MICROSOFT DYNAMICS CRM
POSITIONING WHITE PAPER

xRM Framework and Microsoft SharePoint

Microsoft Dynamics CRM

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Executive Summary

xRM refers to a flexible and extensible framework within Microsoft Dynamics® CRM. This framework enables organizations to rapidly modify Microsoft Dynamics CRM through a point-and-click interface to better fit their customer relationship management needs or to manage other relationships. The primary approach for the xRM application framework is "CRM-out," which focuses organizations first on supporting customer relationships and extensions, and then expanding to customer-like relationships.
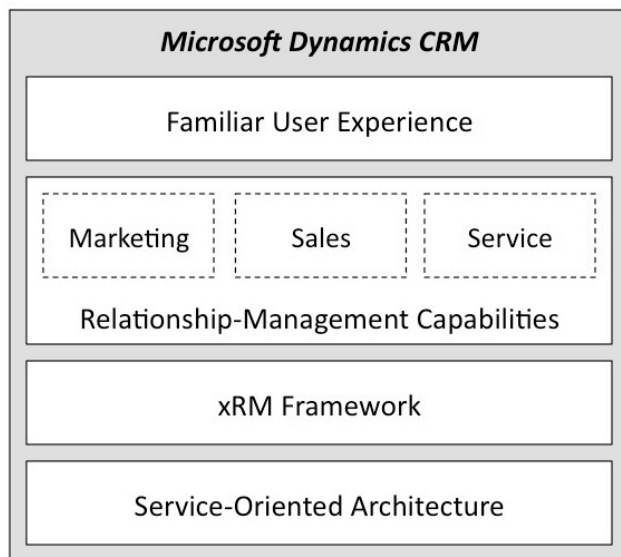
xRM surfaces the Microsoft® Application Platform technologies to better enable the management of these relationships, and to help organizations more fully leverage their technology investments. Microsoft SharePoint® is one of these technologies, which when combined with the xRM application framework helps support any relationship scenarios through its complementary capabilities. The most common connection points between xRM and SharePoint include embedded document repositories, portal integration, enterprise search, and dashboards.

xRM and Microsoft Dynamics CRM

The xRM framework is a component of Microsoft Dynamics CRM, which is a packaged application designed to help organizations manage their customers across marketing, sales, and service activities. Traditional CRM applications were feature-heavy with user adoption issues, poor flexibility, and low deployment success. The key components of Microsoft Dynamics CRM were designed to resolve these issues.

- **User Experience** – Microsoft Dynamics CRM works with familiar productivity tools that our customers use every day—such as Microsoft Outlook®, Excel®, and Word—so users don't have to switch to other applications or learn how to use other systems.
- **Relationship-Management Capabilities** – Out-of-the-box scenario capabilities are provided to support specific marketing, sales, and service requirements. Other packaged relationship-management capabilities are also provided to help organizations support a complex relationship.
- **xRM Framework** – The need for flexibility and extensibility resulted in the development of a business application framework that allows every component of the application to be adapted to fit a wide variety of needs, ranging from data model, business process, security, and integration up through the user interface.
- **Service-Oriented Architecture** – All of these capabilities are built upon a service-oriented architecture (SOA) that supports global enterprise requirements, such as scale and performance.

The xRM framework is a foundational component of Microsoft Dynamics CRM.

xRM Framework

The xRM framework enables organizations to modify every aspect of the Microsoft Dynamics CRM application to better fit their needs. For customers using Microsoft Dynamics CRM for customer management, the xRM framework provides the flexibility to adapt Microsoft Dynamics CRM to better fit their marketing, sales, and service business requirements. The xRM framework also enables customers to create relational applications to help manage other customer-like relationships. This is accomplished through the following xRM capabilities:

- **Framework Services** – The xRM business application framework is a comprehensive set of application services that can be adapted to fit the needs of most relationship-oriented business application requirements.

- **Point-and-Click Customization** – Each of these services is structured to enable business analysts and non-technical users to define and build solutions through point-and-click, significantly reducing the development time, resources, effort, and associated costs required to create new capabilities and solutions.

