is considered by design.

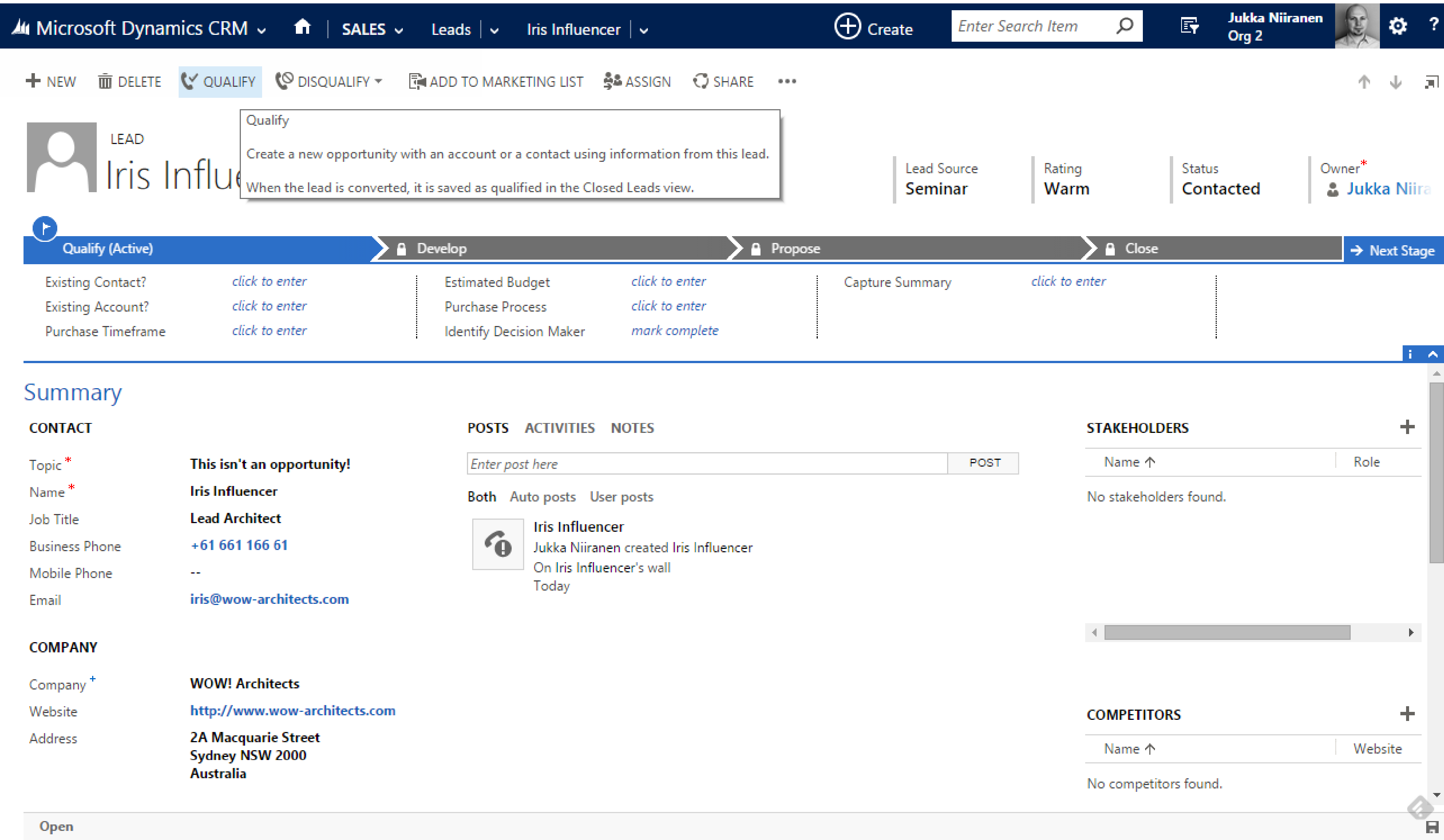
http://support.microsoft.com/en-us/kb/2808201

