



# 21 Reasons **Millennials** Prefer **Microsoft Dynamics**

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# 21 Reasons Millennials Prefer Microsoft Dynamics

Millennials are quickly taking their place as the driving force in the workplace. In 2020, those born between about 1980 and 2000 are expected to comprise half of the workforce and by 2025, 75% of the global workforce.<sup>1</sup>

Having grown up with technology, millennials view the world through a connected, digital lens. They expect technology to simplify tasks and assume instant access to any information they need. So when the organization they work for uses outdated systems that make tasks more cumbersome and data impossible to find, they get frustrated and explore new options.

**Millennials know there is a better way to get work done.**

In this white paper, we'll look at the unique ways that the ERP and CRM functions in Microsoft Dynamics help millennials (and the organizations they work for) get work done. From mobile support to industry-leading collaboration tools, Dynamics is built for the future. Read on to see how you can tap into the power of the millennial workforce to ensure the future of your organization.

<sup>1</sup> <https://www.inc.com/peter-economy/the-millennial-workplace-of-future-is-almost-here-these-3-things-are-about-to-change-big-time.html>



## Contents

Section 1: Productivity anywhere

Section 2: Integration and automation

Section 3: Data mastery

Section 4: Collaboration

Section 5: Security

Section 6: The future



# Productivity anywhere

The definition of “workplace” has profoundly changed over the past decade. On-the-go employees want to work when and where they can, staying productive with apps and information they need. Also, your customers expect the employees they engage with to be fully connected no matter where they are. Dynamics unifies data and functions to allow every worker to achieve their full potential anywhere.

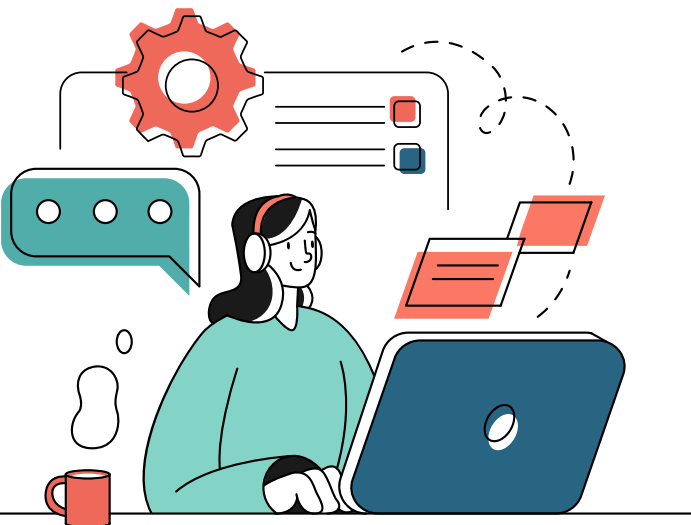
**1. Work/life balance for parents.** There is no predicting when a child will wake up sick and need to stay home from school. Parents appreciate the flexibility to work from home—and still be productive—when the unexpected happens. Dynamics is fully integrated with familiar Office tools like Outlook, Word, and Excel, so working from home is no less productive than being in the office.

**2. Access to current data anywhere.** When they meet with a customer over coffee, and the customer asks how many items they ordered last time, millennials expect to look up the information instantly on their phone. With Dynamics, your sales reps can look up previous orders, confirm inventory status before committing to delivery, and place the order, all from their mobile device.

*“This is a generation that wants to work-to-live, not live-to-work. If you are flexible in certain ways – flex hours, work from home days, etc. – you’ll get quality performance from your workers. Software such as Dynamics 365 that allows workers to perform their duties away from the office, for example with Microsoft Teams, can prove to be valuable to managing a Millennial workplace. Mobility is no longer a future concern—it’s an essential part of staying competitive today and keeping your employees happy.”*

- Rob Triggs, VP Sales and Marketing,  
CRM Dynamics

**3. Productive travel time.** For seasoned travelers, time at the airport is time to catch up. With centralized access to sales, projects, marketing and more, traveling employees can stay engaged no matter where they are. A consistent and secure experience on a desktop, laptop, tablet, or phone allows traveling workers to complete all of their tasks efficiently so they can spend more time building profitable relationships with clients and more time at home with their families.



# Integration and automation

Millennials are accustomed to using personalized applications to simplify every aspect of their lives. From shopping to banking, when they need to get something done, they click on an app. Employees get very frustrated when they have to work through cumbersome processes that require switching back and forth between multiple business applications, email, and document storage. Dynamics brings together financials, sales, service, and operations to create a unified platform for workers. And a thriving marketplace of connecting applications, [AppSource](#), extends the personalized experience.

