



Save Time and Money with Microsoft xRM Applications

The Business Case for Microsoft Dynamics CRM 2011 as a Rapid Application Development Platform

An InfoStrat White Paper

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Contents

Executive Summary	1
Requirements Analysis	2
Configuration versus Custom Programming	3
Using Pre-Built Solution Accelerators.....	4
Tested Reliability.....	6
IT Technical Staff	7
Training and Adoption	8
Software Product Licensing.....	9
Conclusion	10
About Information Strategies.....	11

Executive Summary

Microsoft Dynamics CRM offers more than simply an off-the-shelf Customer Relationship Management (CRM) software package. Microsoft Dynamics CRM can be used to build solutions for common business needs while significantly reducing technical risk, cost, and implementation time, compared to traditional custom application development.

A 2011 study by Flyvbjerg and Budzier published in *Harvard Business Review* illustrates that information technology (IT) projects carry significant risk for organizations. The study shows that for the 1,471 projects surveyed, on an average 27 percent were over budget and 16 percent of the projects failed. They had a cost overrun of over 200 percent and were late by almost 70 percent. An unusually large proportion of software development projects incur massive overages (<http://hbr.org/2011/09/why-your-it-project-may-be-riskier-than-you-think/ar>).

One method to help reduce this risk is to standardize the application development process by using Microsoft Dynamics CRM 2011 as a rapid application development platform. Dynamics CRM 2011 provides powerful form building, business process automation, and report creation capabilities right “out of the box.” This approach to application development is often called xRM where the x stands for “anything”. Building an xRM application in large part takes the form of customizing the existing functionality already included in Microsoft Dynamics CRM.

Building on the foundation of Microsoft Dynamics CRM avoids many of the common pitfalls of custom application development. It gives users a starting point for functional requirements, contains a rich data model, handles many common low-level programming tasks, and provides advanced functionality such as offline replication and integration with Microsoft Office.

Among the reasons the xRM approach will save organizations significant time and money, some stand out as major time and cost savers. This white paper provides an in-depth look at some of the factors which help to reduce project schedules and costs in delivering robust applications for organizations. This paper is designed to complement the InfoStrat White Paper “Microsoft Dynamics CRM as a Development Platform.”

Requirements Analysis

One of the biggest drivers of costs in building any complex business application is the requirements analysis phase. This phase documents the business requirements including the data fields to be captured, the presentation of these data elements in forms, the associated workflows, and the reports for the proposed system. Requirements analysis involves numerous meetings and iterations between the IT staff and the business users as they attempt to document every detail of features needed in the system to meet their information management needs. The task can be daunting because there are many decisions to be made and tradeoffs to consider. It is a major challenge for the end user of the system to envision every minute detail about every possible usage scenario of the new system.

A custom development approach essentially begins with a blank sheet of paper as the paradigm, and requires features to be defined from the ground up. The xRM approach starts with pre-built off-the-shelf component parts and tools, so the requirements analysis phase becomes more of a “gap analysis” type of approach where only the missing functionality needs to be identified and described in detail.

“The Executive Office of the Board of Supervisors is doing more with less by using Microsoft Dynamics CRM to develop flexible, high-impact business applications to meet our demanding strategic plan.”

**John Wei,
Chief Information Officer, Executive
Office of the Los Angeles County
Board of Supervisors**

This “gap approach” for requirements gathering is part of the Microsoft SureStep project methodology (<http://msdn.microsoft.com/en-us/library/dd979122.aspx>). The initial step in an xRM project is called the “Fit-Gap” phase which involves reviewing all of the functionality that comes “out of the box” and determining if it fits the business requirements already and, if not, identifying where the gap is, and describing the nature of the work (configuration or customization) that is required. It is also much easier for customers to envision how the new system will look because they will be looking at Dynamics CRM “out of the box” as the baseline for the purpose of discussing needs and requirements for the new system.

Configuration versus Custom Programming

Configuration

A great deal of the existing functionality in Microsoft Dynamics CRM 2011 can be modified and enhanced using configuration options and settings native to the product. New data elements can be created, forms can be designed, data entry wizards, workflows developed, and reports created all using “out of the box” configuration. An experienced Microsoft Dynamics CRM configuration engineer can rapidly modify the application to customize the functionality to tailor it to their specific business requirements rapidly as compared to writing custom software.

“Counties are strapped for resources. They’re being asked to cut back. This system will allow them to absorb those impacts without negative impacts on safety or how efficiently offenders are processed.”

