

# A COMPARISON GUIDE

## Microsoft Dynamics 365 for Customer Engagement vs. Other CRM Solutions

When it comes to customer relationship management (CRM) software, there are numerous reputable services out there. Some CRM solutions, like Salesforce, are popular CRM software options, used by businesses worldwide. Microsoft Dynamics, meanwhile, is a great choice for those whose businesses are already integrated with other Microsoft services, such as Outlook and Office 365.

Microsoft's service is known as Dynamics 365 for Customer Engagement and, like other CRM systems, offers a ton of other complementary services that expand the basic CRM and go all the way up to enterprise resource planning (ERP) applications. Microsoft Dynamics 365 and many other top CRM providers aim to be an all-in-one solution to serve your office's needs.



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Deciding on which one to use comes down to personal taste, and which one fits your company's needs. A CRM platform isn't just about the service's various attributes, but which one fits best with your company. Let's take a look at the strengths of Dynamics 365 for Customer Engagement and other CRM solutions to get a better handle on what system you should use.

## CRM SYSTEMS COMPARED

There are many reputable CRM solutions that can be found in the marketplace today. Some are so well-known that they've almost become a byword for "CRM Solution" itself. But, just because they are well-known doesn't necessarily mean they are the best fit for your business. Other platforms are well-known for other reasons, such as Microsoft being a popular choice since its natively integrated with Windows and Office – a "one stop shop". Regardless of the solution you choose, they each have their own set of pros and cons.

**Let's look in a little more depth at how Microsoft Dynamics compares to other CRM providers.**

	PROS	CONS
<b>Microsoft Dynamics 365 for Customer Engagement</b>	<ul style="list-style-type: none"> <li>• Fantastic integration with Microsoft tools</li> <li>• Modern look and feel</li> <li>• Solve issues with predictive care</li> <li>• Personalize service with a complete customer view</li> </ul>	<ul style="list-style-type: none"> <li>• Some plans may be pricier than similar solutions</li> <li>• Potentially less appealing if companies are doing business on Google suite</li> <li>• May be a need for many customized pieces</li> </ul>
<b>Competitive CRM Solutions</b>	<ul style="list-style-type: none"> <li>• May solely be focused on CRM</li> <li>• Potentially more cost effective</li> <li>• Majority have easy integration and open API</li> </ul>	<ul style="list-style-type: none"> <li>• May have a complex feel</li> <li>• Some solutions may have uncontrolled admin features</li> <li>• Reports may be difficult to understand</li> </ul>



## MICROSOFT DYNAMICS 365 FOR CUSTOMER ENGAGEMENT

One thing to know about Dynamics 365 for Customer Engagement is it can be integrated into other Microsoft applications very easily. Microsoft's integration doesn't just extend to its desktop software, either.

Even LinkedIn, which Microsoft acquired in 2016, integrates with Dynamics 365 for CE. The platform uses design properties similar to other Microsoft software, making it easier for anyone who's already familiar with the look and feel of modern Microsoft applications to feel right at home.

### SALES APP

The primary starting point for many businesses who choose Microsoft's platform for CRM is Microsoft Dynamics for Sales. This CRM app utilizes predictive analytics and visually appealing dashboards to enhance sales team's snapshots of data and helps those teams make better decisions. This is also where Microsoft's LinkedIn integration helps out; the LinkedIn Sales Navigator integration leverages professional networks to get introductions to potential leads through mutual connections.

Beyond sales there's a customer service module that can present key data and show you a complete customer history. Such as open cases and email history as a dashboard, or you can drill deeper with a timeline of interactions. For companies that need it there are also project and field service modules to help manage ongoing services delivered to a client, as well as those times your company needs to send a technician into the field.

### DASHBOARD VIEW

With D365 for Customer Engagement, you get at-a-glance information about the current state of your business with intuitive dashboards and reports. In Dynamics CRM for Sales, for example, the dashboard supplies current sales revenue, the average deal size, your sales force's lead conversion rate, etc. The dashboards and reports in this CRM solution are completely customizable and usually take the form of a tiled interface with large lettering for key numerical data, as well as large charts and graphs.

### SMART AUTOMATION

Microsoft offers smart automation and has a big emphasis on colorful graphics to help users absorb information quickly. The big deal with Dynamics 365 for CE is its easy integration with other Microsoft software. This is something other CRM solution providers simply can't compete with and businesses already using a variety of Microsoft services, should strongly consider this capability.

For example, the Dynamics 365 Sales module has a feature called Microsoft Relationship Sales that can automatically pull information from Dynamics into Outlook.

On top of that, the same feature can pull in LinkedIn data to give users better information on prospects and current clients. Dynamics 365 offers on premise and cloud versions for its software whereas other CRM solutions are entirely cloud-hosted services.



## OTHER CRM SOLUTIONS

There are some software companies that are known to have some of the best CRM systems around. Those companies insist that they can outdo their main competitors. In truth, the functions of other popular CRM systems and Microsoft Dynamics 365 are broadly similar.

### INTEGRATION WITH TOOLS

All CRM systems will offer all the essential features you need for CRM, such as managing opportunities, leads, contacts, accounts, and email integration (Gmail and Outlook). These other CRM solutions can easily integrate with Gmail and other tools companies may already have in place.

### PRICING

CRM software doesn't always come cheap, and that can be true with Dynamics 365. Other CRM solutions meanwhile, can be a lower cost per user per month. The downside with the cheaper CRM options is that you cannot customize them to the same extent as the higher priced tiers, such as Microsoft. So, if companies have complex and unique business processes, then they may need more customization within their CRM. But then on the other hand, if a business is smaller or not running as many intricate processes, then the cheaper CRM options may be more appealing.

### CRM FOCUSED

A benefit of other CRM solution providers could be that their main focus of business is developing and improving their CRM solution. This means that companies that go with another CRM system may have great experiences because the support and update process is highly concentrated on by the provider.

Microsoft has many software solutions that they provide. ERP systems, Business Intelligence systems, Data Analytics systems, and many more. However, since Microsoft is a top software provider, they spend a countless amount time, money and effort in researching and developing innovations and improvements for their systems. So, if a company decides to go with Microsoft D365, they will not need to worry about not receiving a modern and focused CRM solution.

## SO, WHICH SHOULD YOU CHOOSE?

Our goal is to be as objective as possible, while fully disclosing that we are a Microsoft Partner. However, our primary goal as a software consulting company is to deliver software that is the "right fit", even if it is not an application we offer. We are happy to guide our clients to other software providers when it makes sense.

As we said earlier, the key to deciding on a CRM is finding a service that fits your needs in terms of functionality, price, and customizability. If you are interested in receiving more information or a tailored quote for Microsoft Dynamics 365 for Customer Engagement, please contact us and one of our CRM experts would be happy to chat.

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