*"More than 80% of business use Microsoft business software, and millennials have grown up using tools such as Word, Excel, Outlook and SharePoint. On its own, Dynamics 365 is a powerful business tool that can help drive your success. With D365 integration with Office 365, those advantages are even greater."*

- Rob Triggs, VP Sales and Marketing,  
[CRM Dynamics](#)

**4. Single source of action.** Dynamics surfaces business tasks like requests for quotes or invoices within Outlook, allowing workers to take immediate action without leaving their inbox. The cross-function with other Microsoft products, including Teams, SharePoint, and Office 365, etc. supports efficient work in programs that people are comfortable using.


**5. Breaking down barriers in the organization.** Centralized data management allows departments and business units to work as one. Data flowing in, through and out of your business enables everyone in the organization—from sales and marketing teams to production and service groups—to work with one version of the truth.



# Integration and automation


**6. Providing service with pride.** As millennials seek meaning in their work, they want to provide great service to the customers, patients, and clients they interact with. Through connected customer relationship management and back office processes, customer-facing employees have complete information—like order history, schedules, and inventory—so they can answer questions with confidence and provide personalized service.

**7. Workflows to simplify work.** Today's workers expect tedious manual processes to be automated so they can focus on more important work. Through automated processes, Dynamics manages the most common tasks, such as creating invoices, purchase orders, and production schedules. Workflows automate email notifications to keep orders moving through departments, ensuring prompt approvals, and keeping projects on track.



*"One of the most useful features in Dynamics 365 is the ability to create customized workflows that make your workers more efficient and your business more profitable. And workflows don't have to be restricted to sales and administrative tasks. They can also be used for customer relations. In many ways, this might be the most useful feature as it is well established that maintaining a customer is more important to profitability than finding a new one."*

- Rob Triggs, VP Sales and Marketing,  
[CRM Dynamics](#)



*"Dynamics 365 allows you to access a 360-degree view of each individual customer at your fingertips. With data from your accounting software and your customer relationship management solution seamlessly and securely accessible on any device, you now have a fully mobilized sales force that can answer customer questions in real time; your team can collaborate and share customer insights while traveling; and you can manage your finances and operations without having to spend your vacation in an office."*

- Rob Triggs, VP Sales and Marketing, [CRM Dynamics](#)

# Data mastery

Millennials have a different perspective from previous generations on “following your instincts” and making “gut decisions.” They want data, relevant and focused, to provide a firm foundation for decisions. Human interpretation is still critical to good decision making but it should be supported by rich decision-driving data.

The Common Data Model underlying Dynamics provides the foundation to centralize data and deliver consistent information across the organization. Robust visualizations bring focus and perspective to provide the context and relevance that supports informed decisions.

*“With the new Microsoft program suites, the integration is just fantastic. They speak to each other in a clear voice and create company-wide efficiency.*

*Notes are now captured using Microsoft OneNote, ensuring that all information is in its place, and legacy information is easily passed from departing employees to new staff members.”*

- [Metalworks Group](#),  
CRM Dynamics client

**8. Instant answers.** Finding the answer to most any question today is just a simple search away. The connected data of Dynamics provides instant visibility into the relevant information each employee needs. No matter where they are working, employees can have a unified view of the financial and customer information to deliver real-time responses to the people they work with—both internally and externally.

**9. Personalized, interactive data visualization.** Power BI is Microsoft’s powerful business analytics solution and data visualization tool. Power BI delivers real-time insights from Dynamics to provide deep visibility across company-wide operations. Employees can easily connect Excel queries, data models, and reports to Power BI Dashboards to gather, analyze, publish, and share Dynamics business data. Configurable dashboards and multidimensional reports help employees analyze data to meet their own needs and share information clearly and concisely.

*“With Azure, we avoided killing any more trees by moving documents to the cloud and suddenly our digital filing system became very solid and shareable. When someone needs a document, they’re no longer buzzing the intercom or walking from cubicle to cubicle and tapping people on the shoulder. Everything’s faster.”*

- [Metalworks Group](#), CRM Dynamics client

# Data mastery


In addition to connecting data from accounting, sales, purchasing, inventory, and customer interactions, Dynamics provides the gateway for the next generation of data management through artificial intelligence (AI) and augmented reality.

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**10. Artificial intelligence.** With Dynamics, employees can take advantage of the latest advances in Microsoft AI. Machine learning models can reveal insights from both structured and unstructured data, including text, and images. Out-of-the-box AI applications in Dynamics can help employees gain new perspectives into their specific jobs, like predicting customer behavior through Sales Insights or interpreting social and web interactions with Marketing Insights.


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**11. Mixed reality.** The emerging field of mixed reality lets employees work with cutting edge technology to visualize, collaborate, and learn. Through multiple out-of-the-box Dynamics mixed reality tools, workers can blend real and virtual worlds to produce visualizations, to share, imagine, understand, and design in real time.