- **Extensibility** – xRM also allows deep customizations and extensions to the application through Microsoft .NET Framework and Microsoft Visual Studio®.

xRM SERVICES	DESCRIPTION	EXAMPLES
Feature Services	Reusable out of the box capabilities	Activity/Task/Case Management, Scheduling…
UI Services	Build consistent user experiences	Outlook, Offline, Mobility, Browser, Office…
Process Services	Automate any relationship process	Wizard, triggers, decisions, actions…
Security Services	Define complex security roles and access	Hierarchical, custom, deep and wide controls
Metadata Services	Automatic portability and upgradeability	Metadata, import/export application…
Database Services	Create custom complex data schemas	Data model builder, relational integrity…
Analytical Services	Develop visualizations and reports	Wizard, SAS, SRS, Security, Offline…
Integration Services	Support wide variety of integration needs	UI, Mashup, Business Process, Data, Prebuilt…
Extensibility Services	Add-on features through plug-ins	VS/.NET, Jscript, Plugins, SDK, Offline…

xRM Manages "Customer-Like" Relationships

Microsoft Dynamics CRM is designed to help organizations manage their customer relationships. The flexibility of Microsoft Dynamics CRM and the xRM framework enables organizations to leverage the out-of-the-box relationship-management capabilities to manage other types of "customer-like" relationships. Relationship examples include partners, vendors, students, patients, constituents, employees, and others.

Every organization has relationships they need to manage in order to achieve their business goals. The capabilities required to manage customer relationships are very similar to the capabilities required to manage other types of relationships. The tools used to manage and automate relationship processes and scenarios are the same.

Relationship-Management Capabilities

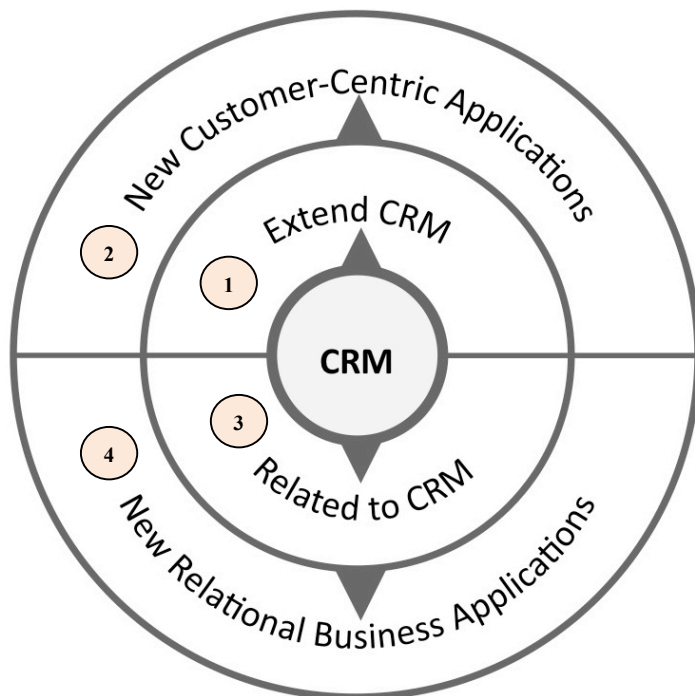| Used By… | ⇢ | Teams that Own Key Relationships (Sales, Service, Partner, Business) |
To Manage…	⇢	Customer or Similar Relationships (Partner, Patients, Students)
By Automating…	⇢	Relationship Processes (Marketing, Sales, Service, Outreach, Programs)
Through Tools…	⇢	Interactions, Tasks, Activities, Cases, Schedules, Knowledge base, Wizards
And Information…	⇢	360 Degree View of Data, Profile, Analysis, Insight, Prediction and Guidance

KEY POINTS

1. Microsoft Dynamics CRM features can be adapted to manage other customer-like relationships.

2. The xRM framework enables the entire application to be adapted to support these relationships.

The "CRM-Out" Approach

The "CRM-out" approach is a structured progression to provide guidance on how organizations should expand from managing customer relationships to managing other types of customer-like relationships.

- Use xRM framework to manage customer relationships:

    1. **Extend CRM** – Enhance marketing, sales, and service capabilities with new features to better support customer relationships, such as customer entitlements for service, or a press and analyst tracking tool.

    2. **New Customer-Centric Applications** – Create new applications that support the primary customer relationship; for example, industry-relevant customer-centric applications such as wealth management.

- Use xRM framework to manage customer-like relationships:

    3. **Related to CRM** – Create capabilities and applications that support the primary customer relationship; for example, create a property management application as an add-on to customer support in order to more effectively manage customers who lease properties.

    4. **New Relational Business Applications** – Create new applications focused on managing other relationships that are similar to customers, such as constituents, patients, students, vendors, or dealers.

KEY POINTS

1. CRM-out is an approach that starts with supporting and extending customer management capabilities and then extends to customer-like relationships.