Step 1: Lead Data Entry

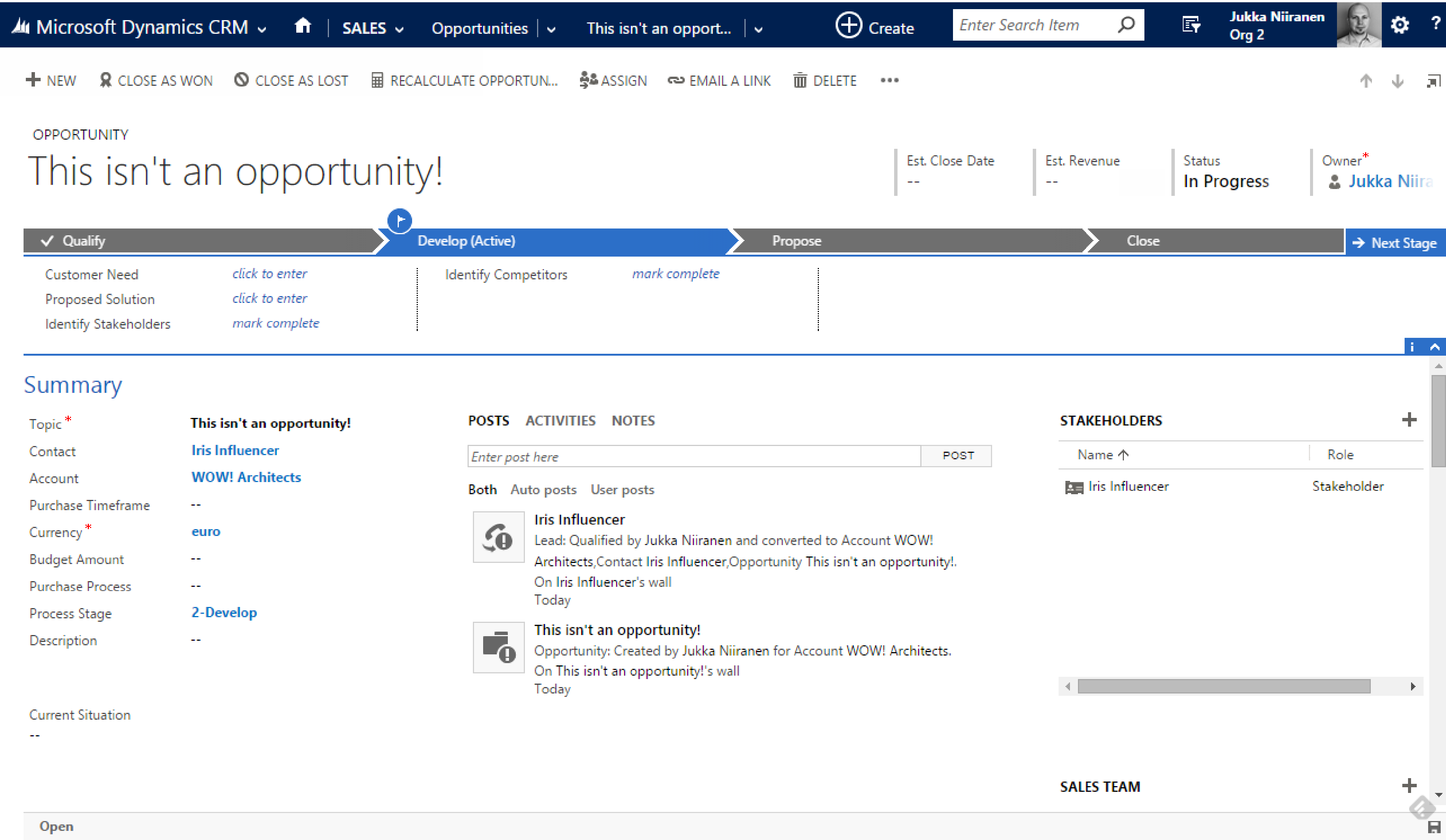


Step 2: Lead Qualification

DIGITAL ILLUSTRATED
DESIGN TECHNOLOGY SUCCESS



Step 3: New Opportunity



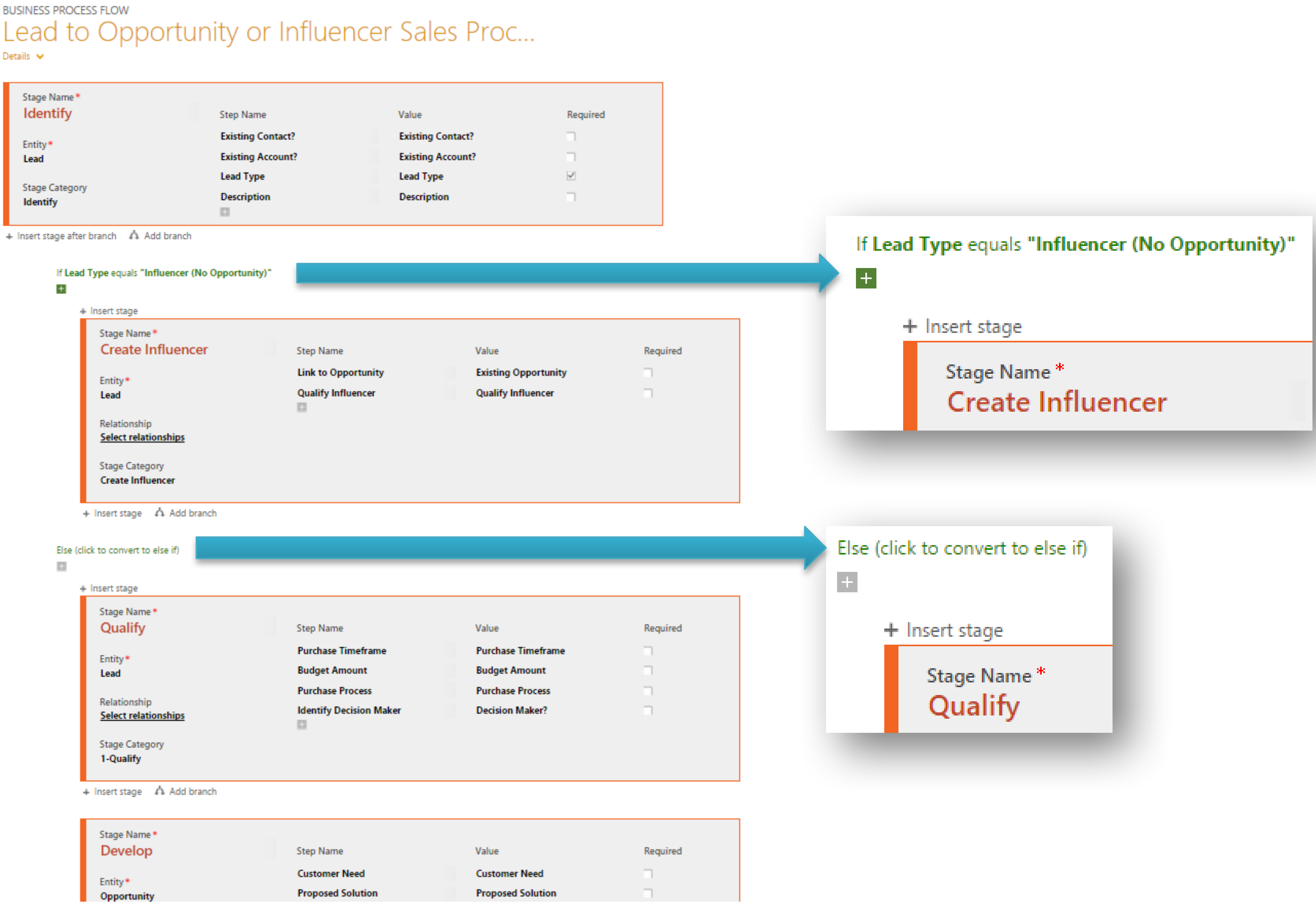
The Solution

- 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



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 accoun

    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)

