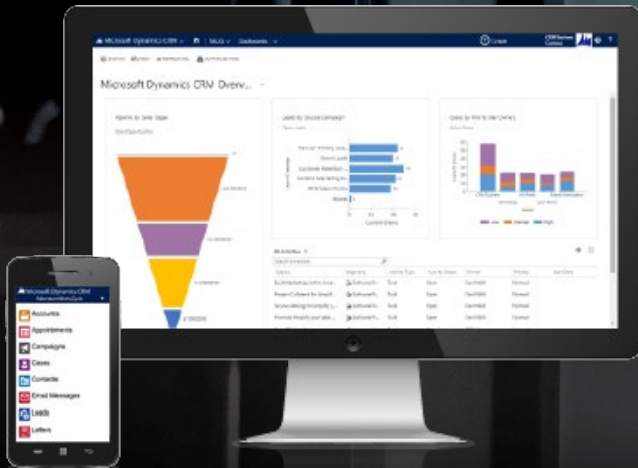


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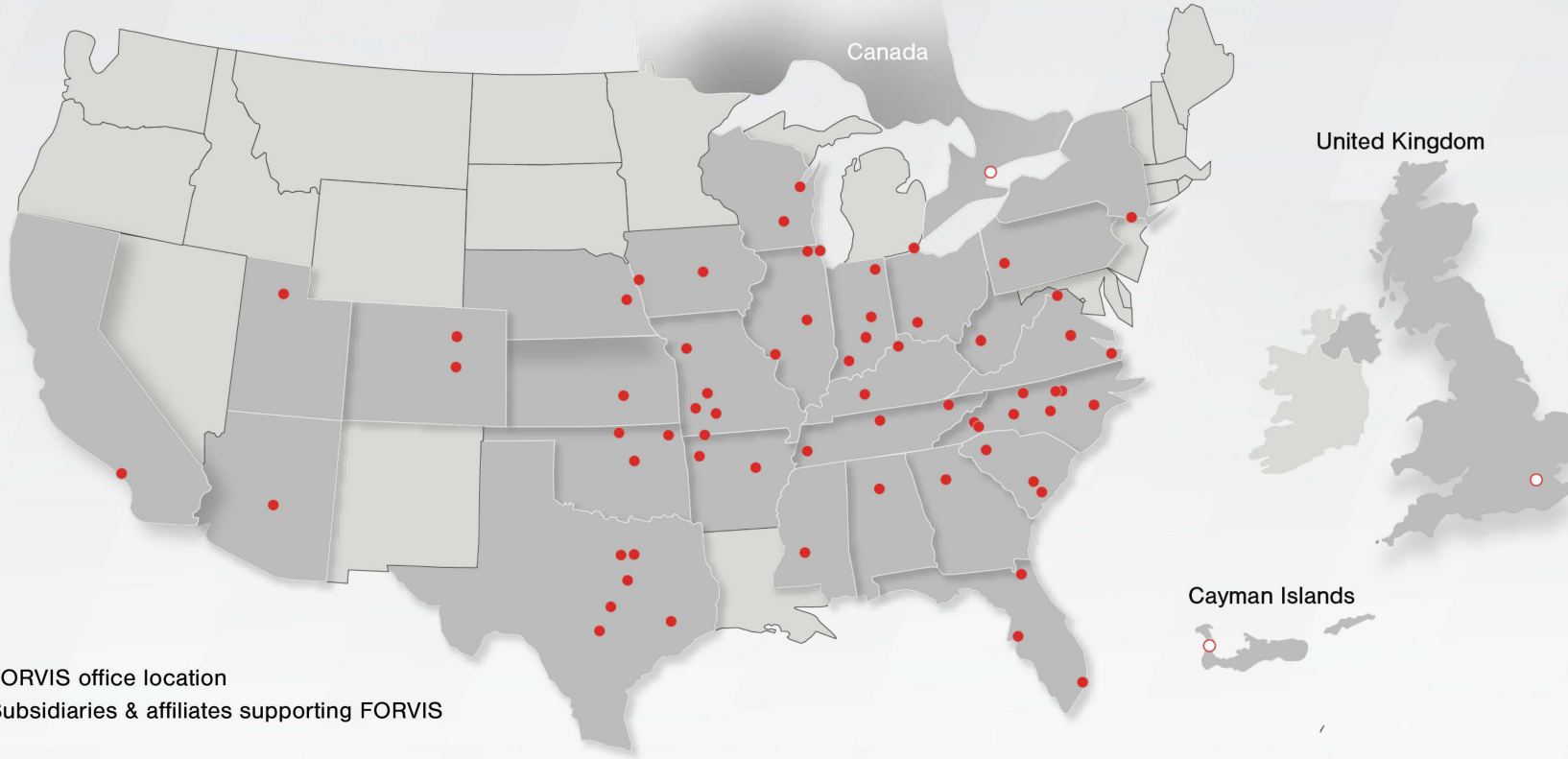
Microsoft Dynamics 365: How to Get More From CRM in 2024