2. xRM—the framework that enables the CRM-out approach.
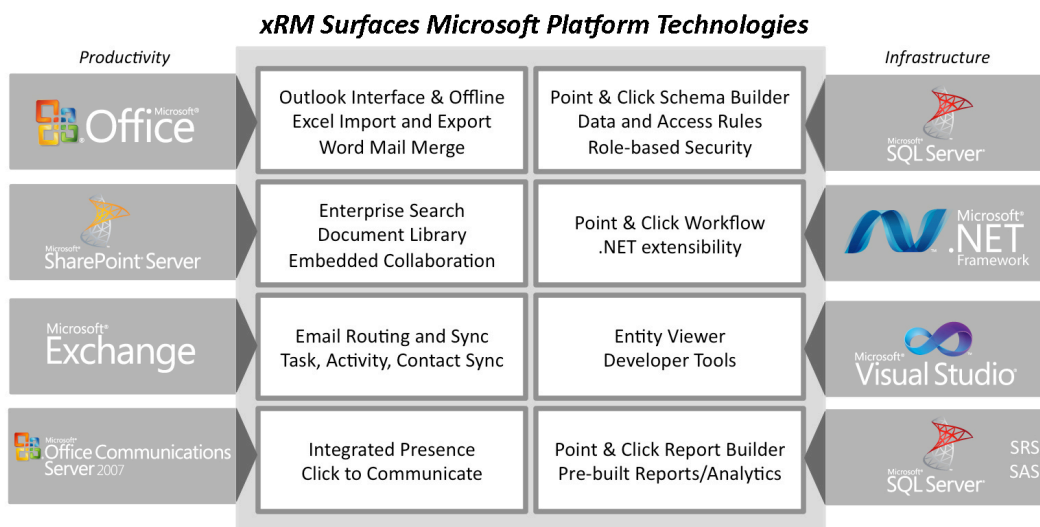
xRM Surfaces the Microsoft Application Platform

In addition to providing core packaged capabilities, the xRM framework also allows organizations to take advantage of the Microsoft Application Platform. xRM surfaces the capabilities of these productivity and infrastructure technologies and connects them as tools in the context of a relationship, providing the following benefits:

- Allows xRM customers to benefit from the Microsoft investments in these platform technologies.
- Enables business applications built with xRM to better fit within an organization's existing Microsoft technology environment.
- Helps organization to better use and maximize investments in Microsoft technologies.

By surfacing these features in the context of a relationship-management application, xRM enables these Microsoft platform technologies to support a broad set of relationship-management requirements.

xRM Surfaces Microsoft Platform Technologies

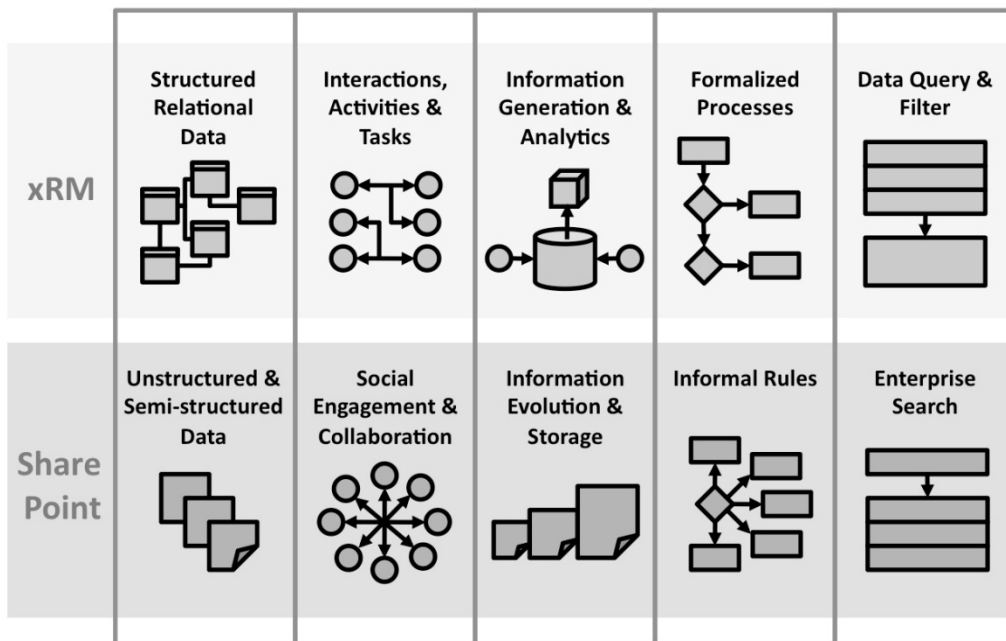| Productivity			Infrastructure
Office	Outlook Interface & Offline Excel Import and Export Word Mail Merge	Point & Click Schema Builder Data and Access Rules Role-based Security	SQL Server
SharePoint Server	Enterprise Search Document Library Embedded Collaboration	Point & Click Workflow .NET extensibility	.NET Framework
Exchange	Email Routing and Sync Task, Activity, Contact Sync	Entity Viewer Developer Tools	Visual Studio
Office Communications Server 2007	Integrated Presence Click to Communicate	Point & Click Report Builder Pre-built Reports/Analytics	SQL Server SRS SAS

