

365

Saturday



Gus Gonzalez

Configuring the UI like an
MVP



resco.net
technology on the move

Nigel Frank
International

FUTUREZ

eXalents

365

Saturday

January, 26th 2019

Boston, MA

Gus Gonzalez

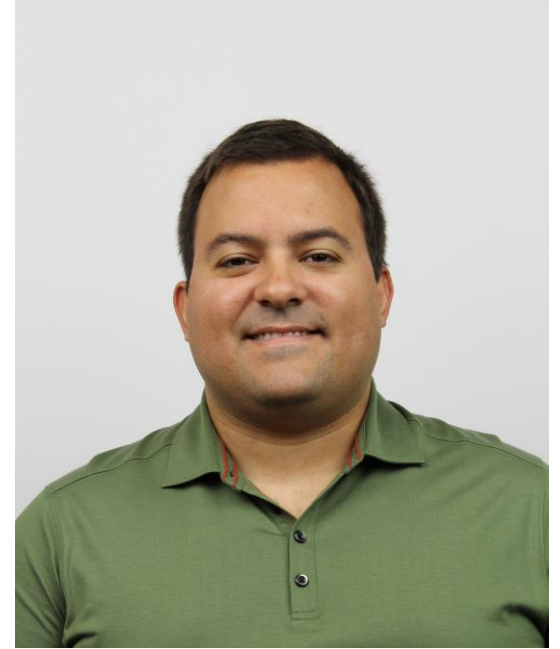
- CEO, Elev8 Solutions
- 7x Microsoft MVP, CRMUG All-Star
- 200+ Deployments
- Host @CRMMVPPodcast