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Business Technology Solutions

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Subsidiaries & Affiliates Supporting FORVIS

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By the Numbers

Top 10
U.S. Public Accounting Firm *

27
States + Canada, U.K., & **
Cayman Islands

10+
Industries

68
Markets

500+
Partners & Principals

6,000+
Team Members



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Business Technology Solutions

FORVIS Business Technology Solutions supports strategic business planning, process definition, and technology solutions to help advance your business.



Microsoft
Dynamics 365

Salesforce

Sage

NetSuite

Insights &
Automation



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Meet the Presenters



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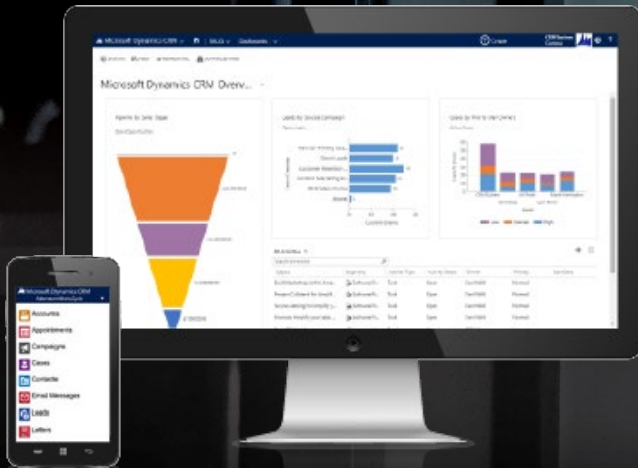
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Microsoft Dynamics 365: How to Get More From CRM in 2024



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Unmatched Client Experience®

By the Numbers

1,000+
Successful Implementations

150+
Dedicated Resources

1
Dedicated Insights &
Automation Practice

30+
Years Legacy Sage ERP
Partner

20+
Years Legacy Microsoft
Dynamics ERP Partner

10+
Years Legacy Marketing
Consulting Services

10+
Years Legacy Salesforce
Partner

15+
Years Legacy Microsoft
Dynamics CRM Partner

2023
Established NetSuite ERP
Consulting Services

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Agenda

- CRM Challenges

- What's New In Dynamics 365 + Community Learning Opportunities

- CRM User Adoption

- Dynamics 365 Training Focus: Views & Filters

- What's Possible With Dynamics 365 Sales (CRM)

- User Questions & Microsoft Dynamics 365 Resources

Your Biggest CRM Challenges

- Not having a CRM
- Implementation
- Accurate data & reporting
- User adoption & buy-in
- Getting sales to use it regularly
- Communication – keeping everyone updated
- Efficiency
- Expressing value of CRM to team members
- Forecasting
- Full utilization of tools/getting the most out of it
- Having enough knowledge to make changes
- How to pull reports & create dashboard
- CRM navigation
- Optimize capabilities to meet specific processes
- Customer trends
- Providing business process flows to be used by multiple teams
- Scalability
- Permissions
- Staying up to date on latest offerings & new features
- Providing value of CRM so more can use it
- Learning industry & competitive advantages
- Integration with ERP + other systems
- Price/cost of CRM
- **Here to learn ... I don't know what I don't know**

