

# Microsoft Dynamics CRM for Government

Take the next  
step forward.



*"I'm now starting to realize the dream of making an impact on the community that I live in.*

*What we are doing is improving the way of life for the citizens of Zimbabwe."*

**Allen Saruchera,  
Manager, IT Services,  
ZIMRA**

*"If I had to choose a technology that would help me race to meet deadlines, it would be Microsoft Dynamics CRM."*

**Keff Johnson  
Dallas County  
Software Manager**

The private sector has revolutionized customer care, and these improvements have accordingly and understandably raised the expectations of individuals and organizations as they interact with their government. People have experienced access to broad customer service options on their own terms, and now citizens and constituents expect seamless, personalized, convenient self-service options for interacting with government organizations across multiple channels at any time of day or night. Government organizations of all sizes can strengthen these relationships by cost-effectively and efficiently delivering higher levels of prompt, "citizen-centric" service using the same customer relationship management (CRM) tools and technologies widely adopted within the commercial sector.

Microsoft's vision is to create opportunities within government to provide extraordinary value to citizens and constituents as well as to workers and leaders; change the way government runs from within and change the way government interacts with the world. This transformation won't come by accident. It requires a strategic approach to make that a reality today and sustainable for the future. A well-defined CRM strategy with Microsoft Dynamics® CRM at its center can help governments meet citizens' expectations for efficient and accessible service, all the while maintaining budgetary integrity.

Microsoft Dynamics CRM is a complete relationship management solution that helps improve collaboration, communication, operational insight and overall efficiencies. Built on and accessed through familiar Microsoft technologies, it provides a flexible and affordable platform that gives government organizations a 360-degree view of citizens' and constituents' information and needs in order to quickly and easily resolve inquiries and issues. Microsoft Dynamics CRM automates and streamlines key tasks associated with citizen services, field inspections, case management, grants management, licensing and permitting and much more, thus empowering government organizations to meet their unique requirements and improve service delivery across all departments and functional areas.

Microsoft Dynamics CRM can help governments attain three key objectives:

- People-Centric Productivity
- Citizen Value Creation
- Government Cost Management

With Microsoft solutions, governments can do NEW with less, by building on existing investments at their own pace to create a modernization approach that works today and is sustainable into the future. Microsoft and our partners bring cloud, Big Data, mobile, and social technologies together in solutions that empower governments to put people first. Imagine what's next!

# People-Centric Productivity

Increase workload efficiencies for staff by automating tasks, centralizing data and enhancing business intelligence.

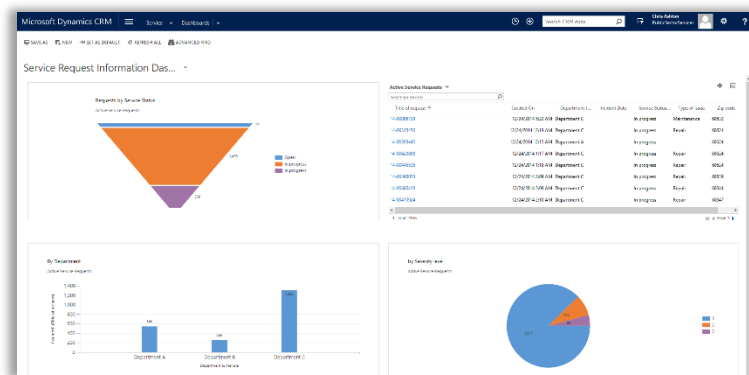
**Streamline processes and automate tasks.** By modernizing processes that are historically tracked via pen and paper, employees can better utilize time and direct resources. Automating workflows and reducing administrative tasks minimize paperwork, errors, delays, and wasted time, so efficiency and effectiveness of staff are increased.

**Enhance business intelligence.** Facilitate data access, analysis and reporting due to the consolidation of citizen information into one central source with real-time updates. This single, holistic view of the citizen allows for more effective tracking, quicker and more accurate reporting, an increased ability to detect and resolve issues and discover trends as well as elimination of duplicative aspects of case handling and data entry. Reports, dashboards and other tools are readily available.

