



D365UG/CRMUG-Detroit Q3 2017 Chapter Meeting Notes

Welcome and Introductions – Jack Ketelhut and Kaul Lefief

We had a great group attending today at the Microsoft office in Southfield, MI, over 15 attendees with a good mix of users, partners, and representatives from Microsoft. Jack Ketelhut, Microsoft Dynamics 365 Specialist, opened the session by addressing the attendees about the importance of collaboration and the value in the User Group. Kaul Lefief, Director of CRM-Great Lakes, also addressed the group providing some insights into what's new at Microsoft and the D365/CRM team.



Chapter News

Adam Rose, Sales Operations Manager at [ImageSoft](#) and D365UG/CRMUG-Detroit co-chair, provided some updates and news of the D365UG/CRMUG, including reasons to attend the upcoming Summit in Nashville, new content available on the CRMUG website, new navigation and layout of the CRMUG website, and benefits of being a member.

Member Showcase: Adam Rose, ImageSoft – OpenMoves and Sales and Marketing

Collaboration in CRM

Adam Rose provided a presentation of how ImageSoft uses CRM and a 3rd party tool called OpenMoves to facilitate marketing and campaign automation and to better facilitate collaboration and communication between the Sales and Marketing teams at ImageSoft. Along with an introduction of ImageSoft and a demo of how they use CRM and OpenMoves, Adam also discussed the decision process they used to choose the 3rd party tool.

The Value of Networking – Tony Stein

Before the break, the group watched a personal video from D365UG/CRMUG General Manager Tony Stein about the value of networking and the value of attending the upcoming Summit conference in Nashville.



Keynote Presentation: Richard Riddle, Microsoft

D365/CRM extraordinaire Richard Riddle addressed the group with a number of fascinating topics including Comparing Dynamics 365 App for Outlook with Dynamics 365 for Outlook, PowerApps and the ability to create an app for a specific use case to utilize the data and power of CRM within a customized user interface, Microsoft Flow – a cloud based service that provides a set of intelligent applications that seamlessly work together unifying the capabilities of CRM, and Dynamics 365 Relationship Insights which continuously analyzes the vast collection of customer-interaction data already stored in your Dynamics 365 and Microsoft Exchange systems, to help you better choose what to do next.



Roundtable Discussions

In typical Detroit Chapter fashion we spent over an hour discussing topics in two groups: attendees interested in more business related issues, and the technical geniuses in the room solving the next biggest problem. A great aspect of our Roundtable Discussions is that you also get to enjoy some free food as well!



"I ALWAYS LEAVE [DETROIT CHAPTER] MEETINGS WITH NEW IDEAS AND WAYS TO USE THE SYSTEM AND/OR CHANGE MY PROCESSES."