DIGITAL ILLUSTRATED
DESIGN TECHNOLOGY SUCCESS

10 Tips for Designing a Great User Experience in Dynamics CRM

Jukka Niiranen

2014-09-23

What am I going to talk about today?

DIGITAL ILLUSTRATED
DESIGN TECHNOLOGY SUCCESS

- How to make your users love CRM even more!
  - …Or hate it a bit less
- Show some design practices I (try to) follow when building CRM solutions
- Give you practical customization tips for the latest Dynamics CRM version
- Zero lines of code needed for all of these!

DIGITAL ILLUSTRATED
DESIGN TECHNOLOGY SUCCESS

Tip 1: Understand what User Experience design means

DIGITAL ILLUSTRATED
DESIGN TECHNOLOGY SUCCESS

*What is this "**UX**" thing anyway?*

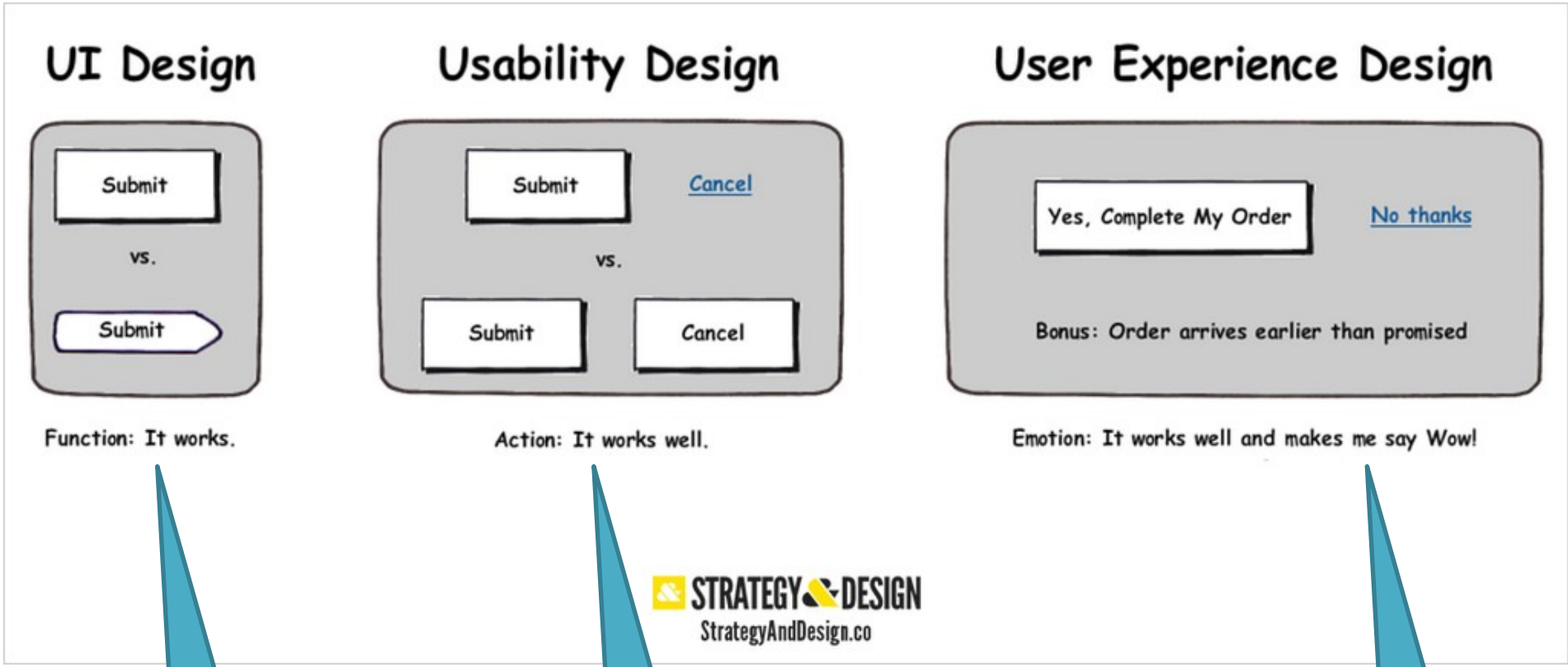
It’s not the same as User Interface design

How UX design makes software better

- *"User knowing how to use the system"* vs. *"system knowing what the **user** wants"*
- The human brain hates uncertainty – UX design can reduce uncertainty via:
  - Choice reduction
  - Visual cues
  - Adapting to user interaction
  - Following the user's natural process

User experience is about the whole process

DIGITAL ILLUSTRATED
DESIGN TECHNOLOGY SUCCESS



Looks good

Works well

Feels great!

Why user experience is important for CRM systems

DIGITAL ILLUSTRATED
DESIGN TECHNOLOGY SUCCESS

- The frequency of user pain
  - Online store customer: temporary pain caused during the commercial transaction
  - CRM system user: continuous pain through repeated encounters with the day-to-day tools
- The variety of use cases and user groups
  - People who don't share the same processes trying to use the same customer information system
  - Trying to deliver "something for everybody" will results in monolithic enterprise software

Why it's especially important with CRM 2013+

DIGITAL ILLUSTRATED
DESIGN TECHNOLOGY SUCCESS

- Higher user expectations due to relative ease of out-of-the-box functionality
- Simplified UI only delivers benefits when the actions visible are the relevant ones
- Tons of new components to configure = more potential for UX success AND failure

