

Optimizing Microsoft Dynamics 365:

CRM Experts Share Their Advice



Table of Contents

Introduction.....	3
Strategy and Organizational Mindset	4
• Stop Thinking About Dynamics – Andrew Welch, Applied Information Sciences and Microsoft MVP	5
• Focus on User and Organizational Adoption – Lori Cheshire, ClickDimensions	6
• Executive Buy-In and Regular Check-Ins – Chris Capistran, Cobalt.....	7
• Dig into User Data – Henry Lin, FMT Consultants.....	8
• Build a Task Force – James Bridges, GMI Group.....	9
• Create User Adoption and Training Plans – Jason Gumpert, MSDynamicsWorld.com	10
• Continuous Investment and User Ownership – Iain Wicks, Rocket CRM.....	11
• Embrace the Power of Data, Mobile and Simplicity – Scott Durow, Microsoft MVP	12
Often-Overlooked Features.....	13
• Excel Online Integration and Embedded Canvas Apps – Rune Daub, Abakion.....	14
• Activities, Quoting and Order Entry – Geoff Ables, C5 Insight and Microsoft MVP	15
• Quick Create Forms and Business Process Flows – Aylwin Wijaya, Clade Solutions	16
• Usage Statistics and Apps - Gustaf Westerlund, CRM-Konsulterna and Microsoft MVP.....	17
• Advanced Finds and Cascading Behaviors – Ulrik B. Carlsson, eLogic and Microsoft MVP.....	18
• Product Catalogs and Goals – Gill Walker, Opsis.....	19
• Field Level Mapping and Tooltips – Heidi Neuhauser, Reenhanced	20
Mistakes to Avoid	21
• A Finite Project Versus an Ongoing Program – Jane Davies, Beyond CRM.....	22
• Implementation is Not the Finish Line – Eric Gervase, Cargas	23
• Small Implementations and Failing to Convey Value – Steve Curtis, Columbus Global	24
• Set It and Forget It and Not Leading by Example – Tania Konczynski, JOVACO	25
• Process and Documentation Gaps – Terry Brown, Protech Associates	26
• A Stagnant Roadmap and Not Recognizing Champions – Adam Hallbeck, Stoneridge Software.....	27
• Lacking Executive Users and Individual Ownership – Brett Meyer, StratusLIVE.....	28
Quick Tips for Becoming a Dynamics Superuser	29
About ClickDimensions	34



Introduction

Microsoft Dynamics 365 is a powerful solution that can help organizations achieve many of their critical business goals. However, as with most technology, what users get out of a platform varies greatly depending on what they put into it. This is especially true for a solution like Dynamics 365 that has the potential to touch so many parts of a business – particularly as it relates to forming, nurturing and maintaining the customer relationships that are essential to organizational success.

As The Marketing Cloud for Microsoft Dynamics™ and a Microsoft partner that has been dedicated to creating marketing technology for Dynamics users since our founding more than a decade ago, the team here at ClickDimensions has worked with organizations in every phase of their Dynamics journey – from consideration to implementation to usage. We have seen plenty of successes and challenges in each of those phases along the way, and they are often related to the questions that are or are not asked about Dynamics.

One question that we feel should be asked more often is this: once an organization gets up and running on Microsoft Dynamics 365, how can they ensure that they are getting the most out of the solution? To answer that question, we turned to Microsoft MVPs, Microsoft Dynamics partners and other experienced CRM experts. Their responses are compiled on the pages that follow to help you optimize Dynamics and ensure that your organization gets the most out of its CRM investment.

Strategy and Organizational Mindset



Stop Thinking About Dynamics



Andrew Welch,
Director of Cloud Applications at
Applied Information Sciences (AIS) and
Microsoft MVP for Business Applications

I tell people all the time that the best way to get the most out of Dynamics is to stop thinking about Dynamics. Imagine that you've got a new car. Dynamics is one of the seats. It's comfortable. It's useful. But the car does so much more than just provide you a seat. Similarly, because Dynamics is itself a Power App, you ought not forget that being up and running on Dynamics means that you have Power Platform under the hood.