What's New With Dynamics 365

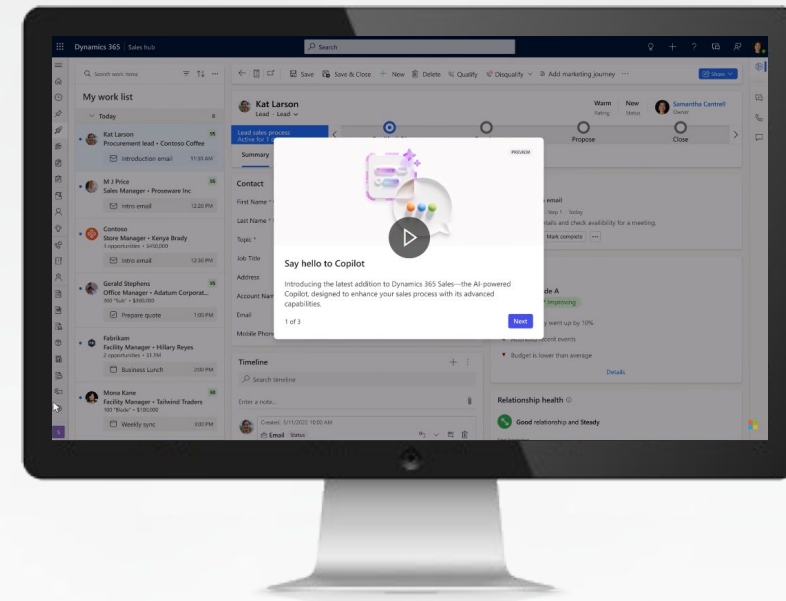
■ Release Schedule

- Dynamics Online has two releases each year (Spring: Wave 1) & Fall: Wave 2), on-prem has one annual release in the fall
- 2023 Release Wave 2 General Availability was October 2023. The release plans provide you with early visibility to get ready for the updates planned from **October 2023** to **March 2024**

■ 2024 Timeline

- Release plans for 2024 Wave 1 typically become available in January with general availability in April
- Release plans for 2024 Wave 2 typically become available in July with general availability in October

>> releaseplans.microsoft.com



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What's New With Dynamics 365

Release Planning for Admins

- View plans in preferred language
- Collaborate using notes
- Share individual release plans
- Filter by release wave
- Search release plans
- Retrieve release plans using the API
- Filter & sort release plans
- View release plans in a timeline
- Create a personalized release plan
- Share release plan with others

The screenshot displays the Microsoft Release Planner interface. The top navigation bar includes the Microsoft logo, 'Release Planner', and various menu items like 'Products', 'Solutions', 'Pricing', 'Partners', 'Platform', 'Resources', 'Support', and 'Community'. The main content area is titled 'Dynamics 365' and features a sidebar with a list of product categories: Marketing, Sales (highlighted), Microsoft Sales Copilot, Commerce, Customer Insights, Customer Service, Field Service, Finance and Operations cross-app, Guides, Finance, Project Operations, Human Resources, Supply Chain Management, Microsoft Supply Chain Center, and Business Central. The main content area is titled 'Watch the new highlights!' and is divided into three sections: 'Planned' (11 upcoming features included in release plans), 'Coming soon' (4 upcoming features available this month), and 'Try now' (11 new features recently released to market). Below these sections, there is a list of updates under the 'Copilot' category, each with a status indicator (NEW or UPDATED) and a release date (Public Preview or General Availability).

Feature	Status	Release Date
Experience Copilot in an immersive widescreen mode	NEW	Public Preview Dec 2023
Improve relevance of Copilot summaries and recent changes	NEW	General Availability Dec 2023
Elevate your customer engagements with AI-recommended content		Public Preview Jan 2024
Get enriched lead summary with information from Customer Insights	NEW	General Availability Jan 2024
Know your account better with AI-generated account summary	UPDATED	Public Preview Feb 2024
Leverage manager dashboards to coach sellers	NEW	General Availability Feb 2024
Strengthen customer relationships with contact summaries	NEW	Public Preview Feb 2024
Maximize sales success with AI-suggested past successful deals	NEW	Public Preview Mar 2024

>> releaseplans.microsoft.com

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Dynamics Focused Communities

dynamicscommunities.com

The screenshot shows the Dynamics Communities website interface. At the top, there is a navigation bar with links for Communities, Content, Partners, Events, Courses, and Join Our Community. Below the navigation is a large blue banner with various icons representing business functions like Data Storage, Marketing, Management, and Sales. The main content area features a community card for 'CE/CRM Dynamics 365 CE / CRM'. The card includes a public status, a description of the user group, and an organizer's profile. Below the card, there is a 'Feed' section with a search bar and a discussion post by Heidi Neuhauser about a free 90-minute session on System Admin 101. To the left, there are sections for 'Upcoming Events' (Community Summit 2024) and 'Explore On Demand Sessions'.



