



Microsoft Dynamics

# Making Business Dynamic

White Paper

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*Microsoft Corp.*

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## INTRODUCTION

The business world shifts relentlessly — creating the need for “dynamic businesses” — a new breed of organization. The dynamic business is fearless and able to anticipate and embrace change while sustaining competitive advantage and realizing long-term strategies through short-term action. Microsoft® recognizes the challenges that businesses face, as well as the opportunities that arise as a result, and is committed to building the software to enable a dynamic business. This paper will explore those challenges as they surface in current business trends, discuss how Microsoft Business Solutions enable your business to meet those challenges head on, and give you a glimpse into the future technology Microsoft Corp. is planning to deliver to help your business thrive.

## WHAT IS A DYNAMIC BUSINESS?

The best businesses today operate at what Bill Gates calls “the speed of thought,” meaning they are able to do an outstanding job of integrating business process with technology to gather, manage and use information in a way that gives them competitive advantage. They’re able to do this because they are supported by software that delivers valuable insights in real time. To truly achieve the aspirations you have set for your business, you need software that is built for speed and forward-looking. But how can you be sure your software is up to the task?

Microsoft can turn your business from a static state into a dynamic one that thrives on change, one that’s quick to recognize and seize new opportunities to maintain a competitive edge. The concept is Microsoft’s “[dynamic business](#)” vision, and to play at this level, an organization has to accomplish three things:

- Maximize the productivity of its **people** by arming them with complete business solutions that automate common tasks while helping workers communicate, collaborate and analyze data to gain insights that would have previously required the help of IT, thereby serving as a catalyst to make swift decisions and take effective action.
- Achieve **process** agility to quickly adapt to new requirements, with business applications that enable visibility into both activities (what you are doing) and the processes (how you are doing it). Such “smart” visibility enables a business to effectively respond to change.
- Encourage connections across an entire **ecosystem** of suppliers, partners and customers, by effectively removing barriers to communication and collaboration. These connections — whether one-to-one or one-to-many — should be fully integrated into the business applications.

People, process and ecosystem are the pillars of the dynamic business. The right business software should ignite these pillars — driving applications more broadly and deeply into the business and continuously delivering compelling benefits.

## INDUSTRY TRENDS REQUIRING A DYNAMIC BUSINESS

Let’s look at some of the trends your company is probably grappling with right now, and consider how becoming a dynamic business would better equip you to deal with them.

### BUSINESS DISAGGREGATION

The past 10 years have seen a dramatic increase in business disaggregation. Companies are now looking outside their organization for competencies that are not part of their key strengths. The trend toward specialization in business — focusing on a small number of core capabilities where a business can build differentiable advantage — takes this new approach to the next level.

UPS is a classic example, investing to excel and differentiate in logistics and distribution to a level that other companies could not match internally. As a result, retailers turn their distribution over to UPS,

outsourcing something that was not their core function to a specialist that can deliver a better service more cost effectively.

The dynamic disaggregated business therefore requires a system view that lets it see its entire business from source to end customer (and back for returns) with the same level of integration it had before the change. Its people need tools that easily connect them to the right processes and the right people so they can easily exchange data with their business partners, vendors and suppliers across the supply chain. Business solutions must support people in their day-to-day tasks, helping them improve communication and collaboration and discover better ways to work with one another, regardless of location.

## NEW WORK FORCE, NEW PATTERNS

A changing population of workers is entering the work force. This new generation has grown up with a plethora of constantly evolving technology at their fingertips and therefore they have vastly different expectations of their workplace. The ubiquity of search and the ability to use it as a navigation tool, and support of multitasking and social networking, are important requirements. These individuals expect an intuitive user experience that facilitates their ability to experiment, which means their business applications should take advantage of their technology savvy and willingness to explore.

The way they work is also new. Many are neither full-time workers nor stationed in a single commercial location. Increasingly, mobile and home office workers are the rule more than the exception, and there is a growing reliance on part-time workers to suit both the needs of the person and the business. JetBlue Airways' adoption of a reservations and customer service work force that works entirely part time from home is a celebrated example of this innovation. In a dynamic business, software must seamlessly work across firewalls and basic Internet connections, with zero-impact deployment on remote client machines.



## CHANGE AS OPPORTUNITY

Historically, business applications first emerged as accounting aids — a way to record transactions — and later took on a control function. Today, although they still have audit and control roles, business applications must increasingly shift their focus from the backward-looking view on work already completed (“What have I done?”) to a forward-looking, strategic view that drives planning and decision-making (“What can I do?” or even “What should I do?” or “What if I do?”). This evolution requires companies to implement increasingly sophisticated models of the business, and requires the people using the software to develop increasing trust in the application. As it moves from passive recording to active optimization, the business application becomes a more significant enabler of business success.

As your business requirements change, dynamic business applications must help you anticipate the impact of that change so you can adapt and respond quickly.

## STRATEGIC USE OF IT

Aligning technology spending with strategic business objectives — and applying the discipline of IT governance — is becoming an increasingly important topic for business executives and IT managers. By connecting people and processes across every division of your business, you catalyze your organization's ability to work efficiently and consistently. Likewise, new business imperatives and practices such as outsourcing or merger and acquisitions require flexible systems that can support extremely flexible models of organizational structure. From a business perspective, IT investment must enable efficiency, tap expertise and enhance the ability to respond to change.