*"Microsoft is delivering new and advanced functionality in the Cloud. Some newer functionality like Azure Machine Learning, Social Engagement, Gamification, and the LinkedIn Sales Connector are only available for Dynamics 365 online."*

- Rob Triggs, VP Sales and Marketing,  
[CRM Dynamics](#)



*A major focus of Microsoft's focus today is in improving the ways that Artificial Intelligence can improve your business. AI is a technology that makes many people excited to see what the future may bring. And in fact, we are already utilizing AI in multiple ways, often without even realizing it. Microsoft has made strides in its AI technology in Dynamics 365 that are designed to make your business run more smoothly."*

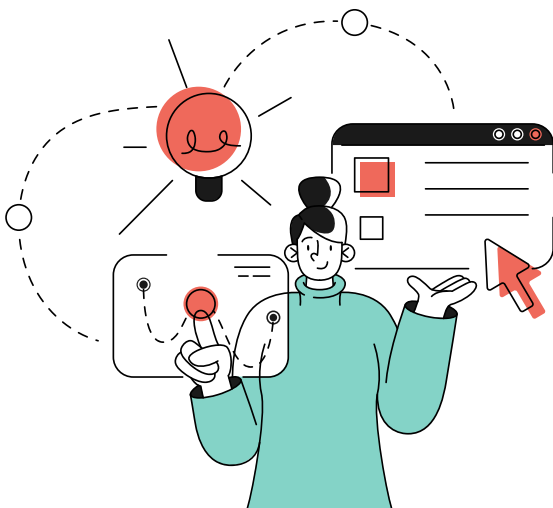
- Rob Triggs, VP Sales and Marketing, [CRM Dynamics](#)

# Collaboration

Extended social networks have shaped the way millennials share ideas, solve problems, and learn new skills. They understand that the organization is stronger through collaboration that crosses departments, business units, and regions. With integrated tools featuring a familiar Office 365 experience, Dynamics supports collaboration across the organization—from marketing and sales through production and service delivery.

*“Millennials care about social interaction and connection. Social Engagement in Dynamics 365 gives you powerful social insights and puts social media at the fingertips of your sales teams, customer service agents, and everyone across your organization. It can help you develop better relationships with your customers, stop small problems before they become big and create a more productive marketing team.”*

- Rob Triggs, VP Sales and Marketing,  
[CRM Dynamics](#)



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**12. Collaborative selling.** Working with Microsoft Teams, Dynamics supports a rich coordinated selling approach. CRM information including Accounts, Opportunities, and other key entities is shared to enable strategic conversations. Sharing and coauthoring sales documents allows experts from across the organization to actively participate in sales cycles. With files stored in one central location, the entire team has easy, consistent, and secure access to the latest documents.

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**13. Effective project collaboration.** Microsoft’s modular, multi-channel applications like Dynamics and SharePoint allow project members to work together on all aspects of projects. Dashboards allow team members to monitor budgets, allocate resources, and make effective decisions with real-time insights. Project-related documents in SharePoint enable everyone to do their best work by unifying relationships, processes, and data.

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**14. Mixed reality collaboration.** Dynamics is at the forefront of the new age of collaboration. Remote Assist allows employees a world apart to share a real-time view to engage expert input, get hands-on training, or share visual experiences.



# Security

Millennials understand the importance of secure data, applications and documents to protect employees and customers—as well as ensuring the reputation of the organization. As a leader in global security, Microsoft delivers layered security in all applications to allow workers to do their best work anywhere with full confidence.

**15. Security anywhere.** Through Dynamics' layered approach, physical and virtual security including access control, encryption, and authentication helps protect data on all devices. To ensure that workers have the information they need to accomplish their jobs, role-based security defines access to system data no matter where they are working.

**16. Intelligent security.** As the risks to data and systems continue to evolve at a frightening pace, modern workers expect systems to be protected by intelligent security. Microsoft applies advanced analytics to compile massive amounts of threat intelligence and security data to provide unparalleled threat protection and detection. Applying knowledge from billions of data points globally, Microsoft diagnoses attacks, reverse engineers techniques, and applies intelligence to continually improve security.

*"With a mobile millennial workforce, a lost laptop can be a million dollar problem when sensitive data is involved. With cloud computing your business can have greater security as your data is stored in the cloud. The data is easily accessible and you can also even remotely wipe data from misplaced to avoid greater risks. The Microsoft Azure platform is among the most secure in the world. No system is hack-proof, of course, but Microsoft's comes close."*

- Rob Triggs, VP Sales and Marketing,  
[CRM Dynamics](#)



**17. Protect customer data.** Employees today want to be confident that the data they collect from customers is secure and fully protected. Dynamics keeps personal and financial information safe, making it easy to maintain customer loyalty and comply with industry regulations—preventing the disclosure of sensitive information such as financial data, credit card numbers, social security numbers, or health records.