FOR USERS, BY USERS

a global community of passionate people – users, partners, & vendors - that empower others to the most from Microsoft Business Applications



DECREASE COMPLEXITIES

turn challenges into actionable ideas and solutions with a wealth of content - tips & tricks, personal insights, and practical how-to's – to help decrease the small and large complexities



Community Supporter
Microsoft

OCTOBER 13-17, 2024
SAN ANTONIO, TX

The largest independent innovation, training and education event for Microsoft business applications delivered by Expert Users, Microsoft Leaders and Partners

TRAINING

500+ GP/D365/Power Platform & AI Sessions

ACADEMY

30+ Deep Dive/Hands-On Classes with CPE Credits

TECH MEDIC

Live In-Person Help Desks for ERP, CRM & Power Platform

EXPO FLOOR

200+ Partners to Fill Voids In Your Microsoft Systems

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Dynamics Focused Communities

dynamicsusergroup.com

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MAY 13-16, 2024!
DENVER, CO

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**DYNAMICS CON
LIVE**
MAY 2024

MICROSOFT DYNAMICS 365, DYNAMICS GP, & POWER PLATFORM USERS & PROFESSIONALS

SUBMIT A SESSION REGISTER TODAY! BOOK YOUR HOTEL BECOME A SPONSOR

The banner features a vibrant, stylized illustration of a mountain range under a blue sky with white clouds. The text is overlaid on this background, with a large, colorful starburst shape behind the main event title.

Dynamics User Group (DUG) is a user & partner community, independent from Microsoft, focused on personal & professional growth for Microsoft Dynamics 365, Dynamics GP, & Power Platform professionals

Through the FREE membership, they empower everyday users, administrators, developers, & partners with the tools & information required to excel in their professions

POWERED BY DUG

**DYNAMICS CON
VIRTUAL**
NOVEMBER 2024

FREE MEMBERSHIP TO DYNAMICS USER GROUP

BECOME A SPONSOR

The banner features a vibrant, stylized illustration of a road leading towards a mountain range under a blue sky with white clouds. The text is overlaid on this background, with a large, colorful starburst shape behind the main event title.

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User Adoption Ideas & Tips

■ For Management & CRM Admin

- Do you have a documented CRM strategy & road map?
- Is Dynamics up to date?
- Is your team aware of WHY they are using CRM?
- Does your CRM functionality align with your processes?
- What's your current user adoption?
- Are you providing consistent CRM tips, tricks, & training resources?
- Do you have a CRM admin & CRM champions that are go-to resources for users?
- Do you have a process to train new employees/users?
- Are you using CRM in communications & meetings?
- Are you “leading by example” using CRM on a regular basis?
- Do you have a process to collect (& use) user feedback & ideas for future enhancements?
- Are you setting attainable, measurable goals for your CRM users & using those metrics to hold users accountable for meeting their goals?



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User Adoption Ideas & Tips

■ For CRM Users

- Embrace CRM. Make it an asset, not a liability
- If you are not using CRM, why? Be honest
- Daily use: Set Dynamics to auto open in a tab
- Personalize to your needs: Dashboards, views, etc.
- Set small achievable goals: Daily, monthly, quarterly, yearly that cover usage & learning
- Provide feedback! Users are key to enhancements & user adoption
- Can be small “fixes,” manual process improvements, automation & efficiency ideas, screen layout & field placement, etc.
- Share your talents & knowledge of CRM with others. Offer to be a “Power User” or “Champion” on your team that others can come to with questions
- Take initiative: Be part of the solution, not part of the problem

10 Reasons Why
Accounting Should
Care About CRM

[Read Now](#)