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"

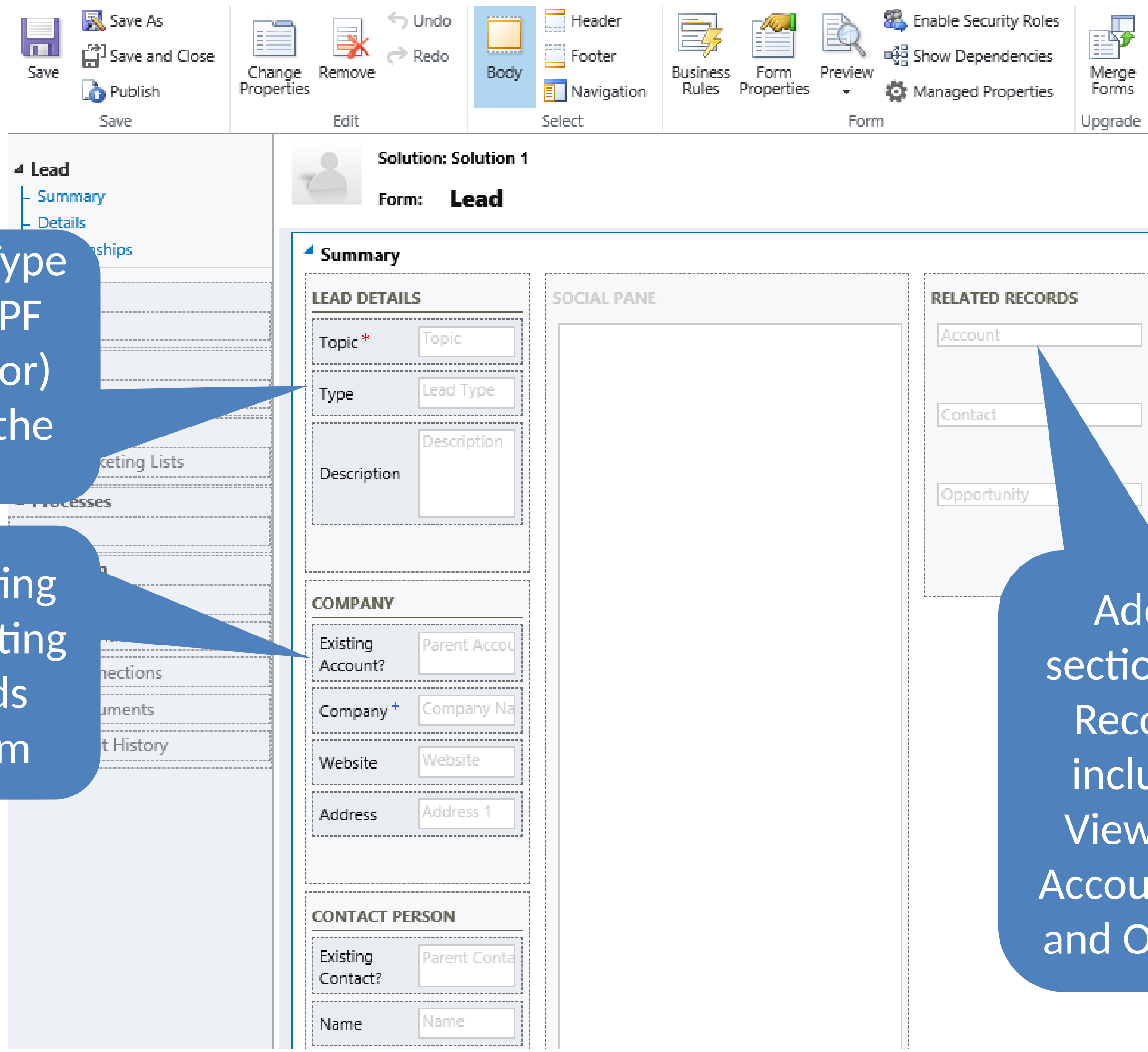
Quick View Forms & Business Rules

- When linking the lead to existing acccount/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



