EVERYONE WINS

*Choosing the right business
solution is a team sport.*

Microsoft Dynamics

START

FOR A BUSINESS MANAGEMENT SOLUTION TO BE SUCCESSFUL, IT HAS TO WORK FOR EVERYONE ON THE TEAM. ANSWER EVERY DEPARTMENT'S WANTS. SOLVE THEIR UNIQUE NEEDS. CONNECT ALL THE PLAYERS.

So what's the game plan? It starts with understanding the whole playing field. Have a talk with all your teammates, using this playbook as a guide. Get a better understanding of their business issues. Find out what they want to accomplish. And what they need from software. Do that, and it's much more likely everyone can use, and benefit from, a solution. Teammates thrive. Business grows. And everyone wins.
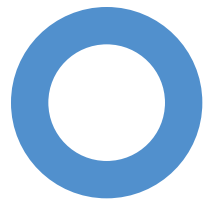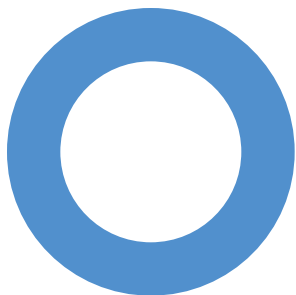
FINANCE

WHAT WE WANT.

We want accurate information fast. We want to make it meaningful, actionable and available to teammates throughout the company. We want to spend less time gathering information and more time helping the company grow.

WHAT I NEED FROM SOFTWARE.

☐ a single system that gathers and stores information from throughout the organization and delivers it via a number of customized reports

☐ real-time, relevant information made easily accessible to the right people via the Internet

☐ training that's easy and a system that works like other familiar software

☐ help implementing and documenting a consistent compliance process — and reducing the cost of compliance at the same time

☐ a way to reduce human errors and establish easy-to-follow audit trails

WHAT WE WANT.

We want to understand the details of our company's finances — where we are and where we're heading. We want to research specific strategic decisions and their impact on the bottom line.

WHAT I NEED FROM SOFTWARE.

☐ the most current data fed into the budgeting process, so we can make more accurate assumptions about market conditions

☐ more free time, so we can explore the "what-if" scenarios that help make wise budgeting decisions

NOTES:

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Finance produces the best information possible so that Operations can make the best possible product.
What does Operations need to win?

OPERATIONS

WHAT WE WANT.

We want to deliver the best product possible, in the most efficient and profitable way. We want to feel confident, knowing we can produce anything our customers want, when they want it.

WHAT I NEED FROM SOFTWARE.

- ☐ fast, on-time completion of all orders
- ☐ smooth accommodation of any exceptions, effortlessly managing orders that call for customized products and require special materials or process adjustments

WHAT WE WANT.

We want one system that works for everyone — from engineering and production to quality assurance and logistics. We want all these different Operations departments to get exactly what's required to do their part, while staying connected to everyone else.

WHAT I NEED FROM SOFTWARE.

- ☐ a single source of data and a platform for shared processes
- ☐ a way to keep everyone up-to-date on customer demand, materials shipments and production schedules
- ☐ collaboration — a system that brings us together, not farther apart

NOTES:

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Operations makes the best product possible so that Sales has something great to sell. **What does Sales need to win?**

SALES

WHAT WE WANT.

We want the information necessary to close deals and win customers — real easy, real fast. We want to know what's in the pipeline and exactly how we're performing at any given time.

WHAT I NEED FROM SOFTWARE.

- ☐ knowledge of all actionable opportunities
- ☐ real-time information about our team's progress on converting new leads to sales
- ☐ a view of the most accurate company data and business-critical information — like forecasts and results — sliced up and served up just for us
- ☐ ease and familiarity, so that we can access data — online or off-line — without having to be tech heads

WHAT WE WANT.

We want to deliver exceptional customer service and keep the customers we already have. We want to know what our competition is up to.

WHAT I NEED FROM SOFTWARE.