Dynamic businesses should be able to continue to support a function that is delivered through the ecosystem and keep alternative structures to provide effective analytics across periods of dramatic structure change. At a more fundamental level, your IT investment must be anchored in delivering value through a relentless focus on minimizing total cost of ownership, and enabling improved business results and reduced operational costs through software.

## EXPANDING ACROSS THE USER BASE AND ECOSYSTEM

A recent survey by **Gartner Inc.**<sup>1</sup> indicates that the percentage of employees licensed and using the ERP system among companies that have deployed so-called “global solutions” is still less than 50 percent, so there is some merit to the notion that the rest need connecting. Expanding penetration is a clear requirement for making every role and every person in the business more efficient, more controlled, more informed and more adaptive — in short, creating a more dynamic business. Extending the power of software to this broader user population will require a combination of more role-specific business intelligence and functionality, and the ability to reach people through mobile and specialized devices.

Another dramatic opportunity emerges in the contrast between the isolating, inward focus of many business applications and the need to compete in an increasingly connected global landscape. The promise of an end-to-end electronic supply chain, free of obstacles, has remained unfulfilled for too long. In a dynamic business, applications enhance the connection and collaboration between companies and their customers, partners and suppliers without the usual limitations to communication and collaboration imposed by firewalls, geography or proprietary concerns.

## BENEFITS OF MICROSOFT DYNAMICS

Microsoft Business Solutions with Microsoft Dynamics® at their heart are designed with the dynamic business in mind. They provide the foundation you need to make your **people** productive, gain insight and control over your **processes**, and proactively embrace connections within your **ecosystem** so that you can thrive in a constantly changing environment. Microsoft Dynamics solutions can do the following:

### ENHANCE PRODUCTIVITY

Microsoft Dynamics solutions can increase your efficiency and effectiveness in many ways. For example, through an innovation called the RoleTailored user experience, Microsoft Dynamics can make your people more productive by fitting software to their role — to how they do their work — and arm them with the business intelligence they need to drive their decisions. When someone logs into Microsoft Dynamics, instead of the clutter often seen on business application screens, the page that launches is their Role



Center — a reflection of their unique role in the organization. The Role Center provides a clear overview of tasks, a sense of workload and alerts to issues that need attention. It also offers one-click access to the places in the application that they use the most.

IDC estimates that information workers spend on average 8.8 hours per week searching for information.<sup>2</sup> Role Centers change that dynamic, focusing people on the activities and tasks they need to execute.

From within a Microsoft Dynamics ERP® application, figure 1 is an example of a Role Center for Susan, an order processor. You can see how the user interface is simplified and organized to give her a snapshot of where her orders stand — what is shipping, what is getting returned and what needs her immediate attention. She

<sup>1</sup> Gartner Inc. Two-Tier ERP Suite Strategy: Considering Your Options, Nigel Montgomery, July 28, 2010

<sup>2</sup> IDC, The Hidden Costs of Information Work: A Progress Report, Doc. #217936 May 2009

also has Action Pane to create new quotes and orders. Because Susan usually spends her day in the Microsoft Dynamics client, Microsoft Outlook® is embedded so she can view her inbox without switching windows.