DIGITAL ILLUSTRATED
DESIGN TECHNOLOGY SUCCESS

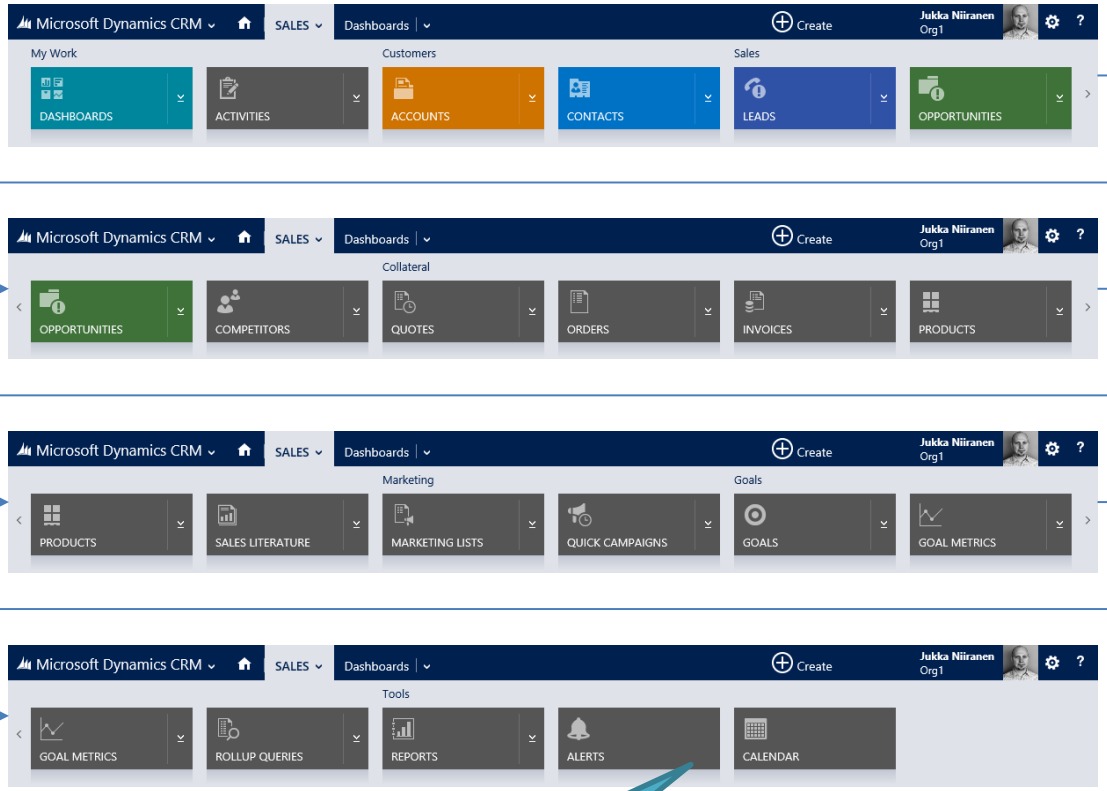
Tip 2: start from the navigation

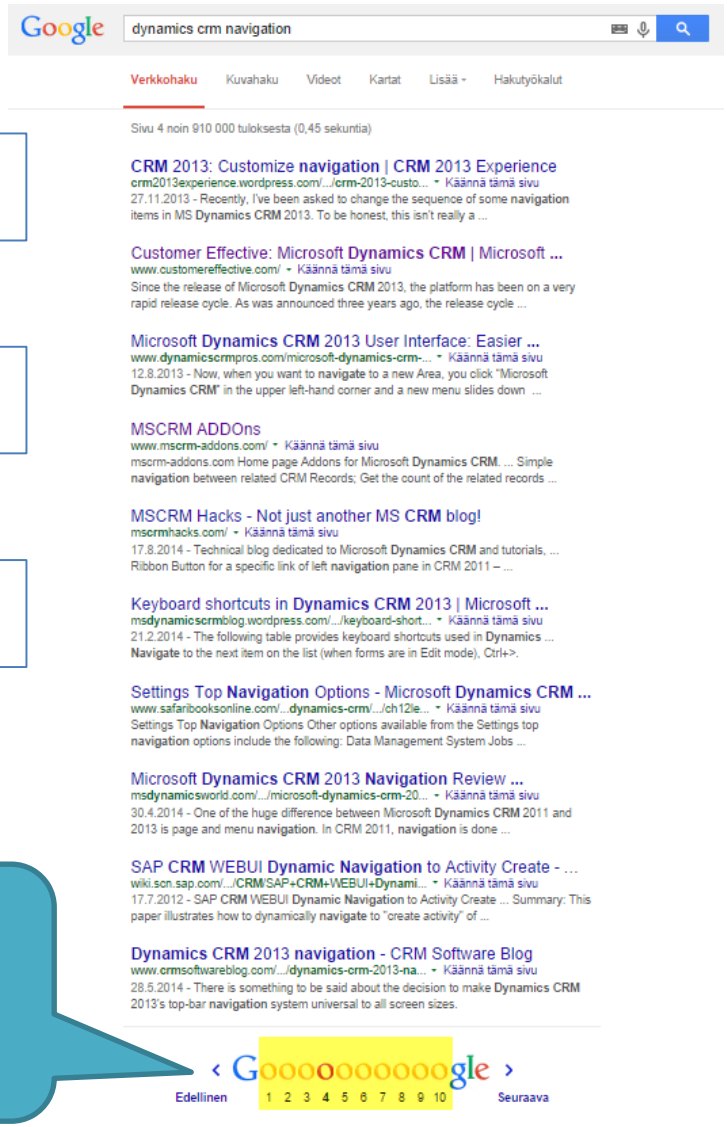
What changed with CRM 2013?

- Drivers for CRM 2013 UI re-design:
  - Single window = global navigation
  - Touch enabled = bigger icons
  - Content over UI chrome = hidden menus
- Casualties:
  - Much fever menus immediately visible
  - Nav Bar mouseover effect requires cursor precision
  - “Vanilla CRM 2013 SiteMap” vs. upgrade experience

Optimization in the world of Dynamics CRM

DIGITAL ILLUSTRATED
DESIGN TECHNOLOGY SUCCESS





Scrolling to the 4th page of CRM 2013 Nav Bar is like...

...Getting to the 4th page on Google. Not very likely.

Optimization tips for the new navigation

- SiteMap
  - Make each process specific area self-sustained
    - Kill the Workplace while you're at it
  - Don't be afraid to add more areas
  - Configure a "landing page" dashboard for each area
- Form Related Records ("the 4th level" in Nav Bar)
  - Remove menu items that already have a subgrid on the form
  - Prioritize the order based on presumed access frequency

DIGITAL ILLUSTRATED
DESIGN TECHNOLOGY SUCCESS

Tip 3: Save clicks with view design

What's #SavedYouAClick?

DIGITAL ILLUSTRATED
DESIGN TECHNOLOGY SUCCESS

Have to click through to a new page to get the information you want

The information you want, right there

CRM views and clicks

- Two reasons for clicking a record in a view
  - You want to access more information from it (minimum 1 click)
  - You need to check if it's the right record in the first place (1…N clicks)
- The best views **don't require a single click**
  - Columns provide the most important info
  - Sorting promotes the most relevant records
    - (Btw: 1 scroll/swipe effort < 1 click effort)

Default views that suck

DIGITAL ILLUSTRATED
DESIGN TECHNOLOGY SUCCESS

Marketing list members: which company/address/permission?