There is so much you can do with the Power Apps, Power Automate and the Common Data Service (CDS) capability you have (Power Virtual Agents and Power BI are both part of the mix, too, but are licensed separately). Because all of your Dynamics data lives inside of CDS, consider what you can do to extend the platform and use of that data throughout your organization with custom solutions to meet business needs beyond the use cases enabled by the Dynamics first-party apps or ISV solutions you have already rolled out.

Focus on User and Organizational Adoption



Lori Cheshire,
Director of Marketing Operations,
[ClickDimensions](#)

For Microsoft Dynamics to succeed within any business, user and organizational adoption is key. It is vital that a plan is in place to drive user adoption across the organization. Often the easiest approach is to first focus on using Dynamics at a management level and making that usage visible to other users, creating a trickle-down effect for enthusiasm for and adoption of the system. This could, for example, involve running a weekly sales call out of Dynamics, re-enforcing the solution's role as system of record and truth.

Proper training is also an essential part of user and overall organizational adoption of Dynamics. If users don't feel comfortable using a piece of technology, they simply won't or will only use it minimally. Because a Dynamics implementation should not be static, training should be ever-evolving too. Organizations should develop an ongoing training plan to ensure that users can maintain their existing CRM skills and develop new ones.

Executive Buy-In and Regular Check-Ins



Chris Capistran,
President, Cobalt

The most important factor when it comes to whether Microsoft Dynamics will succeed in an organization is executive/management buy-in. In our experience, we have seen that organizations that have the support of the higher-ups have a much higher success rate with Dynamics. This is closely followed by organizations that commit the staff time and resources necessary to continue to get the most out of the system. CRM systems are only as good as the data and effort that a business puts into it.

Another effective method for getting the most out of Dynamics is to schedule periodic check-ins with users to discuss new features and to get feedback on what is working and what is not. We do this internally for our D365 instance and we encourage our customers to do this as well. Having something scheduled is key. Put a meeting on the calendar quarterly so that it doesn't get lost in the shuffle.

Dig into User Data



Henry Lin,
Delivery Lead, FMT Consultants

In order to ensure they are getting the most out of Microsoft Dynamics 365, we recommend that organizations first check on user adoption to see if employees are even using the new solution at all. Businesses can view analytics in the Power Platform admin center to see data on active users, mode of access and entity usage.

If you discover that user adoption is low, try to find out why. Host standing open forum sessions where employees can openly share questions or concerns with your CRM admin. Schedule the sessions on various days and times so it's easier for employees to find a time that works for them, thus increasing participation in these sessions and ultimately their effectiveness.

Build a Task Force



James Bridges,
Account Executive, GMI Group

In our experience, the most common trait of customers who get the maximum benefit from their Microsoft Dynamics implementation are the ones who not only have a clear vision about what is needed but also put staff in place to ensure that vision is achieved. This would be in the form of a task force that follows up on CRM activity and steers the continual improvement of the solution to meet the current and changing needs of the organization. The CRM task force should consist of managers and key users who should have also been involved in the CRM implementation from the beginning of the analysis phase.

The task force should ensure that documentation is a key part of their work. There can never be enough documentation. In these challenging times of a global pandemic, we have seen a lot of training being performed online. Often these training sessions are recorded and published as bite-sized fragments covering one topic at a time. This serves as a great reference for both experienced and new users to ensure they are getting the most out of Dynamics.

Create User Adoption and Training Plans



Jason Gumpert,
Editor, MSDynamicsWorld.com

Two elements of the typical Dynamics deployment that rarely get enough respect are training and user adoption. An organization might have software that is up and running, but if they went live without a plan to help their user base get the most out of the new solution, then the results are likely to be sub-optimal in the long term.

The business software history books are full of stories in which projects compromise on training when schedules or budgets come under pressure. But there is only so much flexibility in a training plan. Stretch it too far by allotting fewer training days, fewer trainers, or less materials, and the outcome is predictable: an increased risk of low utilization and lower ROI, even with properly working software.

