

A Non-Developer's Guide to Smarter Sales Processes in Microsoft Dynamics CRM 2015

Part 1: Lead Qualification

Jukka Niiranen

2015-05-06





About This Presentation

- These are the slides from a live webcast on MSDynamicsWorld.com, presented on May 6th 2015
- The webcast recording is available on YouTube: <http://bit.ly/crm15salesprocess>
- The topics are covered in more detail in blog posts at <http://survivingcrm.com/>



About Me

- Dynamics CRM consultant from Helsinki
- Working at [Digital Illustrated Finland](#)
- Dynamics CRM addict since 2005
- Frequent blogger & #MSDYNCRM evangelist on social media
 - Blog: [survivingcrm.com](#)
 - [@jukkan](#) on Twitter
- Microsoft MVP since 2013
- Focused on improving CRM solution usability & information work efficiency



Jukka Niiranen
[@jukkan](#)

Consultant @ Digital Illustrated
Microsoft Dynamics CRM MVP



Customizing Dynamics CRM as a Non-Developer



- Point & click configuration/customization tools of Dynamics CRM have come a long way
- The ratio of custom code vs. configuration in typical CRM solutions is decreasing
- Solution delivery often requires the creative combination of several CRM configuration options
- The goal of this article series is to demonstrate a few scenarios where such combinations are used for delivering new functionality for the CRM sales process



Customization Scenarios Explored in This Series

Part 1

1. Lead qualification

- Streamline data entry for leads on existing accounts & contacts
- Convert leads to influencers instead of new opportunities

2. Opportunity revenue estimation

- Replace opportunity product lines with predefined cost estimate fields
- Calculate opportunity total value from day & rate fields

3. Pipeline development

- Capture opportunity count and revenue per sales stage
- Schedule data snapshots of historical pipeline size



Lead Qualification





The Problem

- In earlier versions of Dynamics CRM it was possible to qualify lead records into an account/contact only
- Starting from CRM 2013 the qualification process changed, together with the introduction of Business Process Flows (BPF)
- Now a qualified lead will always create an open opportunity into the sales pipeline
- There are many valid scenarios where leads shouldn't directly be converted into an opportunity, but no option exists in CRM to configure this behavior



Old Lead Qualification Dialog (before CRM 2013)

Convert Lead

Specify whether to convert this lead into one or more of the following options or to disqualify it.

Qualify and convert into the following records

Status

Account
 Contact
 Opportunity

Potential Customer

Currency

Open newly created records

Disqualify

Status



The Big Switch

← → C support.microsoft.com/en-us/kb/2808201

The Convert Lead dialog box no longer appears during lead qualification in Microsoft Dynamics CRM Online

Article ID: 2808201 - View products that this article applies to.

"After applying the latest Product Update related to the December 2012 Service Update for Microsoft Dynamics CRM Online, users may notice that the lead Qualify button no longer presents the Convert Lead dialog box. This dialog box traditionally allowed users to choose the associated sales records to create during qualify, including Contact, Account, and Opportunity."

(-) Cause

This functionality is considered by design.



Step 1: Lead Data Entry

Microsoft Dynamics CRM | SALES | Leads | Iris Influencer | Create | Enter Search Item | Jukka Niiranen | Org 2 | ?

+ NEW | DELETE | QUALIFY | DISQUALIFY | ADD TO MARKETING LIST | ASSIGN | SHARE | ...

LEAD
Iris Influencer

Lead Source Seminar Rating Warm Status Contacted Owner* Jukka Niiranen

Qualify (Active) Develop Propose Close Next Stage

Existing Contact?	click to enter	Estimated Budget	click to enter	Capture Summary	click to enter
Existing Account?	click to enter	Purchase Process	click to enter		
Purchase Timeframe	click to enter	Identify Decision Maker	mark complete		

Summary

CONTACT

Topic*	This isn't an opportunity!
Name*	Iris Influencer
Job Title	Lead Architect
Business Phone	+61 661 166 61
Mobile Phone	--
Email	iris@wow-architects.com

COMPANY

Company+	WOW! Architects
Website	http://www.wow-architects.com
Address	2A Macquarie Street Sydney NSW 2000 Australia

POSTS ACTIVITIES NOTES

Enter post here POST

Both Auto posts User posts

Iris Influencer
Jukka Niiranen created Iris Influencer
On Iris Influencer's wall
Today

STAKEHOLDERS

Name ↑ Role

No stakeholders found.