**Increase ease of access in the field.** A new Windows 8 and iPad mobile application allows workers to use their mobile devices or laptops to access tools and information, including open cases, applicable citizen information and even customized business logic added to the CRM deployment. Evaluating and managing licensing and permit applications, uploading photos of code violations, accessing service requests and updating their status can all be easily accomplished while out of the office. Mobile analytics have been enhanced for more effective analysis, and upgraded guided processes reduce uncertainty.

**Increase intra- and interagency collaboration, communication and satisfaction.** The amalgamation of citizen information equates to “one view of the truth”, leading to fewer miscommunications, decreased errors and even improved relationships, as the flow of information within the agency and between agencies becomes smoother, accurate, and consistent.

**Manage funds and grant requests.** Automated grant request, review, management, and tracking systems help ensure that the funds granted or received are used efficiently, effectively, and as planned in order to benefit the community.



*A clean, focused, intuitive and immersive experience*

**Provide a comfortable and familiar user experience.** Workers are already proficient with the Microsoft suite of products, and Dynamics CRM’s seamless integration with other Microsoft products such as Outlook, Excel and Word facilitate data handling and correspondence handling, so deployment is swift, and daily use becomes agile, straightforward and conducive to increased productivity. A smoother and more intuitive navigation system streamlines tasks even further and eliminates extraneous clicking, searching and window pop-ups. Process enforcement has also been enhanced to ensure that each interaction is handled in the best proven way.

# Citizen Value Creation

Provide higher levels of service to citizens by streamlining interactions, empowering citizens and increasing transparency.

**Provide quick issue resolution for citizens, a “one-stop-shop”.** Instead of extensive and extended interactions with multiple government workers involving repeatedly providing the same information over and over again, citizens can find resolution of multiple issues through one quick and accurate point of contact due to centralized, agency-wide citizen information. Regardless of whether information or service requests are made by phone or email, via a website or in person, contact center staff members can easily access information and route requests to appropriate departments. Seamless, quick, efficient, citizen-centric service results in increased citizen satisfaction levels and strengthened relationships between government and its citizenry.

**Empower citizens and increase transparency.** Offer more self-service options and real-time access to information through the use of mobile devices, applications and web-based services, letting citizens monitor case resolution results, service request status updates, personal information and more through effective search and tracking tools.

**Improve government offerings to citizens.** Consolidation of information expands government business intelligence capabilities, which promotes effective planning. Government agencies can determine deficiencies and wins as well as citizen wants, needs and dislikes in order to add, remove or adjust offerings accordingly.

**Optimize the usage of taxpayer dollars.** Increased government worker efficiency, improved inter- and intra-agency collaboration and communication, fewer delays, and less bureaucracy translate to spending taxpayer money more efficiently.

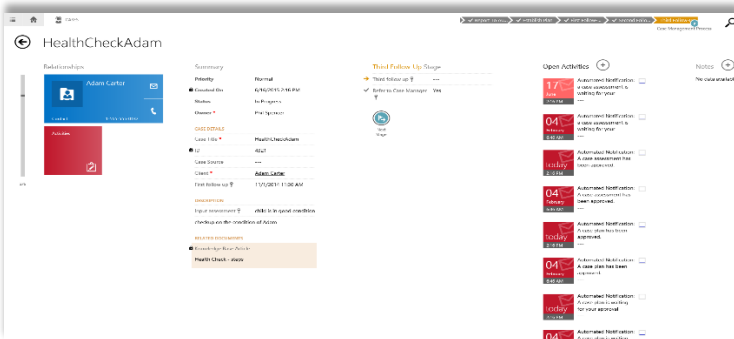
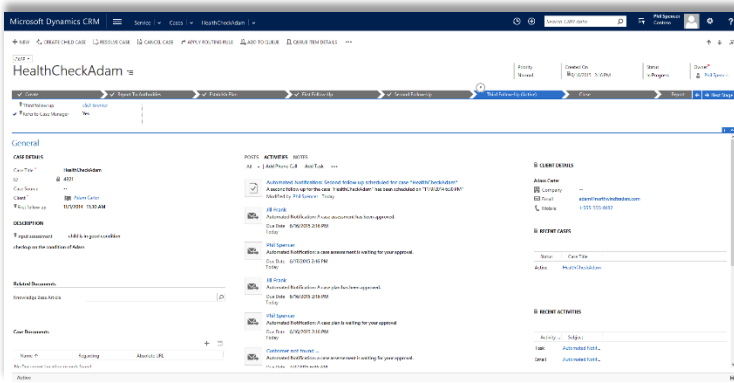
# Government Cost Management

Manage the cost of governing more proficiently and accomplish more with less by adopting tools that quickly integrate with existing infrastructure, enhance usability, and provide insight into current systems.