MARKETING LIST

Invitation to customer event

Locked	Last Used on (Date)	Owner*
No	--	Jukka Niiranen

Members

Full Name	Business Phone
Ari Rahkonen	+358 9 525501
Duke Duplicate	
J. Jones	
Jim Beam	
Jim Glynn (sample)	555-0109
Jimmy Beamish	
Joe Perry	804-762-9576
John Jones	
Jukka Niiranen	
Jukka Niiranen	
Kamlesh Gopalakrishnan	(022) 677 6776
Kim Douglas	
Linda Little	804-762-9576

Active Cases: who's the customer? Or case owner?

Active Cases

Case Title	Case Number	Priority	Created On	Business Unit (...
Complete overhaul required...	CAS-01001-D7L3J8	High	23.8.2013 10:00	Org1
Item defective on delivery (s...	CAS-01010-W7Q1...	High	23.8.2013 9:00	Org1
Maintenance time informatio...	CAS-01013-Z4H2G9	High	24.8.2013 0:00	Org1
Noise from product (sample)	CAS-01016-L6M2P4	High	24.8.2013 0:00	Org1
Service information required...	CAS-01027-L8G5F1	High	24.8.2013 0:00	Org1
Service required (sample)	CAS-01029-N0L9S9	High	23.8.2013 14:00	Org1
Defective item delivered (sa...	CAS-01005-Q3G1Y3	Low	14.8.2013 10:00	Org1
Information on the product (...	CAS-01008-J4D2V0	Low	18.8.2013 0:00	Org1
Maintenance information (sa...	CAS-01011-Z2L4L9	Low	19.8.2013 7:00	Org1
Missing parts (sample)	CAS-01014-T8F5Z1	Low	24.8.2013 0:00	Org1
Product feature information...	CAS-01020-F3C2W4	Low	22.8.2013 10:00	Org1
Service requested (sample)	CAS-01028-W2X0...	Low	24.8.2013 0:00	Org1
Average order shipment tim...	CAS-01000-R5W9H1	Normal	23.8.2013 16:00	Org1
Contact information request...	CAS-01002-V8Q8R8	Normal	21.8.2013 9:00	Org1
Contact information require...	CAS-01003-F5H4T8	Normal	24.8.2013 0:00	Org1
Faulty product catalog (sam...	CAS-01007-G2T8W9	Normal	24.8.2013 0:00	Org1
Need help (sample)	CAS-01015-Z0Z2W1	Normal	22.8.2013 12:00	Org1

Price list items: where's the product's price????

Price List
Finland 2014

Price List Items **Product Price List - Price List**

Product	Unit
Dynamics CRM Online Additi...	Instance/month
Dynamics CRM Online Additi...	Instance/month
Dynamics CRM Online Additi...	GB/month
Dynamics CRM Online Basic	User/month
Dynamics CRM Online Essential	User/month
Dynamics CRM Online Profes...	User/month
Dynamics CRM Online Suppo...	User/month
Office 365 Enterprise E1	User/month
Office 365 Enterprise E2	User/month
Office 365 Enterprise E3	User/month
Office 365 Enterprise E4	User/month

1 - 11 of 11 (0 selected)

Custom views that suck

DIGITAL ILLUSTRATED
DESIGN TECHNOLOGY SUCCESS

Microsoft Dynamics CRM | SALES | My First Entity

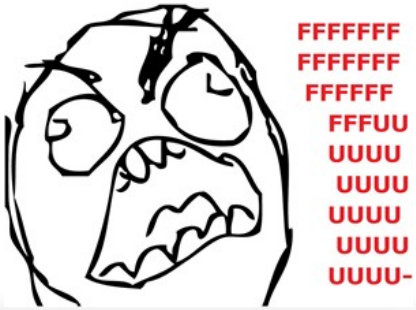
+ NEW | DELETE | COPY A LINK | EMAIL A LINK | RUN REPORT | EXPORT TO EXCEL

Active My First Entity

Name	Created On	Owner
	18.9.2014 21:15	Jukka Niiranen
	18.9.2014 21:15	Jukka Niiranen
	18.9.2014 21:15	Jukka Niiranen
	18.9.2014 21:15	Jukka Niiranen
	18.9.2014 21:15	Jukka Niiranen
	18.9.2014 21:15	Jukka Niiranen
	18.9.2014 21:15	Jukka Niiranen
	18.9.2014 21:15	Jukka Niiranen
	18.9.2014 21:15	Jukka Niiranen
	18.9.2014 21:15	Jukka Niiranen
	18.9.2014 21:15	Jukka Niiranen
	18.9.2014 21:15	Jukka Niiranen
	18.9.2014 21:15	Jukka Niiranen
	18.9.2014 21:15	Jukka Niiranen
	18.9.2014 21:15	Jukka Niiranen
	18.9.2014 21:15	Jukka Niiranen
	18.9.2014 21:15	Jukka Niiranen
	18.9.2014 21:15	Jukka Niiranen

1 - 100 of 100 (0 selected)

All # A B C D E F G H I J K L M N O



ACCOUNT

A. Datum Corporation (sample)

My First Entity Associated View

+ ADD NEW MY FIRST ENTITY | ADD EXISTING MY FIRST E... | BULK DELETE | CHART PANE

Account	Owner	Created On	Name
A. Datum Corporation (...	Jukka Niiranen	18.9.2014 21:15	
A. Datum Corporation (...	Jukka Niiranen	18.9.2014 21:15	
A. Datum Corporation (...	Jukka Niiranen	18.9.2014 21:15	
A. Datum Corporation (...	Jukka Niiranen	18.9.2014 21:15	
A. Datum Corporation (...	Jukka Niiranen	18.9.2014 21:15	
A. Datum Corporation (...	Jukka Niiranen	18.9.2014 21:15	
A. Datum Corporation (...	Jukka Niiranen	18.9.2014 21:15	
A. Datum Corporation (...	Jukka Niiranen	18.9.2014 21:15	
A. Datum Corporation (...	Jukka Niiranen	18.9.2014 21:15	
A. Datum Corporation (...	Jukka Niiranen	18.9.2014 21:15	

1 - 53 of 53

Design views that minimize the clicks

- Sorting
  - Alphabetic sorting almost never makes sense
  - Showing last modified/created records almost always makes sense
- Columns
  - Include relevant fields for visual scanning and manual sorting
  - Synchronize column order (and width!) across your views as much as possible
  - Avoid using lookup fields to other entities as first columns (because the click will not take you to the record you expected)

