<u>Goal management Dynamics CRM 2015</u>

The ***goal management*** in Microsoft Dynamics CRM lets you set sales, marketing, and other business goals for your organization and measure the results against the targets. The goal management will help you motivate your work force, identify successful programs, do better planning, and grow your business.

Goal management offers the following capabilities:

1. Create a complex goal hierarchy where each goal is assigned to an individual goal contributor or a team.
2. Use the goals in the hierarchy to track important business data, such as revenues, customer services cases, or phone calls. You can also track data represented by custom entities.
3. Roll up the totals for each goal, such as total revenues or units shipped, in the hierarchy tree.
4. Measure the results of the rollup against the targets or stretch targets.
5. Track the goal results for a fiscal period or a custom period.
6. Align the goal period with the current fiscal year settings.
7. Support different goal types, such as Amount or Count.
8. Track actual, in-progress, and custom data.
9. Add complex queries to refine the results of the rollup.
10. Override the results of the rollup to include new or additional data.
11. Incorporate goal results in reports, charts, and dashboards.
12. Support workflows and customizations.

<u>Using Goals, Goal Metrics and Rollup Queries in Microsoft Dynamics CRM</u>

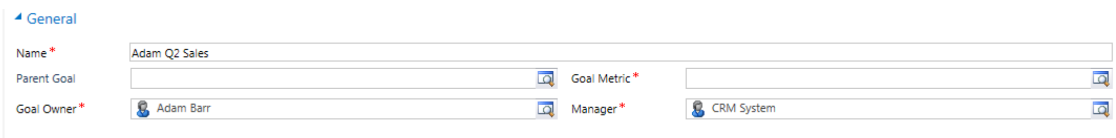
The Dynamics CRM Goals feature makes it easy to set business goals assign goals to individual teams or employees, and track and measure results against your targets.

To begin using Goals in Dynamics CRM, all you need to do is follow the simple instructions, below. First you will need to create a Goal for the data you are trying to measure. Next follow my second step on using a Goal Metric to tell the Goal if the figures being measured are number or dollar amounts. The third step is to create a Rollup field. In Dynamics CRM, every metric has Rollup fields that detail the actual and estimated value of the Goal that you are trying to measure. The last step will cover tracking and measuring results.

Part 1: Creating a New Goal in Dynamics CRM

1. Goals are located in the Sales area of your Dynamics CRM. To get started, click Sales then Goals in the left-hand navigation menu.

2. Select New from the ribbon. (If you want to attach an existing Goal to a colleague, select the Goal in the Parent Goal Lookup, and then skip to Step 2 below.)
3. Give your Goal a unique name.
4. To associate a Goal to a specific person, do a lookup in the Goal Owner field and choose the person that you want this Goal to track.
5. Then select a Manager for the Goal.

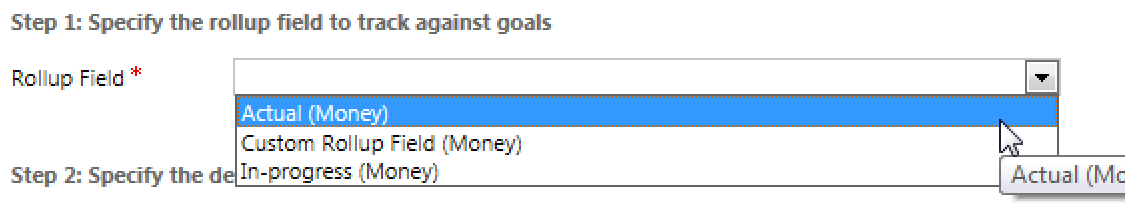


Part 2: Setting up the Goal Metric

1. Select the Lookup in the Goal Metric field.
2. Choose to Create a New Metric.
3. In the new window, give your Metric a name.
4. Select the Metric Type you are tracking. Amount will count the totals that you are tracking, count only counts the rows.
5. Using the pick list, choose the Amount Data Type. Money will return your results in dollar format (use if tracking revenue), Decimal will allow for decimals, and Integer will return a whole number (for tracking quantities).
6. By selecting Track Stretch Target, you can insert a higher Goal to reach.
7. Save but do not close the Goal Metric. You still need to add rollup fields to this Metric.

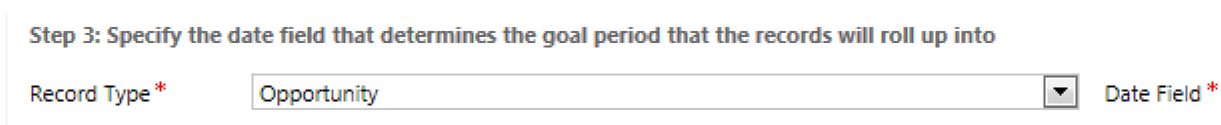
Part 3: Creating a Rollup Field

1. Click within the Rollup sub grid. Then select Add New Rollup Field from the ribbon.
2. Use the Rollup Field pick list to choose what you want to track.



3. The Source Record Type allows you to select the entity you want the data to come from. The Source Field pick list lets you choose the field on the entity that you selected.

4. The Record Type should match the Source Record type that you selected earlier.
5. Pick the Date Field that will give you the most correct data. For example, if you are tracking the total revenue from closed Contracts, then pick Est. Close date. If you are only tracking the number of Leads that a person has brought in, Created On might be your best choice.

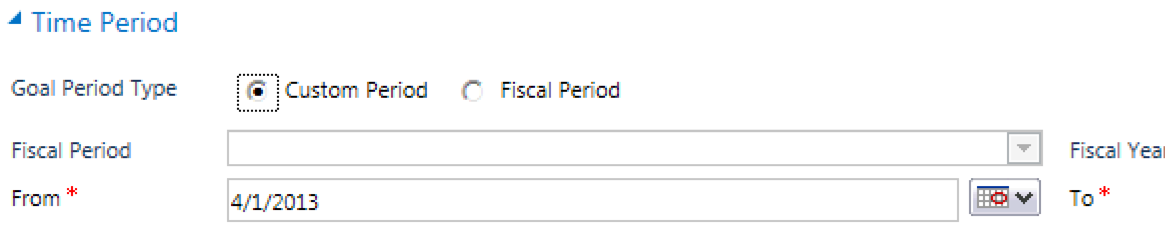


6. Save and Close the new Rollup.
7. Click on Goal Metrics in the ribbon tab.

8. Save and close the Goal Metric.

Part 4: Selecting and Calculating a Goal

1. Choose whether you want to track a goal during a Fiscal Period or set your own custom period.
2. Enter in the Target amount you want to track.



3. Save the Goal.
4. Click Recalculate on the ribbon to run the Goal.
5. The Actuals tab is where you can view how close an employee is to reaching the Goal you just set for them. You might have to scroll down to view your results.