

Blog posts from the past & what we know now

# Dynamics CRM in 2010: 5 year retrospective

# About this retrospective

- My "Surviving CRM" blog has been covering topics related to Microsoft Dynamics CRM for a good few years now
- At the end of year 2015, I decided to have a look back at some of the writings from 5 years ago, to analyze A) what new technologies & trends I considered to be noteworthy at the time, and B) how the future turned out for each of these
- In the slides you'll find an excerpt from the original post + a link to the article (in top right), alongside my notes on the subject 5 years later
- What's the point of all this? Simply gaining perspective on how the software world around us works, so that we can better evaluate the news we encounter and make more educated guesses on what this world will look like tomorrow

# What did I blog about in 2010?

Cloud

Mobile

Portals

MS Office

Social

Business app  
development/XR  
M

Outlook

SharePoint

ISV ecosystem

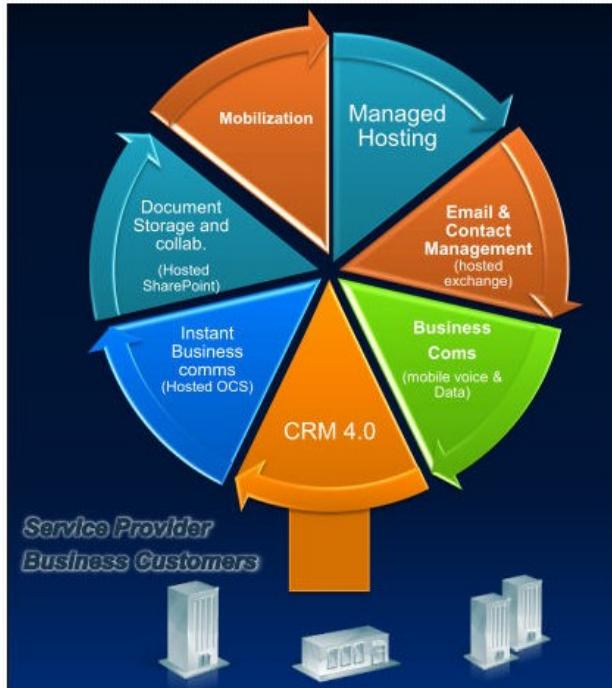
Solution  
management

Charts &  
dashboards

MSFT  
organization

# CRM, the gateway drug for the cloud?

Jan 29th, 2010:  
“Driving towards the cloud through the CRM mist”



Will this gateway theory work in reality and bring new business to Microsoft? If anything, it does at least sound like a plan where the phases are in the correct order. There would appear to be fairly little functional benefits in moving existing monolithic services like Exchange into the cloud, but going there with a customizable and extensible platform such as Dynamics CRM offers a whole lot more opportunities. As long as CRM Online manages to build an attractive ecosystem around the core product and pull in services that demonstrate the benefits of building integration in the cloud, as opposed to behind the firewalls, it has a great chance for stealing the momentum in business application development.

- In 2010 Microsoft started their “*we’re all in*” campaign for cloud as the focus point for their future business, and CRM was seen as a natural first point of entry for businesses
- New Dynamics CRM deployments sure did move quickly to the cloud once Online became available globally in 2011
- Migration of existing on-prem instances was a bit slower, as MS didn’t build any tool/service to accelerate these projects
- Announcement of Office 365 later the same year set the big wheels in motion for MS business cloud products
- It took until late 2015 before CRM Online was sold as add-on license to Office 365, though

# "Mobile" CRM, a bit like "smart" phones

Feb 7th, 2010:  
"Dynamics CRM Online: what does it look like?"

## Mobile Express

Ok, this is not a feature limited to only CRM Online, but since I hadn't previously had the chance to use a CRM server that could be accessed directly through the web, I wanted to test how the Mobile Express client has evolved since the days of 3.0.