DIGITAL ILLUSTRATED
DESIGN TECHNOLOGY SUCCESS

Tip 4: Make your forms more responsive

Why so many entity forms suck

DIGITAL ILLUSTRATED
DESIGN TECHNOLOGY SUCCESS

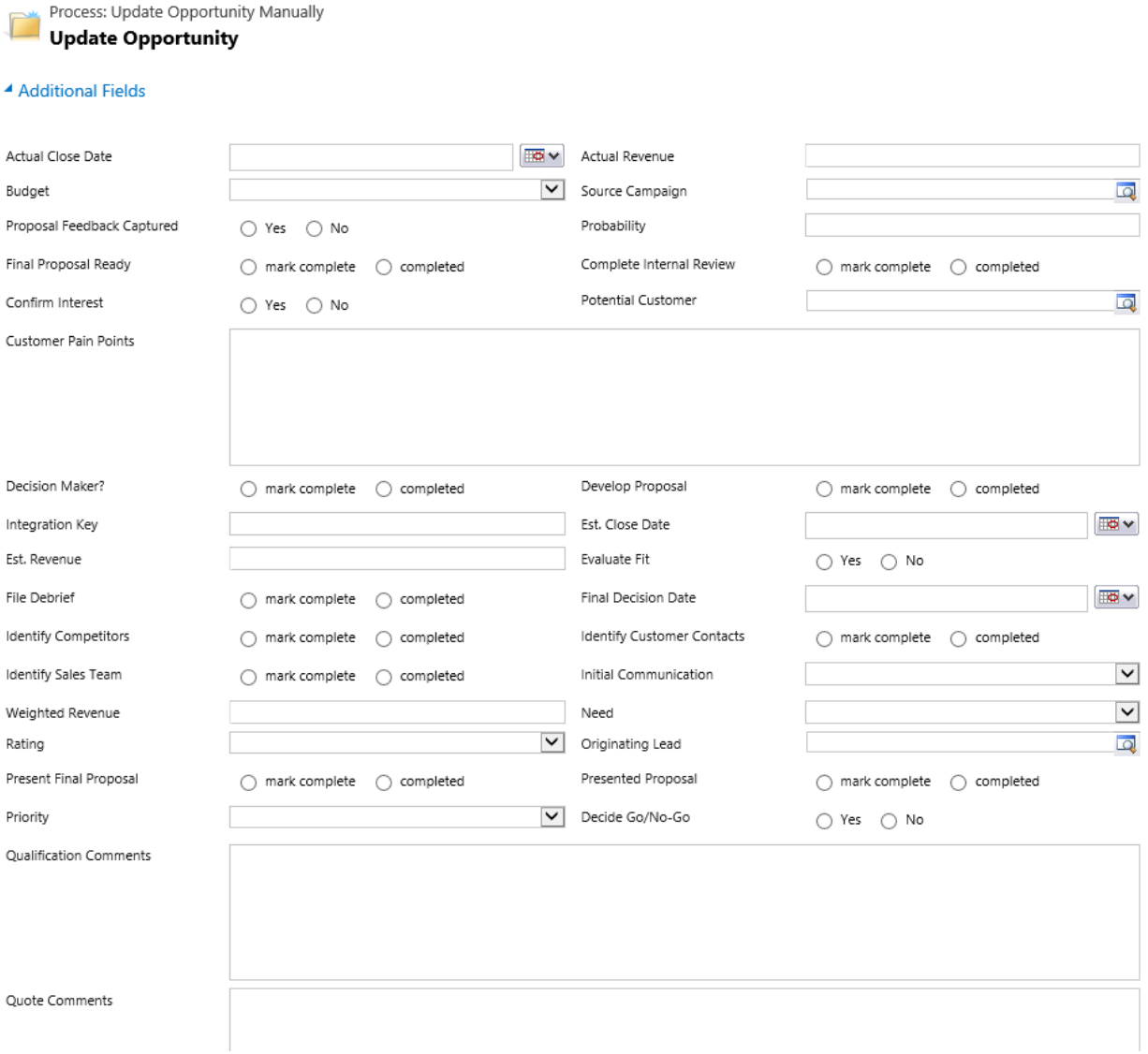
- The eternal dilemma:
  - Process owners would like to have all the data
  - Process actors would like to enter none of the data
- The varying relevance:
  - Some information will never be known by the user upon record create
  - Some information is only relevant in conjuction with other information
  - Some information becomes irrelevant as the process moves forwards
- Entity attributes (data model) and entity presentation (UI) are two different design areas, because the presentation layer has a **time dimension**

Some things are just better kept hidden

DIGITAL ILLUSTRATED
DESIGN TECHNOLOGY SUCCESS

These are all the **standard** hidden fields for the opportunity entity

Imagine you were being trained to use a new CRM application. Would you want to see a form like this after clicking *"add new record"*?



Use Business Rules to trim down the forms

- Show/hide fields for new/existing record forms
  - Conditions for Created On/By field
- Hide entire sections by setting all fields as hidden
- Target Business Rules to specific forms via hidden fields
  - The rule will only run when all fields are present

