

# Microsoft Dynamics CRM User Group (CRMUG®) Virtual Chapter Meeting

**Janet Lampert**  
CRMUG Director

---

**Art Johnston**  
CRMUG Advisory Board Chairman  
CIO , Argo Turboserve Corporation

---

**Andy Hafer**  
Executive Director, Dynamic Communities, Inc.



# ART JOHNSTON

CIO , Argo Turboserve Corporation

Global Chairman CRMUG



# What CRMUG Members Do





# ANDY HAFER

Executive Director, Dynamic Communities



# Objectives of Meeting

- Introduce you to the Microsoft Dynamics CRM User Group (CRMUG®)
- Connect you with other Dynamics CRM Users

# Agenda

- Welcome
- CRMUG Overview
- Special Interest Groups (SIGs)
- Summit 2011
- CRMUG Academy
- Regional Chapters
- How to Get Involved
- Follow up

Dynamics CRM User Group (CRMUG)

# WHAT'S IT ALL ABOUT?



---

**Why  
CRMUG?**

Most organizations use a small  
% of functionality

---

User adoption is an ongoing,  
critical process

---

Someone, somewhere,  
somehow has probably  
answered your question

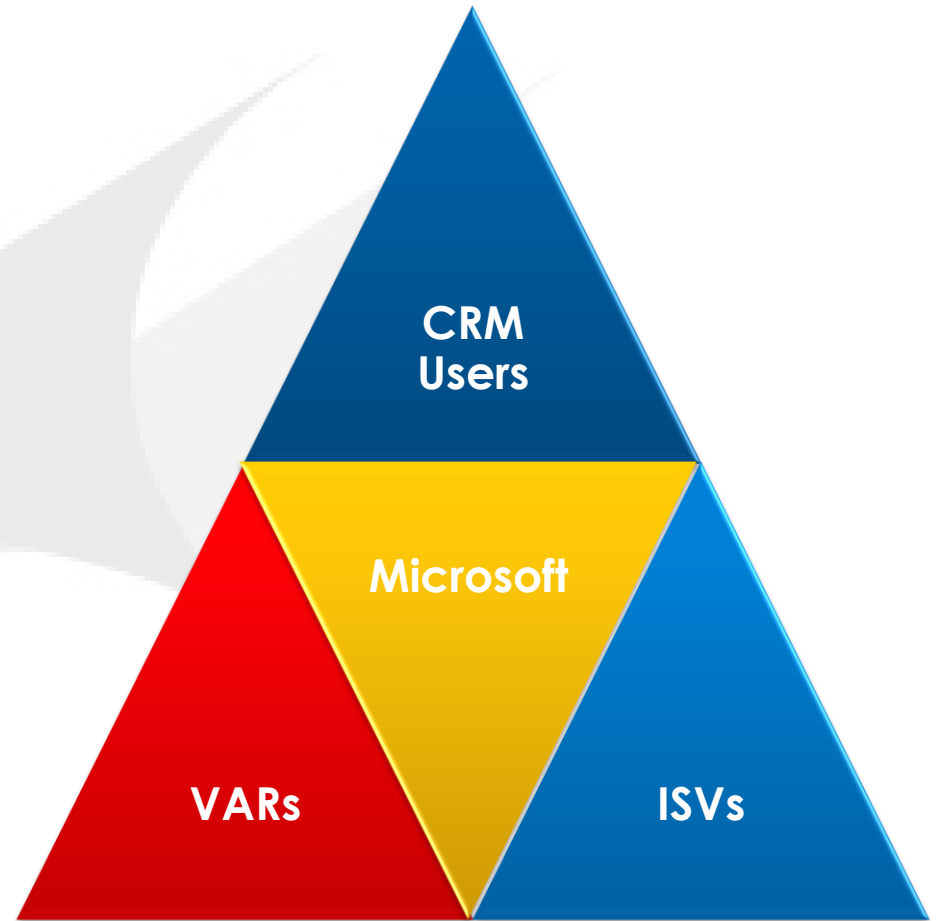
---

# CRMUG Activities



# About CRMUG

- Founded in 2007
- Officially recognized by Microsoft
- The largest, *independent* group for users of Microsoft Dynamics CRM
- 1200+ company members



Dynamics CRM User Group (CRMUG)

# **SPECIAL INTEREST GROUPS (SIG)**



# Special Interest Groups

## Industry

- Professional Services
- Financial Services
- Life Sciences
- Non Profit
- Media & Entertainment

## Role

- Sales
- Marketing
- IT Support
- CRM Admin & Support
- Developer

## Other

- Implementing Dynamics CRM Online
- Business Intelligence (BI)
- Social CRM
- B2B Organizations
- B2C Organizations

Dynamics CRM User Group (CRMUG)

# CONFERENCES





Users Helping Users



**November 8-11, 2011**  
**Caesars Palace – Las Vegas, NV**



# Summit 2011 Overview

- 80+ Concurrent Sessions
  - Birds of a Feather Roundtables
  - Town Hall Meetings
  - Microsoft Conduits
  - Ask the Experts
- Expo Hall
- Optional Pre-conference Academy Training Courses

You could go for FREE!  
Keep listening  
to learn how!



