

News, views and more from the Australian CRM specialists

CRM Opinion

In this issue:

- [Microsoft Dynamics CRM 2015](#) will start rolling out in December for CRM Online users. Do you know what the key changes are? And are you prepared for an upgrade?
- New White Paper '[Achieving Sales Excellence with CRM](#)'
- How the Opsis [Price List Manager](#) simplifies maintenance of multi-country or customer-specific pricing
- Have you upgraded from CRM 2011 to CRM 2013? [Learn how to customise and configure](#) the new features in just one day.



What's new in CRM 2015

- Branching logic to make your **sales processes more flexible**.
- Product families which make it easy to **cross-sell and upsell**
- Even easier **integration with Microsoft Outlook**
- Better **mobile** capabilities
- **Sales hierarchies** so you can see how different offices of one company are related at a glance

Plus licensing changes, more Social Listening, and (for Windows 8.1 phone users) integration with Cortana... - there are plenty of reasons to upgrade. You can [find out more about CRM 2015](#) here.

But **make sure you plan your upgrade**. Check for customisations which might not work as expected. Any hardware or software platforms which are no longer supported. Integration with other systems.

Achieving Sales Excellence with Microsoft CRM



This new White Paper from Opsis examines 5 ways Sales Managers can use Microsoft CRM to deliver more revenue and higher profitability.

CRM is not all about data entry. Reporting is not all about spreadsheets. Smart use of Microsoft CRM can help you:

- identify your most **successful lead sources**
- track and **control margin** and profitability
- **measure your business against competitors**
- understand where your **sales process** is breaking down
- make **sales meetings more efficient** and more useful

If you're a CRM Online user and your upgrade is rolling out soon, you might want to consider a 'soft upgrade' via an **Opsis Upgrade Workshop**. Imagine being able to test your upgrade in advance, so you can resolve issues and know it's going to work when you go live!

So if you're upgrading to CRM 2015, [contact Opsis](#) for a discussion of your specific situation.

Simplify Price List Management

How many price lists do you have in your business?

- Do you operate in several countries and currencies?
- Did you negotiate special terms to win some business?
- Have costs risen, but you can't increase prices just yet for clients on longer contracts?

If all your clients are on the same pricing, you're in the minority!

Pricing models in Microsoft CRM are very flexible, so you can structure your price list to suit your business needs. You can have **multiple price lists** too, but they are not linked by default. So if changes in costs or exchange rates mean you need to update several price lists, it can be a complex and time-consuming process.

The **Opsis Price List Manager** links all your price lists to one pricing master, with clear business rules. So when a price is updated in the Master Price List, updates roll out automatically to all related lists. Alternatively, for exchange rate issues the business rule itself can be amended.

One client cut price list maintenance from about a week's work each time prices were reviewed to just 30 minutes!

Could YOU save several hours of work every time you need to amend your pricing?

[Find out more about Opsis Price Manager here.](#)

[Download the White Paper](#) and start getting more from your sales team right now!



Upgrade your Customisation & Configuration Skills for CRM 2013

Customisation and Configuration in Microsoft Dynamics CRM is one of our most popular courses. That's hardly surprising since it teaches you how to fine tune your CRM investment and get maximum return for your business. It's vital knowledge for the technical staff supporting your CRM.

But what if you've upgraded from CRM 2011 to 2013? The user interface for configuration has barely changed, so it's hard to justify another three day course. Then again, how do you get the most out of the new features like Business Rules, Customised Charts and Team Templates without training?

From 2015, Opsis are offering a new **'Customisation and Configuration 2013 Conversion'** course. This course takes only one day and helps you get the most out of CRM 2013's enhanced functionality.

We're running the course in Sydney on Thursday February 12, 2015.

To get more out of your CRM, find [out more about what the course covers](#) or [book your place now](#).

"Opsis has helped us to better understand campaigns and the sales process in CRM..." [\[read more\]](#)

Kelly Hutchinson
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Help us make this newsletter more useful for you! If you have a particular question or issue (relating to Microsoft Dynamics CRM; CRM in general, or ClickDimensions, just [let us know](#).



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