**Extend existing IT investments with minimal costs.** Microsoft Dynamics CRM can integrate with legacy technology, helping to avoid costly IT investments. Get up and running quickly with low start-up costs, shortening time to benefit. Setup time is reduced due to streamlined installation processes and enhanced diagnostic and troubleshooting tools, while automatic updating tools in Microsoft Dynamics CRM Online can free IT staff from routine, time-consuming updating tasks.

**Development costs are reduced,** as the necessary business functions are provided right out of the box, but any fine-tuning required to meet an agency’s specific needs is simplified through easy, self-service customization capabilities.

**Reduce training costs.** Workers’ existing familiarity with the Microsoft suite of products equates to minimal training costs.



A flexible and configurable, process-centric experience using your PC or tablet

**Save money by sharing solutions and services.** Implement Microsoft Dynamics CRM within single departments or divisions and expand to other areas as resources allow, thus creating synergy between various departments, organizations and data centers, sharing intelligence, and cutting maintenance expenditures and other costs, such as those involved with duplicative data entry into multiple locations.

**Recruit new businesses to the community.** Create and effectively manage economic development communications and interactions using business recruiting and community expansion tools.

**Generate additional revenue** via tax compliance efforts using analytics and data gathered from the licensing and permitting process.

**Help contribute to green initiatives.** Save on paper costs and help save the planet.

**Simplify enforcement of codes.** Automate and streamline code enforcement by linking to licensing and permitting. Obtain a holistic view of violators and their histories.

**Save money due to increased staff productivity:**

- Reduced time spent on tasks previously handled manually
- Easier data access, analysis and reporting
- Reduced time spent in multiple, repetitive interactions with candidates
- A comfortable, familiar user experience
- Improved inter- and intra-agency collaboration and communication

*“Our experience shows how the cloud-based model can transform the way a public sector organization operates, reducing costs while maintaining the right levels of security.”*