Dynamics CRM User Group (CRMUG)

# CRMUG ACADEMY





- Academy Distance Learning
  - Virtual Instructor-Led Training At Your Desk
- Academy Online Learning
  - Thousands of Titles Anytime, Anywhere
  - PMP and Microsoft Certifications
  - Premium Members receive nearly 700 titles FREE
- Academy Onsite
  - Classroom Training for Less

<http://Academy.crmug.com>

Premium Members receive discounts on all training



# Explore all the benefits online!



Dynamics CRM User Group (CRMUG)

**LET'S FIND OUT WHO'S HERE**



Dynamics CRM User Group (CRMUG)

# REGIONAL CHAPTERS



# CRMUG Regional Chapters

*Meet locally. Share globally.*

- Connect with other Dynamics CRM Users
- Share knowledge & experiences
- Boost training and professional development
- Locally led. Fueled by CRMUG.

# Local Leadership

- CRMUG Regional Chapters are led by local users who provide:
  - Overall leadership and specific “grass-roots” value to peers
  - Direction and decisions on applicable educational topics and meeting agendas
  - Guidance to CRMUG
  - Meeting site, format, dates
  - Outstanding VALUE to themselves and local peers

# CRMUG Support

- In organizing a CRMUG Regional Chapter, CRMUG provides:
  - Organizational structure and continuity
  - Dynamic Educational and Programming content
  - Communication, Registration, Administration

# Typical Chapter Meeting

- 8:30-9:00 Registration and Networking
- 9:00-9:40 Member Showcase
- 9:40 – 10:00 Break
- 10:00 – 10:40 Birds of a Feather Roundtables
- 10:40 – 11:00 Break
- 11:00 – 11:40 Educational Workshop
- 11:40 – 12:00 Chapter Business

# 2011-2012 Meeting Dates

Mid-September 2011

Nov 9, 2011 at Summit

Early December 2011

Mid-February 2012

March 18, 2012 at Convergence

Early May 2012

# CRMUG<sup>®</sup>

REGIONAL CHAPTERS



# Upcoming Chapter Meetings

Region	City	Date
<b>East</b>	Atlanta, GA	Sept 13
	Boston, MA	Sept 20
	Charlotte, NC	Sept 15
	New York, NY	Sept 22
	Pittsburgh, PA	Sept 13
	Tampa, FL	Sept 15
	Washington, DC	Sept 14
<b>West</b>	Denver, CO	Sept 16
	Los Angeles, CA	Sept 16
	Phoenix, AZ	Sept 16
	Salt Lake City, UT	TBD
	San Diego, CA	Sept 16
	San Francisco, CA	Sept 16
	Seattle, WA	Sept 16

Region	City	Date
<b>Central</b>	Chicago, IL	Oct 13
	Cincinnati, OH	Sept 29
	Cleveland, OH	Sept 13
	Columbus, OH	Sept 14
	Dallas, TX	Sept 13
	Detroit, MI	Sept 20
	Houston, TX	Sept 15
	Kansas City, MO	Sept 15
	Memphis, TN	TBD
	Minneapolis, MN	Sept 21
	San Antonio, TX	TBD
<b>Canada</b>	St. Louis, MO	Sept 14
	Vancouver & Toronto	Sept 22

# Projected Expansion

- United Kingdom
- Germany
- Switzerland
- Austria
- Denmark
- Norway
- Sweden
- France
- Belgium/Luxemburg
- Netherlands
- Spain
- Italy
- Australia
- New Zealand



# Suggested Locations

- If you would like to see a CRMUG Regional Chapter grow in an area not listed, please suggest it in the provided survey.



