

Technosoft Insider

VOLUME III, ISSUE 3

1 MARCH 2010

MONTHLY NEWSLETTER FOR CUSTOMERS

Heading to the Future

Special on this issue:

Why Improved User Friendliness Doesn't Translate Into Easier Implementation for Microsoft Dynamics CRM

Last year was no doubt the year of social networking booming. Websites such as Twitter, Facebook, MySpace have successfully recruit millions of members and connect them with each other through some common interests.

I would like to point out two important benefits of social networking for your businesses. First, the huge interconnected databases in social networking sites have become the new targets for companies to reach existing and potential customers as well as build brand awareness and loyalty for their products. Imagine having the power to reach your customers and the people who knows your customers and the

people who knows the people who knows your customers. Second, members within the social networking can freely discuss and share information. Through these conversations, you are able to monitor and analyze customers' interests, preferences and experience about your and your competitors' product and services. Additionally, through social networking sites, you can invite your customers and their related friends to be involved in discussion over product suggestions and new development.

Last year Microsoft releases social networking plug-in known as *accelerator* that enable companies to connect a website such as Twitter with Microsoft

Dynamics CRM. This accelerator will allow Dynamics CRM users to post status, receive and analyze replies from a social networking site and stored the information within Dynamics CRM contacts. Do not hesitate to contact us in case you have any questions regarding Dynamics CRM and Social Networking Accelerator.

On behalf of Technosoft big family, I would like to offer my best wishes to Hindu readers who will celebrate *Nyepi Day (Hindu New Year)* on 16 March 2010.

Fredy Tandary
fredy@technosoft.com.sg

Inside this issue:

Creating and Using User Template in MS Dynamics SL 1

MS Dynamics ERP Edging Ahead In The Downturn, Study Says 2

Why Improved User Friendliness Doesn't Translate Into Easier Implementation for Microsoft Dynamics CRM 4

Tips to Help You Decide Between On-Premise and Hosted CRM 5

Destiny 5

Creating and Using User Template in MS Dynamics SL

Did you know that you can save a template in Dynamics SL that will allow you to run a report over and over with the same settings? The template feature can be used to shortcut the sometimes laborious process of filling out the many options available in the familiar SL report screen (herein called ROI, which is short for Report Options Interpreter). ROI has

many tabs running across the top of its interface that each may or may not be adjusted each time you run a report. Each of these tabs settings (Report, Sort, Select, Options, Cover Page, Company Selection) can be saved in a template so that the next time you run the report your options can be reloaded with the click of a button.

CREATING THE TEMPLATE

1. Open the report you want to create a template for
2. Fill out each tab until you get the report running just the way you want
3. Preview the report to ensure it's accurate
4. Click on the **Template** tab and click **Save Template...**
5. Fill out the various fields

- **Template ID:** The name you want to give for your template (must be unique)
- **Description:** information of what the template provides
- **Public:** This checkbox controls to whom the template is available in SL. If checked the template will be seen and editable by all.
- **Save Current Printer Settings with the Template:** This checkbox when checked will force the report to go the printer you've selected. Be

careful using this since the printer needs to be available to anybody that runs the template.

6. Click **OK** to save the template.

USING THE TEMPLATE

1. Click on the **Template** tab
2. Click the template you want
3. Press the **Load Template** button.
4. Press the **Print** or **Print Preview** button to run your report!

Editing templates works the

same as creating a template. You simply give a new template the same **Template ID** as the template you want to edit. Editing is really an "overwrite" of an existing template with the same name.

POWER USER TIP

You can shortcut creating new templates based on existing templates. Load the existing template, change any settings you desire and then save the template with a new name... Voila!

MS Dynamics ERP Edging Ahead In The Downturn, Study Says

"It has a much lower cost and is very predictable.."

In current economic downturn, the market share of Tier II smaller ERP provides has risen significantly while those of ERP heavyweights SAP and Oracle have dropped proportionately and Microsoft Dynamics edged slightly ahead.