COMPETITORS

Name ↑ Website

No competitors found.

Open



Step 2: Lead Qualification

Microsoft Dynamics CRM | SALES | Leads | Iris Influencer | + NEW | DELETE | QUALIFY | DISQUALIFY | ADD TO MARKETING LIST | ASSIGN | SHARE | ... | Enter Search Item | Jukka Niiranen Org 2 | ?

LEAD Iris Influ

Qualify
Create a new opportunity with an account or a contact using information from this lead.
When the lead is converted, it is saved as qualified in the Closed Leads view.

Lead Source Seminar **Rating Warm** **Status Contacted** **Owner* Jukka Niira**

Qualify (Active) ➤ **Develop** ➤ **Propose** ➤ **Close** ➤ **Next Stage**

Existing Contact? click to enter | Existing Account? click to enter | Purchase Timeframe click to enter | Estimated Budget click to enter | Purchase Process click to enter | Identify Decision Maker mark complete | Capture Summary click to enter |

Summary

CONTACT

Topic *	This isn't an opportunity!
Name *	Iris Influencer
Job Title	Lead Architect
Business Phone	+61 661 166 61
Mobile Phone	--
Email	iris@wow-architects.com

COMPANY

Company +	WOW! Architects
Website	http://www.wow-architects.com
Address	2A Macquarie Street Sydney NSW 2000 Australia

POSTS ACTIVITIES NOTES

Enter post here | POST

Both Auto posts User posts

Iris Influencer
Jukka Niiranen created Iris Influencer
On Iris Influencer's wall
Today

STAKEHOLDERS

Name ↑	Role
No stakeholders found.	

COMPETITORS

Name ↑	Website
No competitors found.	

Open



Step 3: New Opportunity

Microsoft Dynamics CRM | SALES | Opportunities | This isn't an opport... | Create | Enter Search Item | Jukka Niiranen Org 2 | ?

+ NEW CLOSE AS WON CLOSE AS LOST RECALCULATE OPPORTUN... ASSIGN EMAIL A LINK DELETE ...

↑ ↓ ↻

OPPORTUNITY

This isn't an opportunity!

Est. Close Date -- Est. Revenue -- Status In Progress Owner* Jukka Niira

✓ Qualify Develop (Active) Propose Close Next Stage

Customer Need click to enter Identify Competitors mark complete

Proposed Solution click to enter

Identify Stakeholders mark complete

Summary

Topic *	This isn't an opportunity!	POSTS ACTIVITIES NOTES	STAKEHOLDERS
Contact	Iris Influencer	<input type="text" value="Enter post here"/> POST	Name ↑ Role
Account	WOW! Architects	Both Auto posts User posts	Iris Influencer Stakeholder
Purchase Timeframe	--		
Currency *	euro	Iris Influencer Lead: Qualified by Jukka Niiranen and converted to Account WOW! Architects, Contact Iris Influencer, Opportunity This isn't an opportunity!. On Iris Influencer's wall Today	
Budget Amount	--		
Purchase Process	--		
Process Stage	2-Develop		
Description	--	This isn't an opportunity! Opportunity: Created by Jukka Niiranen for Account WOW! Architects. On This isn't an opportunity!'s wall Today	
Current Situation	--		
Open			SALES TEAM



The Solution

- Functionality delivered:
 - Ability to qualify a lead as an influencer, without creating a new opportunity record
 - Ability to associate the qualified lead with an existing opportunity record
- Components used:
 - Branching Business Process Flow
 - Real-time Workflows
 - Business Rules
 - Quick View Forms