 @GusGonzalez2 | @Elev8Solutions

 <http://www.crmmvppodcast.com>

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UI Design Focus



Putting yourself on the wrong shows

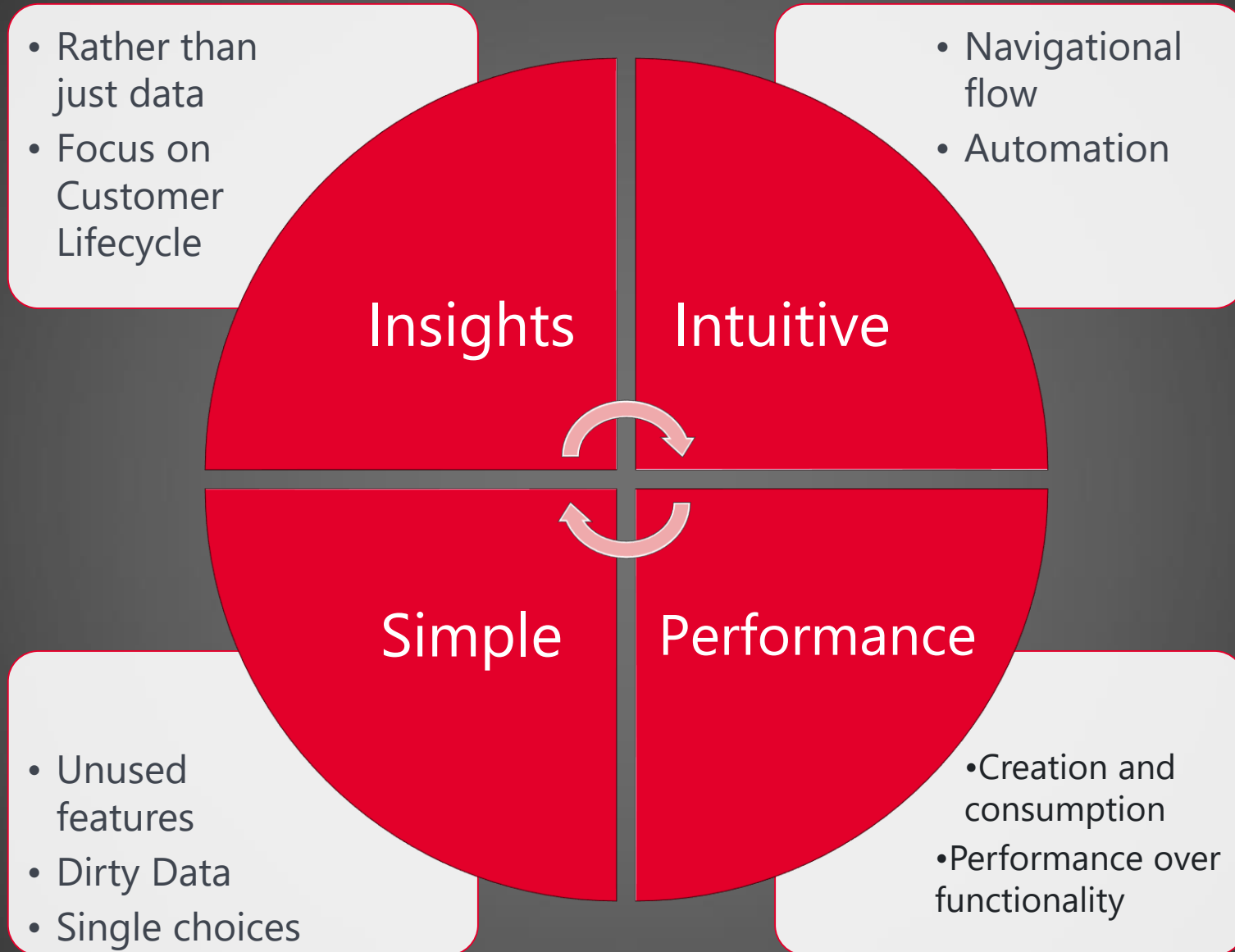


A photograph of a business meeting. In the foreground, a person's hand in a dark suit and light blue shirt is writing on a notepad with a silver pen. Another person's hand is visible in the background, also writing. The scene is brightly lit, likely from a window. Overlaid on the right side of the image is the text "Don't be a Whiteboard Consultant" in a large, bold, dark purple font.

**Don't be a
Whiteboard
Consultant**

OUR APPROACH



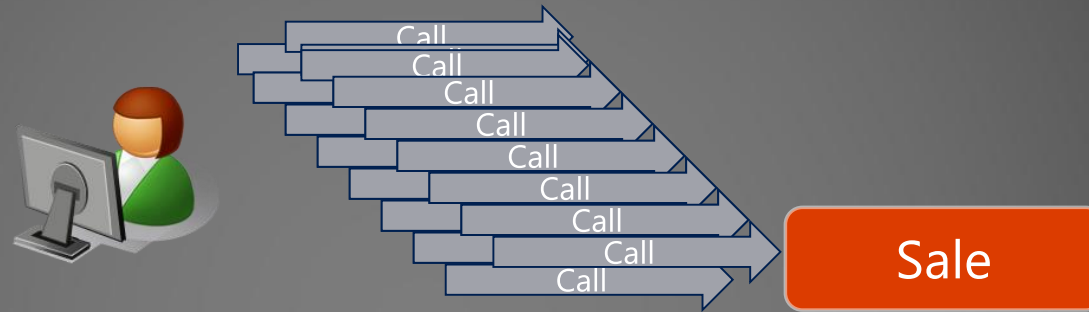


Common Mistake

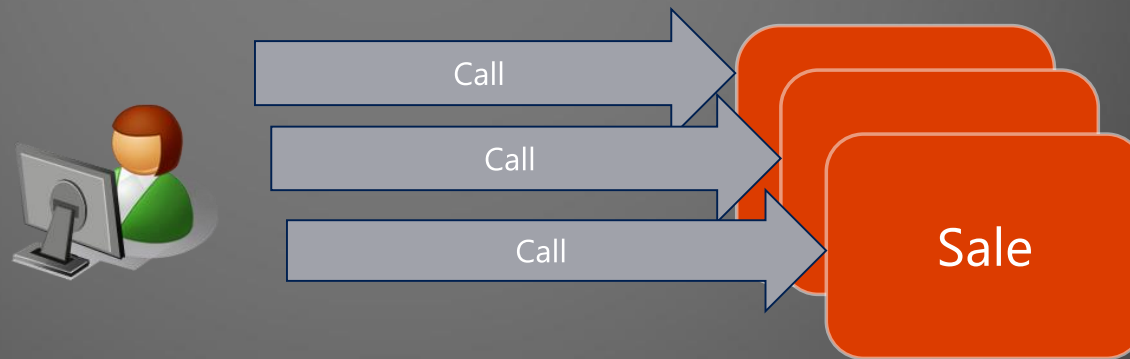
**Speed over
Outcomes**



Which one is better?



VS.



What is the actual objective?

- Reduce clicks or Drive Business?
 - Calculating clicks is a measure of UI, not UX
- If you could increase First Time Close for service calls raising cases by 50% would it be worth adding 2 clicks to the process?
- If you could increase your opportunity win rate by 10% by adding 4 extra clicks would it be worth adding them?

Story time



To-do

- Keep your eye on Form Load
 - Static information at the top
 - Load the right form by default
 - Load related info for all departments
 - Add rarely used data into collapsed sections
- Minimize White Space
- "Task Completion" mindset
- Enable UX Accelerators



UX Accelerators

- “Landing Zone” Dashboards
- Editable Grids
- Quick View forms
- Quick Create forms
- Business Process Flows
 - Especially for Multiple Entities



Ready to Go?

- User Experience goes beyond a great User Interface
- Data Integration Performance
- Security Performance
- Real-time workflow abuse
- Thinking outside the CRM box
- If it's not in CRM, it doesn't exist
- Beautify your Dynamics 365 Implementation





QUESTIONS



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