***Rita Reynolds, Director of Technology
Services and Telecommunications,
County Commissioners Association of
Pennsylvania***

Custom Programming

To implement functionality that cannot be accomplished through “out of the box” configuration, there are two typical approaches: The method used to manipulate form behavior to implement conditional logic is the use of the programming language called JavaScript. Another mechanism is the use of what is called a “plug-in” which complements the built in workflow capability and allows the integration of the full range of custom business logic including existing proven code. Plug-ins and console applications are written in the familiar VB.NET or C# languages and can be developed by any experienced Microsoft .NET programmer. There may also be a need for some complex reports which go beyond the “out of the box” reporting tools. The tool used to construct these more complex reports, Microsoft SQL Server Reporting Services (SSRS), will again be familiar to any .Net developer. The reports are defined in Microsoft standard Report Definition Language (RDL) XML markup language. This means any custom report created in SSRS can be integrated seamlessly into the structure of CRM reports and dashboards created within CRM itself.

Using Pre-Built Solution Accelerators

To save additional time and money, the client should first determine whether the solution they want is similar to any of the pre-built Dynamics CRM Solution Accelerators provided by Microsoft or Microsoft partner companies. By installing a solution accelerator that maps well to the desired solution, the “gap” will be noticeably less during the requirements analysis phase and therefore the work to close the gap takes less time and money.

The Dynamics CRM marketplace and Pinpoint website contain directories of Dynamics CRM solutions. Some are available at no charge as downloads from Microsoft.

For instance, Microsoft Grants Manager (www.microsoft.com/grants) is a solution that automates government grant processes and workflows, including online applications, reviews, payments, and post-award reporting.

“The new system not only allows us to continue this important public safety service but also improves access to vital information and saves money while doing so. This initiative will strengthen the collaboration between our partners in criminal justice and the mission that we share in protecting communities across the State of Indiana.” (The change in service is estimated to save the State approximately \$2.4M over the next four years)

Edwin G. Buss, Commissioner
Indiana Department of Corrections

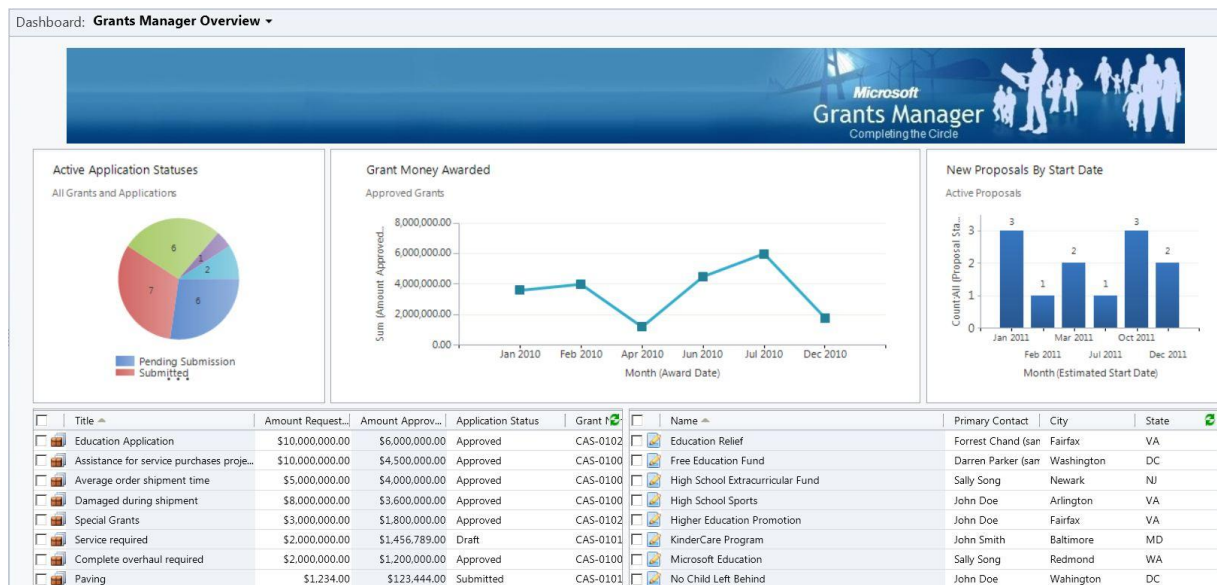


Figure 1. Microsoft Grants Manager solution

Another popular solution accelerator in use at many government organizations across the nation is Constituent Manager (<http://pinpoint.microsoft.com/en-us/applications/constituent-manager-4295006359>). Constituent Manager helps elected officials track phone, email, and correspondence inquiries and requests from constituents. A powerful workflow allows assignment of tasks and delegations.

The screenshot shows the 'Overview' tab of the Constituent Manager interface. The constituent is 'Bill Robbins'. The summary is 'Pothole'. The street address is '132 Main'. The issue/request is 'Pothole'. The case type is 'Report Problem'. The department assignment is 'Public Work'. The follow-up date is '4/14/2012'. The case origin is 'Phone'. The severity is 'Normal'. The recurring issue is 'No'. The case was created by 'James Richar'.