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

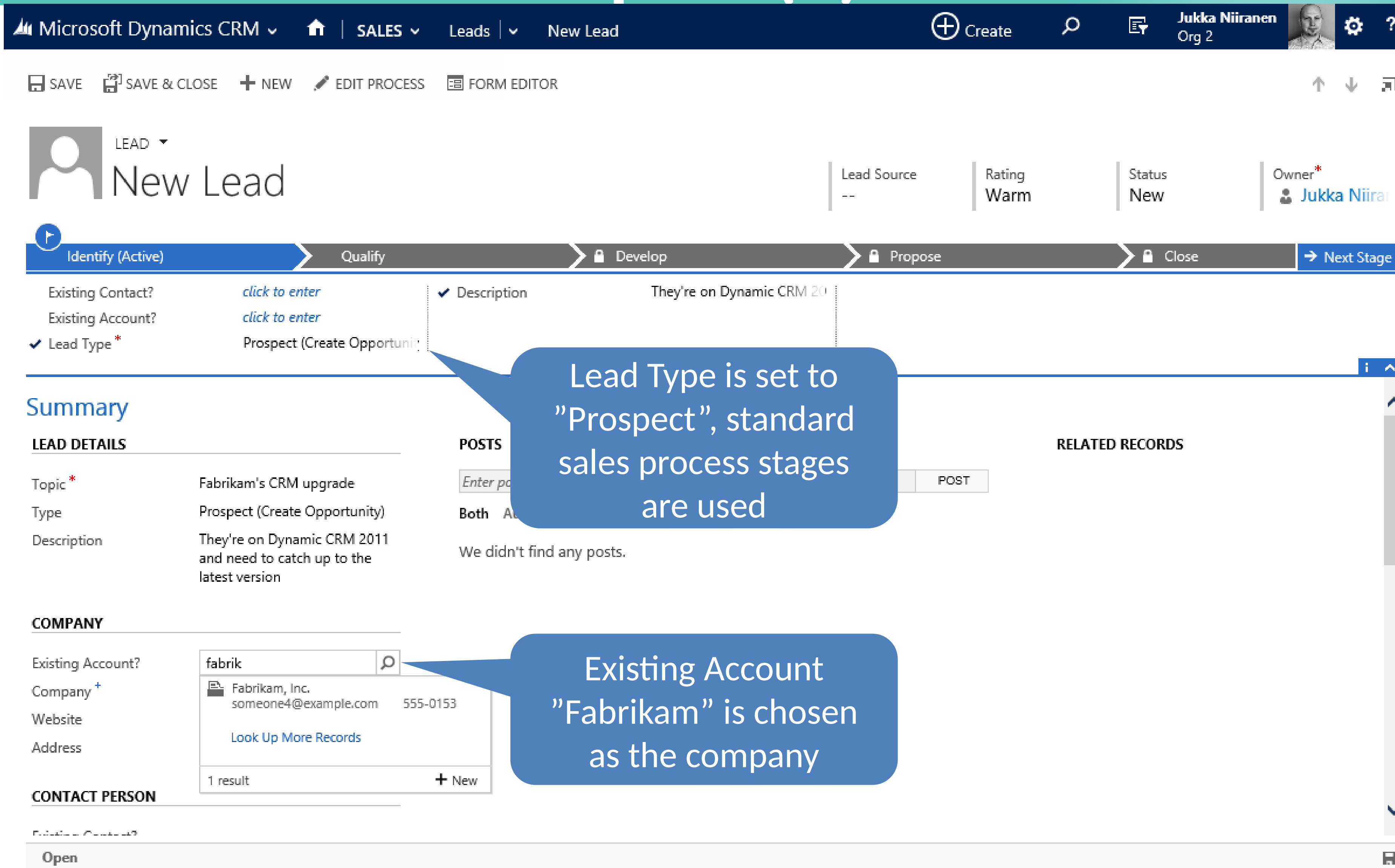
ACTION

Show field **Name**

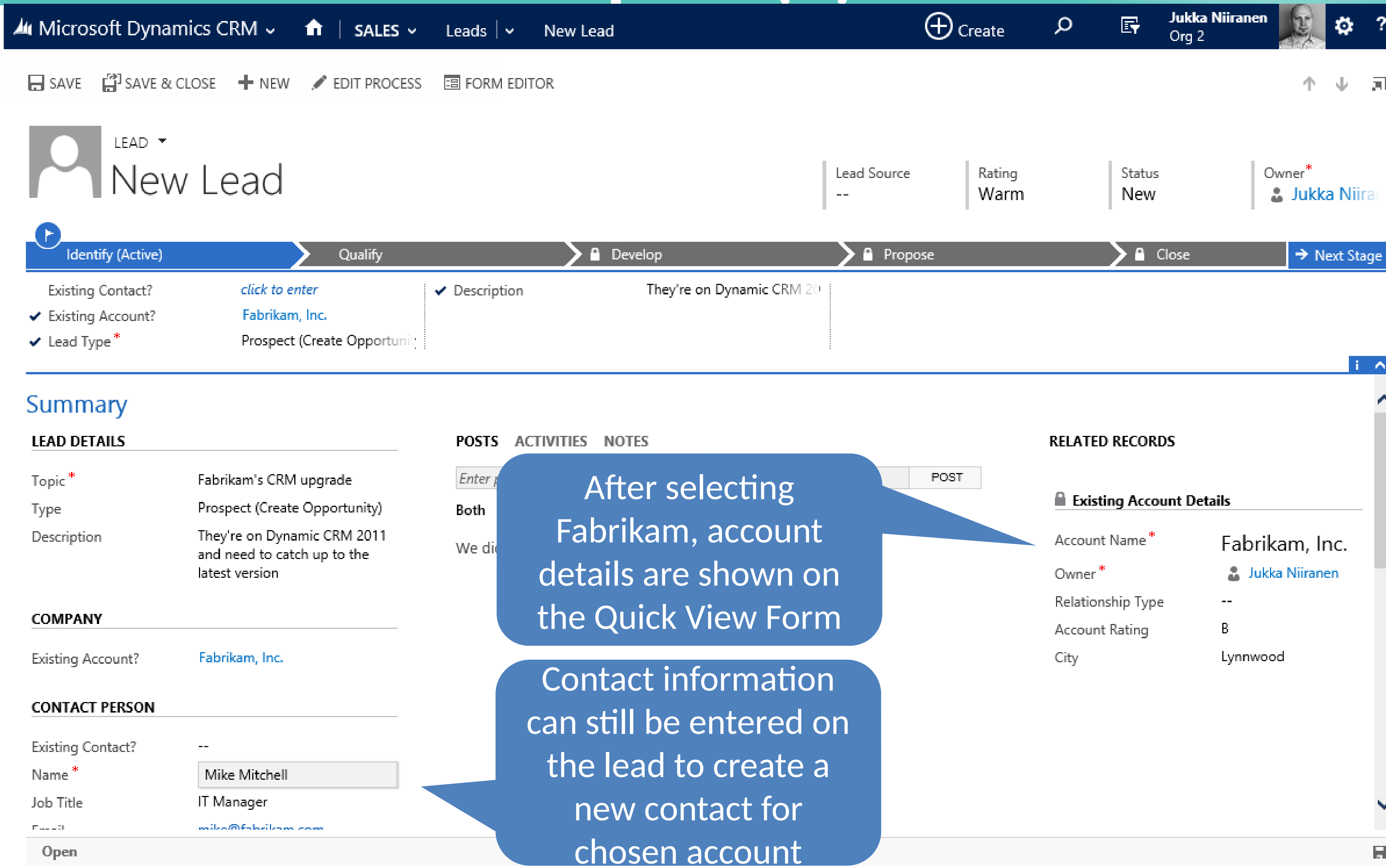
Create 2 rules that watch the Existing Account/Contact lookup fields