According to a 2010 survey by vendor-neutral ERP consultants [Panorama Consulting Group](#), the market share of Tier II ERP vendors grew from 23% to 30% on 2009 while ERP leader SAP dropped from 35% to 31% and Oracle from 28% to 25%. MS Dynamics held its own, growing slightly from 14% to 15%.

Panorama's 2008 survey was based on 1,300 respondents worldwide while the 2010 survey was tallied from 1,600 participants last year.

Panorama President Eric Kimberling said the market changes reflect that small and medium

sized companies have been moving ahead with ERP implementations in the downturn while larger firms have been holding back on upgrades and modifications.

"Microsoft is a better fit and more appealing in a downturn. It has a much lower cost and is very predictable (in implementation)," Kimberling said.

Even though the rise in Dynamics' market share is slight, it is still significant in light of the declines for SAP and Oracle, he added.

The 2010 survey also ranked MS Dynamics No. 2 behind SAP on ERP vendor short lists by prospective buyers and seventh of the top 10 in selection.

In its 2008 report, the Denver, Co.-based consulting firm pointed out that the cost savings for MS Dynamics is great, with an SAP implementation averaging \$16.8 million in total

costs compared to \$12.6 million for Oracle, \$2.6 million for Dynamics and \$3.5 million for Tier II applications.

In the detailed study, Panorama concluded that Dynamics was gaining in popularity because of its markedly lower price tag; Dynamics was favored by users, who like the familiar interface, but less popular with executives, who cited a somewhat higher business risk.

Business Intelligence

One cause for higher risk worries in the earlier study was Dynamics' lack of business intelligence tools. However, Microsoft may have alleviated that concern with Dynamics' addition of FRx financial reporting tool. FRx is already slated to be replaced by Management Reporter and augmented with self-service reporting in Office 2010. Also contributing to a higher per-

ceived risk factor with Dynamics is the small to mid-sized market it serves rather than the software itself. Smaller customers lack the sophistication of larger enterprises and often try to cut corners and/or implement the software without recognizing the need for specialized help, Kimberling said.

Project Duration and Cost

Comparative marks for project implementation in the earlier study also were a mixed bag for MS Dynamics, which averaged two weeks to two months less than Oracle and SAP, respectively, but, on the downside, showed the largest variability in project completion.

The major factors extending project duration for Dynamics ERP installs are large numbers of modules and/or users and complex business processes, Kimberling said. In the latter case, companies often are too quick to customize the software to existing business workflows rather than change their processes to accommodate the software, he said. While minimizing the ERP impact to the workforce, customizing software with alterations to the source code delays the project and complicates maintenance down the road, he said.

In its 2010 report released early this month, Panorama concluded that more ERP implementations last year took longer than expected (57%) and cost more than expected (59%) but, on the plus side, they consumed 20% less as a percentage of annual revenue

(6.9% in 2009 vs. 9% in 2008). However, the "savings" came with a price: 41% of responding companies failed to achieve at least half of the benefits they anticipated from their ERP installations. These results have not yet been broken down by vendor.

"The path to lower costs is cutting the scope or key project activities that are critical to success," Kimberling said, citing factors like training, hardware and project management. "You don't necessarily need to spend more but you need to have realistic expectations and take the right steps to make sure you succeed. This is even harder now with less resources."

Managing Organizational Change

In addition, the 2010 study concluded that most companies do not effectively manage the organizational changes that ERP sets in motion, with nearly half citing poor communication between management and employees as a contributing factor. Many companies also were adjusting to a new CEO during their ERP implementations while significant numbers were coping with layoffs, merger or acquisition.

The problem is that there is a management/employee "disconnect". New ERP systems impose change and stress on the workforce when employees are already worried about their future. But management wants to push ahead with ERP systems now to retain

"head knowledge" and increase efficiency to do more with less, he said. In this environment, some companies are cutting organizational change activities related to their ERP installs, which "doesn't bode well" for their projects, Kimberling said.

