Microsoft Dynamics CRM Training Guide

A Curriculum Guide for CRM Enthusiasts Based on “The CRM Field Guide”

The CRM Field Guide

How to CRM like an MVP with Microsoft Dynamics CRM

The CRM Field Guide is an essential guide to Microsoft Dynamics CRM that everyone should have on their bookshelf. This book offers you details not only on CRM fundamentals and extensibility points but also the tried and true best practices and strategies of the combined experience of some of the most recognizable global experts in the CRM industry. The field guide contains insights from many CRM MVP contributors and is intended to be a book you pick up over and over again as you use CRM.

Prepared By

Jerry Weinstock, Microsoft Dynamics CRM MVP
Co-author “The CRM Field Guide”

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Introduction

The CRM Field Guide was published in October 2012. It is a collection of contributions by 19 Microsoft Dynamics CRM MVPs. The book is an essential guide to Microsoft Dynamics CRM that everyone should have on their bookshelf. The Field Guide offers you details not only on CRM fundamentals and extensibility points but also the tried and true best practices and strategies of the combined experience of some of the most recognizable global experts in the CRM industry.

The challenge with the book is that it is potentially overwhelming in the content it contains at 900+ pages in 25 chapters. The chapters were loosely organized, but not in any specific sequence since it was designed to fit the needs of a broad audience. This curriculum guide is designed to solve the issue for owners of the publication – which chapter do I start with, which ones do I read and is there a particular sequence that they should be read to maximize my learning?

The curriculum guide is based on six personas and one environment. The most relevant chapters for each discipline are organized in recommended reading sequence. It ranges from about 8 chapters on the low end to 16 on the high end for each group. Can you read other chapters that weren’t highlighted in the curriculum? Absolutely! Depending on the way your organization uses the CRM system there may be other chapters that were not in the recommended sequence that could complement your learning program.

Audiences

The audiences are:

- **CRM Admin** – This is the person(s) in the organization that is responsible for guiding the implementation and general support of the CRM application. Depending on the size and structure of your organization you may be either a coordinator, process manager, or actual ‘doer’ for the CRM system.
- **Power User** – Typically a technology enthusiast that loves to understand a computer program’s functionality and push it to the limit while maximizing how that helps them in their daily work.
- **Business Analyst** – The interpreter and translator that sits between the business users and the technology team to guide and define how the out of the box features and functions will be customized to work the way the business works.
- **IT Support** – You are the owner of the network, infrastructure, servers and the devices at your company. Anything that touches the hardware or operating system requires your oversight and involvement.
- **Developer** – The coders. You take the specifications from the business analyst and customize or extend the application with your programming skills. You also educate the rest of the business with things they should know and consider as they work to craft the solution to support the business.
- **New User** – You’re the person that has been using some other contact management system or pen and pencil, Excel, Outlook, or Access to help you manage your customer information. You now will be using Microsoft Dynamics CRM and need to understand its features, functions. As you become more informed you will be more proficient with the application and be able exploit its features to organize your customer information and support your activities.
• **On-Premise Environment** – this is a collection of chapters that are of interest to a cross section of users that need to understand the implementation and support process for the CRM On-Premise application.

**Curriculum Guide**

The following is the Curriculum Guide for each persona listing the chapters in the sequence they should be read.