**How to access Mobile Express on your mobile device**

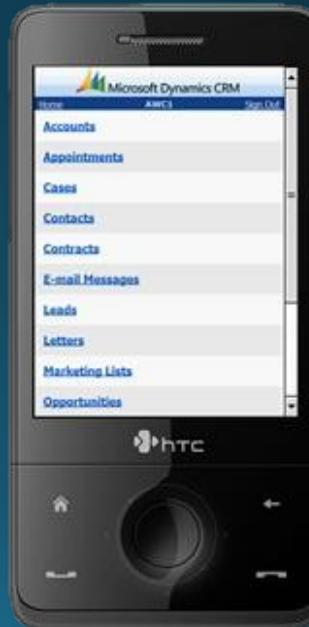
Back

You must have an Internet connection to use Mobile Express.

1. From your mobile Web browser, go to <http://crm.dynamics.com/>.
2. Sign in with your Windows Live ID.
3. From the home page, start using Microsoft Dynamics CRM Online.

What's the verdict? Well, let's just say that it's "a nice try" and better than nothing, but there's still a long and winding road for Microsoft to travel, if they intend to reach a mobile user experience that would somehow be at least close to what is delivered through the web and Outlook clients. The whole process was full of pitfalls that shouldn't really exist: from trying to desperately log into the service with a Windows Mobile phone (HTC Touch Pro2, with Opera as the default browser), fighting with the useless default customization configurations, to the point of eventually realizing how the relational data model of CRM is only partially supported in Mobile Express. There could be some specific use cases where the mobile client would serve its purpose, but as a CRM system admin I might hesitate on promoting these to the CRM users who don't understand the limitations.

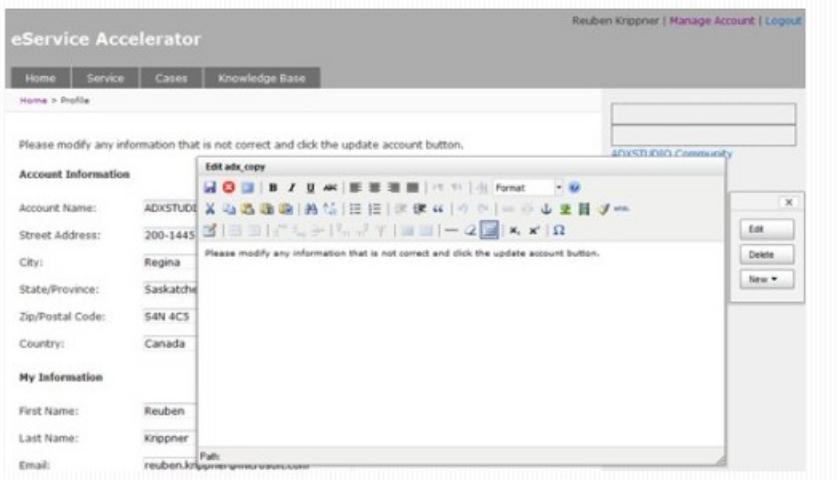
- In 2010 customers started having iPhones and other modern smartphones in their pockets, so mobile access to CRM became a hot topic
- MS was offering Mobile Express, a lightweight web edition of CRM as their in-house solution for mobility
- Designed for Blackberry/Symbian style keypad navigation, the user experience on a touch screen device left a lot to be desired, not to mention the customization options (or lack of them)
- After almost acquiring an ISV solution, MS decided to build their own mobile client (MoCA) application for CRM from the ground up
- In mid-2015 the true smartphone app for accessing rich Dynamics CRM functionality finally became available for CRM Online customers



May 2nd, 2010:  
“Greetings from Microsoft  
Convergence 2010 in Atlanta – Part 1”

# Using CRM as your CMS, is that really a thing?

A good example of the benefits of running your Dynamics CRM in the cloud instead of your own server behind the firewall are the recently announced portal accelerators for CRM Online. The package that initially includes Event, eService and Partner Management accelerators is presumably going to offer a full Portal Development Toolkit (see the MS Partner Network [presentation for May 2010 release](#)). What you effectively get is a CMS system for building websites with dynamic content straight out of your Dynamics CRM Online database, with out-of-the-box content hosting and CRM integration running on Azure. There have already been products like this offered by ISV's like Adxstudio before (who, I believe, are also behind the portal accelerator development), but providing it as an extension to CRM Online can lower the barrier to such a level that I'm sure many customers cannot resist the temptation to try it out. Considering that there is no External Connector license model for CRM Online (like there is for on-premises installations), the total cost of having the basic web + CRM functionality could potentially be highly attractive for many SMB's.