# Chapter Leadership Roles

- Chairman
  - Oversees Regional Chapter and organization of meetings
- Vice Chairman for Programming
  - Develops meeting objectives and synthesizes Resource Kit into agenda
- Vice Chairman for Membership
  - Ensures member profile and attendance records are maintained and accurate
- Vice Chairman for Communication
  - Communicates Chapter events and activity, and helps recruit new members

Dynamics CRM User Group (CRMUG)

# HOW CAN I GET INVOLVED?



# It's as Easy as 1-2-3

- **Complete the follow-up survey** – this one simple step will allow you to:
  1. Join CRMUG – *Be a part of the discussion!*
  2. Sign up for the next Regional Chapter meeting in your area – and, if you're interested, take a leadership role in your Chapter
  3. Tell us about your interest, if any, in our Special Interest Groups (SIGs)

Visit [www.crmug.com](http://www.crmug.com) – Click the Easy Button!



Register | Contact Us | Sign in

Home About Join CRMUG Events Member Resources Training Academy Conferences Contact



CRMUG Virtual Chapter Meeting Participants:



Our Premier Sponsors



**Upcoming Events**

- CRMUG Virtual Chapter Meeting (Aug 11 2011)
- CRMUG Summit 2011 Preview (Aug 2011)
- CRMUG 10@10of10 (Aug 17, 2011)

> [View All](#)

**Quick Links**

- > BI FOCUS 2011
- > Summit 2011
- > Upcoming Events
- > Training Academy
- > Regional Chapters
- > Special Interest Groups
- > Membership Benefits
- > Convergence Encore

**Socialize With Us!**

- > On Twitter
- > On LinkedIn
- > Company Member Directory

## Welcome!

The Dynamics CRM User Group (CRMUG) is an independent community of Microsoft Dynamics CRM users, partners and experts who share a common goal: getting more out of Microsoft Dynamics CRM.

We network, learn and swap ideas through a series of live and virtual

## Recent News



**[Dynamic Communities Leaders Recognized as Microsoft Dynamics Most Influential People for 2011](#)**

We are pleased to announce that our very own Andy Hafer and Mark Rhodes

# Access the follow-up survey



## CRMUG Virtual Chapter Meeting Follow-Up - Aug 2011

### 1. Welcome!



Thank you for your interest in joining the CRMUG community! The old adage says, "You get out of it what you put into it." With that in mind, please use these next few pages to let us know

This quick survey will allow you to:

- 1) Enroll in CRMUG as a free Basic Member and begin enjoying Basic Member benefits. (If you're interested in CRMUG Premium membership, please be sure to indicate that on the Member
- 2) Tell us which Regional Chapter(s) you would like to be a part of.
- 3) Let us know if you're interested in taking a leadership role in your Regional Chapter.
- 4) Tell us which Special Interest Groups (SIGs) interest you.

This survey will take just a couple minutes. Then you'll be on your way to realizing the many benefits of participating in the CRMUG community. There are only a few required fields, but we

community areas and best serve your needs.

We hope your CRMUG experience is enjoyable and delivers as much value to you and your company as it has for thousands of others before you!

Next

Next →

# Provide your contact information to establish your Preview Membership



## CRMUG Virtual Chapter Meeting Follow-Up - Aug 2011

### 2. CRMUG Membership



\*1. First Name

\*2. Last Name

\*3. Company:

\*4. Phone Number:

\*5. Mailing Address 1:

6. Mailing Address 2:

\*7. City:

8. US State:

9. Province/Region (if non-US)

\*10. Country:

\*11. Zip/Postal Code:

\*12. Email Address:

13. Company Website

14. Industry

Next →

# Indicate your Regional Chapter preferences



## CRMUG Virtual Chapter Meeting Follow-Up - Aug 2011

### 3. CRMUG Regional Chapters



One of the best ways to solve your CRM challenges and make better use of your system is to learn from the expertise and experiences of other Dynamics CRM users. A great way to do this is by engaging face-to-face with users in your CRMUG's current Regional Chapters are listed below. If you don't see your region on the list and would like to see a Chapter introduced in your area, please indicate that below.