Modifying the Business Process Flow

- Turn the standard "Lead to Opportunity Sales Process" into a branching BPF (new in CRM 2015)
- Add a new stage to the very beginning of the BPF: "Identify"
- Add a new option set field on the lead entity: "Lead Type"
 - Option 1: "Prospect (Create Opportunity)"
 - Option 2: "Influencer (No Opportunity)"
- Re-create the necessary stages into each BPF branch
 - Option 1: proceed from lead to opportunity
 - Option 2: stop at the lead entity



The Branches

BUSINESS PROCESS FLOW

Lead to Opportunity or Influencer Sales Proc...

Details ▾

Stage Name * **Identify**

Entity *	Lead
Stage Category	Identify

Step Name	Value	Required
Existing Contact?	Existing Contact?	<input type="checkbox"/>
Existing Account?	Existing Account?	<input type="checkbox"/>
Lead Type	Lead Type	<input checked="" type="checkbox"/>
Description	Description	<input type="checkbox"/>

+ Insert stage after branch Add branch

If Lead Type equals "Influencer (No Opportunity)"
+ Insert stage

Stage Name * **Create Influencer**

Entity *	Lead
Relationship	Select relationships
Stage Category	Create Influencer

Step Name	Value	Required
Link to Opportunity	Existing Opportunity	<input type="checkbox"/>
Qualify Influencer	Qualify Influencer	<input type="checkbox"/>

+ Insert stage Add branch

Else (click to convert to else if)

+ Insert stage

Stage Name * **Qualify**

Entity *	Lead
Relationship	Select relationships
Stage Category	1-Qualify

Step Name	Value	Required
Purchase Timeframe	Purchase Timeframe	<input type="checkbox"/>
Budget Amount	Budget Amount	<input type="checkbox"/>
Purchase Process	Purchase Process	<input type="checkbox"/>
Identify Decision Maker	Decision Maker?	<input type="checkbox"/>

+ Insert stage Add branch

Stage Name * **Develop**

Entity *	Opportunity
----------	-------------

Step Name	Value	Required
Customer Need	Customer Need	<input type="checkbox"/>
Proposed Solution	Proposed Solution	<input type="checkbox"/>

If Lead Type equals "Influencer (No Opportunity)"



+ Insert stage

Stage Name *
Create Influencer

Else (click to convert to else if)



+ Insert stage

Stage Name *
Qualify



Real-time Workflow

- Clicking the Qualify button on the lead form will always create a new opportunity record
- Merely changing the lead record status to "Qualified" via a server-side process however does not trigger this action
- The workaround we'll use:
 - Create a new two-option field "Qualify Influencer", add it to BPF stage, use as a workflow trigger
 - Add a new real-time workflow process that runs when this trigger field is set to "Yes"



Real-time Workflow (2)

- Workflow conditions
 - Check if the lead is associated with an existing account and/or contact
- Workflow actions
 - Create the necessary new records in the workflow steps & link them to the originating lead
 - If you want to associate the lead to an existing opportunity as a stakeholder, first add a new custom relationship between lead & opportunity entities (N:1). Then create a new Connection record between the selected opportunity and the new contact in WF
 - Finally, change the lead status to "Qualified"



The Logic (1)

▼ Check if "Qualify Influencer" trigger field has been set to "Yes"

If Lead>Status equals [Open] AND Lead:Qualify Influencer equals [Yes], then:

▼ See if lead is linked to an existing account

If Lead:Parent Account for lead does not contain data, then:

- **Create new account**
Create: Account [View properties](#)
- **Set new account as parent account for the lead**
Update: Lead [View properties](#)

▼ See if lead is linked to an existing contact

If Lead:Parent Contact for lead does not contain data, then:

- **Create new contact**
Create: Contact [View properties](#)

▼ Check whether the contact should be linked to an existing account or the newly created account

If Lead:Parent Account for lead contains data, then:

- **Set contact parent account**
Update: Create new contact (Contact) [View properties](#)

Otherwise, if Create new account (Account):Account contains data, then:

- **Set contact parent account**
Update: Create new contact (Contact) [View properties](#)

On lead record change event, proceed if trigger field is set to "Yes"

Check if existing account / contact fields are populated

If not, create new records and link to other records



The Logic (2)

▼ Create a new influencer connection if existing opportunity has been selected

If Lead:Existing Opportunity contains data, then:

▼ Check the contact to be associated with the opportunity

If Lead:Parent Contact for lead contains data, then:

- Connect contact with opportunity

Create: Connection [View properties](#)

Otherwise, if Create new contact (Contact):Contact contains data, then:

- Connect contact with opportunity

Create: Connection [View properties](#)

- Close lead as qualified

Change record status to: Lead Qualified

Check if the lead
has been linked
to an existing
opportunity

Create a new
Connection
between the
records

Change the lead
record's status to
"Qualified"



Quick View Forms & Business Rules

- When linking the lead to existing account/contact there shouldn't be any data entered into lead fields related to them
 - These will be discarded during qualification and present unnecessary data entry options for the user
- How to improve the lead form's usability:
 - Add the lookup fields for existing account/contact directly onto the lead form (by default only in BPF)
 - Use Business Rules to hide the detail fields if existing account/contact has been selected
 - Display Quick View Forms of the existing account/contact records on the lead form to provide overview of existing record data



Quick View Forms & Business Rules (2)

- Use case:
 1. User creates a new lead record
 2. User links the lead to existing account record
 3. Business Rule hides other account fields
 4. Quick View Form displays the account summary
- Note: this also works as a verification of lead qualification process success indicator after a new account/contact is generated for the lead



Form Designer

The screenshot shows the Microsoft Dynamics 365 Form Designer. At the top, there's a toolbar with Save, Save As, Save and Close, Publish, Undo, Redo, Body (selected), Header, Footer, Navigation, Business Rules, Form Properties, Preview, Managed Properties, Merge Forms, and Upgrade buttons. Below the toolbar, the left sidebar shows a navigation tree for 'Lead' with 'Summary' and 'Details' nodes. The main area displays a 'Solution: Solution 1' for a 'Lead' form. It includes a 'Summary' section with 'LEAD DETAILS' (Topic*, Type, Description), a 'COMPANY' section (Existing Account?, Company+, Website, Address), and a 'CONTACT PERSON' section (Existing Contact?, Name). To the right are 'SOCIAL PANE' and 'RELATED RECORDS' panes.

Put the Lead Type option set (BPF branch selector) to the top of the form

Drag the Existing Account / Existing Contact fields onto the form

Add a new section "Related Records" and include Quick View Forms of Account, Contact and Opportunity



Business Rules

BUSINESS RULE: Lead

Hide Lead Company fields for existing Account

- ▲ IF...THEN
 - ▲ CONDITION
 - If Parent Account for lead contains data
 - ▲ ACTION
 - Hide field **Company Name**
 - Hide field **Website**
 - Hide field **Address 1**
- ▲ ELSE
 - ▲ CONDITION
 - ▲ ACTION
 - Show field **Company Name**
 - Show field **Website**
 - Show field **Address 1**

BUSINESS RULE: Lead

Hide Lead Contact fields for existing Contact

- ▲ IF...THEN
 - ▲ CONDITION
 - If Parent Contact for lead contains data
 - ▲ ACTION
 - Hide field **Name**
 - Hide field **Job Title**
 - Hide field **Email**
 - Hide field **Business Phone**
 - Hide field **Mobile Phone**
- ▲ ELSE
 - ▲ CONDITION
 - ▲ ACTION
 - Show field **Name**

Create 2 rules that
watch the Existing
Account/Contact
lookup fields

Hide other related
fields from the form
if the lookup
contains data



Creating a New Lead, Type Prospect (1)