- In Convergence 2010 the concept of building portal websites on top of Dynamics CRM was introduced
- Later on it was bundled into CRM 2011 as Portal Accelerator framework, essentially a “lite” version of Adxstudio Portals
- Despite the obvious needs for having external parties interact with CRM data in many scenarios, customers & partners were slow to adopt this XRM based architecture for their web portals over traditional integration of back/frontend systems
- In 2015 Microsoft bought Adxstudio and decided to make these portals the foundation for their customer engagement product offering

May 2nd, 2010:  
"Greetings from  
Microsoft  
Convergence 2010 in  
Atlanta – Part 1"

# Better Together: CRM and SharePoint... or Excel?

Since the Office 2010 wave of products was released very recently, there was of course some promotion of SharePoint 2010 and how it can be "better together" with CRM. On a practical level there wasn't too much to show about the synergies, as the demos were along the lines of showing SharePoint search results in an account form iFrame. Useful, but hardly revolutionary. Many vendors are promoting their automatic document library integration products, but if you want my opinion, I'd say you should wait to see what CRM 5.0 (edit: make that [Dynamics CRM 2011](#)) will offer on that front before committing to ISV add-ons. All in all, the best demos related to Office 2010 were actually the [PowerPivot](#) examples of building dynamic data cubes directly on the client PC instead of relying on SQL Server Analysis Services. Very cool stuff, wish I could convince our corporate IM department to upgrade my Excel so I'd be able to try some of that "personal BI" magic...

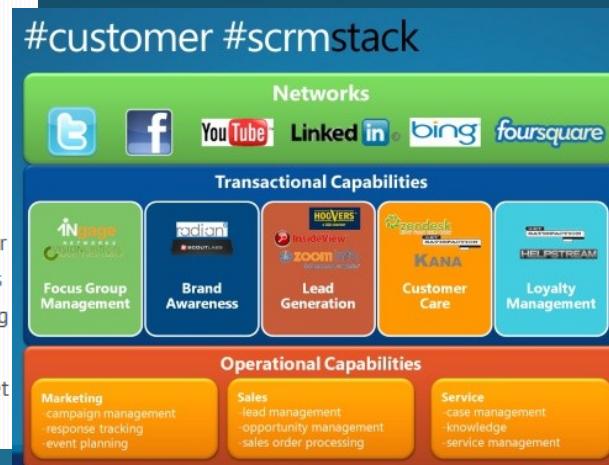
- 2010 may have been the year of "peak SharePoint", at least in the commercial priorities of Microsoft
- Finding ways to push SP in every demo was top priority for MS, but these collaboration tools remained fairly distant from structured CRM systems in many practical implementations, due to factors like system ownership and required development effort
- Greater synergies were seen in the BI capabilities that at the time were packaged into Office product line
- Unbundling BI from Office turned out to be the strategy MS would later choose in order to let Power BI evolve into the next generation cloud BI solution we see today

# Making Microsoft Social

Returning to the social customer stack, it was quite delightful to see that Microsoft has been able to grasp the fact that the future of applications needed for any company to adopt a holistic practice of SCRM activities is not something they alone can engineer by themselves at Redmond. Maybe this can be partially attributed to the phenomena uncovered by the recent study by NetProspect, which found that [Microsoft employees were the most social media-savvy in the world](#). If the company is able to transform this savviness into products and services that encourage coexistence and integration of applications from outside the Microsoft stack, then all those hours wasted by MS employees in reading each other's Facebook status updates may actually deliver a nice ROI in the long run. Heck, maybe they'll even survive beyond the looming death of the desktop operating system.