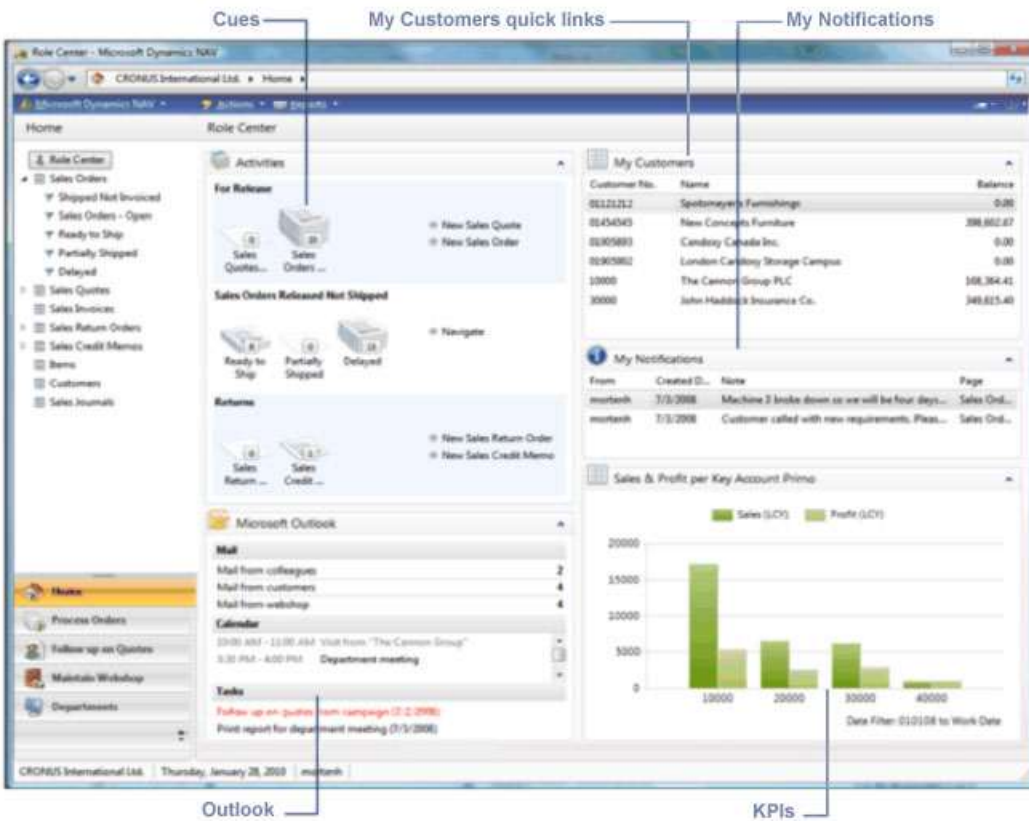


Figure 1: Example of a Role Center for Susan, an order processor

As Susan moves beyond her Role Center to complete a sales order, she'll benefit from many other aspects of RoleTailored design, such as FastTabs, which group and organize complex information into simple, manageable clusters, and Fact Boxes, which provide more information about the entity currently in focus, such as customer interaction notes, shipping status and the financial status of the account.

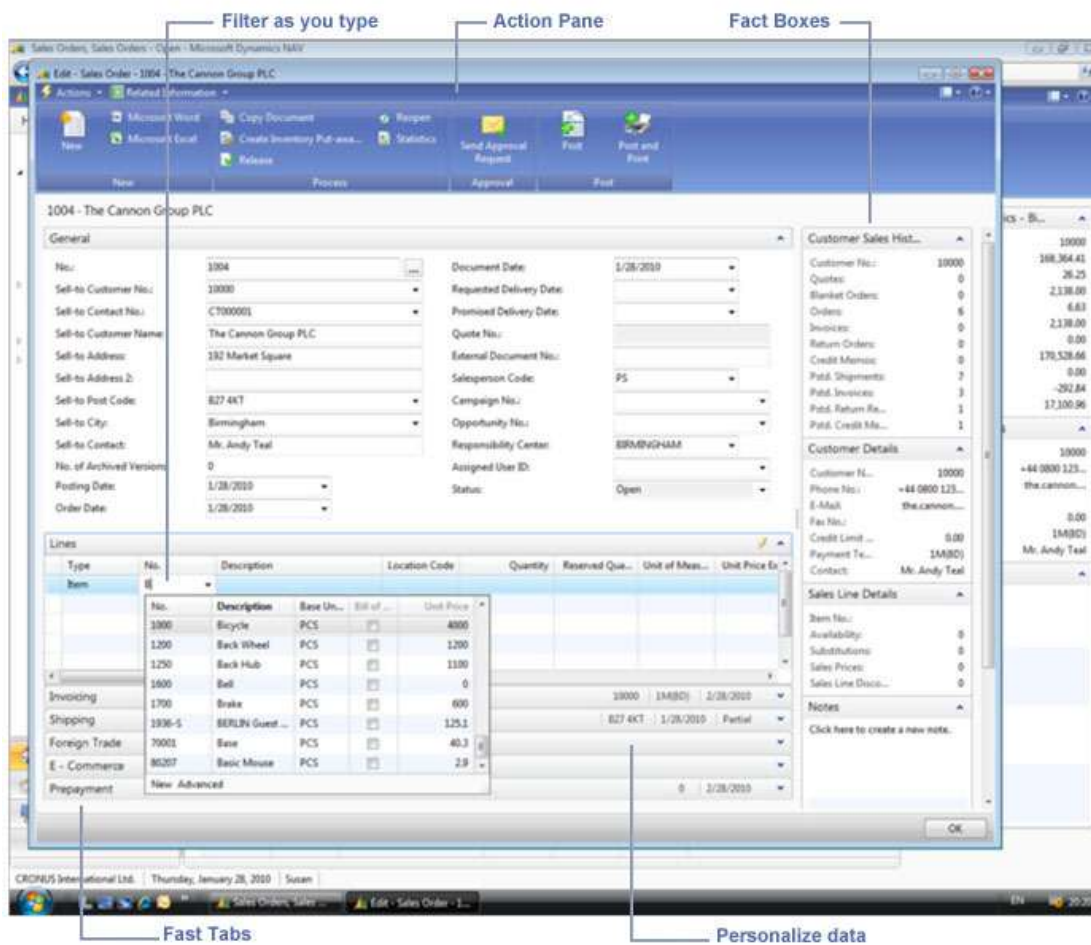


Figure 2: RoleTailored design helps you easily drill down into key data using tools like Fast Tabs, Fact Boxes and an Action Pane. You can further personalize the information you want promoted in the tab itself, as well as filter while you type, making it easier to find the things you are searching for.

Getting an instant read on key information is critical, especially to roles like that of Sara the CFO (see figure 3). She can appreciate that instead of having to leave the work she is doing and go to a separate application to seek out business intelligence (BI), Microsoft Dynamics provides embedded business intelligence — reports, charts and key performance indicators — providing people across the organization with in-line access to real-time information within the context of what they are working on so they can make better decisions more quickly.