# The future

Millennials understand that the digital revolution can and will transform every aspect of organizational operations. Microsoft agrees, weaving leading edge functions—like automated workflows, social engagement, field services, cognitive services, and artificial intelligence—into all of the Dynamics suite of modular solutions. Dynamics is central to Microsoft’s vision to enable every organization to realize the full benefit of digital transformation.

At the forefront of that transformation are the Dynamics partners, working directly with Microsoft in the practical application of emerging technology. Working with forward-thinking clients, Dynamics partners work to architect the solutions that will deliver business value.

*“Microsoft provides constant breakthroughs in innovations when it comes to technology – such as AI (Artificial Intelligence), Omni Channel Solutions and much more – and we utilize all of that to provide solutions that work for our clients.”*

- Rob Triggs, VP Sales and Marketing,  
CRM Dynamics

**18. More to explore.** With ten core business function modules, from sales through project service automation, Dynamics can bring operational improvements to every part of the organization. Microsoft’s continuing investment in expanding automation, integration, and artificial intelligence provides unlimited opportunities for employees to rethink and improve operations.

**19. The promise of AI.** Artificial Intelligence is the next frontier of data applications. With data volumes growing beyond the ability of humans to analyze, AI promises to help uncover customer preferences, improve resource management, optimize cashflow, and recommend strategic decisions based on analytics and predictive insights.



# The future

**20. Re-imagined human resources.** Dynamics supports a new approach to attracting, hiring, onboarding, and retaining talented people. Using the power of Office 365 and LinkedIn, Dynamics creates a more secure, intelligent, and connected organization. Managers and employees are empowered to track accomplishments, identify issues, and take immediate actions to optimize results.

**21. Unlock potential.** With a flexible, unified operational system, Dynamics gears up organizations to take on new opportunities. Predictive financial information identifies future trends and opportunities while collaboration supports the sharing of ideas to address on those opportunities. And the regulatory compliance built into Dynamics reduces the risks when entering new markets.

*"The Millennial demographic is massive. They are now the biggest, most important and highly influential portion of the marketplace. The reality is though, like any demographic, this generation is much more diverse than the stereotypes suggest. And older. The oldest millennial will turn 40 in 2021. It's important for a business to understand their diversity when considering how to manage Millennials in the workplace, as well as how to reach them in the marketplace."*

- Rob Triggs, VP Sales and Marketing, [CRM Dynamics](#)

*"The digital age has given us all the gift of easy collaboration and now with a cloud-based Microsoft Dynamics solution your teams are able to do more together, and do it better. Your teams can access, edit and share documents anytime, from anywhere."*

- Rob Triggs, VP Sales and Marketing, [CRM Dynamics](#)

# Next steps and resources

Microsoft Dynamics, customized by CRM Dynamics to fit your organization's needs, can help you not just do more, but achieve more. Many small and midsize business are already using Microsoft business solutions to transform not only their IT operations, but their day-to-day customer interactions.

[Digital Transformation & What it means for your Business: eBook](#)

## ***Not sure where to start?***

CRM Dynamics is here to help you navigate your options and define the technology strategy that will work best for you. We can help you implement the right size solution to extend productivity and mobility to your employees on the go.

Our goal is to help you succeed, by developing clear path strategies supported by tools that your team members, of all generations, will appreciate and understand.

[Connect with us to start transforming how you do business.](#)

# About CRM Dynamics Ltd.

CRM Dynamics Ltd. is a Microsoft Dynamics 365 partner with a core focus on empowering clients using integrated solutions efficiently. Based in Canada, serving clients across the globe, we draw from over 20 years of experience in virtually all industries and have served numerous clients in meeting their CRM project objectives.

CRM Dynamics is one of the largest Gold Certified Partners specializing in Dynamics 365/CRM in Canada.

- Top 1% of Microsoft's Global Network of Partners for Business Applications 2019/2020
- 2019 Microsoft Impact Awards Winner

We focus solely on Microsoft Dynamics 365 and the benefits that it can provide to our clients. That size and targeted knowledge is what sets us apart from other Microsoft partners. We can bring an extra level of expertise that only specialization provides.

## **We're here to make it simple.**

Working with you, we'll discuss your current business goals and identify areas where Microsoft Dynamics can help bridge the gap. Our expert consultants will take a deep dive into your current systems, making note of important data and connections that need to be maintained. Our goal is to help you be more efficient, while selling more.

Let's start the conversation.

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