SharePoint Complements xRM

Microsoft SharePoint is an integrated suite of collaboration and content management capabilities for information sharing across organizational boundaries. Many organizations are already familiar with SharePoint in its role as supporting a variety of collaborative business applications. SharePoint provides complementary capabilities to xRM for organizations seeking to manage customers and other customer-like relationships.

Most end-to-end relationship management scenarios require the ability to extend the business process and data components out to a broader set of resources, internally and externally. SharePoint, as an extension to Microsoft Dynamics CRM and xRM, improves an organization's ability to better manage these scenarios.
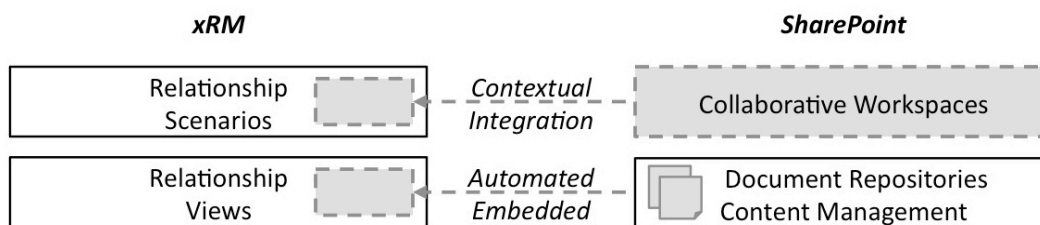
SharePoint Enhances xRM

Every organization will choose to manage their customers and other key relationships differently. xRM defines the core relationship data model and views as well as the business processes and relationship scenarios.

Within these relationship views and business processes, there is very often the requirement to track documents, manage content, or provide a collaborative workspace for internal teams to work together on a specific topic. These are required to be contextually aligned with the relationship they are supporting, such as agreement forms for a vendor, or contracts for a customer.

xRM surfaces SharePoint by enabling the automated provisioning and display of a document repository or collaborative workspace based on the attributes of a relationship, such as a repository that is created and embedded when a new vendor is created, or a document repository when a large sales opportunity is qualified.

xRM connects the SharePoint tools directly within the context of a relationship view or within a business process. This connects structured and unstructured data for a specific person, activity, or process.
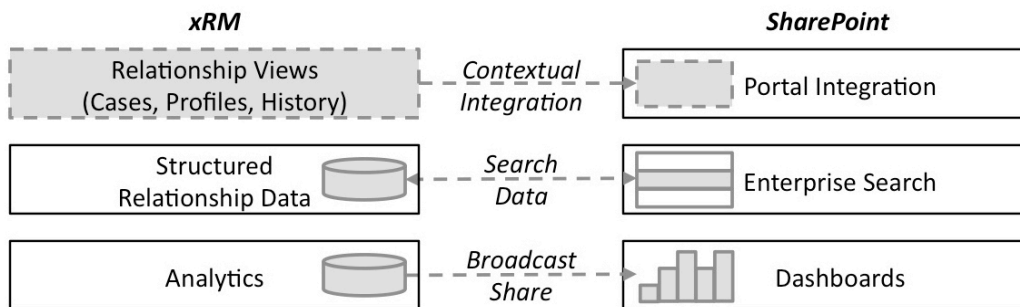
xRM Enhances SharePoint

In addition to the ways in which SharePoint can be embedded within xRM to support the management of relationship-oriented processes, there are several key scenarios in which xRM also enhances SharePoint implementations by delivering relationship data in a variety of ways for better discovery and information sharing. These connection points include:

1. **Access** – Access relationship data and process controls in SharePoint through Web parts for portal integration.
2. **Search** – Search and retrieve relevant relationship data within a SharePoint enterprise search.
3. **Share** – Share xRM data and reports through SharePoint dashboards.

Conclusion

The xRM framework is a tool that can help organizations create applications to better support customer-relationships or to manage other customer-like relationships. xRM surfaces a variety of Microsoft Application Platform technologies, including SharePoint, to better support these relationship scenarios. SharePoint is a complementary technology that can be embedded within the context of a relationship within xRM, and relationship data in xRM can be surfaced within SharePoint connecting structured and unstructured relationship-oriented data.