19. Please select the Regional Chapter(s) with which you wish to be affiliated.  
(You may choose more than one)

- |  |   |   |
|--|---|---|
| <input type="checkbox"/> Atlanta, GA     | <input type="checkbox"/> New York City, NY  | <input type="checkbox"/> Canada – Eastern |
| <input type="checkbox"/> Boston, MA      | <input type="checkbox"/> Phoenix            | <input type="checkbox"/> Canada – Western |
| <input type="checkbox"/> Charlotte, NC   | <input type="checkbox"/> Pittsburg, PA      | <input type="checkbox"/> Denmark          |
| <input type="checkbox"/> Chicago, IL     | <input type="checkbox"/> Portland, OR       | <input type="checkbox"/> France           |
| <input type="checkbox"/> Cincinnati, OH  | <input type="checkbox"/> Salt Lake City, UT | <input type="checkbox"/> Germany          |
| <input type="checkbox"/> Cleveland, OH   | <input type="checkbox"/> San Antonio, TX    | <input type="checkbox"/> Italy            |
| <input type="checkbox"/> Columbus, OH    | <input type="checkbox"/> San Diego, CA      | <input type="checkbox"/> Netherlands      |
| <input type="checkbox"/> Dallas, TX      | <input type="checkbox"/> San Francisco, CA  | <input type="checkbox"/> New Zealand      |
| <input type="checkbox"/> Denver, CO      | <input type="checkbox"/> Seattle WA         | <input type="checkbox"/> Norway           |
| <input type="checkbox"/> Detroit, MI     | <input type="checkbox"/> St. Louis, MO      | <input type="checkbox"/> Spain            |
| <input type="checkbox"/> Houston, TX     | <input type="checkbox"/> Tampa, FL          | <input type="checkbox"/> Sweden           |
| <input type="checkbox"/> Kansas City, KS | <input type="checkbox"/> Washington DC      | <input type="checkbox"/> Switzerland      |
| <input type="checkbox"/> Los Angeles, CA | <input type="checkbox"/> Australia          | <input type="checkbox"/> United Kingdom   |
| <input type="checkbox"/> Memphis, TN     | <input type="checkbox"/> Austria            |   |
| <input type="checkbox"/> Minneapolis, MN | <input type="checkbox"/> Belgium/Luxemburg  |   |

# Tell us about your interest in Special Interest Groups (SIGs)



## CRMUG Virtual Chapter Meeting Follow-Up - Aug 2011

### 4. Special Interest Groups (SIGs)



Special Interest Groups (SIGs) allow you to connect with like-minded Dynamics CRM users to dig deep into the specific topics that are most important to you.\*

Current CRMUG SIGs are listed below. Please select the groups in which you'd be interested in participating. If you have an idea for a SIG that doesn't currently exist, please add your suggestion below.

#### 22. Industry SIGs

(You may choose more than one)

- |   |  |
|---|--|
| <input type="checkbox"/> Financial Services | <input type="checkbox"/> Media & Entertainment |
| <input type="checkbox"/> High Tech          | <input type="checkbox"/> Non-Profit            |
| <input type="checkbox"/> Life Sciences      | <input type="checkbox"/> Professional Services |
| <input type="checkbox"/> Manufacturing      |  |

#### 23. Role-based SIGs

(You may choose more than one)

- |   |                                    |
|---|------------------------------------|
| <input type="checkbox"/> CRM Administration/Support | <input type="checkbox"/> Marketing |
| <input type="checkbox"/> Developer                  | <input type="checkbox"/> Sales     |
| <input type="checkbox"/> IT Professional            |                                    |

#### 24. Other SIGs

(You may choose more than one)

- Implementing Dynamics CRM Online
- Business Intelligence
- Social CRM

# That's it!

Your Preview Membership will be created and we'll get you signed up for your requested Regional Chapters and SIGs. Look for an email from us in the next week – you'll need to authenticate and activate your membership.



Exit this survey

## CRMUG Virtual Chapter Meeting Follow-Up - Aug 2011

### 5. Thank You!



Thank you for your time and your interest in CRMUG!

If you are a CRM user, our team will get your Basic membership set up and provide you with the information you need to engage with the community based on your responses to this survey. Please look for information from CRMUG in the coming days - you'll need it to authenticate and activate your membership. In the mean time, please contact [programming@crmug.com](mailto:programming@crmug.com) if you have any questions or concerns.

If you are a Dynamics CRM VAR or ISV, we will follow up with you shortly to help you establish your membership.

Thanks, again, and welcome to the community!

Prev

Done

# Take Action Today and Attend Summit 2011 - FREE!

- The first 100 survey respondents will be entered into a drawing for a FREE trip to Las Vegas, NV, for CRMUG Summit 2011 (November 8-11, 2011)!
  - Summit Package Includes:
    - One (1) full conference registration
    - 3-nights hotel stay at Caesars Palace
    - \$400 airfare voucher
- Complete your survey right away!
- Survey available until next Friday, Aug 19

# Additional Questions

Janet Lampert, CRMUG Director

[Janet.Lampert@CRMUG.com](mailto:Janet.Lampert@CRMUG.com)

877-324-8880 x1440

[www.crmug.com](http://www.crmug.com)