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

Creating a New Lead, Type Prospect (1)



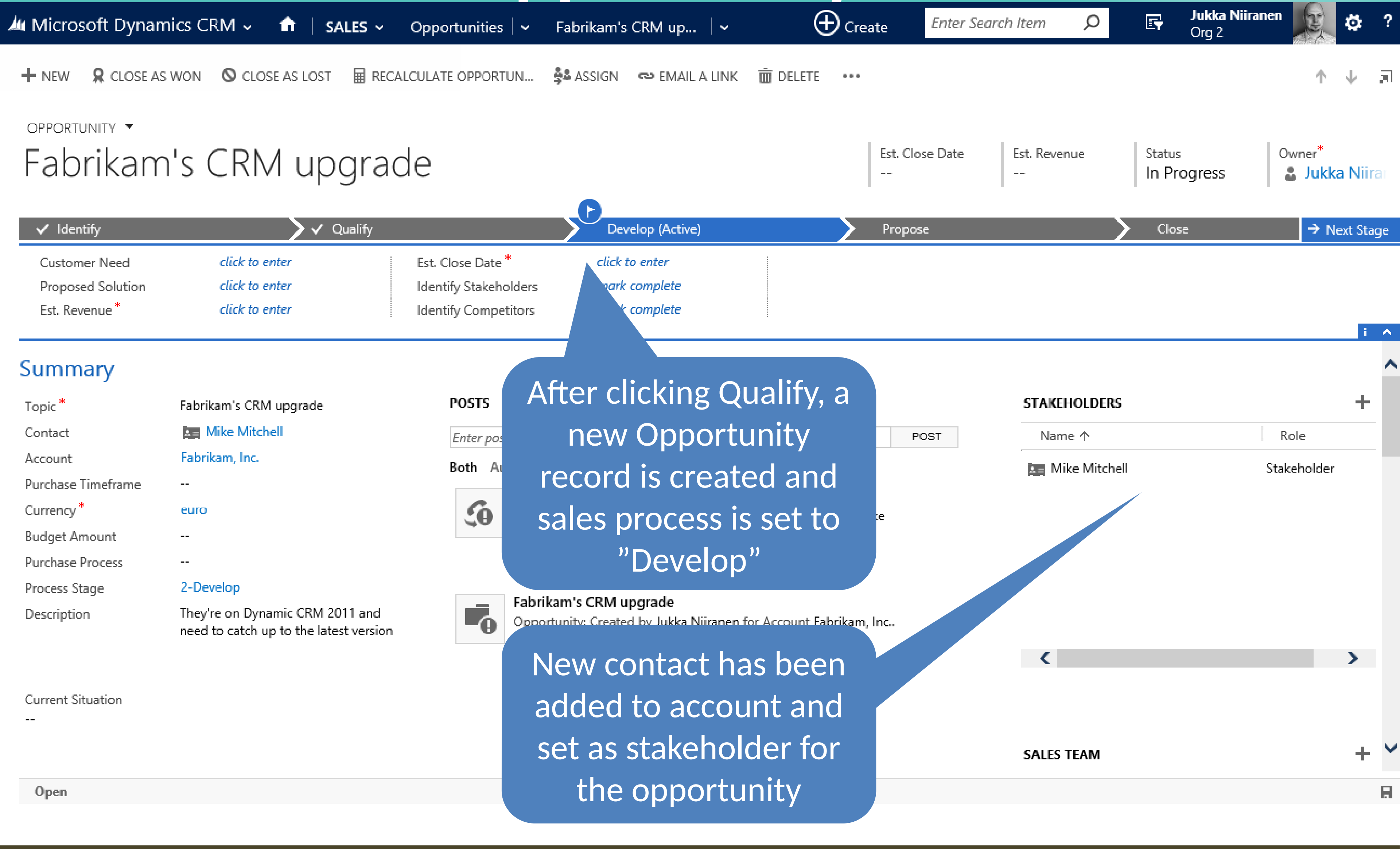
Creating a New Lead, Type Prospect (2)