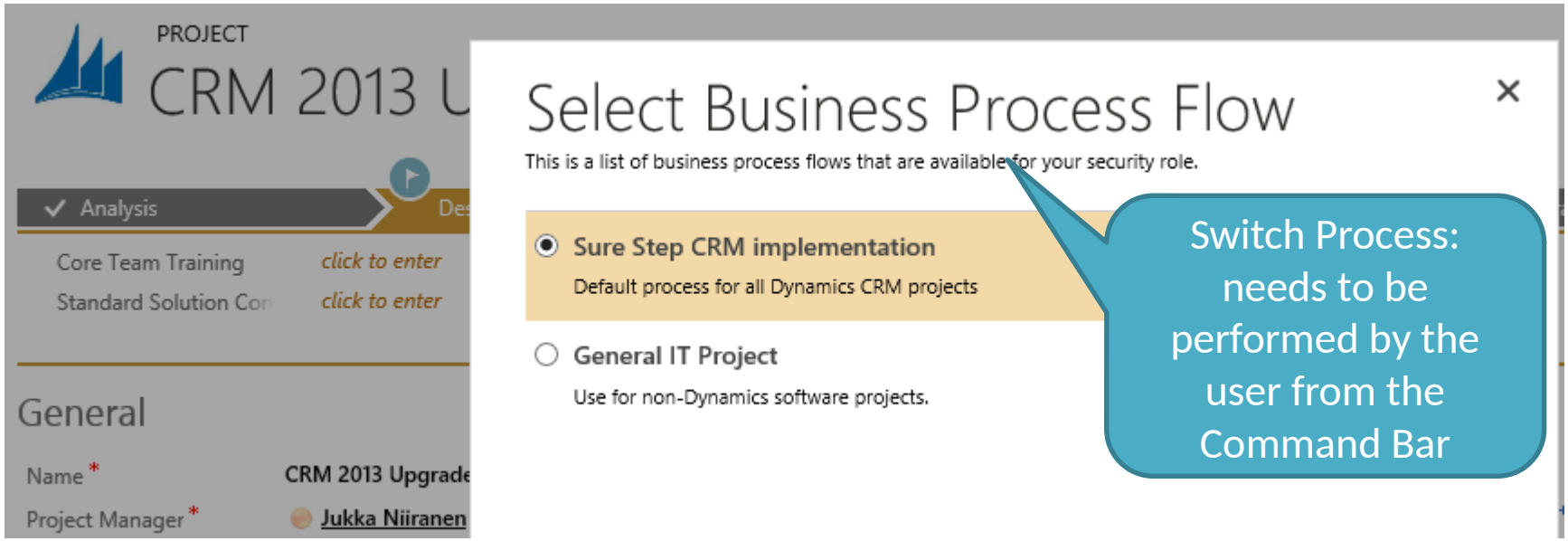
DIGITAL ILLUSTRATED
DESIGN TECHNOLOGY SUCCESS

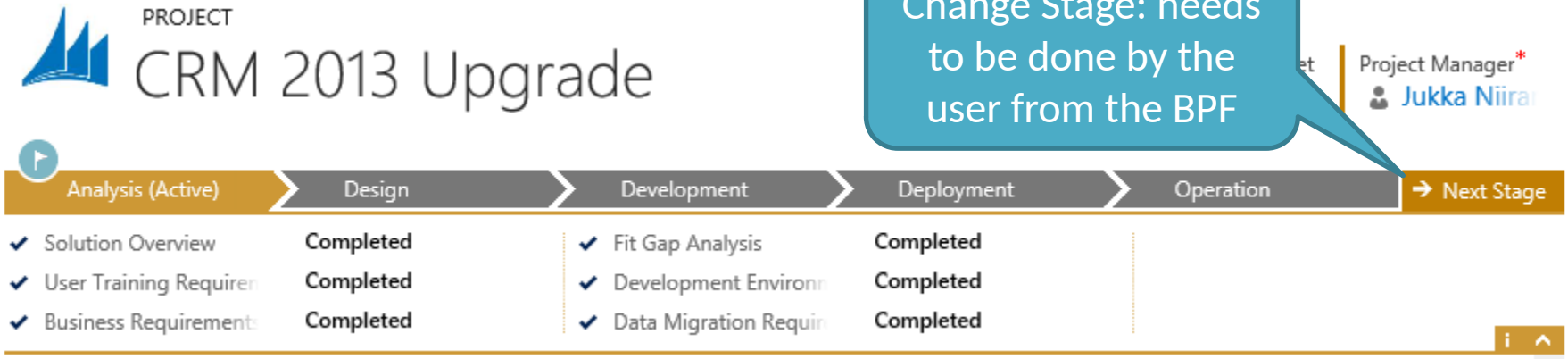
Tip 5: Automate the business process (flow)

The truth about Business Process Flows

- Business Process Flows (BPF) are the opposite of workflows:
  - Front & center in the UI vs. behind the scenes
  - All manual actions vs. fully automated process
- Business Process Flows alone are just a process map
  - They show you what should be done next
  - They don't know when it's time to move on

The manual steps





Tips for smarter processes

DIGITAL ILLUSTRATED
DESIGN TECHNOLOGY SUCCESS

- Automate the process selection via workflows
  - Requires a custom workflow activity, Google for "*dynamics crm workflow essentials*"
- Control process stage changes
  - Run a workflow from *stageid* & *stepid* field changes to trigger further actions
- Use process & stage specific Business Rules to trim the forms
  - Copy the stage value onto a custom field, so you can reference it via Business Rule conditions

DIGITAL ILLUSTRATED
DESIGN TECHNOLOGY SUCCESS

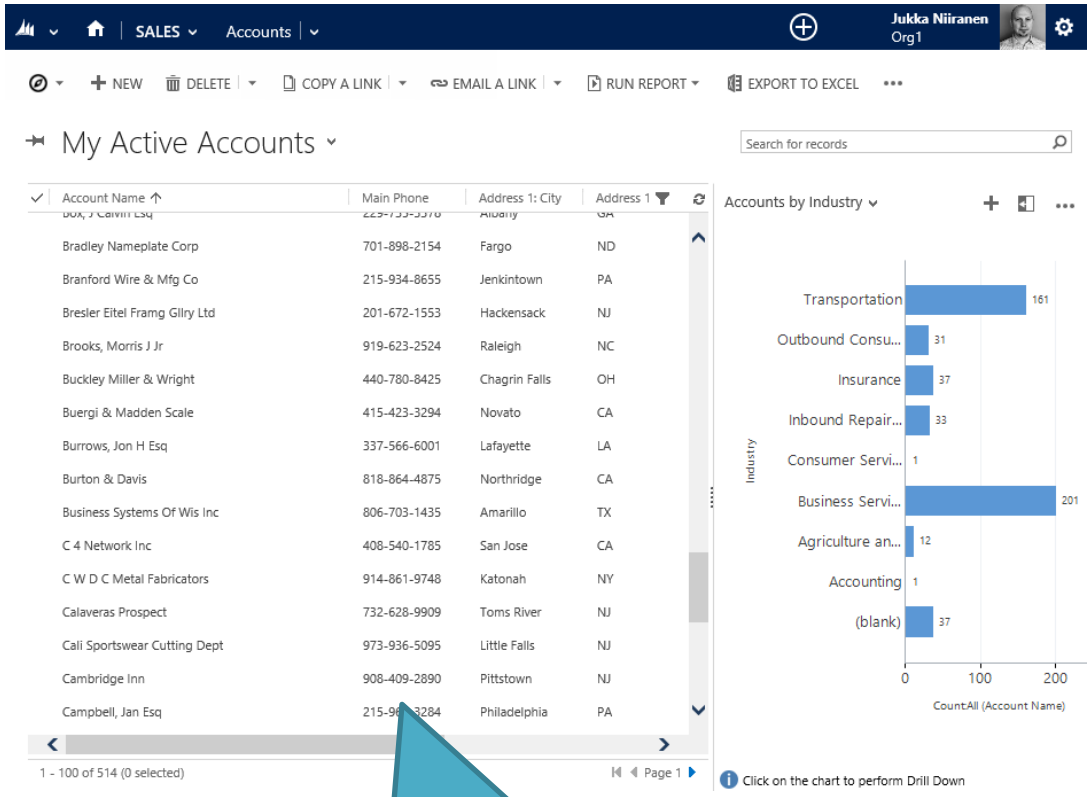
Tip 6: Show the user what's going on

CRM: is it just for storing records?