What does it all mean for Dynamics CRM? Well, your guess is as good as mine, but I believe the business applications world will be moving towards the app store model that we've seen grow quite popular in the consumer mobile arena. In order to get there, it's going to require a little bit of work from Microsoft to make this transformation possible, but I see them taking the steps into right direction. With the Solution Management features to be introduced in CRM 5.0 (*edit: now branded as [Dynamics CRM 2011](#)*), the possibilities for creating real application packages that a CRM using organization could easily consume will be at a whole new level. With its Azure platform, Microsoft has a natural expansion tank in place to facilitate the growth of its CRM customers' solutions to become a network of applications.

Even though it is somewhat disappointing that there doesn't appear to be any [Chatter](#) type of functionality built into the upcoming version of CRM (guess you'll need to use SharePoint 2010 for that) to foster the social enterprise approach for transparency on CRM customer data, perhaps this isn't the most important thing Microsoft to focus on. Social CRM will not be a module you can plug into your existing application, it's about being able to support whatever new methods of communication and collaboration emerge "out there" between companies and their customers. Get the right pieces in there and the ecosystem may just invite you to be a part of the conversation.

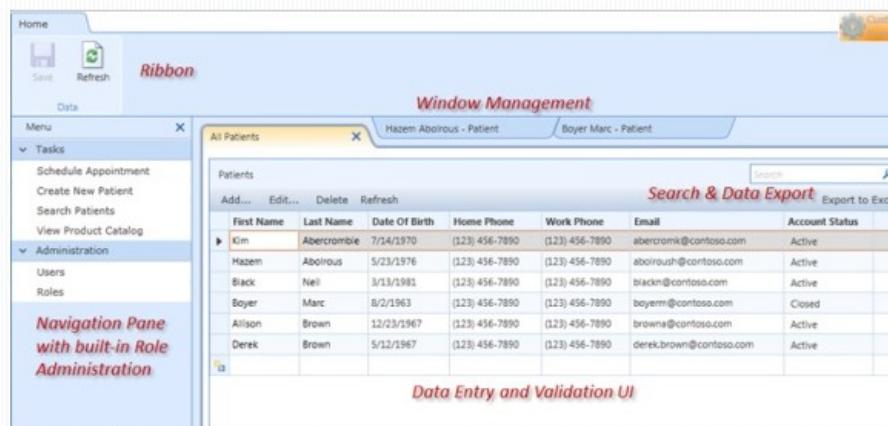


- In 2010 no one was able to hide from social media anymore, "Social CRM" had become the Next Big Thing, the customers were now in charge
- Software giants like MS weren't able to match the speed of agile startups building all the coolest social tools, so working well together with these new tools was the best that anyone could hope from them
  - For internal social tools, a response to SFDC Chatter was nowhere in sight yet. As the Office guys weren't able to deliver it, MS ended up buying Yammer to fit this gap 2 years later
  - External social channels were covered via Netbreeze acquisition in 2013, which in 2015 integrated with customer social profiles in CRM as MS Social Engagement

May 8th, 2010:  
"Greetings from  
Microsoft  
Convergence 2010 in  
Atlanta – Part 2"

# The many faces of LoB app development

The recent beta launch of [Visual Studio LightSwitch](#) made me think about this topic some more, since so many of the selling points mentioned in Microsoft marketing material for LightSwitch ring a bell from the XRM gospel we've seen pushed for Dynamics CRM lately. LightSwitch is a SilverLight app development tool that's being branded as the "simplest way to build business applications for the desktop, web and cloud". "Quickly build custom LOB applications that rival off-the-shelf solutions." "Simplifies the development process because it lets you concentrate on the business logic and does a lot of the remaining work for you." "Designed for non-programmers, you don't have to write any code for navigation, toolbars/ribbons, or dirty checking." Yep, that's CR... no, I mean LightSwitch. Check our [this blog post](#) from the product team for an introduction to the feature set included.