**CRM Admin**

1. **Chapter 1** - Building the Foundation – This chapter lays the groundwork for understanding the various terms and parts of a CRM Organization. It includes helpful tips not covered elsewhere in the book.
2. **Chapter 2** - CRM Server Installation & Configuration – Learn the requirements, the planning steps, and the process for installing and configuring your CRM server.
3. **Chapter 3** – CRM Outlook Client Installation & Configuration addresses the different choices and troubleshooting techniques for installation and configuration of Dynamics CRM Outlook Client.
4. **Chapter 5** – E-mail Router Installation & Troubleshooting covers the necessity of the e-mail router, the deployment wizard, the configuration manager, hardware and software requirements, installation and configuration and user settings for the e-mail router.
5. **Chapter 6** - Security Best Practices covers the why and the how of security in Dynamics CRM, including the security tools already built in to CRM as well as a look at special case handling.
6. **Chapter 10** - The Power of CRM & Outlook explores the benefits of integrating and synchronizing CRM and Outlook and explains how to make it happen and make the most use of the combined tools.
7. **Chapter 12** – Processes delves into the power and scope of Workflows and Dialogs, how they work and how you can use them for maximum benefit.
8. **Chapter 11** – Dynamics CRM Goal Management is an in-depth look at the foundations of goal management, ranging from Sales to Marketing to Service and beyond.
9. **Chapter 9** - Marketing Management Best Practices is a detailed look at the benefits of CRM’s marketing tools, including marketing lists and campaigns, as well as campaign reporting.
10. **Chapter 18** - Data Management Best Practices explores using the Data Import Wizard, duplicate detection, and bulk deletion, plus best practices for ensuring high-quality data in your CRM system.
11. **Chapter 20** - Customization Strategies discusses a variety of strategies that can be used to customize CRM to fit your business needs and reviews the solution architecture and management.
12. **Chapter 21** - Introduction to Solutions gives details on custom solutions and components, managed vs. unmanaged solutions, the importing and exporting of solutions, deleting solutions and managed properties.
13. **Chapter 16** - CRM Outlook Optimization & Troubleshooting examines what you can do to optimize the performance of the Outlook client and how to troubleshoot CRM for Outlook.
14. **Chapter 15** - SharePoint & CRM: Better Together discusses the benefits of SharePoint collaboration tools being integrated with CRM in order to provide the 360° view of the customer, including how to set up integration and how to access CRM from SharePoint.
15. **Chapter 23 - Dynamics Connector - From Zero to Hero**, in this chapter, you will learn what some of the considerations are when combining CRM with other members of the Dynamics family, what options are available, how to choose and implement the best option or combination of options, and some helpful resources for reference.

16. **Chapter 25 - Community Resources** is a plethora, a veritable cornucopia, of resources from the global community of user groups, users, MVPs, Microsofties, social media masters and blogs that can help you maximize your CRM skills and guide you to the answers you seek.

**Power User**

1. **Chapter 1 - Building the Foundation** – This chapter lays the groundwork for understanding the various terms and parts of a CRM Organization. It includes helpful tips not covered elsewhere in the book.
2. **Chapter 19 - User Adoption** shares key concepts and strategies for encouraging and improving user adoption within your organization.
3. **Chapter 7 - Sales Management Best Practices** examines critical success factors for sales management, activity and lead management, customer, opportunity and pipeline management, and workflows and sales processes.
4. **Chapter 9 - Marketing Management Best Practices** is a detailed look at the benefits of CRM’s marketing tools, including marketing lists and campaigns, as well as campaign reporting.
5. **Chapter 10 - The Power of CRM & Outlook** explores the benefits of integrating and synchronizing CRM and Outlook and explains how to make it happen and make the most use of the combined tools.
6. **Chapter 12 – Processes** delves into the power and scope of Workflows and Dialogs, how they work and how you can use them for maximum benefit.
7. **Chapter 11 – Dynamics CRM Goal Management** is an in-depth look at the foundations of goal management, ranging from Sales to Marketing to Service and beyond.
8. **Chapter 13 - Aligning Reports to the Audience** helps the reader understand and meet the needs of different users and stakeholders by exploring the varying needs and expectations of users and using the array of out-of-the-box tools.
9. **Chapter 25 - Community Resources** is a plethora, a veritable cornucopia, of resources from the global community of user groups, users, MVPs, Microsofties, social media masters and blogs that can help you maximize your CRM skills and guide you to the answers you seek.

**Business Analyst**

1. **Chapter 1 - Building the Foundation** – This chapter lays the groundwork for understanding the various terms and parts of a CRM Organization. It includes helpful tips not covered elsewhere in the book.
2. **Chapter 19 - User Adoption** shares key concepts and strategies for encouraging and improving user adoption within your organization.
3. **Chapter 20 - Customization Strategies** discusses a variety of strategies that can be used to customize CRM to fit your business needs and reviews the solution architecture and management.
4. **Chapter 7** - Sales Management Best Practices examines critical success factors for sales management, activity and lead management, customer, opportunity and pipeline management, and workflows and sales processes.