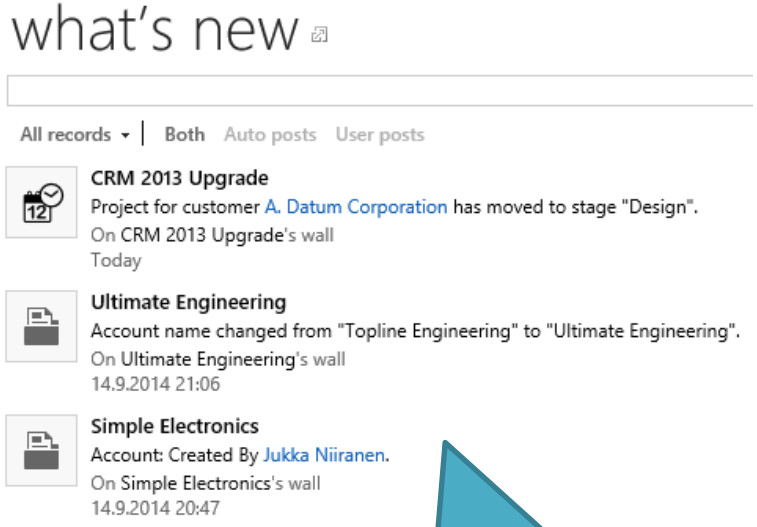
- CRM solution design is often focused on planning what information needs to be *captured* for records (i.e. data entry) and how it is to be *queried* (views, charts, reports)
- This record centric approach is not very good at surfacing the *actions* performed by CRM users
- Yet these actions are a key component when users evaluate the validity and relevance of the data
  - Account created today vs. last updated three years ago: which data would you trust more?
  - Primary contact for customer account changes: will the account team discover this information on their own?

Static vs. dynamic information system

DIGITAL ILLUSTRATED
DESIGN TECHNOLOGY SUCCESS



Are we building just a static, glorified address book?



Or can CRM tell the users what is going on RIGHT NOW?

Surfacing actions performed on CRM data

- Show the timestamps on who created and modified the record, and when
- Identify events that are important enough to raise a special flag, then use a workflow to write the data (activity feed post, note, custom field)
- Always provide at least one view per entity that shows the latest created/modified records at the top

DIGITAL ILLUSTRATED
DESIGN TECHNOLOGY SUCCESS

Tip 7: Don’t forget your clients

Our twisted reality

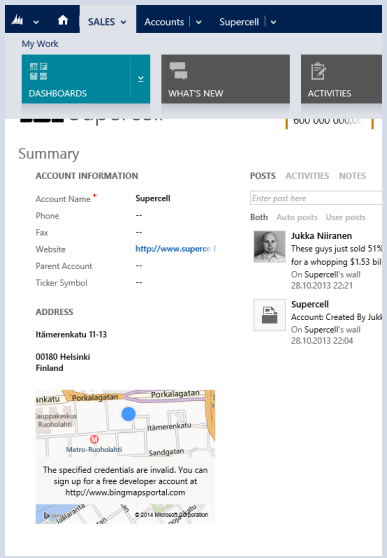
DIGITAL ILLUSTRATED
DESIGN TECHNOLOGY SUCCESS

- System customizers live inside the web client, because opening CRM organizations with other clients requires jumping through hoops
- For the past ~10 years CRM Outlook client was the main selling point, today it's the mobile apps
- CRM 2013 web client looks nice & fresh, works great for demos and is the only practical tool for customization work
- So, what's the problem?

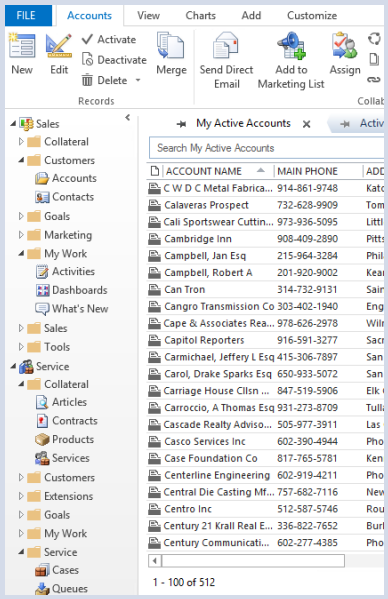
CRM is not just a browser application

DIGITAL ILLUSTRATED
DESIGN TECHNOLOGY SUCCESS

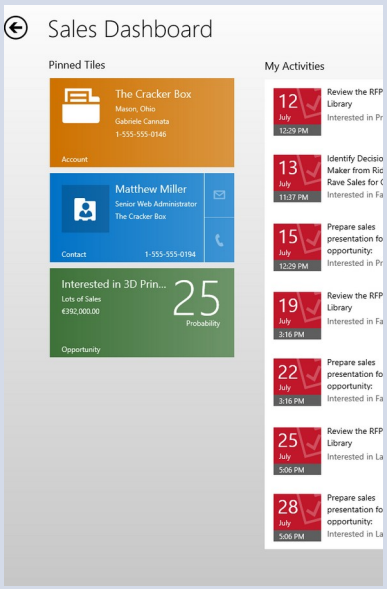
Web



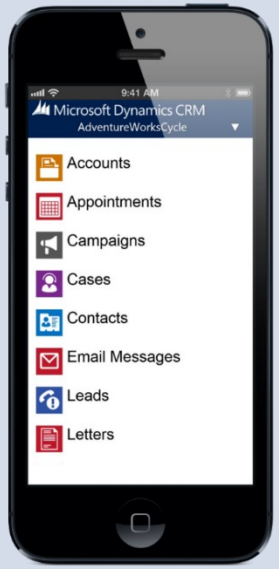
Outlook



Tablet



Phone



Know the limitations of each client

- Outlook
  - Folder based navigation & popup windows
  - Reading Pane: single column form with multi-column subgrids
- Tablet
  - Uses same form definition as web client, single form, “single row” rendering, first 75 fields or 5 tabs
- Phone
  - Separate Mobile form, single column, no scripts or Business Rules
  - No process specific actions available, just “CRUD”