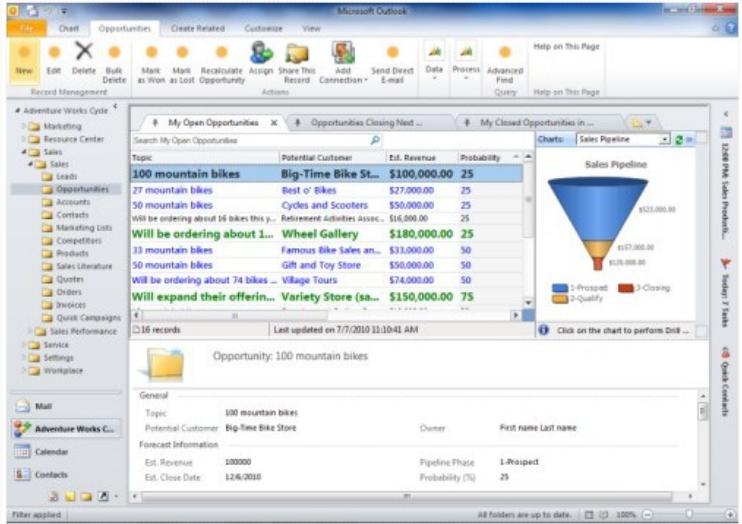
The conclusions behind the value proposition of LightSwitch do sound valid. Most mid-size organizations would surely benefit from being empowered to build their own LoB apps to replace overgrown Excel sheets, also most of these apps could share the same form, grid, search etc. concepts offered in familiar MS style UI wrappings. However, the approach is coming from the

Sep 2nd, 2010:  
"Dynamics CRM  
summer news round-  
up"

- In 2010 the question "*what comes after web apps*" was answered with "*Rich Internet Applications a.k.a. RIA*"
- Microsoft's RIA browser plugin was Silverlight and at that point there was even speculation on if we would see a SL based CRM client app emerge
- MS launched LightSwitch as a toolkit for building small business apps in SL, which sounded a lot like the earlier XRM story
- As we now know, RIA plugins died within a couple of years as HTML5/Javascript won the battle. LightSwitch got assimilated into the complex app development story of MS, but XRM as a concept is still alive

# A CRM that works exactly like Outlook

July 12th, 2010:  
“Dynamics CRM 2011 and the world of (cloud) apps”



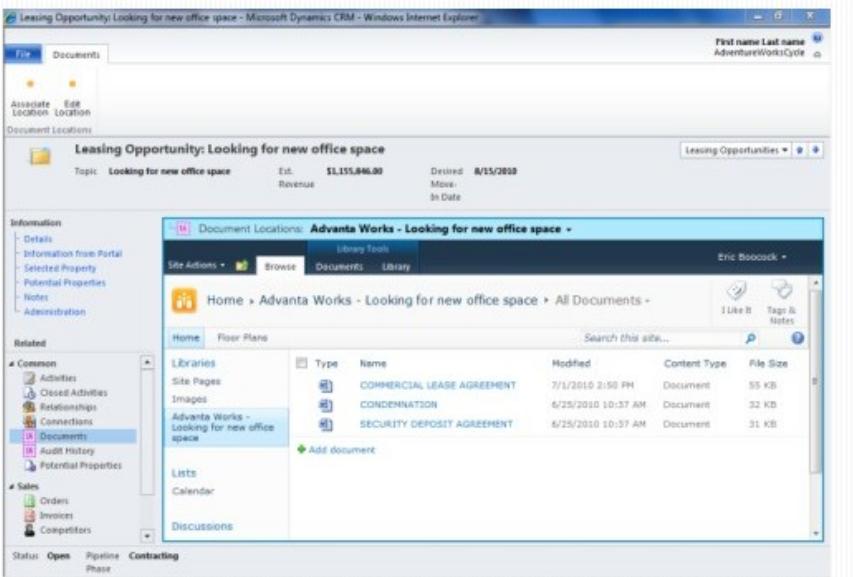
Instead of merely wrapping the web client page into an Outlook frame, the new rich client interface introduces whole new components that attempt to follow the familiar Outlook UI experience. Tabs will help in keeping the number of pop-up windows under control while the preview pane we've learned to take for granted in processing our email inboxes is now also available in the scope of CRM entity forms. Since Dynamics CRM 2011 now comes with the ribbon interface like most other MS products, the CRM functionality now blends into the Outlook toolbar and gets presented in all its context sensitive glory. I myself have always preferred to use CRM through the web client, since the Outlook version has faded away some of the native CRM application navigation in order to remain Outlook-ish. With the new 2011 version, it looks like there will actually be better functionality (and hopefully usability as well) available through the rich Outlook client, which may make the web client look thin in comparison. Now, this of course raises the question that will any of these rich UI features be available if you stick to Office 2007 or do they require Outlook 2010? Remains to be seen.