While user adoption relates to training, it is a different discipline that can be harder to account for in a project plan. Different organizations achieve their user adoption goals in different ways. Some will bring in organizational change consultants, especially when the disruption is significant, but more typically a project team will identify a core group of enthusiastic employees from within the user base and empower them to become product champions. These small groups of motivated individuals can have a huge impact on broader adoption, often by going above and beyond to teach, encourage, cajole and even inspire their fellow users.

Continuous Investment and User Ownership



Iain Wicks,
Director, Rocket CRM

Microsoft Dynamics 365 succeeds when the company directors are engaged. Without that support, a CRM system won't have much chance of surviving into year two and certainly won't net a business a return on their investment.

As part of this engagement, company leaders must commit to continue investing in the development of the CRM system once it is live. This may involve securing a proper managed service contract, which helps ensure ongoing optimization specific to your company.

Another trait of organizations that successfully optimize their use of Microsoft Dynamics is a focus on training. When users take on a sense of responsibility for their own training, they will naturally engage more, so it can sometimes be a good idea to include some kind of Dynamics proficiency into job descriptions in organizations where CRM is a core system.

Embrace the Power of Data, Mobile and Simplicity



Scott Durow,
Microsoft MVP for Business Applications

To get the most value from Microsoft Dynamics, organizations must become addicted to their data! They must constantly dig into the information being collected and ask what more they can learn, and how to improve quality and accuracy. Company leadership should look at how often the data is updated and by whom – getting in touch with those people to find out how their job can be made easier.

Secondly, implementing a mobile-first strategy to CRM has been shown to increase user adoption. As users spend more time inside CRM, the data quality will naturally increase. Don't insist that users go on lengthy training courses before they use CRM on their desktop; send out regular bite-sized guides on getting common tasks done quickly using the Dynamics mobile app or inside the Outlook mobile app.

Finally, keep in mind that if your solution is heavily customized, it becomes both costly to maintain and it becomes harder to adopt new features as they are released by Microsoft. Keep your customizations to a bare minimum, even if that means changing your processes somewhat.

Often-Overlooked Features



Excel Online Integration and Embedded Canvas Apps



Rune Daub,
Partner and Senior Solution Architect,
Abakion

Excel Online integration is a default feature of Dynamics 365. The feature is overlooked and forgotten as people tend to activate editable grids within Dynamics and teach this to their users. But Excel Online will give you an extremely effective data entry system for both new records and existing records in an interface that is a lot more responsive than the native editable grid.

Another feature that is wildly underestimated is a newer one – embedded canvas apps in the model-driven Dynamics 365 application. With embedded canvas apps, we have the possibility of changing the layout for users to match very specific requests. An example of this could be to include pictures of products when you create opportunity product lines or optimizing account views to include data from third-party tools, without having to merge the data into CRM. Canvas apps are a game changer for Dynamics users.

Activities, Quoting and Order Entry



Geoff Ables,
Managing Partner at [C5 Insight](#) and
[Microsoft MVP for Business Applications](#)

One Microsoft Dynamics feature that doesn't get the recognition and usage it deserves is activities. Yes, activities. They have been there since day one of Dynamics and they have been underused that entire time. Activities are at the heart of turning sales reps into proactive innovators and are at the heart of many of the new AI features that Microsoft is adding. Getting users into a pattern of planning, and not just tracking, activities is critical.

Quoting and order entry are two other underutilized Dynamics 365 features. Most companies have built these capabilities into their ERP system and are reluctant to migrate them into their CRM system. But these are customer-facing activities and should be performed in your customer-facing system. This is particularly true if your customer care or inside sales reps have to generate quotes and orders – these roles must use CRM to stay in sync with other customer-facing people in the organization, and it is demonstrably counter-productive to have them use ERP for quoting and ordering.