Microsoft Dynamics CRM | SALES | Leads | New Lead

CREATE | SEARCH | PRINT | Jukka Niiranen | Org 2 | SETTINGS | HELP

SAVE | SAVE & CLOSE | NEW | EDIT PROCESS | FORM EDITOR

LEAD | New Lead

Lead Source: -- Rating: Warm Status: New Owner: Jukka Niiranen

Identify (Active) Qualify Develop Propose Close Next Stage

Existing Contact? click to enter Existing Account? click to enter Lead Type * Prospect (Create Opportunity)

Description: They're on Dynamic CRM 2011

Summary

LEAD DETAILS

Topic *	Fabrikam's CRM upgrade
Type	Prospect (Create Opportunity)
Description	They're on Dynamic CRM 2011 and need to catch up to the latest version

POSTS

Enter post Both All

We didn't find any posts.

RELATED RECORDS

POST

Lead Type is set to "Prospect", standard sales process stages are used

Existing Account "Fabrikam" is chosen as the company

COMPANY

Existing Account? Company + Website Address

fabrik

Fabrikam, Inc. someone4@example.com 555-0153

Look Up More Records

1 result + New

CONTACT PERSON

Open



Creating a New Lead, Type Prospect (2)

Microsoft Dynamics CRM | SALES | Leads | New Lead

CREATE | SEARCH | PRINT | Jukka Niiranen | Org 2 | GEAR | ?

SAVE | SAVE & CLOSE | NEW | EDIT PROCESS | FORM EDITOR

LEAD | New Lead

Lead Source: -- Rating: Warm Status: New Owner: Jukka Niiranen

Identify (Active) Qualify Develop Propose Close Next Stage

Existing Contact? click to enter Existing Account? Fabrikam, Inc. Lead Type* Prospect (Create Opportunity)

Description: They're on Dynamic CRM 2011

Summary

LEAD DETAILS

Topic*	Fabrikam's CRM upgrade
Type	Prospect (Create Opportunity)
Description	They're on Dynamic CRM 2011 and need to catch up to the latest version

COMPANY

Existing Account?	Fabrikam, Inc.
-------------------	----------------

CONTACT PERSON

Existing Contact?	--
Name*	Mike Mitchell
Job Title	IT Manager
Email	mitchell@fabrikam.com
Open	

POSTS ACTIVITIES NOTES

Enter post content... POST

Both

We did it!

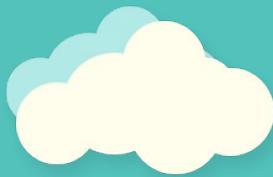
After selecting Fabrikam, account details are shown on the Quick View Form

Contact information can still be entered on the lead to create a new contact for chosen account

RELATED RECORDS

Existing Account Details

Account Name*	Fabrikam, Inc.
Owner*	Jukka Niiranen
Relationship Type	--
Account Rating	B
City	Lynnwood



Converting the Lead to Opportunity



Microsoft Dynamics CRM | SALES | Opportunities | Fabrikam's CRM up... | Create | Enter Search Item | Jukka Niiranen | Org 2

+ NEW CLOSE AS WON CLOSE AS LOST RECALCULATE OPPORTUN... ASSIGN EMAIL A LINK DELETE ...

OPPORTUNITY ▾

Fabrikam's CRM upgrade

Est. Close Date -- Est. Revenue -- Status In Progress Owner* Jukka Niiranen

✓ Identify > ✓ Qualify > Develop (Active) > Propose > Close > Next Stage

Customer Need click to enter Est. Close Date * click to enter
Proposed Solution click to enter Identify Stakeholders click to enter
Est. Revenue * click to enter Identify Competitors click to enter

Summary

Topic *	Fabrikam's CRM upgrade
Contact	Mike Mitchell
Account	Fabrikam, Inc.
Purchase Timeframe	--
Currency *	euro
Budget Amount	--
Purchase Process	--
Process Stage	2-Develop
Description	They're on Dynamic CRM 2011 and need to catch up to the latest version
Current Situation	--
Open	--

POSTS Enter post Both All POST

STAKEHOLDERS Name ↑ Role
Mike Mitchell Stakeholder

Fabrikam's CRM upgrade Opportunity: Created by Jukka Niiranen for Account Fabrikam, Inc.