- While the CRM Outlook plugin had provided track/sync features for years, the next CRM 2011 version promised to make CRM data truly a native part of the familiar Outlook experience
- The Ribbon, reading pane, conditional formatting and all the other MAPI goodness sure made CRM feel like Outlook – in good and bad
- While lowering the barrier for Outlook users to access CRM, the reliability of the Outlook client never reached a level where system administrators wouldn't need to worry about it
- In 2015 MS introduced the first version of CRM Outlook (web) App that will potentially make the “fat” Outlook client a thing of the past (one day)

# Hey, about that SharePoint integration...

July 12th, 2010:  
“Dynamics CRM 2011  
and the world of  
(cloud) apps”

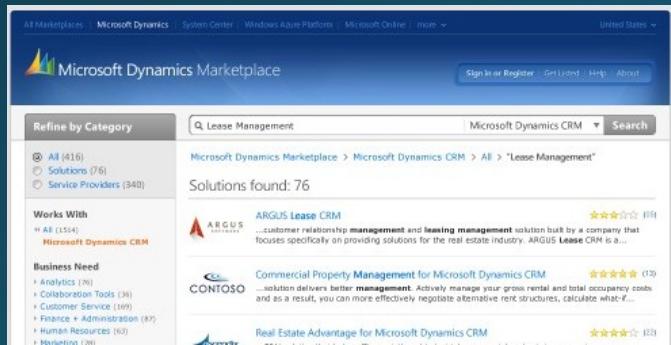
Another common integration point after the Exchange/OCS messaging infrastructure is of course SharePoint for document management, which is also becoming a native part of Dynamics CRM 2011. The OOB functionality is unlikely to offer much glamour over the previous custom integrations of showing document libraries in an iFrame. The big deal would however be in synchronizing the user rights across the CRM and SharePoint realms, which is where I would put my money on MS to deliver a solution. What I would also *like* to see offered is a native integration to the FAST based search, thus providing a more Google like search experience for CRM users, but since SharePoint 2010 is highly unlikely be a system requirement for CRM 2011 implementation, this will surely remain a custom solution to be offered by the Dynamics CRM implementation partners.



- Linking documents to customer records wasn't an uncommon CRM requirement in 2010, so MS wanted to make SharePoint the obvious choice for document storage with CRM 2011
- While automated folder creation for new records in CRM 2011 was neat, the lack of configuration options and dependency on client-side code made this difficult to leverage in real world implementations
- CRM-SP security sync was where I put my money for MS to build an OoB solution, but looks like I'll never see a dime of it now...
- SP search features never arrived to CRM, but in 2016 the new Relevance Search powered by Azure Search service promises to finally bring more advanced content indexing to CRM

# Build a Marketplace and the apps will come?

Building a marketplace is relatively easy, but getting it to work for the benefit of all interest groups (sellers, buyers and the platform provider) can be very tricky. Just because Apple has done such a phenomenal job on this front and built a whole new value adding layer around their core product experience with the help of 3rd party developers doesn't mean that any app store would automatically be a success. Nokia, the previous leader in the smartphone field had launched their own Software Market around 10 years ago, failing to get much traction on the concept, and finding itself [still struggling today](#), chasing Apple with a not so appealing concept called Ovi Store. Or have a look at the Windows Mobile / Windows Phone Marketplace and compare that to what Apple and Android have. Get the picture? The moral of the story is that you need so much more around the Marketplace concept than just a pretty site with some links to random products you have on sale. App stores only work when they are truly designed to serve the application ecosystem, not just to make money from the service or use the partners as a showcase for your own offering. Solve a real problem first, then watch the revenue streams accumulate later as a result of the value that you injected into the process first. Here's hoping that Microsoft can build a serious contender for Salesforce.com AppExchange and the likes, as this will surely be one of the key success factors in the brave new world where rigid business applications are transforming into flexible services that the customers assemble into customized solution packages on-demand, pay-as-you-go.