Quick Create Forms and Business Process Flows



Aylwin Wijaya,
Solution Architect, Clade Solutions

The first underutilized Microsoft Dynamics feature that comes to mind is quick create forms. Whenever a user wants to add new rows to a grid, they will be redirected to a new form that occupies the whole screen. For many people, this kind of user experience distracts from their thought process. It is easy to forget what to do next or where to go back to after you fill out the whole form full of fields. Not many developers think about this problem. Creating a quick create form probably is the last thing in a developer's mind because it has little to do with functionality. However, small things like this are the very definition of user-friendly to the end user.

The second often-overlooked feature is business process flows. Historically, CRM has been viewed as system of record, that is a system whose whole purpose is to record information. However, successful organizations need more than just a system of record. They need to have a process that ensures consistent and quality outcomes regardless of who the operator is, which business process flows can deliver.

Usage Statistics and Apps



Gustaf Westerlund,
Principal and CIO at CRM-Konsulterna and
Microsoft MVP for Business Applications

Driving change is critically important to organizations today and all Microsoft Dynamics features that can help accomplish that mission are very useful. For example, usage statistics in the admin panels, which reveal who is using the system and who isn't. Then try to understand why. An established model for driving change like Prosci or Kotter's 8-Step Process for Leading Change can help drive those who aren't using the system to become regular users.

Also, from a more technical perspective, making streamlined apps for specific target user groups within Dynamics can be very useful. It is simply a way of grouping features in an app and linking that to a security role, but that can make the system much more relevant for the users as the features they see are actually all useful for them. Don't we all hate a system that has a ton of buttons and knobs that we don't understand and hence never use? It just makes us feel stupid – and who wants that? So, making streamlined apps for targeted internal audiences is a great solution for filtering out the noise users often encounter within a system.

Advanced Finds and Cascading Behaviors



Ulrik B. Carlsson,
Business Solutions Lead at [eLogic LLC](#) and
[Microsoft MVP for Business Applications](#)

Two often-overlooked Microsoft Dynamics features that impact usage are optimizing the settings for which fields are enabled for advanced find and the cascading behavior between entities.

Limiting the number of fields that are searchable through advanced find will help end users more easily create their own views. They will be able to select from a list of relevant fields and not have to scroll through an endless list of Address 2, Address 3 and countless other system fields that are not being used anyway.

Setting the cascading behavior between related entities can prevent unintended consequences of reassigning or deleting records. For example, the default action in many instances is to reassign all activities on an open case to the new owner when assigning it. However, this is not desirable as those activities are usually already assigned to the correct owner and the automatic reassignment removes that link.

Product Catalogs and Goals



Gill Walker,
CRM Success Catalyst, Opsis

After they get up and running on Microsoft Dynamics 365, many organizations do not use the product catalog – either because they do not understand it or they feel that product management should be done in their ERP/finance solution. This often results in email communications back and forth between salespeople and accounts people to get the sale invoiced. Of course, this double handling of data is error-prone and inefficient.

Goals are another often-overlooked feature in Dynamics. Once an organization is using Dynamics 365, setting user-appropriate goals within CRM acts as an encouragement to use Dynamics 365 because the goals are driven directly off Dynamics 365 data. This can be a big boost for user adoption and engagement.

Field Level Mapping and Tooltips



Heidi Neuhauser,
Director of CRM Projects, Reenhanced

There are so many out-of-the-box features in Microsoft Dynamics 365 that are underutilized or overlooked; it is difficult to only pick one or two! However, number one on my list is field level mapping. This is when you map a field value on an entity to another entity (for example, during lead qualification). It eliminates the need for duplicate data entry across entities. When your data is cleaner and more streamlined, your users are more likely to provide information needed at different stages of your sales or service flow.

Another simple, but often overlooked, feature available to anyone with a System Administrator or System Customizer security role are tooltips. When a user hovers over a field name, a description of what the field does and is used for is displayed. These are extremely simple to configure – simply add a description on any new field you add to Dynamics 365. Helping users understand what fields should be used for helps eliminate confusion and potential data errors.

Mistakes to Avoid



A Finite Project Versus an Ongoing Program



Jane Davies,
General Manager, Beyond CRM

Organizations that treat their Microsoft Dynamics implementation as a finite project, rather than an ongoing program, will fail. Their implementation may not fail immediately, but will eventually, as their business changes and users become disenchanted.

