



**Zap Business Intelligence  
for Microsoft Dynamics CRM**



**Advanced CRM  
analytics made simple**

# Leverage your investment in Microsoft CRM

Microsoft Dynamics™ CRM gives your business a cohesive view of customers, from first contact through to purchase and post-sales service. With a customised deployment to suit the unique needs of your business, you have highly relevant and streamlined data at your fingertips.

To fully realise the potential of this data, you need high level insights to drive effective decision-making across the marketing, sales and service functions. Not just canned reports, but customised analytics that reflect the key issues and challenges facing your business. Analytics allow you to pinpoint changing trends and market conditions, measure performance against goals, and share this information with employees. This functionality adds significant value to your business, providing it is efficient and easy to use.

Zap Business Intelligence for Microsoft Dynamics CRM delivers instant value with a rich suite of management and business analytics out of the box. Drill up, down or across any level of data in your CRM – unlimited custom reports are just a few mouse-clicks away.

*“Companies that have implemented customer relationship management (CRM) systems know that capturing data is just the tip of the iceberg. Below the surface lies the challenge of figuring out how to use customer information to improve profitability.”*

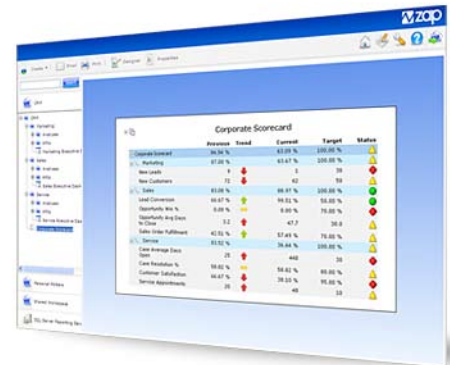
Samuel Greenguard  
Business Finance

## Key product features

- A complete view of customised data. See a complete view of your business by intelligently and automatically integrating all of your Microsoft Dynamics CRM data – including any customisations made within your CRM system.
- Fast to deploy. Zap is a web-based, zero footprint application that deploys in as little as one day. This enables your business to take immediate advantage of the out-of-the-box solution.
- User friendly. Business users can easily create reports using drag-and-drop functionality, without requiring specialist IT skills or programming knowledge.
- An affordable investment. Gain immediate, increased value from your existing CRM. Zap leverages the Microsoft® technology needed to run the Dynamics CRM solution.
- Scalable. Whether you're a small business with a simple deployment or you have a robust, multi-server, customised implementation, Zap keeps pace with your business reporting needs.
- Maintain data security. Administrative tools ensure that users only see appropriate data – at all levels of the system. This applies from entry to the application, permissions to access reports and folders, and the ability to view underlying data.

# Benefits to your business

- Get more value from Microsoft Dynamics CRM: Unlock greater value from your Microsoft Dynamics CRM implementation and instantly increase your return on investment.
- Improve productivity: Empower your staff to create advanced, insightful analyses and reports to aid better decision-making.
- Gain critical insights: See the big picture for your business through executive dashboards. Report easily and quickly on all aspects of your CRM, including areas of customisation.



## Instant analytics

- Analyse your CRM data across all modules, from leads through to services.
- Get analytics up and running immediately. Zap can be used out-of-the-box, even for customised areas of your CRM.
- Create executive dashboards, KPIs, scorecards and reports.
- Turn a table of data into an interactive chart with a single mouse-click.
- Build KPIs over any data and consolidate them into a scorecard for an executive overview.
- Drill up, down and through data in tables and charts, right down to the actual transactions in the CRM database.
- Apply a filter to a dashboard on the fly.

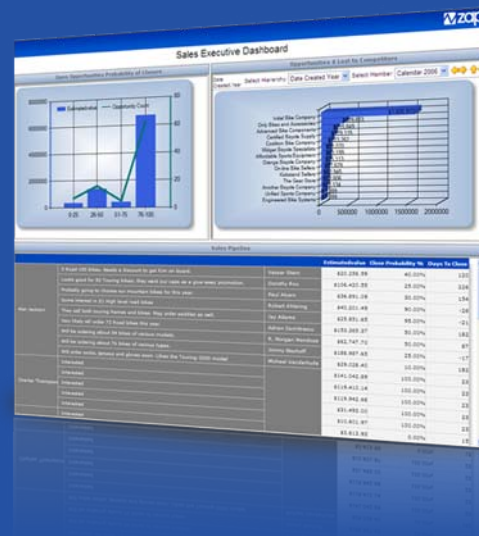


# Sales analytics

## Drive better sales performance

Sales management needs deep market insights to gain and maintain a competitive edge. The sales process must be focused on effectiveness in forecasting, lead and opportunity management, and territory assignment. You need deep visibility into the sales pipeline to determine how to focus on the right opportunities at the right time. Create sales dashboards, scorecards and reports to:

- Monitor and measure sales performance against targets.
- Analyse the sales pipeline, for instance by stage, geography, product and sales person.
- Prioritise and manage key opportunities.
- Monitor win/loss ratios and conversion rates of leads/opportunities.
- Highlight overdue opportunities.
- Identify the most profitable partners and sales channels.
- Capitalise on cross selling opportunities.
- Monitor competitor impact.
- Gain visibility into marketing campaign effectiveness and lead generation activities.



# Marketing analytics

## Enable better marketing decisions

Marketing professionals increasingly need sophisticated analytics to justify return on investment for their budgets. In turn, analytics help to manage campaigns and optimise resources for continual improvement. Today's marketing department must have a timely, cohesive snapshot of all activities to inform decisions and truly add value to the business.

Create marketing dashboards, scorecards and reports to:

- Monitor and evaluate marketing campaign effectiveness.
- Measure cost per lead and lead quality.
- Monitor response rates and adapt strategy accordingly.
- Understand customer value at the segment and individual level.
- Identify at-risk customers.
- Track the lead generation and qualification process.
- Identify product bundling and cross-selling opportunities.



# Service analytics

## Improve customer satisfaction

The challenge facing customer service executives today is to continuously improve service quality while decreasing costs. Having insights into the high level trends and metrics associated with customer service allows you to make informed decisions. Customer service analytics also provide valuable information to other parts of the business, such as sales, product management and marketing.

Create service dashboards, scorecards and reports to:

- Monitor and measure case resolution rates, average case duration, service level performance.
- Measure service staff against key performance indicators.
- Track service trends such as spikes and dips in service calls and customer complaints.
- Analyse complaints by geography, product, salesperson.
- Track demand and workload to better manage resource utilisation.
- Analyse support requirements by region, customer, product type or service type.
- Increase cross-selling opportunities.



# Technical specifications

Zap Business Intelligence for Microsoft Dynamics CRM is a turnkey business intelligence (BI) solution that reads data from your Microsoft CRM database and presents it via the Zap web portal. This out-of-the-box solution immediately facilitates OLAP-style analysis, charts, reporting, KPIs, scorecards, and dashboards.

## Functionality

- Interactive online drill-down, slice-and-dice, advanced filtering, comprehensive formatting and custom calculations on your CRM data.
- Presentation of analytical and structured reports through the Zap web portal.
- Infinite click-through and support for cell-level actions and KPIs defined in OLAP cubes.

## Deployment and integration

- The Zap Deployment Wizard simplifies installation and configuration of the middle-tier data warehouse components. Process the pre-built data warehouse and your CRM business data is ready for analysis within minutes of deployment.
- The Zap Cube Wizard automatically imports custom CRM entities and attributes for immediate use in reports. Data security is maintained by automatic synchronisation with CRM security.
- The zero footprint web architecture installs easily and quickly on your server environment with no intrusion on your end-users' computers.
- Presentation of individual reports through SharePoint via a Page Viewer web part, without compromising security.
- A comprehensive diagnostics utility instantly returns detailed diagnostic information for efficient troubleshooting.