5. **Chapter 9** - Marketing Management Best Practices is a detailed look at the benefits of CRM’s marketing tools, including marketing lists and campaigns, as well as campaign reporting.

6. **Chapter 12** – Processes delves into the power and scope of Workflows and Dialogs, how they work and how you can use them for maximum benefit.

7. **Chapter 11** – Dynamics CRM Goal Management is an in-depth look at the foundations of goal management, ranging from Sales to Marketing to Service and beyond.

8. **Chapter 13** - Aligning Reports to the Audience helps the reader understand and meet the needs of different users and stakeholders by exploring the varying needs and expectations of users and using the array of out-of-the-box tools.

9. **Chapter 15** - SharePoint & CRM: Better Together discusses the benefits of SharePoint collaboration tools being integrated with CRM in order to provide the 360° view of the customer, including how to set up integration and how to access CRM from SharePoint.

10. **Chapter 18** - Data Management Best Practices explores using the Data Import Wizard, duplicate detection, and bulk deletion, plus best practices for ensuring high-quality data in your CRM system.

11. **Chapter 21** - Introduction to Solutions gives details on custom solutions and components, managed vs. unmanaged solutions, the importing and exporting of solutions, deleting solutions and managed properties.

12. **Chapter 23** - Dynamics Connector - From Zero to Hero, in this chapter, you will learn what some of the considerations are when combining CRM with other members of the Dynamics family, what options are available, how to choose and implement the best option or combination of options, and some helpful resources for reference.

13. **Chapter 25** - Community Resources is a plethora, a veritable cornucopia, of resources from the global community of user groups, users, MVPs, Microsofties, social media masters and blogs that can help you maximize your CRM skills and guide you to the answers you seek.

**IT Support**

1. **Chapter 1** - Building the Foundation – This chapter lays the groundwork for understanding the various terms and parts of a CRM Organization. It includes helpful tips not covered elsewhere in the book.

2. **Chapter 2** - CRM Server Installation & Configuration – Learn the requirements, the planning steps, and the process for installing and configuring your CRM server.

3. **Chapter 3** – CRM Outlook Client Installation & Configuration addresses the different choices and troubleshooting techniques for installation and configuration of Dynamics CRM Outlook Client.

4. **Chapter 5** – E-mail Router Installation & Troubleshooting covers the necessity of the e-mail router, the deployment wizard, the configuration manager, hardware and software requirements, installation and configuration and user settings for the e-mail router.

5. **Chapter 6** - Security Best Practices covers the why and the how of security in Dynamics CRM, including the security tools already built in to CRM as well as a look at special case handling.

6. **Chapter 10** - The Power of CRM & Outlook explores the benefits of integrating and synchronizing CRM and Outlook and explains how to make it happen and make the most use of the combined tools.

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7. **Chapter 16** - CRM Outlook Optimization & Troubleshooting examines what you can do to optimize the performance of the Outlook client and how to troubleshoot CRM for Outlook.

8. **Chapter 17** - CRM Server Optimization, Maintenance & Monitoring covers CRM server, IIS, and SQL server optimization, as well as maintenance and monitoring of the servers.

9. **Chapter 21** - Introduction to Solutions gives details on custom solutions and components, managed vs. unmanaged solutions, the importing and exporting of solutions, deleting solutions and managed properties.

10. **Chapter 15** - SharePoint & CRM: Better Together discusses the benefits of SharePoint collaboration tools being integrated with CRM in order to provide the 360° view of the customer, including how to set up integration and how to access CRM from SharePoint.

11. **Chapter 4** - CRM 4 Upgrade to CRM 2011 – In this chapter you’ll learn the software and hardware requirements, develop an upgrade plan, prepare your database, upgrade customizations, perform and test the upgrade and train your users.

12. **Chapter 25** - Community Resources is a plethora, a veritable cornucopia, of resources from the global community of user groups, users, MVPs, Microsofties, social media masters and blogs that can help you maximize your CRM skills and guide you to the answers you seek.

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**Developer**

1. **Chapter 1** - Building the Foundation – This chapter lays the groundwork for understanding the various terms and parts of a CRM Organization. It includes helpful tips not covered elsewhere in the book.