The Cloud

Panorama's latest survey found that SaaS (Software-as-a-Service) and hosted ERP solutions are faster to implement and cost less than on-premise applications. The downside: they are far more likely to exceed budget estimates due to excessive vendor hype, the report said. In addition, SaaS and hosted solutions tend to be more appropriate for small- and mid-sized companies and narrow functions such as CRM or purchasing, the report said.

MS Dynamics does not currently have a SaaS or hosted ERP offering (although various partners and resellers do offer hosted solutions), but Kimberling predicted that Microsoft will develop one because so many mid-market companies perceive that SaaS/hosted is a way to tiptoe into ERP without a big, upfront cost.

As for other future trends, SAP and Oracle will try to grow their respective markets by extending down from the enterprise to the mid-market. Although this will provide more competition for the Dynamics product line, Microsoft is already "well entrenched," and has its name and branding on its side, he said.

Pam Derringer



Why Improved User Friendliness Doesn't Translate Into Easier Implementation for Microsoft Dynamics CRM

MS Dynamics CRM is a wonderful application, but occasionally, Dynamics CRM projects fail. In my experience, there are three primary causes for a CRM implementation to fail:

1. Inappropriate requirements. The key to Dynamics CRM implementation success is to develop the right business requirements. I have seen many projects where the requirements were changed, and then changed some more, and then changed again. Dynamics CRM is a very flexible application, and changes can be applied quickly, but the odds of a project failing increase as more changes are built in to the requirements.

The foundation of a good working Dynamics CRM application is the blue print, the business requirements. The process of developing the business requirements is commonly divided into defining which business processes should be supported and then identifying the right solution.

2. A lack of support by the business. Who drives the development of business requirements? This is a key question. Too often, Dynamics CRM projects/initiatives are driven by the IT department. Of course, IT people

are not using the system. Other departments like marketing, manufacturing, and of course, sales, work daily with the CRM application. These key end users need to be involved as early as possible in the process to ensure adoption of the application.

External CRM business analyst can help translating the various user needs into formal requirements for CRM application. The main goal of this external representative is to keep the requirements up-to-date and keep the right people involved and motivated during the project.

3. An underestimation of the complexity of Dynamics CRM. The product is becoming more mature and the options are increasing. At this time, we tend to use the term xRM which should make it more clear that Dynamics CRM does not end with account, contact and sales process data. In general, people seem to think lightly about the impact of implementing it.

Because Dynamics CRM has become more user friendly, there is a temptation to think anyone can carry out its implementation. Unfortunately, this is a potentially

serious miscalculation that could lead to failure of the implementation. It is very important to understand that because CRM is used by many different people in a variety of roles, implementation is actually more complex than is commonly perceived.

In general, I suggest having a dedicated implementation team available. This team should be dedicated, because the implementation challenge extends to many areas and people (end users, key users, decision makers, marketing executives, and sales executives). I also suggest complementing the implementation team with external experts, because they are not bound by internal prejudices and political agendas. I also recommend not undertaking the implementation by yourself or having core team changes during an implementation.

One final matter to keep in mind: Your application needs will continue after the first successful go-live. Consider having your key people trained or familiar with the product and possibilities for extension of Dynamics CRM during the project, along with outsourcing the maintenance and support

*Sandor Schellenberg,
friendlyITsolutions*

"Your application needs will continue after the first successful go-live..."

"Quality is never an accident; it is always the result of high intention, sincere effort, intelligent direction and skillful execution; It represents the wise choice of many alternatives."

William A. Foster quote (US Marine, February 17th 1917 – May 2nd 1945)

Tips to Help You Decide Between On-Premise and Hosted CRM

So you know that your organization would benefit from a CRM solution – but now it's decision time. Not only do you need to pick a solution but also a deployment method, either hosted Software as a Service (SaaS) or on-premise that you host yourself. Some CRM software solutions are limited to only one deployment method, so it's a good idea to know what deployment type best fits your company before you begin comparing CRM solutions.