*Paul Brigland*

*Supreme Court of the United Kingdom*

*Head of ICT*



## At-a-Glance Chart of Features and Benefits of Microsoft Dynamics CRM

<b>Citizen Services</b>	<ul style="list-style-type: none"> <li>• Allow citizens and constituents to access information, submit, and self-monitor requests via self-service portals incorporating role-based security. A “one-stop-shop” for all their needs.</li> <li>• Consistent interaction: Deliver seamless experiences across web, social, chat, email, mobile &amp; phone.</li> <li>• Easily handle simultaneous interactions through voice, chat and email while increasing effectiveness using guided scripts and in-context application automation</li> <li>• Deliver consistent and contextual answers at the right time by unifying knowledge across all service channels. Provide rich media articles such as images, videos and real-time feeds.</li> </ul>
<b>Citizen Case Management</b>	<ul style="list-style-type: none"> <li>• Increase efficiency with citizen case management capabilities that streamline the creation, assignment and management of cases across multiple channels:             <ul style="list-style-type: none"> <li>◦ defining and managing service entitlements and SLA's</li> <li>◦ creating dynamic routing and queuing rules to ensure you hit your service targets</li> <li>◦ enabling agent swarming on high priority cases using Yammer</li> </ul> </li> <li>• Maintain an audit trail for cases for improved oversight</li> <li>• Multi-channel Care*; 24/7 self-service across mobile devices, Facebook, and real-time chat with integrated knowledge from your desktop or mobile device.</li> </ul>
<b>Grant Management</b>	<ul style="list-style-type: none"> <li>• Use automated grant management processes to track requests, identify available funds, review and approve spending, and track progress</li> <li>• Effectively manage and report on multi-year projects funded by multiple grants by using various accounting capabilities and workflow tools</li> <li>• Help ensure accountability and compliance with legislative requirements</li> <li>• Streamline the financial aspect of grants management, including authorization of funding sources, processing of payment requests, and invoicing with the integration of a financial package</li> </ul>
<b>Licensing, Permitting and Code Enforcement</b>	<ul style="list-style-type: none"> <li>• Reduce time spent on tasks traditionally handled using paper-based manual processes by automating the processes behind licensing and permitting requests and approvals</li> <li>• Increase productivity of workers when away from the office via easy access from the field through the use of mobile devices</li> <li>• Simplify and streamline enforcement of codes by automating and linking to licensing and permitting efforts</li> </ul>
<b>Constituent Management</b>	<ul style="list-style-type: none"> <li>• Simplify and streamline key tasks using automated workflows, dashboards, and analytical tools</li> <li>• Easily route requests to the appropriate departments and flag for follow-up alerts.</li> <li>• Develop and distribute targeted communications about upcoming events, new services, and changing policies</li> <li>• Efficiently manage phone, email, or in-person communications</li> <li>• Fuel outreach and recruitment efforts by managing a pipeline of new or expanding businesses and employment opportunities</li> </ul>
<b>Social Engagement</b>	<ul style="list-style-type: none"> <li>• Easy to understand Dashboard shows volume of conversations by language, sentiment and channel</li> <li>• Interactive, visual analytics for easy insights and understanding</li> <li>• View posts and reply in-line Tweets</li> <li>• Early warning alerts to quickly identify constituent issues and trends</li> <li>• Track and measure topics you care about across Facebook, Twitter, Blogs, Videos and news publications.</li> <li>• Top influencer tracking lets you see who is talking most about your topic</li> <li>• Native language sentiment analysis in the native language so you won't miss cultural cues</li> <li>• Transform social interactions into end to end customer service experiences with the ability to create and route cases from social posts based on sentiment, keyword and language.</li> </ul>

<b>Knowledge Management</b>	<ul style="list-style-type: none"> <li>• Author, review and publish knowledge for internal use with employees and external with citizens/constituents from social channels, service interactions and subject matter expert</li> <li>• Intuitive search provides highly relevant results including how-to videos, FAQs and other documents</li> <li>• Reduce time spent searching for files by keeping all related files together; documents or notes can be attached to any CRM entity, including linking SharePoint document libraries.</li> </ul>
<b>Human Resources and Operations Management</b>	<ul style="list-style-type: none"> <li>• Manage internal help desk and human resources services via dashboard, portal, and communication capabilities</li> <li>• Track employee training and skill development</li> <li>• Keep people informed about policy changes, events, and more</li> <li>• Help attract and retain skilled staff by giving them a solution that's easy to learn and use</li> </ul>
<b>Comprehensive Business Intelligence</b>	<ul style="list-style-type: none"> <li>• Respond quickly to changing constituent needs and government legislation by increasing the efficiency of resource planning and allocation activities</li> <li>• Quickly analyze critical trends and share real-time information</li> <li>• Pull together all your data for easy analysis in any of the more than 40 out-of-the-box reports covering a wide range of areas such as revenue, leads, cases, campaigns, accounts, contacts, events, win-loss, and pipeline</li> <li>• Build your own rich, interactive, structured reports using a Report Wizard, even using data from other data sets</li> <li>• Easily conduct your own analysis, modeling and reporting of data within the system by using a broad suite of flexible, powerful tools</li> <li>• Review reports and analytics anywhere by taking them offline</li> <li>• Import data of any record type into the system</li> </ul>
<b>User Experience and Workflow</b>	<ul style="list-style-type: none"> <li>• Improve adoption time and eliminate the costs associated with software familiarization, as users are accustomed to the Microsoft look and feel due to the standard set of icons and visual components that are utilized across the platform</li> <li>• Control what data is surfaced, how it appears to the individual user, and their read/write access to the data. Easily configure new user and security roles.</li> <li>• Manage preferences through the entire scope of the application, including access, security, privacy, and communication</li> <li>• Obtain online help with Microsoft Dynamics CRM's native knowledge base application built right in</li> <li>• Implement workflows the way you want to--simple, single step workflows or complex ones, across out-of-the-box system entities or custom entities, and across few or all record types, manually or automatically when you pre-determine</li> <li>• Collaborate more broadly by using Groups across Office products</li> <li>• Create a uniform look and feel across all your applications with themes, such as adding a company logo or change default colors for entities or links</li> </ul>
<b>Mobility Over Multiple Devices</b>	<ul style="list-style-type: none"> <li>• Re-imagined phone app, with support for iPhone, Android, and Windows Phone, allowing the user to manage data guided by contextual business processes while on the go.</li> <li>• Obtain rich client versions through certified partners</li> <li>• Tailor CRM mobile solutions to your unique business environment using a Mobile SDK that provides rich configuration and customization capabilities. Write minimal code to connect to REST/SOAP endpoints</li> <li>• Increase analytical effectiveness due to enhanced mobile analytics, reduce uncertainty through guided processes and even access customized business logic added to your CRM deployment</li> <li>• Azure App Services connector facilitating custom mobile app that leverage Azure services</li> </ul>
<b>Microsoft Platform Interoperability</b>	<ul style="list-style-type: none"> <li>• Eliminate application-to-application challenges via CRM's seamless, native integration with Microsoft Outlook, Microsoft SharePoint Server, Microsoft Exchange Server, Microsoft Office Communications Server and Microsoft Lync Server. <ul style="list-style-type: none"> <li>◦ Outlook— due to bidirectional synchronization, data is always up-to-date and doesn't need to be input or tracked in multiple sources</li> <li>◦ Excel-- two-way data transfer translates to easy analysis and reporting</li> <li>◦ Word—easily create mass email or postal mail campaigns with CRM data via integration with mail merge</li> <li>◦ Lync—simplify communications by being able to see presence status of Lync users, initiate Lync calls or instant messaging conversations from within CRM</li> </ul> </li> </ul>