DIGITAL ILLUSTRATED
DESIGN TECHNOLOGY SUCCESS

Tip 8: Sweat the little things

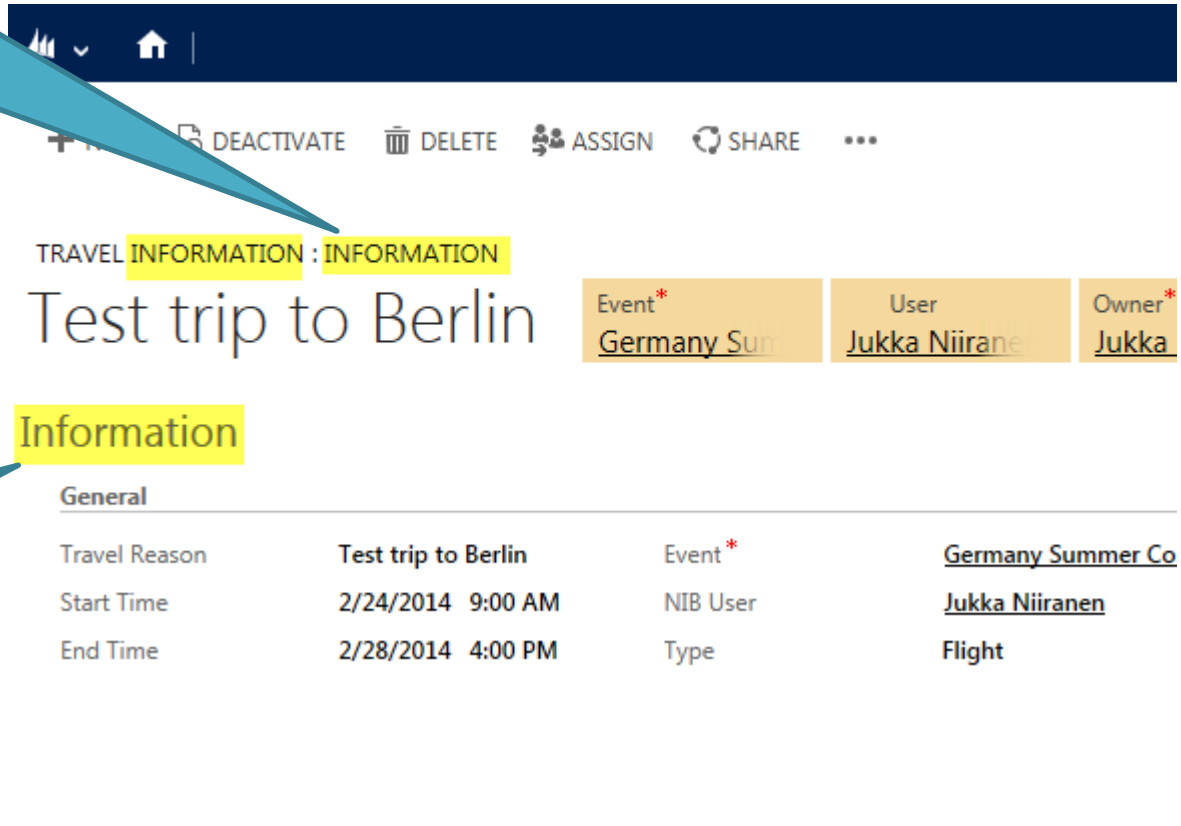
What really matters

- The longer you work with CRM, the easier it is to become blind to the small glitches
- The efforts of the customizer are not necessarily in any proportion to the significance of a design detail
  - An expensive custom plugin may perform an action that the users will never actually notice
  - A single choice of wording may frustrate and confuse the users every time they use the system
- “People use what works – well” (will.i.crm)

Do you even notice these details anymore?

DIGITAL ILLUSTRATED
DESIGN TECHNOLOGY SUCCESS

Do all of your updated CRM forms or custom entity forms say “information” in the header?



Do you have useless tab labels at the start of your form, stealing screen estate?

Details that are A) important and B) cheap to fix

DIGITAL ILLUSTRATED
DESIGN TECHNOLOGY SUCCESS

- Field names:
  - Avoid redundancy: “Case Title” vs. “Title”
  - Group fields with (short) prefixes to help usage in Advanced Find
- View names: think about the sorting
- Field descriptions: provide a tooltip for users
- Custom entities: icons are not optional

DIGITAL ILLUSTRATED
DESIGN TECHNOLOGY SUCCESS

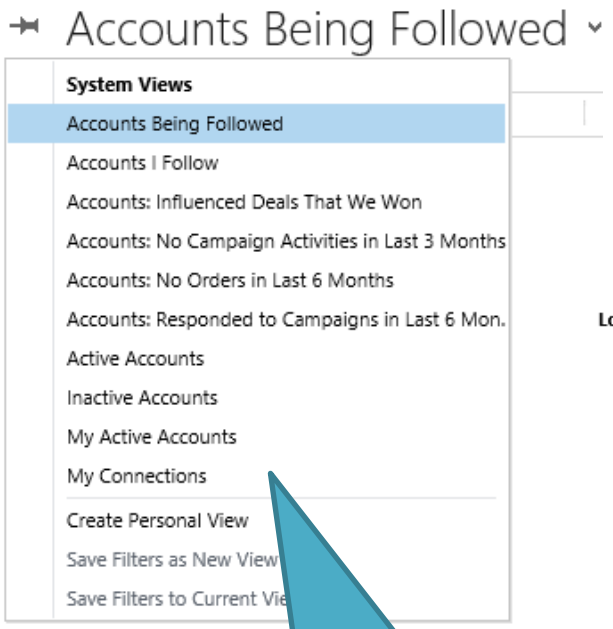
Tip 9: Clean up after you're done

The messy construction site of CRM

- Rome wasn't built in a day, neither was your CRM
- Rome had a sanitation system, but does your CRM system have one?
- The system customization process usually starts with the *"add more stuff"* stage
- You should always include a *"take stuff away"* stage into that process, too

