MARKETING

ANALYZE MARKETPLACE
Analyze market share & competition → Perform internal analysis → Research customer needs → Identify opportunities

DEVELOP MARKETING PLAN
Develop marketing strategy → Determine marketing channels → Create marketing plan and budget → Define individual campaign

CONDUCT CAMPAIGN
Select target audience → Run campaign and manage vendors → Process incoming leads → Monitor and achieve campaign

SALES

ESTABLISH SALES FORECAST
Collect forecast data → Create forecast → Distribute forecast

MANAGE SALES FORCE
Assign territories → Define sales processes → Establish sales targets → Monitor sales progress → Review and adjust sales targets

GENERATE SALES
Find new customers → Qualify leads → Assign leads → Contact new prospects → Up sell to existing customers → Report and track sales opportunities

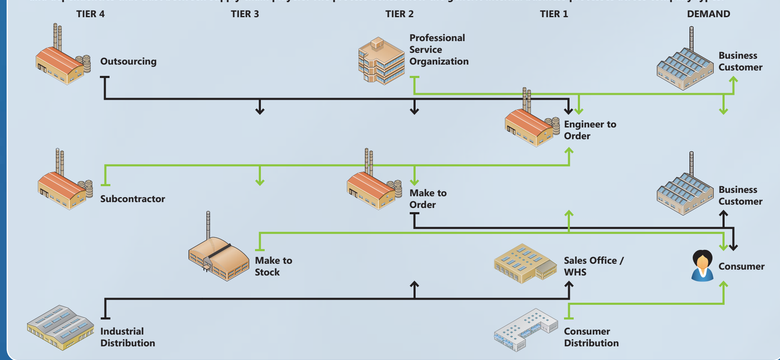
SCHEDULE CUSTOMER ACTIVITIES
Find new customers → Qualify leads

MAKE THE SALE
Respond to RFQ/RFP → Contact customer and gather requirements → Offer solution to customer → Close deal and implement

PROCESS SALES ORDERS
Process inquiry and quote → Receive, enter and validate orders → Manage back orders and exceptions → Complete invoice information

SUPPLY CHAIN PLAYERS

The supply chain players diagram outlines the different positions individual companies can have in the global supply chain and the possible interrelation and dependencies that exist between supply chain players. The process boxes show the generic internal business processes across company types.



DESIGN & ENGINEERING

PRODUCT DESIGN
Plan product quality and cost targets → Design product → Define material and product process → Product and production prototyping → Create documentation → Manage transition into production → Refine existing products → Manage product changes

PROJECT ENGINEERING
Plan product quality and cost targets → Detail specification of WBS → Engineer components → Identify critical resources of supply → Create documentation → Review and approve specifications → Manage changes to scope and product

OPERATIONS

OPERATION PLANNING
Identify and aggregate requirements → Resource availability planning → Master planning → Material requirement planning → Planning optimization → Communicate plans

PURCHASING
Identify sources and supply → Select final supplier and negotiate → Manage purchase requisitions and orders → Manage, receive, and verify discrepancies → Authorize supplier payment → Manage return goods

RECEIVING
Receive products → Verify products → Receive return products → Verify return products

QUALITY ASSURANCE
Inspect products → Inspect return products → Test products (sample) → Receive and inspect product at customer site → Outsourced inspection

WAREHOUSE OPERATIONS
Schedule warehouse activities → Move product → Warehouse services → Put-away → Picking → Pack and move to dispatch → Inventory counting

PRODUCTION
Finalize engineering → Schedule production activities → Issue materials → Produce and test incl. subcontracting → Release product for delivery

SHIPPING
Consolidate orders → Route shipments → Plan and build loads → Select carrier and rate shipments → Load vehicle, generate ship docs and ship product → Receive and verify products at customer site

The Microsoft Dynamics Customer Model describes how people in departments do work within and across organizations. It is the repository for all of the Microsoft Dynamics division's information and research regarding processes and people and is used to ensure that we are focusing on a common set of people and processes when we build software.

CUSTOMER SERVICE

PLAN SERVICE
Determine service performance → Forecast service levels → Identify people and resources → Schedule resource working hours

FULFILL SERVICE CONTRACTS
Develop and establish contract → Monitor and implement contract → Update and evaluate contract

HANDLE CUSTOMER ENQUIRIES
Receive customer inquiries and prioritize → Determine solution or assign service case → Follow up on customer case → Determine customer satisfaction level → Authorize customer returns

DELIVER SERVICE
Plan and allocate service orders → Prepare for service → Deliver service → Finalize and close order

HUMAN RESOURCES

MANAGE ORGANIZATION
Plan organizational elements → Manage work environment → Manage workforce → Offboard workers

RECRUIT WORKFORCE
Source jobs → Manage recruitment → Onboard workers

RETAIN WORKFORCE
Manage training → Manage KSAs → Manage time and attendance

MOTIVATE WORKFORCE
Manage performance → Manage benefits → Manage compensation

PROJECT MANAGEMENT

PROJECT MANAGEMENT
Initiate project → Schedule and manage resources → Manage project budget → Monitor progress and performance → Manage risks and issues → Manage project supplies

FINANCE

PAY
Pay for product or service → Prepay for product or service → Pay expense/ commission/ salary → Refund customers

COLLECT
Collect for product or service → Process customer prepayments → Collect other income → Collect supplier refunds

TREASURY MANAGEMENT
Deposit bank funds → Reconcile bank account → Transfer bank funds → Manage short-term investments → Manage long-term investments → Manage short-term borrowings → Manage long-term borrowings → Netting accounts

CAPITAL ASSETS
Capitalize asset → Transfer/ lend asset → Revalue asset → Split asset → Depreciate/ amortize asset → Dispose/ retire asset

CLOSE
Process closing transactions → Allocate costs/income → Revalue currency amounts → Prepare pre-closing reports → Close books → Prepare closing statements

Customer Model

PEOPLE, **DEPARTMENTS, WORK**

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