News, views and more from the Australian CRM specialists

CRM Opinion

In this issue:

The countdown to Christmas is on, and before you know it a new year will have begun. If you want your CRM to perform better in 2015 than in 2014, now's the time to take stock, then take action.

- If you're still using CRM 2011 (or earlier!), what can you gain by upgrading to 2013?
- Special offers on December training courses to get you ready for the New Year
- Use Opsis Address Manager to clean up and maintain your address data
- Is 2015 the year to move to the Cloud? With local Azure hosting and special offers from Microsoft, it's worth a review.

Why upgrade to CRM 2013?

'With the latest release of 2013, I believe Microsoft has arrived as the premier CRM source.'
That's what one online reviewer said.

If your business could benefit from:

- availability on multiple **mobile devices** and **multiple browsers**
- a **cleaner interface with no popup windows**
- integration with **Skype, Lync** and **Yammer**
- improved handling of **process flow**

then maybe it's time to plan an upgrade!

One great way to start is with an Upgrade Workshop from Opsis. We take a copy of your system and run a trial upgrade. Then we spend half a day with you reviewing the end result.

You can experience the interface as you and

Microsoft Azure now in Australia

But will it speed up CRM Online?

As our clients who use CRM Online know only too well, it tends to be painfully slow. The main reason is that CRM Online is hosted in Singapore for the Australian market, and the internet between Australia and Singapore is slow.

Everyday use of CRM is sluggish and frustrating for users, but the effect on development is even worse. Time (and costs!) increase while developers wait for the system. This is particularly an issue when developing new reports, or modifying standard ones.

On October 27th Microsoft declared their cloud computing platform Azure available locally from data centres in Sydney and Melbourne. Surely this should help speed up CRM Online?

Unfortunately, there's no immediate benefit. There are plans to migrate CRM Online to Australia, but this may take another 6 to 18 months.

If you want to take CRM to the cloud immediately, AND get the speed benefits promised by Azure, Opsis actually offers a CRM hosting service hosted in Australia now. Contact Opsis for more information.

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your team will see it. Identify any customisations, platforms or third-party integrations which will need work. Test new features and decide which to implement when.

So if you're considering an upgrade to CRM 2013, contact Opsis for a discussion of your specific situation.

Address Data in your CRM

Do all your Contact records in CRM have address data?
Do your Account records?
Does the data match, even when a company moves location?
What about the delivery or service address?

Microsoft CRM is very powerful, but not all addresses are automatically linked to update in the way you might expect. So how do you keep your address data up-to-date without the cost of endless rekeying?

The **Opsis Address Manager** plug-in can help. And not only does it auto-update addresses for related addresses as required, it can also help you with distinguishing and organising postal addresses versus actual locations. Find out more here.

"Opsis were extremely professional throughout the process, demonstrating excellent grasp of both business and technical issues. Their work was detailed and accurate...[read more]"

Colin Hickling
ICT/Program/Project Management Consultant
Dept of Financial Services, Land & Property Information

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4 CRM Training Mistakes

Don't let these common errors damage the success of ***your*** project!

December Training Special Offer

50% discount on 3rd and further bookings

'It's all to do with the training: you can do a lot if you're properly trained.'
Queen Elizabeth II

She wasn't speaking about CRM, but proper training can help you do a lot more with your investment! So why not register for training in Sydney this December?

Book December courses by Friday 14th November and we'll give you a 50% discount on all courses after your first two bookings.*

(Use promo code 'OctNL' to claim discount.)

Introduction to MS Dynamics CRM 2011 / 2013 courses are ideal if you're just starting out on your CRM project and want to understand the features available straight out of the box. Or perhaps you're upgrading and want to ensure you get the best out of CRM 2013. This course is also a great starting point for technical people, who may not be CRM users but will be involved in technical aspects of the project.

MS Dynamics CRM Customisation and Configuration is for more advanced users or technical people - the people who will tweak your system to suit your needs in the future. Give them the understanding they need to really make your CRM sing.

The Sales Management and Customer Service courses are for - you guessed it – people who want to understand the functionality available to salespeople and customer service staff!

*The 50% discount offer applies whenever one organisation book three or more places on Opsis courses in December. That could be any of:

- three or more people on the same course
- one person on three or more courses
- three or more people on different courses.

Where bookings are made for courses of different lengths, the discounts will be applied to the shorter courses first.

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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