	<ul style="list-style-type: none"> <li>○ Exchange Sync Online – Configure and manage synchronization between CRM Online and Microsoft Exchange Online</li> <li>○ OneNote – create and view notes containing text, photos, voice, spreadsheets, and freeform drawings all within context</li> </ul>
<b>Platform Security and Customization</b>	<ul style="list-style-type: none"> <li>• Use several methods to build customized solutions to meet your needs on top of the flexible, robust core platform capabilities included with CRM; no need to custom-build the foundation</li> <li>• Many of the most common customization tasks can be carried out using point-and-click tools included in Microsoft Dynamics CRM, but more sophisticated customizations may be carried out using Visual Studio tools and any .NET development language.</li> <li>• Maintain distinctions between multiple departments' data and customizations</li> <li>• Regulate data access with CRM's combination of role-based security, record-level security, and field-level security</li> <li>• Control identity management and ease the burden of mundane password management by setting up various standards-based identity providers if authenticated sign-on security is required</li> <li>• Set up web-based citizen or constituent-facing portals that connect to CRM and run in your data center or in Windows Azure via CRM's flexible web portal framework</li> <li>• Develop and test customizations in an isolated, non-production online environment</li> </ul>
<b>CRM Online</b>	<ul style="list-style-type: none"> <li>• Enjoy financially backed security, data privacy, and consistent Microsoft-managed upgrades</li> <li>• Guaranteed uptime backed by a 99.9 percent service level agreement and online and phone support</li> <li>• Pay-as-you-go pricing that allows you to change capital expenditures into predictable operating expenses</li> <li>• Ongoing application monitoring and maintenance, and software upgrades</li> <li>• Multi-tenant platform to host workloads and apps in a public or private cloud.</li> <li>• Migrate from one deployment model to another, providing maximum flexibility.</li> </ul>

## Partner with industry experts

Microsoft Dynamics CRM is delivered by a global network of partners with deep public sector experience. These business partners can provide you with assistance tailored to your specific needs from planning and configuration to implementation, training, and ongoing support. This means you can get world-class business solutions from professionals who understand how your organization works. To find a local Microsoft Dynamics partner and solutions for government, visit <http://dynamics.pinpoint.microsoft.com>

## Do more with less

Microsoft Dynamics CRM offers solutions that increase worker productivity, create value for citizens and constituents, and help governments manage costs. Accelerate your time to value by adopting Microsoft Dynamics CRM today.

## Learn more about Microsoft Dynamics CRM

Visit our website at <http://www.microsoft.com/en-us/dynamics/crm.aspx>

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