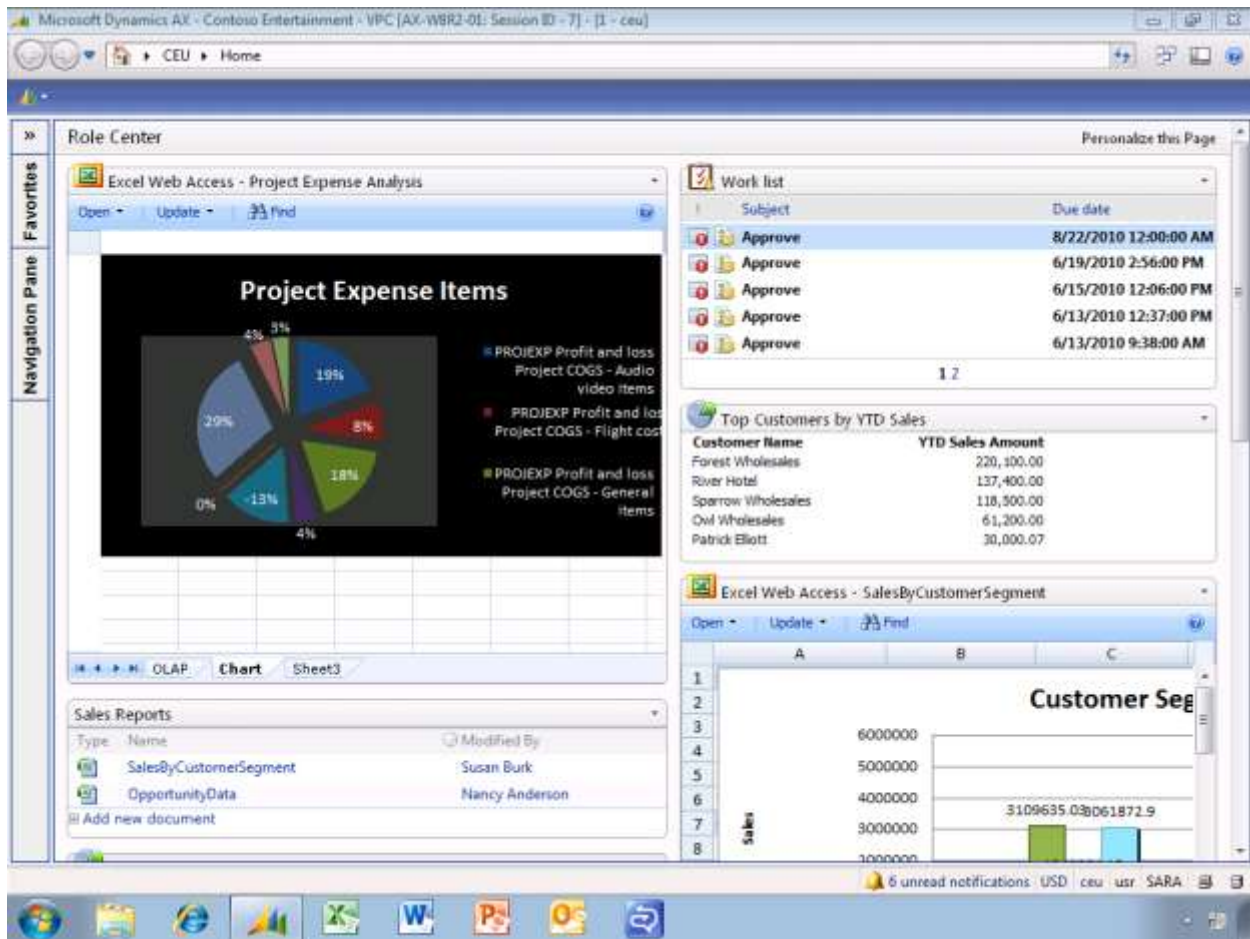


Figure 3: Example of a Role Center for Sara, the CFO

Another way Microsoft Dynamics solutions enhance your productivity gains is by combining the solutions with Microsoft Office® products. Creating sales quotations, for instance, becomes easier with features such as document co-authoring. Feeding data from your Microsoft Dynamics application into the data visualization features in Microsoft Excel® will improve your planning and analysis. And the Microsoft SharePoint® Server interface can be customized so that users, even those casual or less-experienced users, can easily take action on relevant information from the Microsoft Dynamics solution.