July 12th, 2010:  
"Dynamics CRM 2011  
and the world of  
(cloud) apps"

- CRM 2011 was about to deliver a new solution management model into CRM, thus greatly enhancing the technical foundation for installing add-ins from 3rd parties into customized CRM environments
- Dynamics Marketplace was promoted as the place from which customers would conveniently find these solutions, listed there by ISV partners and verified via MS's certification process
- Although "full ecommerce" functionality was promised, it never arrived, thus leaving a central component of a true marketplace missing
- Today Dynamics Marketplace is no more and the contents has been rolled back to the generic MS Pinpoint listings that always were behind the service
- While great ISV solutions continue to be developed for Dynamics CRM, the inability for MS to support their partner app ecosystem is quite puzzling

# Solutions are the final solution

Sep 11th, 2010:  
Dynamics CRM 2011  
in all its (beta) glory

The screenshot shows the Dynamics CRM 'Components' screen for a solution named 'TestSolution'. The left sidebar lists various solution components: Entities, Options Sets, Security Roles, Workflows, E-mail Templates, Contract Templates, Article Templates, Mail Merge Templates, Client Extensions, Web Resources, and Connection Roles. The main area displays a grid of components with columns for Display Name, Name, and Type. The components listed are: Account (Entity), Activity (Entity), Configuration (Options Set), Contact (Entity), Contact count per account (Workflow), Contact count per account... (Workflow), Main Sales Contact Change (Workflow), Opportunity (Entity), Price List (Entity), Tekla logo small (Web Resource (gif)), and Test Security Role (Security Role).

Display Name	Name	Type
Account	account	Entity
Activity	activitypointer	Entity
Configuration	new_configur...	Options Set
Contact	contact	Entity
Contact count per account	Contact coun...	Workflow
Contact count per account...	Contact coun...	Workflow
Main Sales Contact Change	Main Sales C...	Workflow
Opportunity	opportunity	Entity
Price List	pricelevel	Entity
Tekla logo small	New_Tekla_lo...	Web Resource (gif)
Test Security Role	Test Security ...	Security Role

You have Unmanaged Solutions and Managed Solutions. By default every solution you create is Unmanaged, but upon exporting it you have the option to lock it down, i.e. turn it into Managed. These can be added to or removed from a CRM organization and the platform will take care of updating the components like entities and workflows respectively. However, the order in which the solutions are added does make a difference in cases where customizations are addressing the same attribute, for example. Also, direct modifications to the Default Solution will remain supported like in 4.0.

Despite of the clear benefits in having solution layers available in Dynamics CRM, I've got a feeling that there's going to be a learning curve in adopting them and formulating the best practices for solution management process. In terms of the upcoming Dynamics Marketplace launch, the solutions are a must, so I'm sure everyone will be encouraged to work towards seamless installation and co-existence of ISV solution packages.

- Before CRM 2011, trying to merge customizations from multiple vendors into a single CRM organization was quite painful
- The managed solution layers promised peace & harmony for co-existence of various ISV add-ons
- In practice, dependencies across different solutions' components often blocked the graceful uninstall
- Fooled by MS's initial guidance to always use managed solutions in production, many VAR partners learned it the hard way that customer specific customizations were usually best left in unmanaged state
- Solution framework has gradually improved and in CRM 2016 the ability to select solution components on a more granular level than whole entities is promising a brighter future