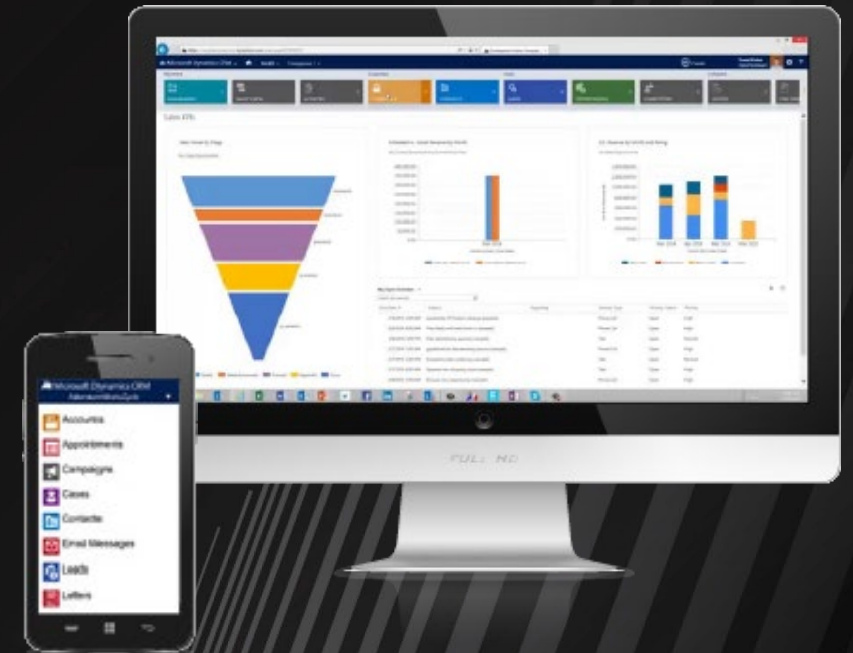
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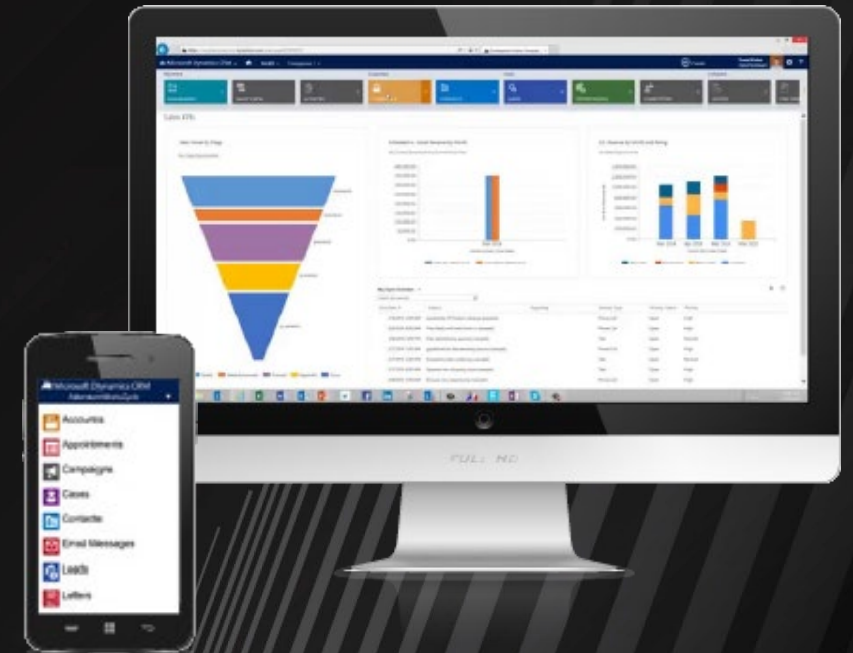
Training Spotlight: Demo of Views