SALES TEAM

After clicking Qualify, a new Opportunity record is created and sales process is set to "Develop"

New contact has been added to account and set as stakeholder for the opportunity



Creating a New Lead, Type Influencer (1)

Microsoft Dynamics CRM | SALES | Leads | Lisa Hathaway | + Create | Enter Search Item | Jukka Niiranen | Org 2 | ?

+ NEW | - DELETE | QUALIFY | DISQUALIFY | ADD TO MARKETING LIST | ASSIGN | SHARE | ...

LEAD | Lisa Hathaway | Lead Source: Web | Rating: Warm | Status: New | Owner: Jukka Niiranen

Identify (Active) > Create Influencer > Next Stage

Existing Contact? click to enter
✓ Existing Account? Fabrikam, Inc.
✓ Lead Type* Influencer (No Opportunity)

Description: Lisa mentioned that they ha...

Summary

LEAD DETAILS

Topic*	Attended CRM 2015 webinar
Type	Influencer (No Opportunity)
Description	Lisa mentioned that they have already been talking with us about a CRM upgrade project.

COMPANY

Existing Account?	Fabrikam, Inc.
-------------------	----------------

CONTACT PERSON

Existing Contact?	--
Name*	Lisa Hathaway
Job Title	CRM Manager
Email	Lisa@Fabrikam.com

Using same account, details of another new contact person are added

Lead Type is set to "Influencer", sales process stages are updated to reflect this

POSTS

Enter post

Both Autopost

Lisa's wall

Jukka Niiranen created Lisa Hathaway On Lisa Hathaway's wall Today

POST

RELATED RECORDS

Existing Account Details

Account Name*	Fabrikam, Inc.
Owner*	Jukka Niiranen
Relationship Type	--
Account Rating	B
City	Lynnwood



Creating a New Lead, Type Influencer (2)

Microsoft Dynamics CRM | SALES | Leads | Lisa Hathaway | + Create | Enter Search Item | Jukka Niiranen | Org 2 | ?

+ NEW | DELETE | QUALIFY | DISQUALIFY | ADD TO MARKETING LIST | ASSIGN | SHARE | ...

LEAD | Lisa Hathaway

Lead Source: Web | Rating: Warm | Status: New | Owner: Jukka Niiranen

Identify | Create Influencer (Active)

Link to Opportunity | Qualify Influencer

fabrik | Fabrikam's CRM upgrade | Fabrikam, Inc.

Look Up More Records | 1 result | + New

Summary | LEAD DETAILS | COMPANY | CONTACT PERSON | RELATED RECORDS

Topic *: Attended CRM 2015 webinar | Type: Influencer (No Opportunity) | Description: Lisa mentioned that they have already been talking with us about a CRM upgrade project.

Existing Account?: Fabrikam, Inc.

Existing Contact?: -- | Name *: Lisa Hathaway | Job Title: CRM Manager | Email: lisa@fabrikam.com

Process is moved to the "Create Influencer" stage

Lead is linked to the existing Fabrikam opportunity

POST

Existing Account Details

Account Name *: Fabrikam, Inc. | Owner *: Jukka Niiranen | Relationship Type: -- | Account Rating: B | City: Lynnwood



Creating a New Lead, Type Influencer (3)

Microsoft Dynamics CRM | SALES | Leads | Lisa Hathaway | + Create | Enter Search Item | Jukka Niiranen | Org 2 |  | 

+ NEW | - DELETE | QUALIFY | DISQUALIFY | ADD TO MARKETING LIST | ASSIGN | SHARE | ...