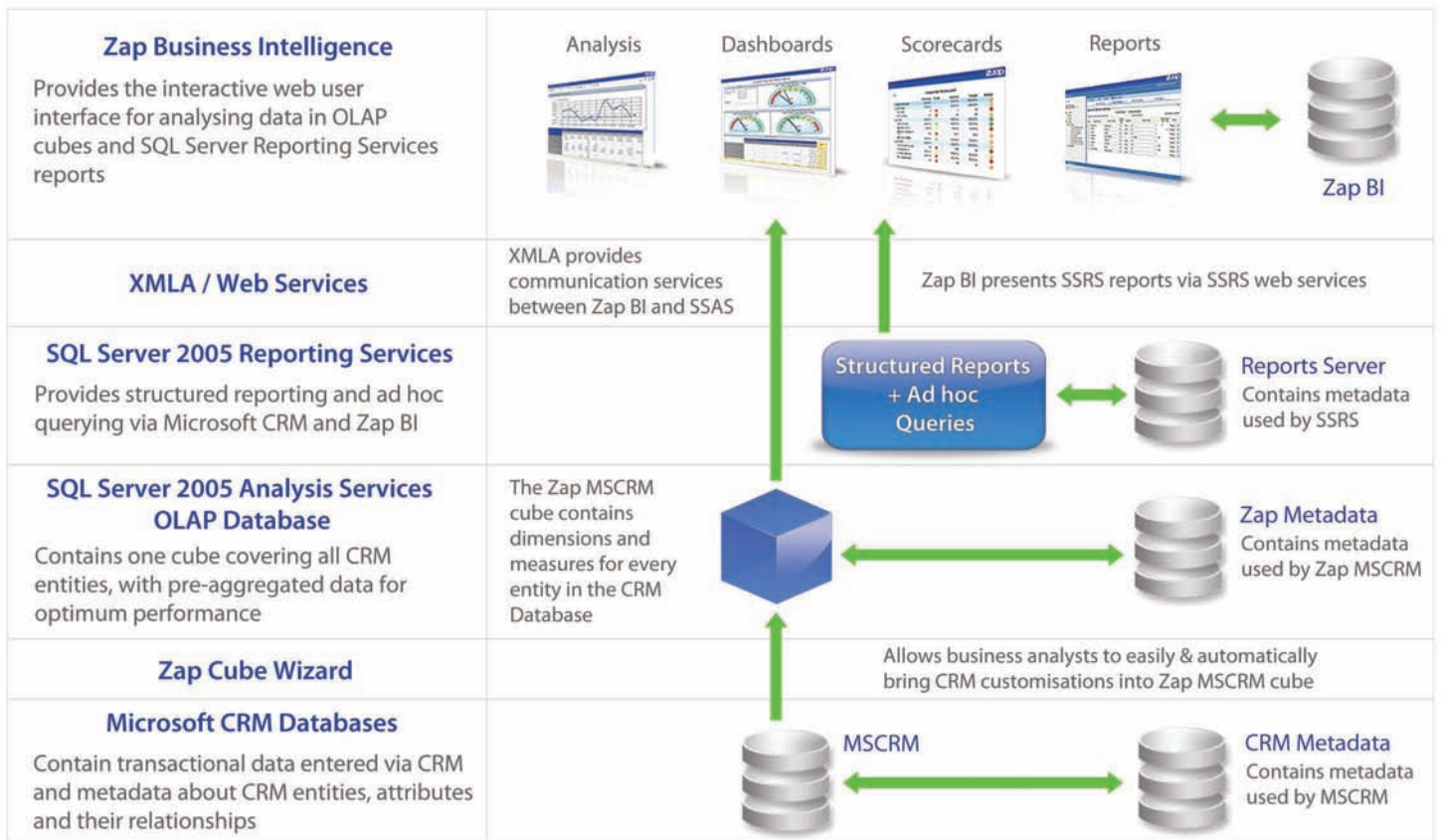
## Performance, security and administration

- Specifically designed to minimise network bandwidth usage.
- Leverages the performance of 64-bit platforms to optimise analysis of massive datasets.
- Scalable from one to thousands of concurrent users – proven by industry standard testing.
- Integrates with the Windows Active Directory for authentication and offers a comprehensive authorisation model that allows permissions to be assigned at any level of granularity: from a report folder to cell-level data.
- Offline auditing can track any piece of data viewed by any user at any time, with a negligible impact on performance.

## System requirements

- Operating System: Windows 2000 Desktop/Server, Windows XP, Windows Vista, Windows 2003 Server\*
- Web Server: IIS 5, IIS 5.1, IIS 6\*, IIS 7
- Database Server: SQL Server 2005 SP2 (Standard or Enterprise Edition)
- Client: Internet Explorer 6, 7\*

# Architecture



## Zap Cube Wizard for Microsoft Dynamics CRM

The Zap Cube Wizard provides an easy to use, step-by-step approach to import your CRM customisations into Zap Business Intelligence for Microsoft Dynamics CRM for immediate analysis. The Zap Cube Wizard provides an automated discovery mechanism which reads customisations defined in the CRM database and merges them into the Analysis Services module of the Zap Business Intelligence for Microsoft Dynamics CRM solution. The customised CRM information can then be used immediately for analysis.

### Key features

- Automatically import custom CRM data into Zap Business Intelligence for Microsoft Dynamics CRM.
- Smart defaults automatically detect the type of customisation for you. Or you can choose to edit the advanced properties of measures, dimensions, attributes, hierarchies and relationships.
- Automatic synchronisation with your CRM security model.

### Customisations handled

- New custom entities, attributes and relationships.
- Changes to standard and custom entities, attributes and relationships.
- Removal of custom entities, attributes and relationships.





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