- ☐ help maximizing relationships with existing customers and providing them with the most advanced service, including online self-service
- ☐ instant access to current and comprehensive customer account information
- ☐ a way to keep track of our competitors

NOTES:

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Sales turns leads into customers. Marketing makes sure sales always has leads to work with.
What does Marketing need to win?

MARKETING

KEY PLAYERS:

WHAT WE WANT.
We want to be in total control of all our marketing efforts. We want help planning and executing every phase and each element of a campaign.

WHAT I NEED FROM SOFTWARE.
☐ smart ways to accurately target campaigns and personalize communications
☐ automated tools that can easily set up a complicated, multifaceted campaign
☐ help tracking the progress and completion of campaign-related tactics
☐ integration with other company software, making it easier to coordinate meetings and tasks

WHAT WE WANT.
We want to know our marketing is effective — and have the hard data required to justify the money we spend.

WHAT I NEED FROM SOFTWARE.
☐ the ability to link a campaign to a budget, so we can monitor investment in real time, tracking details like response rates, revenue and cost
☐ reports that summarize a campaign based on time parameters, both planned and actual
☐ a way to assess the success of a campaign based on different market segments
☐ comparison of the company's most and least successful campaigns, based on a number of variables, like cost effectiveness and customer response

NOTES:

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Marketing is always generating new customers. IT makes sure everybody's plugged in.
What does IT need to win?

INFORMATION TECHNOLOGY

WHAT WE WANT.

We want to integrate all of our company's departments and functions into a single platform. We want a system that works for our business now and well into the future.

WHAT I NEED FROM SOFTWARE.

☐ one platform and one source of data
☐ customized options, so I can purchase and install only what's needed now with the flexibility to add on later
☐ a way to bring our business to the Internet

WHAT WE WANT.

We want to feel completely secure. We want to easily handle any problems.

WHAT I NEED FROM SOFTWARE.

☐ limited, if any, downtime and minimal business disruption
☐ a seamless transition from old systems to new
☐ an expert business partner to work with and learn from

WHAT WE WANT.

We want all of our systems, old and new, to fit together easily.

WHAT I NEED FROM SOFTWARE.

☐ a solution that lets us leverage all our existing technology, maximizing the IT investments we've already made
☐ connectivity to other systems, both inside and outside the company
☐ training that's easy and minimal, so that people can get up to speed quickly

NOTES:

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IT makes sure everything and everyone is up and running. HR helps everybody do their best.
What does HR need to win?

HUMAN RESOURCES

KEY PLAYERS:

WHAT WE WANT.
We want to maximize the investment we've made in people. We want to help them fulfill their potential while minimizing our administrative costs.

WHAT I NEED FROM SOFTWARE.
☐ Internet-based administration, giving team members easy, secure access to their personal information
☐ a way to simplify administrative tasks and control costs
☐ streamlined, accurate and on-time payroll processing
☐ assistance in executing year-end processes and ensuring full regulatory compliance
☐ easy, effective training, so our team can focus on what matters most

WHAT WE WANT.
We want to hire the right people, and create the teams that have the highest potential for success.

WHAT I NEED FROM SOFTWARE.
☐ a tool to assess and drive every individual's and team's performance in line with business goals
☐ insight into the makeup of our team
☐ help optimizing staffing levels
☐ a way to make recruiting, hiring and performance reviews more efficient and equitable

NOTES:

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HR puts together the ultimate team — so that every department has the players needed to win.

NEXT STEPS

NOW THAT YOU CAN SEE THE WHOLE PLAYING FIELD, AND WHAT EVERY MEMBER ON THE TEAM WANTS AND NEEDS, WHAT'S YOUR NEXT MOVE?

Spread the word. Share the playbook with all your teammates.

Get smart. Read about software in action at companies just like yours at **www.microsoft.com/dynamics/casestudies**.

Go deep. Take your information gathering process to the next level at **www.microsoft.com/dynamics/selection_guide**.

Get help. Contact us with questions or find a local partner at **www.microsoft.com/dynamics/request_more_info.mspx.**