It is impossible within an implementation project to capture and meet every business requirement and the nuances of every business process, or to anticipate how the business may evolve over the next few years. Organizations must grow with their CRM solution and perhaps are not ready from day one for the changes they will make in three years, until they have grown and experienced that evolution. Otherwise there is the gradual, or not-so-gradual, business change which results in the CRM functions no longer matching the business process. If organizations acknowledge that their Dynamics 365 instance must change as the business changes, and ensure an annual budget is dedicated to this, they will have a much better chance of long-term success.

Implementation is Not the Finish Line



Eric Gervase,
Sales Manager, Cargas

Too many organizations expect that the end of the implementation is the finish line. That's actually the starting line with Microsoft Dynamics. Continued investment varies, but CRM success will depend on an organization's ability to continue to evolve usage to get the measurables and insights they want and need from their sales and marketing organization.

The most common trait shared by organizations that avoid this mistake, hands down, is executive support and vision. The "why" is way more important than the "what." If the "why" is clearly communicated to the team, there is a much better chance of adoption, understanding of goals and success.

It is also important that the organization listens to the end users. Too often, CRM implementations are solely a top-down strategy. There has to be a balance of strategic goals that satisfy the needs of the organization and helpful efficiencies that make the sales team's job easier and enables them to sell more. It can't just be an effort to satisfy the organization's need for data.

Small Implementations and Failing to Convey Value



Steve Curtis,
Customer Experience Lead, Columbus Global

Many customers will try to keep their Microsoft Dynamics 365 implementation as small as possible – often because of cost constraints. Consultancy rates per diem can be much higher than using internal resources, and so it's understandable that businesses want to minimize implementation time and cost. But often this is at the cost of capabilities that the business then does not understand. So, my recommendation is to always ensure that, through phasing, organizations implement all the features of the product that will add real benefit to the business. If needed, you can phase to go live quickly, but plan out the subsequent phases to use the true power of the platform you've invested in.

Also, I see a lot of projects fail when the business does not think about “What’s in it for me?” from each internal audience’s perspective. For instance, why would a salesperson want to adopt Dynamics? All too often, if the sales application is purely looked at from the lens of management reporting, then sales will avoid using it and will purely see it as a management overhead. Instead, implement the solution to optimize the value for sales with full unification of contact management with sales, with LinkedIn access from the app to see people and companies, and with analysis using insights of better ways to manage contacts and clients.

Set It and Forget It and Not Leading by Example



Tania Konczynski,
Director of Sales and Marketing, JOVACO

By far, the biggest mistake that I see organizations making with Microsoft Dynamics is that they try to set it and forget it. Once they are up and running on the system, they don't take the time to speak with users and see what's working and what isn't. It's important to recognize that how an organization expects things to go post-implementation may not be how they actually go. Regular check-ins allow for course correction before an issue gets completely out of hand.

Another big problem I see at organizations once they are up and running on Microsoft Dynamics is that company leadership doesn't always lead by example. Management doesn't use the solution. If leadership doesn't manage based on what is in the system, or use other tools or spreadsheets to manage tasks, activities or KPIs, the rest of the organization won't see the value in using CRM and it is bound to fail.

Process and Documentation Gaps



Terry Brown,
Vice President of Project Services,
Protech Associates

Perhaps the biggest mistake organizations make after they get up and running on Dynamics is trying to make the new CRM system work the same way that their old system did. When a new system is rolled out, process gaps will be identified. There are two primary ways to address these gaps: modify the system to work according to your current process or modify your process to work better with the new system. In most cases, users will achieve better results if they make every attempt to modify the current processes to work the way the new system does out of the box. If this doesn't work then, and only then, should the organization explore adding customizations to the system.

Other common mistakes include not investing in training for your staff or properly documenting the departmental processes. I recommend breaking your business processes into daily, weekly, monthly and annual tasks. Focus on the most important ones first to be sure they can be performed efficiently and are well documented to prevent disruption when roles or people change.