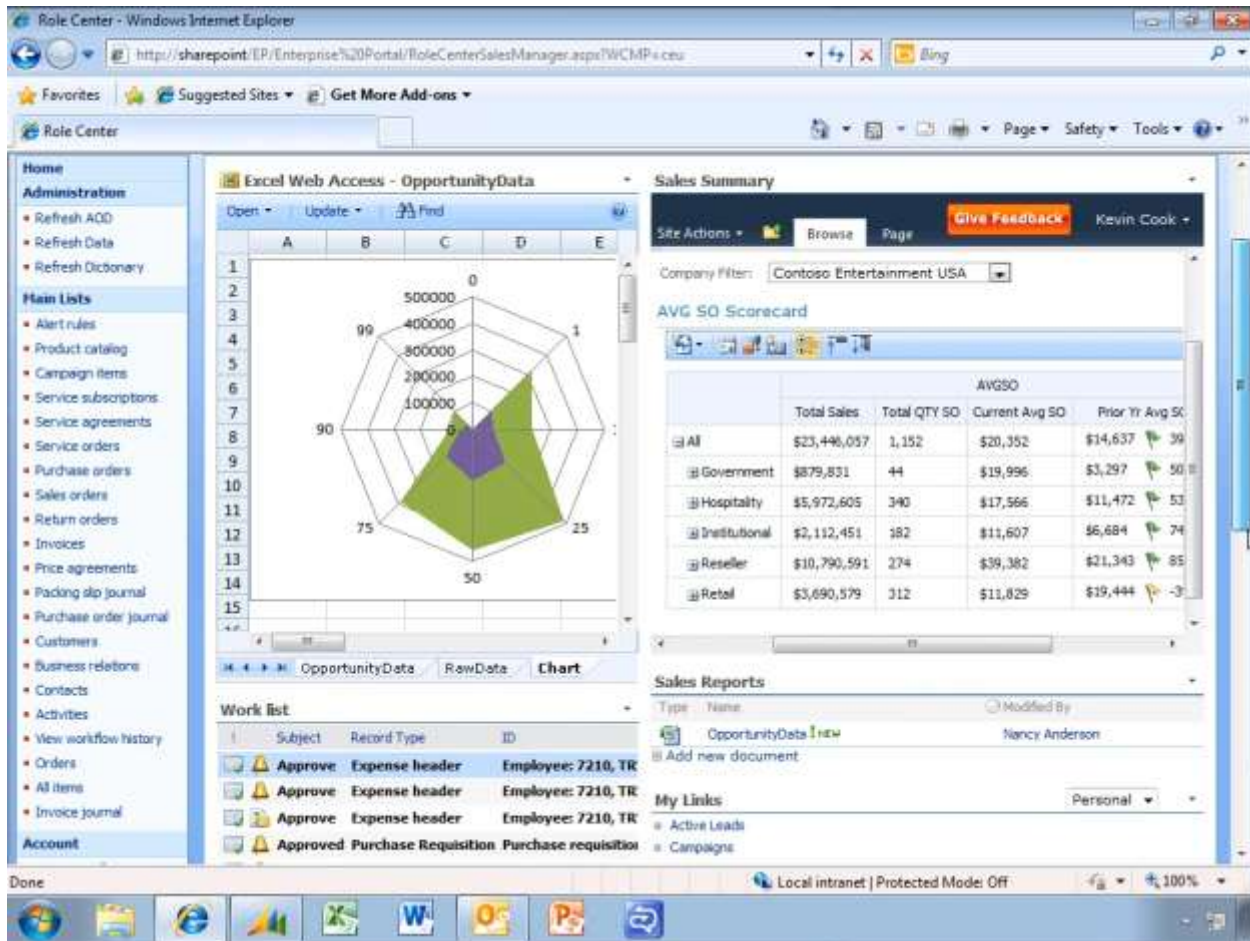


Figure 4: This screenshot shows Kevin, the sales manager, accessing Microsoft Dynamics® AX through Windows SharePoint Services. Here, he is able to view information about his current opportunities in several ways using the Microsoft Office Excel tool he is familiar and comfortable with.

For ChemPoint, a distributor of specialty chemicals, RoleTailored design means a shorter learning curve for new employees. Using Microsoft Dynamics ERP with a Microsoft SharePoint Server interface, ChemPoint has created an interface for its customer service people that one executive calls “the equivalent of five years of experience.” When calls come in to the company’s agents, the callers’ full description pops up on the agents’ screens — everything from the callers’ order history to their local weather to help facilitate small talk. And a new order form is created, pre-populated with all the relevant information.

## IMPROVE BUSINESS INSIGHT

Microsoft Dynamics offers a suite of solutions that can provide rich business intelligence capabilities, with specialized functionality across many industries. It can erase boundaries between data silos and deliver the critical insights needed for rapid, effective decision-making, including the following:

- Accurate, up-to-the minute information about product costs, sales trends and profit margins that you can use to make strategic decisions about where to spend money, how to grow revenue, and how to strengthen your margins, thereby increasing your shareholder value.
- All-up reports that integrate sales and revenue forecasts from your subsidiaries and recent acquisitions — even data in disparate systems.

- Executive views of production schedules or resource availability on demand, without waiting for reports.

Best of all, the ability to create reports no longer requires the help of someone with intimate knowledge of how the database works; all you need to understand is the data. InFocus Corp. is a leading supplier of digital-projection systems for conference centers and meeting rooms. The company's supply chain director tells this story:

"With Microsoft Dynamics, I'm able to access almost any data I need immediately. For example, one of our product managers came into my office recently to talk about some new import regulations in Indonesia. We wanted to do a quick assessment of what we had shipped to Indonesia and what was scheduled to be shipped there. In 10 minutes, I was able to create a custom report gathering this information from the database. I didn't need an IT person to do this for me. And I'm a typical user, not an IT pro. I also write my own reports for our weekly executive meetings, such as analyses of backlogs, forecasts and inventory projections."

## RESPOND TO CHANGING BUSINESS CONDITIONS

Your ability to respond quickly to new business needs is key to your company's success. Thanks to its open architecture, object-oriented development environment and built-in programmatic interface, Microsoft Dynamics helps keep your business agile in countless ways. Here are three examples:

- It simplifies the customization of forms and screens for employees in new roles.
- As you add customers or your regulatory requirements change, you can quickly make the necessary adjustments in your report templates.
- You can accommodate changes in staffing with easy-to-use security and user-provisioning tools.