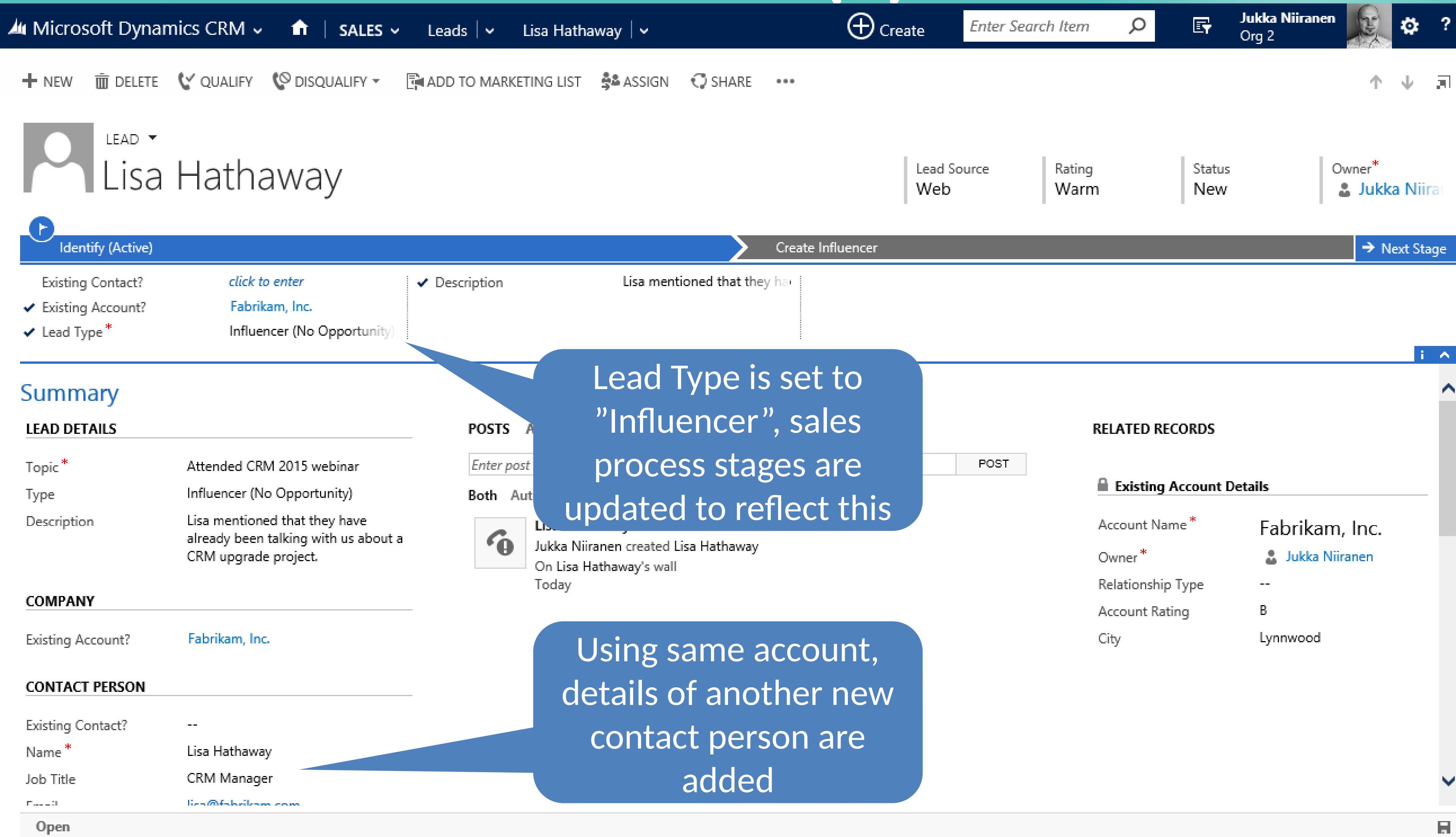
After selecting Fabrikam, account details are shown on the Quick View Form