Overview	
Constituent *	Bill Robbins
Summary *	Pothole
Street Address	132 Main
Issue/Request	Pothole
Case Type	Report Problem
Department Assignment	Public Work
Latitude	
Case Origin	Phone
City	
Recurring Issue?	No
Severity	Normal
Follow Up By	4/14/2012
Longitude	
Created By	James Richar

Figure 2 Constituent Manager solution

Tested Reliability

Microsoft has invested tens of millions of dollars in development and testing of the Microsoft Dynamics CRM 2011 code base over nearly a decade. The software is in use by hundreds of thousands of customers around the globe every day and new releases are shipped once or twice a year. Consequently, Dynamics CRM is already robust and reliable and, unlike custom software, out-of-the-box CRM functionality does not require testing by the customer.

In an xRM project, the testing phase can focus primarily on custom areas (JavaScript, Plug-Ins, Custom Reports) that were developed during the project. This reduces the scope of testing and issue remediation.

“The LAUSD is a massive, complex organization responsible for educating hundreds of thousands of students every day. Supporting its operations requires systems that are agile and robust, enabling us to problem solve quickly and focus on the business of helping our students succeed.”

Ron Chandler CIO
LA Unified School District

IT Technical Staff

Organizations that adopt an xRM approach can maintain a dedicated group of software developers who focus on building and enhancing their Dynamics CRM developer skills to apply to all xRM-based applications.

If you purchase off-the-shelf products for line of business solutions based strictly on their features, you may end up with solutions that use different programming languages and therefore create a high long term support cost. Maintaining multiple technology teams for various applications is costly if different technologies are used for different line of business solutions with little overlap in technical skills.

If your organization standardizes on the Microsoft platform, particularly SQL Server and .NET development, you may crosstrain developers and support personnel on multiple solutions. This approach also applies to xRM development.

Training and Adoption

The Microsoft Dynamics CRM 2011 User Interface looks and acts like the Microsoft Outlook interface. As most organizations have standardized on Microsoft Outlook, end users are immediately comfortable in Dynamics CRM. The User Interface is consistent throughout the entire application. Initial pushback from end users, typical when they see new IT systems, is less of an issue. The functionality is easily discoverable and more intuitive based on their Outlook experience. This makes training go faster and end users quickly learn the new system.

Whether you're just starting to learn about Microsoft Dynamics or you're a seasoned veteran seeking a quick refresher, Microsoft offers you many ways to increase your knowledge and productivity with Microsoft Dynamics CRM. If your organization is enrolled in a service plan for Microsoft Dynamics, you can access unlimited Dynamics CRM online training – E-Learning, training materials, and learning plans (<http://www.microsoft.com/dynamics/customer/en-us/training.aspx>).

In addition, thousands of Microsoft Learning Partners worldwide are available to help you achieve your training goals. Microsoft Learning Partners are the only ones in the market with the latest Microsoft Official courses. They offer a breadth of solutions to suit your training needs, from classroom training to distance learning.

Software Product Licensing

By using the xRM approach, you can share the Dynamics CRM product licenses and spread this fixed cost over all of the xRM applications in use in the organization. This maximizes the benefit of the Dynamics CRM software licenses purchased and eliminates the need to buy and maintain products from an array of different software vendors.

Microsoft offers several licensing options for Dynamics CRM, including

- a. on-premise (installed on your servers at your premises),
- b. hosted (at a third party hosting facility),
- c. or the cloud-based Microsoft Dynamics CRM Online

Click on the below link to download the Pricing and Licensing Guide to learn about licensing options, programs, pricing, and payment terms available:

<http://www.microsoft.com/en-us/dynamics/crm-purchase-support.aspx>

Conclusion

Microsoft Dynamics CRM enables you to build line of business solutions in weeks or months that would take years as custom development projects, with high quality, greater reliability and lower cost.

The platform's rich out-of-the-box feature set, allows developers to provide rapid turnaround on a "proof of concept" for an organization so business users can validate logic and assumptions early in the development process. Furthermore, business users can be fully involved in the development process which increases user acceptance. The combination of these factors saves development time, reduces risk and leads to a lower overall cost of deployment than custom developed applications.

About Information Strategies

Information Strategies, Inc. (“InfoStrat”) is a national Information Technology (“IT”) consulting firm. We are trusted advisors to many state and local governments and institutions. We have been in business for over 25 years and have a proven track record of success. InfoStrat began with a focus on implementing relational database management systems and evolved into developing sophisticated web applications, portals, customer relationship management systems, and multi-touch applications. InfoStrat is recognized as one of the nation’s leaders in adopting Microsoft development technologies, more recently in the areas of multi-touch devices, business intelligence, and social networking.

InfoStrat is one of the top Microsoft Application Development Partners in the nation and is a Gold Certified Partner, the highest partner category. InfoStrat has Gold Certifications in Customer Relationship Management, Portals and Collaboration, and Digital Marketing. InfoStrat is the winner of numerous Microsoft Partner Awards over the past twelve years, most recently being awarded the “Partner of the Year Award State & Local Government Solutions” at the Microsoft Worldwide Partner Conference in July 2010.



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