[CAPTRUST Financial Advisors](#) saw the benefits of this agility in late 2008, when the collapse of Lehman Brothers provoked considerable stock market turmoil — what one CAPTRUST IT manager described as "a 100-year flood for our industry." By using the reporting features in Microsoft Dynamics, the company was able to quickly segment its customers according to their exposure, perform due diligence on their positions and prioritize its communications. CAPTRUST's financial advisors could quickly assess the relative exposure their clients had to the deteriorating credit markets and then help those clients adjust their portfolios accordingly — a highly targeted response to rapidly changing conditions that won the firm customer loyalty.



## CONNECT WITH CUSTOMERS, SUPPLIERS AND PARTNERS

In the past, collaboration with customers, suppliers and partners happened outside the business application software. But today's business world is a connected one; you communicate easily, your systems operate in concert and your business thrives because you are effectively working with your suppliers, partners and customers as if they were down the hall — even if they are really continents away.

To achieve that kind of seamless engagement, these points of collaboration must be fully integrated into your business applications. Microsoft Dynamics links your business to its ecosystem, enabling all approved members to participate in your processes. Firewalls, corporate network boundaries and national borders are no longer barriers to cooperation.

InFocus, the projection systems company referred to earlier, uses Microsoft BizTalk® Server to connect business information from Microsoft Dynamics AX and Microsoft Dynamics® CRM to other applications. This allows InFocus to provide electronic data interchange to third-party logistics vendors and offer dealer-specific product-locator tools, which draw on account information from Microsoft Dynamics CRM. In the future, the company also plans to take advantage of the Enterprise Portal in Microsoft Dynamics AX to provide key reports and other information from the ERP system to its suppliers.

Microsoft Dynamics can create RoleTailored user experiences for your suppliers, in addition to those it creates for your internal functions. Linking all the vendors in your supply chain can be especially helpful if problems arise, such as the necessity of a health or safety recall. Wouldn't it save your staff significant time and resources if your suppliers had direct access to information such as upcoming requests for proposal, payment schedules and the status of their bids? Think of all the calls, faxes and e-mails that could be eliminated. Of course, this capability comes with the necessary security, authentication and permissions tools.

Finally, because rapid adaptability is at the core of the dynamic business vision, Microsoft Dynamics can give your business a bridge to social networks, which can help you identify issues and opportunities sooner.

## MANAGE ACCOUNTABILITY AND COMPLIANCE

The cost of regulatory compliance and financial accountability can be significant, but the cost will be far higher if your business fails to comply with legal requirements or mandates from customers will be far higher. Microsoft Dynamics provides the transparency, traceability and accountability your business needs to comply with complex regulatory requirements and to manage risk. For example, it does the following:

- Provides easy-to-use tracking and tracing tools to ensure regulatory compliance
- Helps you enforce compliance with company procedures or quality initiatives by automating workflows
- Gives you one-stop access to key risk indicators
- Collects and analyzes information from multiple departments and processes
- Strengthens your auditing processes with automatic transaction recording

And in a continued effort to enable companies to be less reactive and more proactive, Microsoft has introduced an Environmental Sustainability Dashboard (see figure 5). Recently certified by the Global Reporting Initiative (GRI), this solution helps your business measure energy consumption and associated costs while tracking your environmental footprint. Often, this is information businesses are able to see for the first time — giving them insight into changes they can make that not only decrease their impact, but deliver bottom-line cost savings. This is a significant first step in enabling our customers to run environmentally sustainable businesses.