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

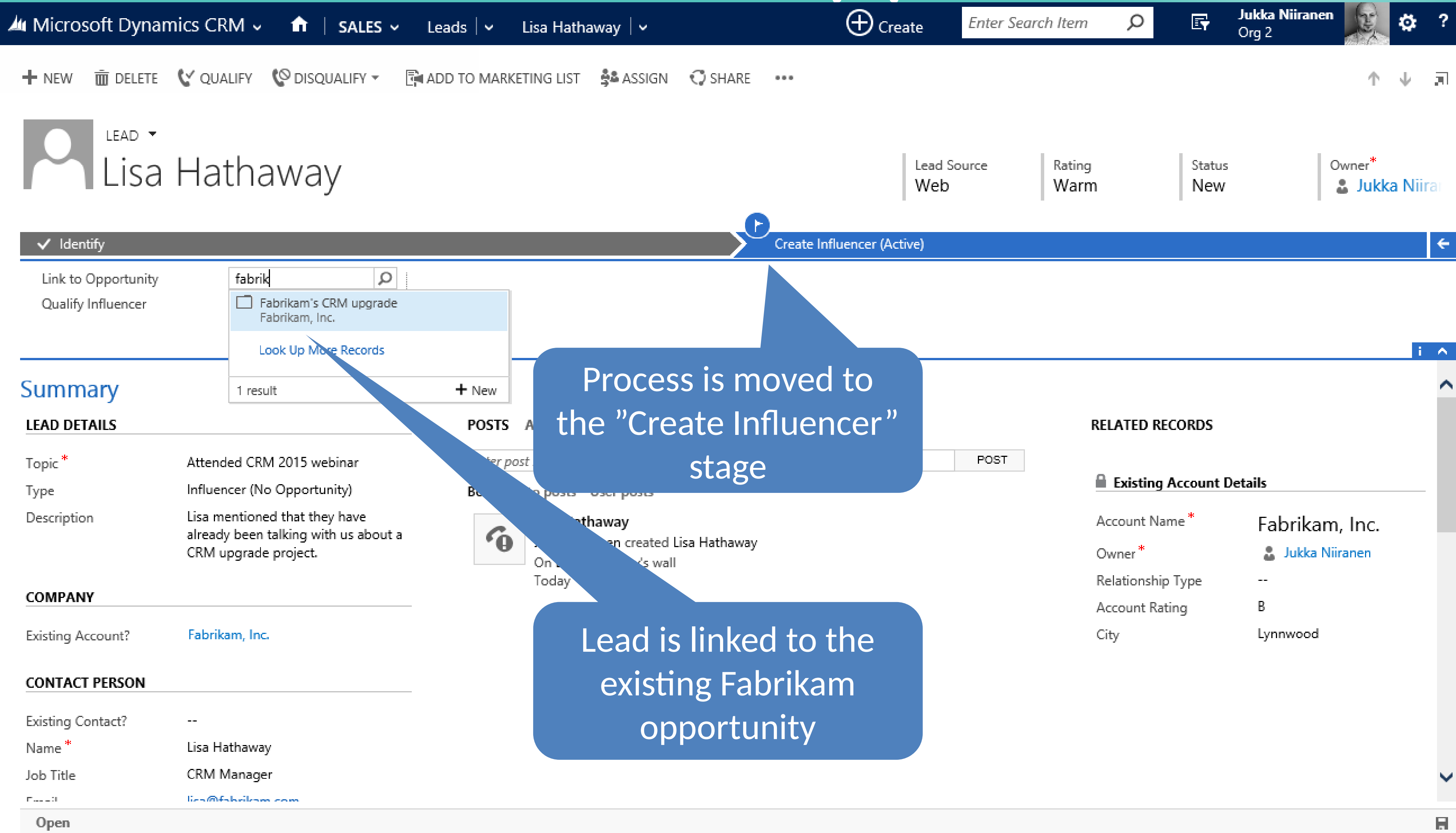
Converting the Lead to Opportunity



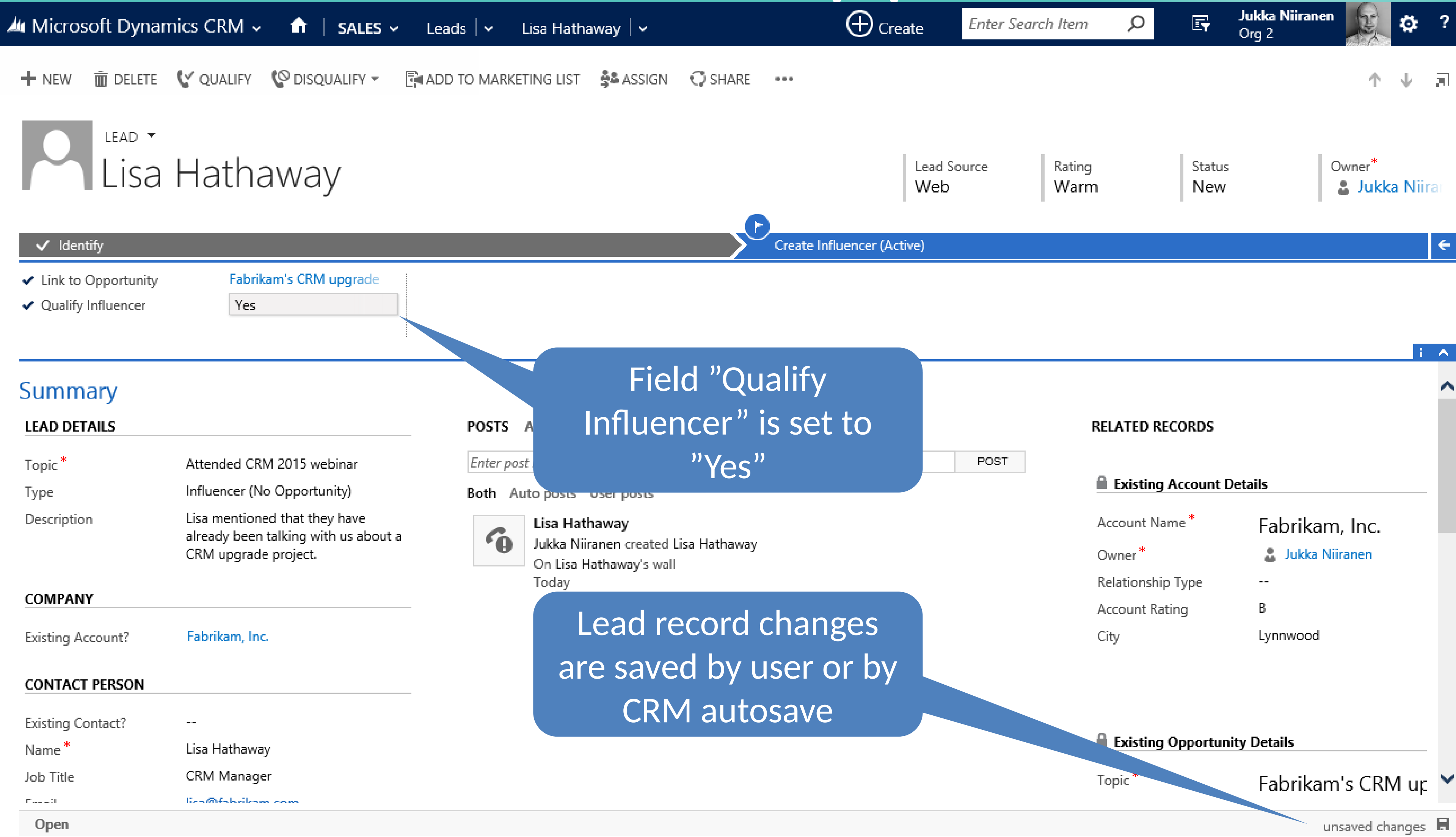
Creating a New Lead, Type Influencer (1)



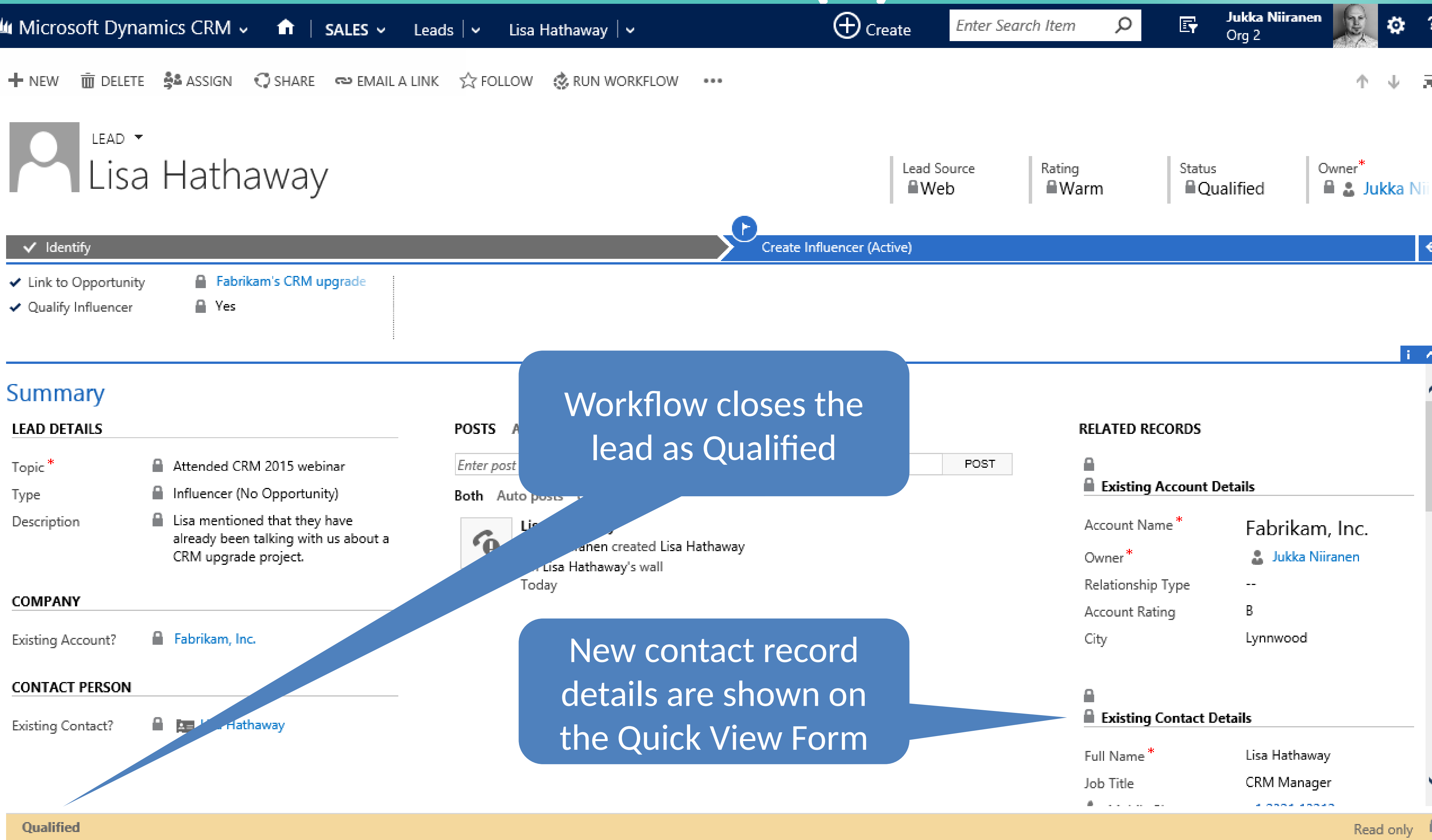
Creating a New Lead, Type Influencer (2)