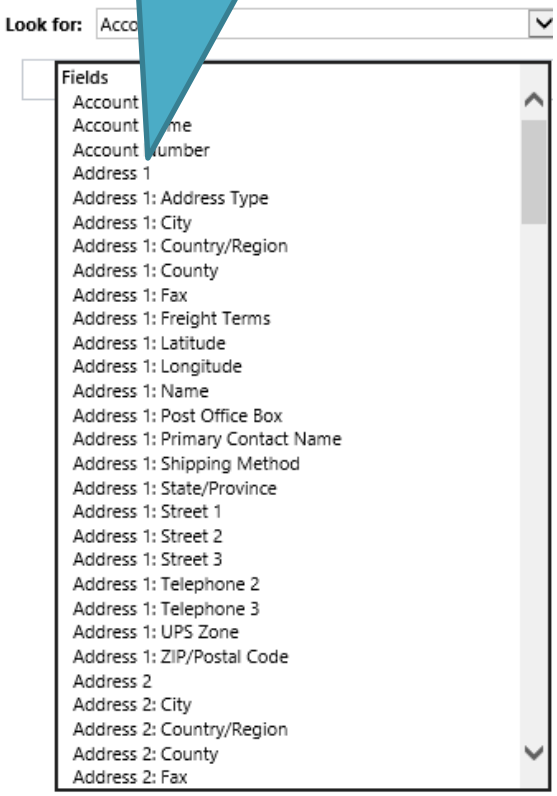
CRM comes with clutter right out of the box

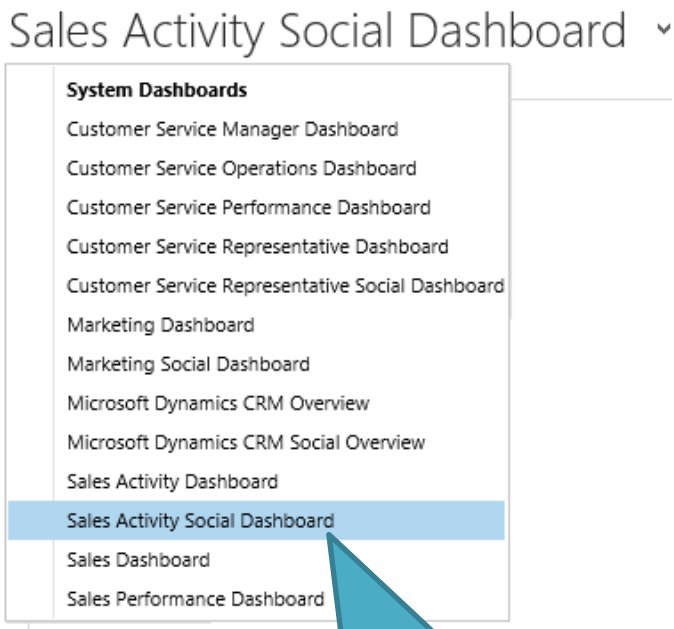
DIGITAL ILLUSTRATED
DESIGN TECHNOLOGY SUCCESS



Do all these account views make sense for your business?

Are you really using that many address fields?





Why do you need “social” vs. “non-social” dashboards?

Clean up that clutter

DIGITAL ILLUSTRATED
DESIGN TECHNOLOGY SUCCESS

- Hide unused fields from Advanced Find
  - Use XrmToolBox to find fields not on forms
- Remove unused fields from forms
  - Use CRM Data Detective for quick statistics
- Deactivate unnecessary default components
  - Views that don't make sense to you
  - Charts using fields that you are not using
  - Dashboards without an audience

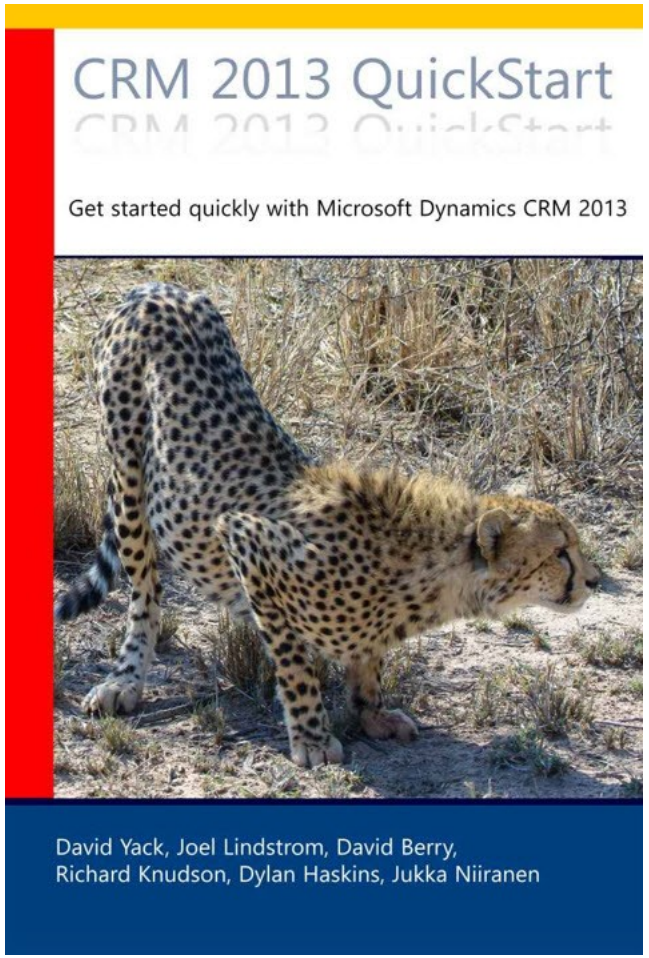
DIGITAL ILLUSTRATED
DESIGN TECHNOLOGY SUCCESS

Tip 10: Get even more tips!

CRM 2013 QuickStart Book

DIGITAL ILLUSTRATED
DESIGN TECHNOLOGY SUCCESS

- What's new/different in the CRM 2013 version
- For people who already know something about a previous Dynamics CRM version
- 11 chapters of content from 6 CRM MVPs
- **Special 20% discount code!**
  - JukkaNiiranenCRMQuickStartEBook
  - http://www.crm2013quickstart.com/



Recap

My 10 tips for better CRM user experience

DIGITAL ILLUSTRATED
DESIGN TECHNOLOGY SUCCESS

1. Understand #UX
2. Start from the navigation
3. Save clicks with view design
4. Make your forms more responsive
5. Automate the business process (flow)
6. Show the user what's going on
7. Don't forget your clients
8. Sweat the little things
9. Clean up after you're done
10. Know where to go for more tips!

Thank you for listening!

You can follow me at: https://twitter.com/jukkan

…or read my Surviving CRM blog: http://niiranen.eu/crm/