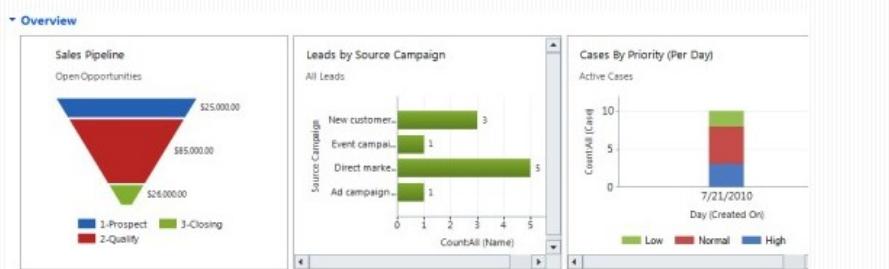
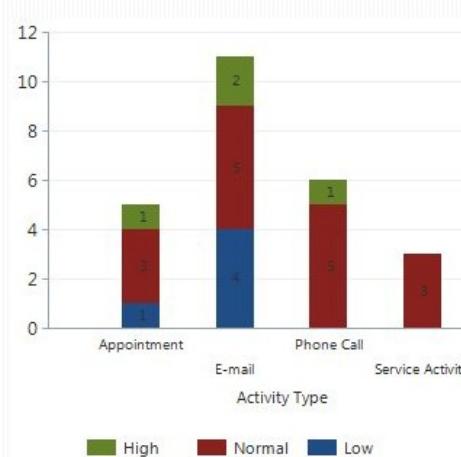
# My God, it's full of charts!

Sep 11th, 2010:  
Dynamics CRM 2011  
in all its (beta) glory

## Charts and Dashboards

Data visualization is now a native part of CRM, not something you necessarily need to use SQL Server Reporting Services for anymore. Any grid view can be accompanied by a chart that follows the view criteria definitions. Out-of-the-box charts include column, bar, line, pie and funnel. More can be added through custom development with Microsoft Chart Controls for Microsoft .NET Framework 3.5.

You're not limited to only showing the charts in grids, as the new Dashboard functionality allows you to combine a multitude of charts on a single page with various layout options. Also keep in mind that a dashboard does not need to consist of charts, as also grids, iFrames and the new Web Resources are supported elements. Dashboards can therefore be used also for creating console views of detail data and interfaces to other web based services. Whether there is support for passing parameters from one component to another within the dashboards is something to be verified.



- The addition of charts and dashboards in CRM 2011 greatly expanded the usefulness of the application for managing complete business processes, not just records and fields
- Simple SSRS report development was replaced with chart configuration, thus lowering the barrier for applying data visualizations into processes
- No major feature development of the ASP.NET based charts was introduced after CRM 2011, advanced customization of CRM visualizations remained quite rare, full SSRS capabilities weren't ever brought into the cloud
- As the Power BI features are rapidly evolving, the future alignment of external analytics and CRM built-in visualizations is becoming a topic to keep a close eye on

# All in the cloud - all on their own trajectories?

Oct 25th, 2010:  
“Greetings from Microsoft  
Convergence 2010  
EMEA”



I didn't read about it until browsing my Twitter feeds during the cab ride back from the airport, but Microsoft went out and announced [Office 365](#) during the same day as Convergence Prague took place. If there was any mention of it in the event, I surely missed it, but it's more likely that the Microsoft considered this to be something not falling directly under its Dynamics product line and therefore no need to integrate it into their Convergence story. Nevertheless, the announcement has big implications on the future of Dynamics CRM, since it [has been announced](#) that CRM Online will be added into the Office 365 service portfolio in 2011.

In the early days of Windows Azure press releases, the concepts of Dynamics CRM Services and SharePoint Services were presented as a future part of the Azure platform. We all know that the [contents of Azure](#) today is a bit different from those planned features. SharePoint has been taken into the cloud as a part of [BPOS](#) and CRM Online has enjoyed success as an independent product. When CRM will now be finding a home as a part of BPOS 2.0 a.k.a. Microsoft Office 365, it's starting to clearly look like this will be how Microsoft is aligning its two business application development platforms. Not as a generic service available to 3rd party cloud app developers but rather as the foundation of basic information worker infrastructure provided to all businesses operating in the MS Office world.

- In 2010 Convergence EMEA the concurrent launch event of Office 365 was not mentioned at all to the Dynamics crowd
- Earlier plans for including “XRM Services” as an Azure component had been scrapped, instead the focus was on selling a modern cloud CRM application, with user identities managed via Windows Live ID
- Fast forward to 2015, Convergence US event was all about showcasing non-Dynamics products from MS portfolio, rather than the latest CRM/ERP features
- Later the same year MBS as a unit was dismantled and Dynamics product development moved to Scott Guthrie's C+E unit, home of Azure