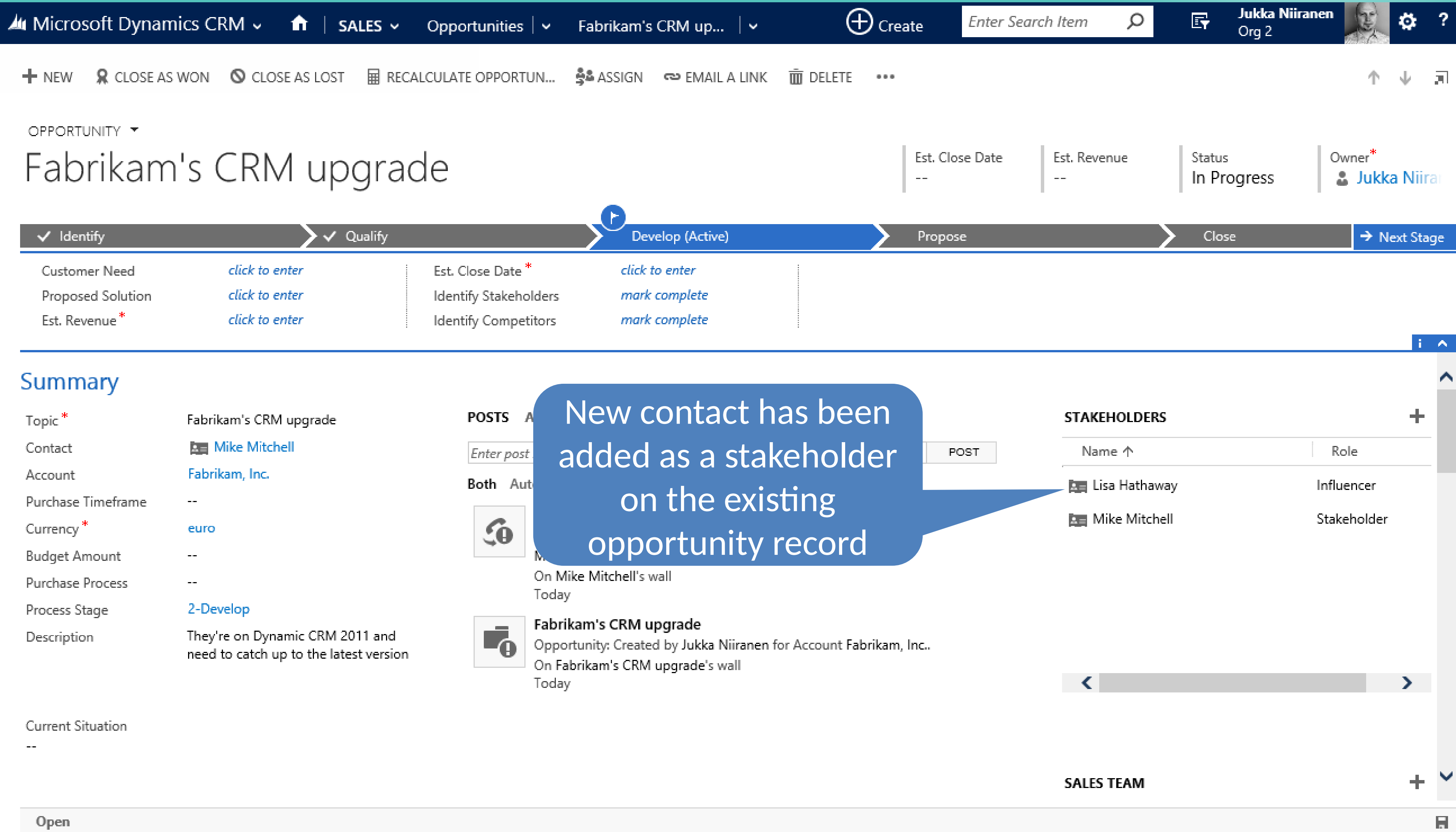
Creating a New Lead, Type Influencer (3)



Creating a New Lead, Type Influencer (4)



Updated Opportunity



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!