Success with Microsoft Dynamics CRM 4.0

Implementing Customer Relationship Management

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Justin Mathena, Aaron Yetter,
Hoss Hostetler

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This book is dedicated to our families for their never-ending support throughout our careers and during this latest endeavor. We could not achieve success without their love, support, and understanding.

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Contents

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PART 2 ■■■ **Implementation Planning,
Approach, and Guidelines**

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Foreword

I met Justin Mathena in Toronto in the summer of 2004 where he was receiving the Microsoft Dynamics CRM Partner of the Year award with his previous company. Justin, Hoss Hostetler, and their team had been working with the Microsoft CRM product team since well before we released the first version to market and it was entirely appropriate that they receive this award. Justin and Hoss were far more than beta testers of that first version of Microsoft CRM; they provided those of us on the development team critical insight into understanding the business drivers behind CRM adoption and successful implementations. They showed us, developers of productivity applications, web browsers, and collaboration servers, that there is far more to business software success than building a great product. Success in this very different market requires that the technology implementer understand deeply and communicate broadly with their customer.

Over the following years, the Microsoft Dynamics CRM business grew dramatically. At every turn the only limitation to growth seemed to be the number of firms with the knowledge and skills to evaluate and successfully implement CRM opportunities. And so I was delighted (and a bit envious) when Justin and Aaron Yetter invited me to lunch in the autumn of 2006 and told me that they had formed Altriva Solutions. Justin, Aaron, and Hoss have decades of experience building and implementing CRM solutions and have tackled implementations in large firms, in multiple industries across the country. Altriva's entry into the market could only increase the reach of Microsoft Dynamics CRM and increase the success of more businesses.

Customer Relationship Management solutions need to enable business success. Historically, CRM systems have been implemented at great cost and with high expectations only to be underutilized, delivering disappointing results. I have seen enough CRM successes to know that this does not have to be. When properly implemented a CRM project can empower a workforce to increase sales and customer loyalty while increasing job satisfaction of the employees that use and manage the solution. This is possible when the solution fits the work habits of its users, when it can quickly adjust and conform to the changing processes within a business, and when the solution sits on top of a stable operational platform.

Any solution adaptable to varied business needs requires people capable of fitting the solution to the strategic objectives of their organization. "Success with Microsoft Dynamics CRM 4.0: Implementing Customer Relationship Management" will show you how to fit Microsoft Dynamics CRM to your organization, how to increase user adoption, and how to ensure ongoing success of the solution over time. With knowledge from their successful implementations of Microsoft Dynamics CRM, Justin Mathena, Aaron Yetter, and Hoss Hostetler will show you how to bridge the divide between technology and business needs and have a positive impact on your organization.

Barry Givens
Senior Product Manager
Microsoft Dynamics CRM

About the Authors

■**JUSTIN MATHENA** is a proven leader in the information technology industry with broad experience defining technology solutions that meet business challenges, implementing successful CRM strategies and solutions, managing functional and technical teams, developing strategic relationships, and overseeing operational efficiencies. Justin has worked with customers across many industries, including manufacturing, healthcare, insurance, timber, high tech, energy, and publishing.

Justin is a founder and principal of Altriva Solutions, a professional services firm based in Bellevue, WA. Prior to founding Altriva, Justin served as a director of delivery for The Interlink Group (now EMC) where he was responsible for managing the consultant delivery personnel and operational management in the PacWest region. Justin started his services career as a consultant with Equarius where he served in leadership capacities including Business Development Manager, Strategic Account Manager, and CRM Practice Lead.

■**AARON YETTER** is a seasoned technology professional with extensive experience overseeing and implementing successful CRM strategies and related business initiatives. His experience includes delivering customer-centric solutions for market-leading companies across various industries, including healthcare, insurance, financial services, technology, and services.

Aaron is a founder and principal of Altriva Solutions, a professional services firm based in Bellevue, WA. Prior to founding Altriva, Aaron was CVP and CRM Practice Director for Resolute Corporation, where he was responsible for leading the growth and development of the CRM Practice. Prior to Resolute, Aaron served as President and founder of the services firm Acetta, where he led the company during its first three years of growth. Previously, Aaron was Group Consulting Manager for Onyx Software, where he was responsible for many aspects of consulting, consulting sales, and customer retention.

■**HOSS (MARK RENEE) HOSTETLER** is a business technologist specializing in CRM strategy and implementation. Hoss' background is in the Microsoft technology stack and how CRM applications coupled with an expert understanding of business processes can benefit customers. He has been implementing CRM solutions since his career began and is considered an expert in CRM business and process modeling, CRM infrastructure architecture, integration architecture, application design, ISV extensions, data

migration, and extension development. He is passionate about the value a properly executed CRM project can bring to any organization.

Hoss is the Director of CRM at Altriva Solutions, a professional services firm based in Bellevue, WA. Before joining Altriva, Hoss served as the PacWest CRM Practice Manager at EMC's Microsoft Practice Group, where he was responsible for managing the CRM team, leading projects, architecting solutions, and ensuring success with EMC's CRM clients. Hoss started his consulting career at Equarius, where he led CRM projects and delivered successful CRM solutions.

About the Technical Reviewer

■**CHRIS JOHNSTON** has 15 years of experience in the consulting services industry with a focus on the Microsoft technology set. Chris has worked with Microsoft CRM from its inception and is a veteran of many full-cycle CRM implementations.

Chris continues to focus on maximizing his clients' return on investment in technology in a private consulting practice, The Metta Group, Inc, in the Seattle area.

Acknowledgments

This book could not have been written without the many talented people that we have been fortunate to work with over the years. Clients, partners, and fellow consultants have provided great insight into how CRM success is achieved and demanded our best efforts in working with them. We thank you all for being part of the more than 30 years of combined experience we have been fortunate to gain.

Introduction

The latest release of Microsoft Dynamics CRM, with its Microsoft Office integration, ease of installation, and broad capabilities for configuring and extending Microsoft CRM to address an extremely wide variety of requirements, provides companies an opportunity to utilize a CRM tool that transforms their business if implemented with knowledge and expertise. In support of this new release, we decided it was time for a different kind of CRM how-to book that can help you understand your project's potential challenges and methods to overcome them. Instead of providing step-by-step installation details, a description of each component, and a user guide for configuration, this book provides expert insights to ensure success: background and understanding of the stages of a CRM initiative, a proven approach for implementation, questions and challenges to consider during the project, and how to expand the success of the initiative. It identifies how best to use, configure, or customize functionality that can be challenging to configure and use within your business.

Generally, the information in this book will benefit anyone who wants to learn more about implementing Microsoft Dynamics CRM and how to approach each aspect of the project to ensure long-term success. Specifically, it is for the business sponsor, subject matter experts, business analysts, technical architects, and consultants involved in implementing Microsoft Dynamics CRM.

After reading this book, if you are interested in discussing your implementation of Microsoft Dynamics CRM using our proven business-focused approach, go to `http://www.altriva.com/CRMSuccess` and contact us.