LEAD | Lisa Hathaway | Lead Source: Web | Rating: Warm | Status: New | Owner*: Jukka Niiranen

✓ Identify | Create Influencer (Active)

✓ Link to Opportunity | Fabrikam's CRM upgrade | Qualify Influencer | Yes

Summary

LEAD DETAILS

Topic*: Attended CRM 2015 webinar
Type: Influencer (No Opportunity)
Description: Lisa mentioned that they have already been talking with us about a CRM upgrade project.

COMPANY

Existing Account?: Fabrikam, Inc.

CONTACT PERSON

Existing Contact?: --
Name*: Lisa Hathaway
Job Title: CRM Manager
Email: lisa@fabrikam.com

POSTS

Enter post | POST

Both Auto posts User posts

Lisa Hathaway
Jukka Niiranen created Lisa Hathaway
On Lisa Hathaway's wall
Today

RELATED RECORDS

Existing Account Details

Account Name*: Fabrikam, Inc.
Owner*: Jukka Niiranen
Relationship Type: --
Account Rating: B
City: Lynnwood

Lead record changes are saved by user or by CRM autosave

Existing Opportunity Details

Topic*: Fabrikam's CRM up

unsaved changes



Creating a New Lead, Type Influencer (4)

Microsoft Dynamics CRM | SALES | Leads | Lisa Hathaway | + Create | Enter Search Item | Jukka Niiranen | Org 2 |  | 

+ NEW | - DELETE |  ASSIGN |  SHARE |  EMAIL A LINK |  FOLLOW |  RUN WORKFLOW | ...

LEAD | Lisa Hathaway | Lead Source: Web | Rating: Warm | Status: Qualified | Owner: Jukka Niiranen

✓ Identify | Create Influencer (Active) | ↗

✓ Link to Opportunity |  Fabrikam's CRM upgrade | ✓ Qualify Influencer |  Yes

Summary

LEAD DETAILS

Topic *	 Attended CRM 2015 webinar
Type	 Influencer (No Opportunity)
Description	 Lisa mentioned that they have already been talking with us about a CRM upgrade project.

COMPANY

Existing Account?	 Fabrikam, Inc.
-------------------	--

CONTACT PERSON

Existing Contact?	 Lisa Hathaway
-------------------	---

RELATED RECORDS

Account Name *	Fabrikam, Inc.
Owner *	 Jukka Niiranen
Relationship Type	--
Account Rating	B
City	Lynnwood

Existing Account Details

Full Name *	Lisa Hathaway
Job Title	CRM Manager

Workflow closes the lead as Qualified

New contact record details are shown on the Quick View Form

Qualified | Read only



Updated Opportunity



Fabrikam's CRM upgrade

OPPORTUNITY

Est. Close Date -- Est. Revenue -- Status In Progress Owner* Jukka Niiranen

Identify Qualify Develop (Active) Propose Close Next Stage

Customer Need click to enter Est. Close Date * click to enter
Proposed Solution click to enter Identify Stakeholders mark complete
Est. Revenue * click to enter Identify Competitors mark complete

Summary

Topic *	Fabrikam's CRM upgrade
Contact	Mike Mitchell
Account	Fabrikam, Inc.
Purchase Timeframe	--
Currency *	euro
Budget Amount	--
Purchase Process	--
Process Stage	2-Develop
Description	They're on Dynamic CRM 2011 and need to catch up to the latest version
Current Situation	--

New contact has been added as a stakeholder on the existing opportunity record

POSTS

Both Auto

POST

STAKEHOLDERS

Name ↑ Role

Lisa Hathaway Influencer

Mike Mitchell Stakeholder

Sales Team



Final Notes





Next Steps

- Read more articles on Microsoft Dynamics CRM customization best practices at
<http://survivingcrm.com/>
- Follow [@jukkan](#) on Twitter for the latest #MSDynCRM related news and tips
- Check out the Dynamics CRM webcasts series at
<http://msdynamicsworld.com/webcasts>
- Thanks for viewing these slides & enjoy customizing your Dynamics CRM environment!