There are a few basic indicators that should help you decide whether to go with hosted CRM or on-premise CRM.

SaaS is the right choice if you...

- Do not have internal IT staff and/or hardware to support on-premise software.
- Are looking for a short implementation time-frame (solution is readily available whenever your business is ready for the solution).
- Prefer a monthly software fee rather than a large upfront investment.

On-Premise is the right choice if you...

- Need a large number of customizations.
- Have data access needs that require two-way integrations with other applications, such as ERP system.
- Can afford an upfront Software or implementation cost that can be recouped during payback period resulting in the long-term cost benefits.
- Have an on-site IT staff and the hardware to support the system readily available.

Regardless of whether you select a hosted or on-premise CRM implementation, the best

long-term solution for your business is to choose a CRM software with a flexible deployment which will allow you to switch between their on-premise and hosted deployments as your business needs grow and change.

MS Dynamics CRM are great examples of a product with flexible deployment options. Get a taste for what both deployments can offer by trying Microsoft Dynamics CRM Online free for 30 days!

*Holly Chamberlain
and Tom Furr,
CRM Solutions Consultants*

Destiny

During a momentous battle, a Japanese general decided to attack even though his army was greatly outnumbered. He was confident they would win, but his men were filled with doubt.

On the way to the battle, they stopped at a religious shrine. After praying with the men,

the general took out a coin and said, "I shall now toss this coin. If it is heads, we shall win. If it is tails we shall lose."

"Destiny will now reveal itself."

He threw the coin into the air and all watched intently as it landed. It was heads. The soldiers were so overjoyed and filled with confidence that they

vigorously attacked the enemy and were victorious.

After the battle, a lieutenant remarked to the general, "No one can change destiny."

"Quite right," the general replied as he showed the lieutenant the coin, which had heads on both sides.



TECHNOFT

Graha Elok Mas
 Jalan Panjang 83 F-G
 Jakarta, 11510
 Indonesia

Phone: 62-21-565-8566
 Fax: 62-21-563-2078
 E-mail: info@technosoft.co.id
 Web: www.technosoft.co.id



Your Partner in Providing Strategic Capabilities

Founded in Jakarta 1996, PT Graha TechnoSoft Informatika (TechnoSoft Consulting) is the leading Business Solution provider for SME (Small Medium Enterprise). Our solutions extend from the back to the front office and include the leading Microsoft-based Enterprise Resource Planning (ERP) and Customer Relationship Management (CRM).

We have assisted over 100 customers in more than 20 industries and 10+ countries, by designing, implementing, managing and supporting technology solutions that power and empower your business.

Our commitment has always been to establish long term partnership with customers, to assist in increasing their efficiency and profitability. Only Technosoft arms you with comprehensive IT solutions and services and critical business applications that will accelerate your strategies.

In order to add value for customers satisfaction, we are open for any advice or article request according to our customer needs. Your request can be sent to our fax or email directly.



Mind Bender : Futoshiki

Here comes our second Futoshiki quiz for the new Mind Bender which is a grid of squares, some of which contain numbers, less-than (<) and greater-than (>) signs. You need to solve the puzzle by placing the number such that each row and column contains each number (1 to 4) only once.

Feb 2010 Quiz Answer :

4	>	3	1	2	
		∨			
3		2	4	>	1
1		4	2	<	3
2	>	1	3		4

2			3
		<	
3	2		

- Submit the answer, your name and company to Technosoft fax at +62-21-563-2078 or email to insider@technosoft.com.sg
- Answer will need to be submitted by March 20th, 2010
- All correct entries will be included in a lucky draw for 8GB USB drive. Lucky winners will be announced on the following month of Technosoft Insider edition
- Only Technosoft Customers will be count on the participation.

Congratulations to Mr. Marlion Angga Iskandar from PT. Baria for winning the 8GB USB Drive solving the Mind Bender in February 2010.