Lastly, I suggest following the crawl, walk, run approach to process automation. I have seen organizations spend a great deal of time and money attempting to automate processes that have not been well defined or were properly tested. To avoid this frustration, attempt to execute the process manually first, refine any steps that are not working properly and then automate once the process is complete.

A Stagnant Roadmap and Not Recognizing Champions



Adam Hallbeck,
Presales Architect, Stoneridge Software

Not having a collaborative, living roadmap of priorities across your organization – as well as someone to own it – is one of the biggest mistakes I see organizations make post-implementation with Microsoft Dynamics. The mindset is mistakenly, “How can we grow?” when it should be “How should we grow?” It sounds kind of cheesy, but distractions – and on the other side of things, analysis paralysis – become barriers to healthy adoption and scalability.

In addition, organizations too often fail to identify and support their Dynamics champions. Dynamics 365 and the Power Platform are very frequently updated and improved. Having someone on your team to stay on top of what’s new, what’s planned, and how the features and functionality can add value to your business is critical.

Lacking Executive Users and Individual Ownership



Brett Meyer,
Director of Product Management and
Services, StratusLIVE

The most common factor that I have seen that determines the success or failure of Dynamics within an organization is executive buy-in for the system as a whole. Not having this buy-in is a tremendous mistake. This means not only does company leadership need to evangelize the application, but they also need to be users. They must demonstrate to the broader organization that they think it is a valuable tool everyone should be using, including themselves.

The second thing is that everyone needs to see this as their application. I know that sounds strange but as we often see with SAAS-based systems, there can be this mindset that they just have this online tool that they can look at every so often and it will magically have just what they are looking for. Dynamics requires attention. It requires users using it every day. It requires them to feel like they need to enter the data properly so everyone can benefit from the outcomes. What it does not need is to become a management tool to watch over the users. Users must be given a reason as to why it will benefit them in their individual roles and not just management.

Quick Tips for Becoming a Dynamics Superuser





"Most users will understand the processes that are relevant to a CRM system. The big difference between a superuser and a normal user is understanding the data that lies beneath those processes. So, to become a superuser, you really need to take the time to learn how the data is structured and what you can do with it."

- Rune Daub, Partner and Senior Solution Architect, Abakion



"Utilize the Dynamics integration with LinkedIn Sales Navigator. It enhances your ability to get insights about a prospect or customer and the news and relationships that you should be aware of about a company and contact, right from inside Dynamics. It is really powerful."

- Eric Gervase, Sales Manager, Cargas



"Roll up your sleeves and get your hands dirty. There is a wealth of information available online for free for the Microsoft Dynamics 365 platform. You can learn the system conceptually by reading and watching videos, but you will not understand the full power or become a superuser until you spend time using and configuring the system."

- Terry Brown, Vice President of Project Services, Protech Associates



"The biggest thing I tell people who want to be superusers is to really learn advanced find. That feature can be fickle, and you need to know where to start in order to get optimal results from a query. This is so important because really all Dynamics charts and dashboards must have the right data set under them to be of value."

- Brett Meyer, Director of Product Management and Services, StratusLIVE



"The user adoption work and learning process does not stop when the solution goes live. It is an ongoing process to keep teaching users as well as optimizing the system based on new knowledge from the users."

- Ulrik B. Carlsson, Business Solutions Lead at eLogic LLC and Microsoft MVP for Business Applications



“Get people excited and give them the time to learn. We’ve found that customers that give people the time and freedom to spend time learning develop some true Dynamics superstars within their organization.”

- *Chris Capistran, President, Cobalt*



“Learn how to export data to Excel and then re-import any updates you make. It’s much easier to keep your data healthy if you can update it in bulk using Excel.”

- *Scott Durow, Microsoft MVP for Business Applications*



“My tip is to always keep it simple. We come across reboot projects that have failed because not enough thought has been given to simplifying the user interface.”

- *Iain Wicks, Director, Rocket CRM*



“Learn keyboard shortcuts. The less you touch your mouse, the more impressive it becomes. You can find a full list of keyboard shortcuts [here](#).”