How to use views & filters to access & share data in Microsoft Dynamics 365



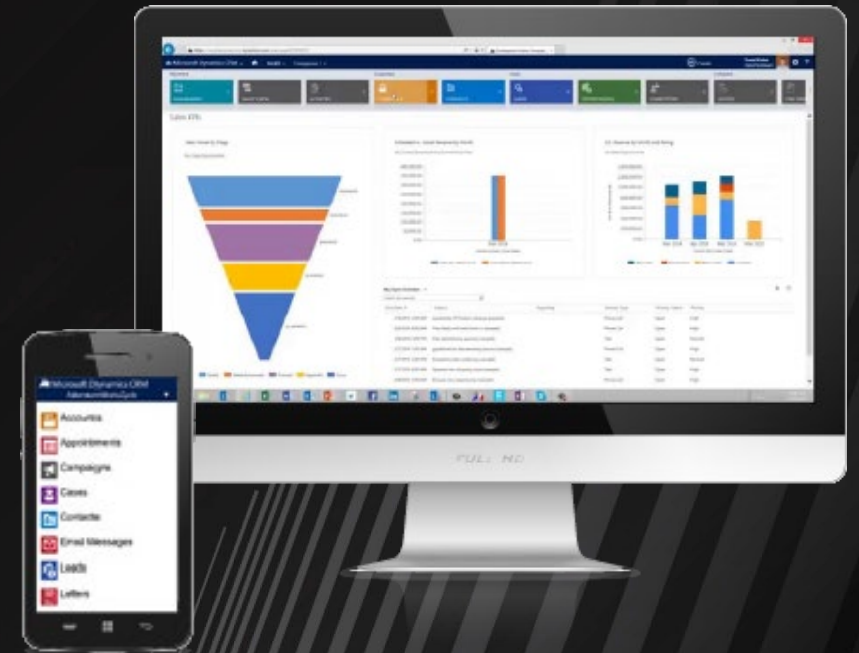
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What's Possible in Dynamics 365 Customer Engagement



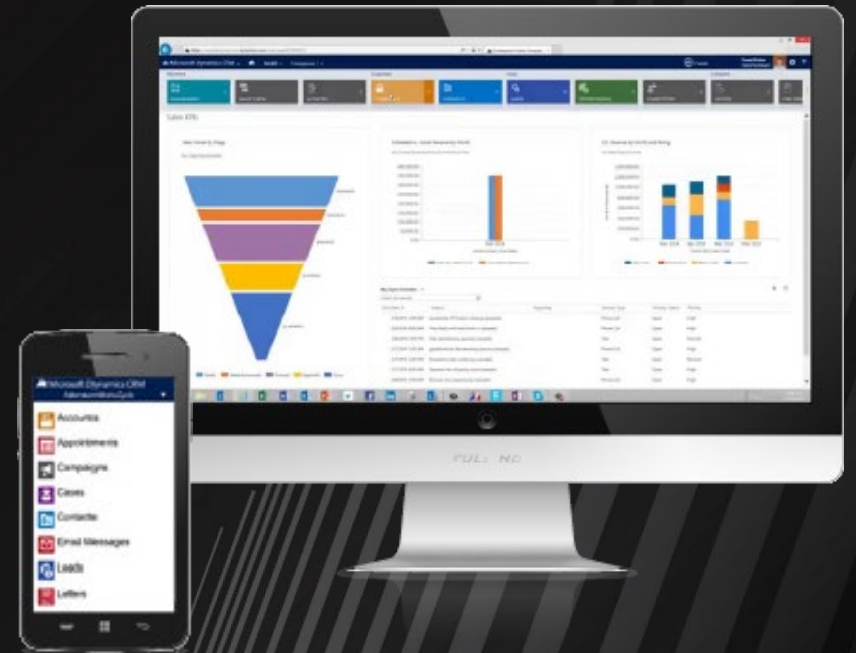
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Addressing YOUR CRM Questions



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Resources @ FORVIS



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Microsoft Dynamics Resources From FORVIS



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Improve Insights & Productivity with Dynamics 365 for Sales

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How to Share a View in Microsoft Dynamics 365 CRM

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How to Create Email Templates in Microsoft Dynamics 365 CRM

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How to Use Calculated Fields in Microsoft Dynamics 365 CRM

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Change Ownership Records in Microsoft Dynamics 365 CRM

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How to Add Custom Email Signatures in Dynamics 365 CRM

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Microsoft Dynamics 365 CRM Support



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Microsoft Dynamics AX Support



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Embrace the Mantra



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Additional Questions?

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