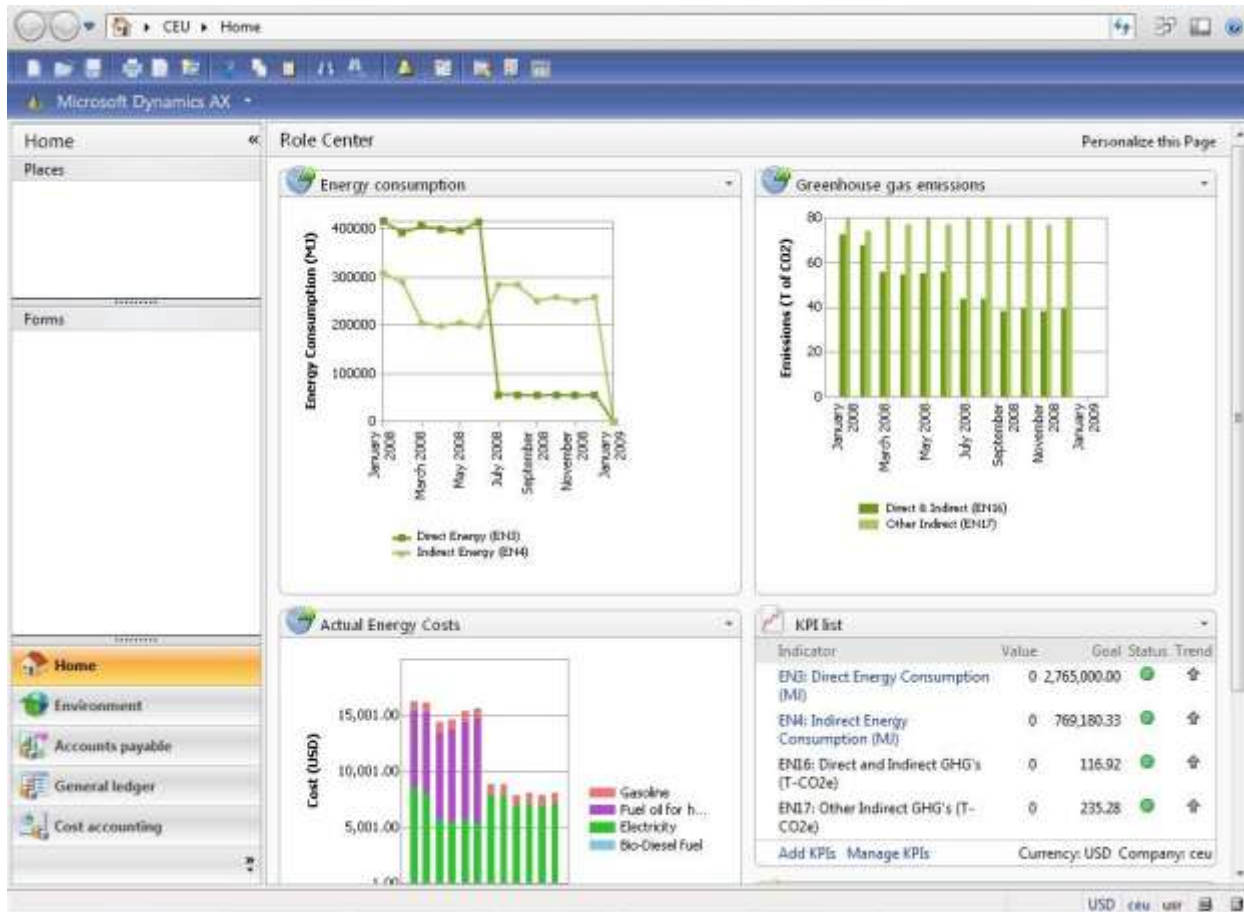


Figure 5: Environmental Sustainability Dashboard for Microsoft Dynamics AX

## REDUCE IT COSTS

Challenged to do more with less, many IT departments are finding that the cost of maintaining outdated, legacy business systems is simply too high. Microsoft Dynamics solutions are built to help your IT teams simplify and streamline common tasks and reduce costs. Consider the following examples:

- Our business solutions run on Microsoft products that you may already be using, such as Windows® Server or Microsoft SQL® Server. By re-using existing servers and licenses, your company may be able to lower its total cost of ownership.
- Custom configurations and modifications are relatively easy and quick to create thanks to our use of open architectures and an object-oriented development environment.
- To further ease the burden on IT, we provide users with self-service functionality and easy-to-use tools.

## CHOOSE WITHOUT COMPROMISING

Cloud computing has changed the nature of the question about how to effectively deploy business application software. Some businesses demand software delivered as a service and acquired on a subscription basis; others demand the increased control and flexibility of software owned and deployed on their premises. But if your company's needs change, or the relative capabilities of deployment models evolve, you shouldn't be stuck with a solution that no longer gives you optimal flexibility, performance and productivity. And you certainly shouldn't have to compromise on features or functionality.

That's why [Microsoft offers you a choice](#) of either deployment model for its CRM applications, allowing you to maximize flexibility and access while minimizing cost and management overhead. And our ERP solutions combine the best of on-premises software with cloud-based services along with the choice to deploy on-premises or have it hosted by a Microsoft Dynamics ERP partner so you can take advantage of new technologies as they develop to answer mission-critical business needs.

## **FUTURE VISION: FIVE TECHNOLOGIES TRANSFORMING BUSINESS APPLICATIONS**

It is important to look beyond today's requirements to the long-term viability of any software solution you choose for your business. One of the most powerful indicators of future promise is your solution provider's investment in research and development. Microsoft's more than \$9 billion per year investment in research and development means choosing Microsoft Dynamics has advantages beyond the cost and operational benefits you receive today. It ensures your business has access to future technology innovations from Microsoft Research as they begin to surface in Microsoft Dynamics business applications. Technologies you may now take for granted that graduated from the lab include click-to-communicate buttons and the ability to move potential customers from online ads to your organization's landing page. Delivering cutting-edge capabilities in each new generation of Microsoft Dynamics solutions — both in the application itself and the entire technology platform that supports it — is an essential component of the dynamic business vision. Here are five technologies that Microsoft is developing to support that vision.

### **NATURAL USER INTERFACES**

In some work environments, such as manufacturing operations, the use of a mouse and keyboard may be impractical. So Microsoft Dynamics is harnessing [natural user interface \(NUI\) technologies](#) — such as touch screens, and voice and gesture recognition — to allow workers in those environments to be more productive, more intuitively. Microsoft researchers are also working on more advanced NUI technologies, such as eye tracking to enable your system to anticipate what you might want to do next, and physiological computing that transforms the human body itself into a user interface enabling what is called skinput.