2. **Chapter 24** - Rapid Development Best Practices is an overview of the strategies of preparation, planning, execution and delivery of customizations in an efficient and effective way that meets the needs of the client without reinventing the wheel.

3. **Chapter 20** - Customization Strategies discusses a variety of strategies that can be used to customize CRM to fit your business needs and reviews the solution architecture and management.

4. **Chapter 21** - Introduction to Solutions gives details on custom solutions and components, managed vs. unmanaged solutions, the importing and exporting of solutions, deleting solutions and managed properties.

5. **Chapter 22** - Solution Management and Troubleshooting is a more in-depth look at solutions, covering import behavior, managed properties, layering strategies and tips and tricks to get the most out of your CRM solutions.

6. **Chapter 23** - Dynamics Connector - From Zero to Hero, in this chapter, you will learn what some of the considerations are when combining CRM with other members of the Dynamics family, what options are available, how to choose and implement the best option or combination of options, and some helpful resources for reference.

7. **Chapter 6** - Security Best Practices covers the why and the how of security in Dynamics CRM, including the security tools already built in to CRM as well as a look at special case handling.

8. **Chapter 14** - Report Development shows how to create the best (read: most useful) reports by utilizing SQL, FetchXML and other tools to build custom reports in CRM.

9. **Chapter 9** - Marketing Management Best Practices is a detailed look at the benefits of CRM’s marketing tools, including marketing lists and campaigns, as well as campaign reporting.

10. **Chapter 25** - Community Resources is a plethora, a veritable cornucopia, of resources from the global community of user groups, users, MVPs, Microsofties, social media masters and blogs that can help you maximize your CRM skills and guide you to the answers you seek.

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New User

1. **Chapter 1** - Building the Foundation – This chapter lays the groundwork for understanding the various terms and parts of a CRM Organization. It includes helpful tips not covered elsewhere in the book.

2. **Chapter 19** - User Adoption shares key concepts and strategies for encouraging and improving user adoption within your organization.

3. **Chapter 10** - The Power of CRM & Outlook explores the benefits of integrating and synchronizing CRM and Outlook and explains how to make it happen and make the most use of the combined tools.

4. **Chapter 7** - Sales Management Best Practices examines critical success factors for sales management, activity and lead management, customer, opportunity and pipeline management, and workflows and sales processes.

5. **Chapter 9** - Marketing Management Best Practices is a detailed look at the benefits of CRM’s marketing tools, including marketing lists and campaigns, as well as campaign reporting.

6. **Chapter 8** - Service Management Best Practices explains the optimal use of cases, contracts, articles, service scheduling and the service calendar.

7. **Chapter 13** - Aligning Reports to the Audience helps the reader understand and meet the needs of different users and stakeholders by exploring the varying needs and expectations of users and using the array of out-of-the-box tools.

8. **Chapter 25** - Community Resources is a plethora, a veritable cornucopia, of resources from the global community of user groups, users, MVPs, Microsofties, social media masters and blogs that can help you maximize your CRM skills and guide you to the answers you seek.

On Premises

1. **Chapter 2** - CRM Server Installation & Configuration – Learn the requirements, the planning steps, and the process for installing and configuring your CRM server.

2. **Chapter 17** - CRM Server Optimization, Maintenance & Monitoring covers CRM server, IIS, and SQL server optimization, as well as maintenance and monitoring of the servers.

3. **Chapter 5** – E-mail Router Installation & Troubleshooting covers the necessity of the e-mail router, the deployment wizard, the configuration manager, hardware and software requirements, installation and configuration and user settings for the e-mail router.

4. **Chapter 4** - CRM 4 Upgrade to CRM 2011 – In this chapter you’ll learn the software and hardware requirements, develop an upgrade plan, prepare your database, upgrade customizations, perform and test the upgrade and train your users,
The CRM Field Guide

The book is published by We Speak You Learn. It is available for purchase at the publisher’s web site http://www.crmfieldguide.com or at Amazon.com by searching for The CRM Field Guide. It is available in paperback and or e-book. The ISBN number is 0981511899 and is 945 pages.
## Appendix – CRM Field Guide Curriculum Training Matrix

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<th>IT Support</th>
<th>Developer</th>
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