- *Thai Phan, Growth Manager, Clade Solutions*



“Learn how the system works under the hood. The Power family of products drives Dynamics, and most business users can quickly learn – and reap the benefits of – Power Automate and Power Apps if the business lets them.”

- *Steve Curtis, Customer Experience Lead, Columbus Global*



“Fire up Power Apps and get started making beautiful and useful things that extend the core Dynamics functionality.”

- *Andrew Welch, Director of Cloud Applications at Applied Information Sciences (AIS) and Microsoft MVP for Business Applications*



“Learn advanced find and the data model. Mastering these will make you king or queen of Dynamics.”

- *Gustaf Westerlund, Principal and CIO at CRM-Konsulterna and Microsoft MVP for Business Applications*



“Getting as familiar and comfortable with Advanced Find functionality as possible – it not only helps you understand the structure of Dynamics but what and how you track data. If you can master that, you can truly analyze any specific area of the business.”

- *Lori Cheshire, Director of Marketing Operations, ClickDimensions*



“Make CRM your activity management system of record. Activities connect to everything in CRM. So, if you’re using it as a marketer, sales rep or customer care agent, use the activity planning and tracking features to stay on top of your plans and your notes.”

- *Geoff Ables, Managing Partner at C5 Insight and Microsoft MVP for Business Applications*



“Superusers want to know more about the technology, more about the business execution, and more about the needs and interests of their fellow users. They become the voice of both what is possible today and what the future could hold in terms of maximizing the value of a software investment.”

- *Jason Gumpert, Editor, MSDynamicsWorld.com*



“Go get lost. Jump into unfamiliar corners and tools in the Power Platform and find your way out. Join community webinars and sessions that challenge your comfort zones. Everyone has their own method and pacing for learning new concepts, but for me, getting turned around in a new Power Platform maze and finding my way out is always super enlightening.”

- *Adam Hallbeck, Presales Architect, Stoneridge Software*



“Create a CRM user group at your organization! Include a variety of skill and comfort levels, not just the superstars. Try to get internal influencers to be a part of this group. Use this group to help test and approve new features and changes to the system. They also can help become Dynamics evangelists.”

- *Heidi Neuhauser, Director of CRM Projects, Reenhanced*



“Set up a steering committee consisting of internal and external stakeholders. By holding regular workshops – for example every quarter – the use and usefulness of Dynamics can be evaluated and further finetuned to suit the needs of the organization.”

- *James Bridges, Account Executive, GMI Group*



“Think about using tools that already exist as they will be tested and have a lot of accompanying documentation. GitHub has a free Dynamics 365 Workflow Tool that I have used before, and there are lots of other great resources available there too.”

- *Henry Lin, Delivery Lead, FMT Consultants*



“The key to becoming a superuser of any solution is to understand it more widely. This understanding should extend beyond the usage required by that user to understanding in detail why specific functionality was implemented in the way that it was implemented.”

- *Gill Walker, CRM Success Catalyst, Opsis*



“Be curious! If the information exists in your system, there is a way to extract or use it. Stuck on an issue? There is a wealth of information out there and you are probably not the first person to run into a certain problem, so start by researching what’s out there – you will be surprised what you can find.”

- *Tania Konczynski, Director of Sales and Marketing, JOVACO*



“A mastery of advanced find is the single most empowering skill a user can have. Learning how to structure a query and understanding their unique data structures can take some effort, but the user that makes this effort will be a true superuser and an asset to any organization.”

- *Jane Davies, General Manager, Beyond CRM*

About ClickDimensions

Founded in 2010, ClickDimensions is the leading marketing platform for Microsoft Dynamics, with more than 3,700 customers around the globe and a partner network that spans 76 countries today. As The Marketing Cloud for Microsoft Dynamics™, ClickDimensions is redefining how marketers work and attain results with the only unified marketing technology, analytics and services platform in the market – made exclusively for and natively built within Dynamics.

To learn more, visit us at clickdimensions.com or follow us on Twitter at [@ClickDimensions](https://twitter.com/ClickDimensions).