### **RICH VISUALIZATION**

Some tasks require the analysis of large quantities of data, or monitoring a complex network of factors. In these situations, data visualization across multiple dimensions can be vastly more effective than spreadsheets. 3-D visualization is an effective way to take large quantities of data and translate them into meaningful insights that are visual in nature. This style of visualization appeals to a work force that appreciates something they can perceive instantly. Furthermore, the ability to navigate the data for critical insight can help you grasp key facts about relationships and entities in a fraction of the time it would take to get that information from a typical report. For example, below is a touch-enabled display detailing planned purchase orders for a hypothetical snowboard company demonstrating how rich visualization can not only convey a large amount of detail, but also create an engaging experience.



Figure 6: Example of a rich visualization display

Looking ahead, rich visualization is likely to evolve into immersive virtual and augmented reality for business applications. Experiences found today only in gaming environments may in the near future drive new levels of productivity for businesses. Consider trying to understand efficiency information around a production process: Wouldn't it be far more effective to see the data in the context of a virtual-reality trip through the line?

Information visualization is one enabler of an important transformation taking place in the function of business applications, from a tool primarily for transaction input to one designed for information output in the form of user guidance and business insights.

## CONTEXT-AWARE SOFTWARE

Understanding someone's role — the RoleTailored experience — is just the first step in customizing applications to the person using them. The next will involve enabling the system to provide contextual cues based on where you are, what you are working on or where you are in the business calendar to increase effectiveness — a fully context-aware user experience. Imagine if your business application knew when you log in that it is the end of the quarter, or that you have just introduced a new product, and it could bring more relevant information to your attention and help you prioritize the tasks you need to complete at that time.

Similarly, if a user accesses the system from a small-format portable device or a conference room equipped with a display wall, a context-aware application will automatically adapt to this contextual cue to optimize for the screen size.



Figure 7: Example of context-aware application display

## MACHINE LEARNING

Microsoft Research is breaking new ground in [machine learning](#). These technologies will make possible applications software that becomes more intelligent over time using predictive mathematical modeling to optimize business processes and help users be more productive.

Microsoft Dynamics CRM is already using machine learning to automatically analyze incoming faxes and forward them to the correct e-mail alias. The range of future possibilities is endless, from recognition of signals that might predict a supply shortage to making sense of the information your customers access on your website so you can not only improve your ability to target them with online ads, but you can optimize your site to better meet their needs.

## THE CLOUD

Cloud technology has the potential to change almost every aspect of information technology delivery, and it will dramatically alter the landscape for business applications. The cloud transformation enables new scenarios for connecting with customers, suppliers and partners — your ecosystem — a central pillar of the dynamic business vision. Bringing vast amounts of data together in the cloud opens the door to a new generation of analytics that can deliver powerful new business insights while still protecting the privacy and security of that data, reinforcing another central principle of the vision. Beyond enabling new scenarios and new insights, the cloud can transform delivery of core business applications to enable new levels of simplicity, cost of ownership and time to value. Microsoft Dynamics CRM Online is already at the forefront of that transformation. Like every previous shift in infrastructure technology, it is not enough to just move existing applications to a new platform. To reach the true potential, it is important for the platform, the system architecture and the application to all evolve to deliver benefits beyond those of the previous generation. Microsoft, with its “all-in” commitment to the cloud, from systems architecture and datacenter design and investment to the Azure platform and cloud-based productivity applications, capped by the evolution of Dynamics for the cloud, is uniquely positioned to bring the true benefits of the cloud paradigm to dynamic businesses.

## CONCLUSION: BRINGING IT TOGETHER

In a world of constant change, businesses need to perceive change faster so they can change their processes to reflect a new world. Business applications should be enablers, detecting trends, facilitating decisions and proactively driving change into practice to help your business thrive and win.

At the highest level, software enables a dynamic business by helping people be more productive, gain better insight and control over their business processes, and proactively embrace connections with others in their ecosystem.

Microsoft Dynamics solutions deliver the following:

- The simplicity of a RoleTailored experience that maps to how people work
- The ability to derive the most value from every interaction and investment
- Constant innovation that fuels growth and offers competitive advantage



Although Microsoft offers compelling and adaptable business solutions today, this is only the beginning. Each successive release of Microsoft Business solutions with Microsoft Dynamics at the heart will continue to deliver enriched, context-aware experiences that embrace new display and input technologies. And each new generation of Microsoft Dynamics solutions will deliver increasing customer value and innovation, over the long-term through smooth upgrades and exemplary user experiences.

Software architecture is an important consideration as we move to the future and Microsoft sees two major transformations — the architectural constructs of model-driven software and service orientated architecture — that will shape the evolution. Although these constructs are present in Microsoft Dynamics solutions today, over time additional flexibility and customer value will be delivered that will enable you to win in this dynamic business environment.

In our increasingly complex and connected world, the opportunities to set your business apart are there for the taking. With the broad and deep technology investment of Microsoft, delivered through innovative Microsoft Dynamics business applications, isn't it time for your business to become a dynamic business?

For more information about how Microsoft Dynamics can help your business become a dynamic business, visit <http://www.microsoft.com/dynamics/en/us/business-need.aspx>.

Microsoft Dynamics is a line of simple to learn and use ERP and CRM solutions that work with your existing technology and scale as you grow to give you long-term value. By using software and online services that work the way people and organizations work, businesses are better able to make informed decisions and adapt to rapid change. Microsoft Dynamics helps your people be more productive and your investments in existing systems last longer, while enabling your business to derive the insights necessary to respond quickly and have a competitive edge in an ever-changing world of business.

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