TRAINING RESOURCE GUIDE

For Microsoft Dynamics CRM

Brought To You By

ClickDimensions

eBooks

Certification

Webinars

Classroom

Videos

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INTRODUCTION

Microsoft Dynamics CRM is a customer relationship management software platform that assists companies with managing their sales, marketing and customer service functions. CRM allows users to store leads and contacts, manage accounts, forecast opportunities, track marketing campaigns, develop customized management reports and much more. CRM is one component of Microsoft's suite of Dynamics applications, which includes Dynamics AX, Dynamics GP, Dynamics NAV and Dynamics SL in addition to Dynamics CRM.

Microsoft Dynamics CRM offers both on-premise and cloud-based CRM solutions. As of this publication, the most current version is Dynamics CRM 2016; however, both CRM 2015 and 2013 are still widely used. CRM 2011 also still has a fair amount of users at this time.

One of the benefits of Dynamics CRM is that it allows Microsoft partners and independent software vendors (ISVs) to extend the functionality of CRM and provide additional value-added solutions that work on top of the core CRM platform. This is where ClickDimensions comes in.

ClickDimensions is a top-rated, Microsoft-certified ISV that embeds marketing automation functionality into Microsoft CRM. Providing email marketing, campaign automation, web intelligence, surveys, landing pages, web forms and more, ClickDimensions allows organizations to discover who is interested in their products, quantify their level of interest and take the appropriate actions.

To learn more about Microsoft Dynamics CRM, visit crm.dynamics.com, and for more information about ClickDimensions marketing automation for CRM, visit www.clickdimensions.com.

About this Resource Guide

Through our marketing efforts surrounding Microsoft Dynamics CRM, and our own use of the product, we noticed a demand for training resources for CRM. While we're not in the business of writing CRM training manuals, we had a pretty good collection of places to go to find help – from websites to blogs to discussion forums and more. We assembled the Training Resource Guide for Microsoft Dynamics CRM to assist CRM users in finding the help they need and also introduce them to new resources and products they may not have known were available.

This resource guide is helpful for anyone using Microsoft Dynamics CRM – from beginners to administrators. For those of you who are already using the ClickDimensions marketing automation solution with your CRM, there is also a section dedicated to finding training and help for ClickDimensions.

This guide includes resources for CRM 2016, 2015, 2013 and 2011, and we will periodically publish updates as more resources for the newest CRM version become available. Note that while we have selected reputable sources, we can't guarantee the accuracy of the content included in each resource. And while all of the resources in this guide were accessible at the time of this publication, they may not be currently available.

We hope that you find this training guide helpful in your journey to learn CRM! We welcome your feedback, or if you have a resource that you think should be included in the Training Resource Guide for Microsoft Dynamics CRM, please send an email to marketing@clickdimensions.com.

Icon Key

2016 CRM 2016	Blog	Publication	Requires Login or Registration	Beginner
2015 CRM 2015	Certification	Video	Requires Fee or Paid Membership	Intermediate
2013 CRM 2013	Classroom/ Live Training	Webinar		Advanced
2011 CRM 2011	Discussion Forum			Admin/ Developer
ClickDimensions	eBook/Digital Publication			

ONLINE TRAINING

This section includes a variety of online training resources including webinars, videos, eBooks and more. Since Dynamics CRM is a Microsoft product, we have grouped Microsoft resources together at the top of the list. Additional resources follow.

Microsoft Resources

Microsoft Dynamics CRM Customer Center

2016 2015 2013

This is Microsoft's main help and training portal for Dynamics CRM customers. The content is geared toward beginner users – the Videos and eBooks area contains good "getting started" training, for example. There are good "quick tips" for more experienced users, however, and links to other resources.

Microsoft Dynamics CRM Developer Center

2016 2015 2013 2011

Similar to the Customer Center, the Developer Center is a dashboard to CRM information specifically for developers. The site contains information you need to develop, design and distribute solutions for CRM, including the SDK download package, introductory and in-depth training articles, overview and reference documentation, and more.

Microsoft Dynamics CRM Setup and Administration Center

2016 2015 2013 2011

Much like the Customer Center and the Developer Center, this online portal contains a wealth of information for Microsoft CRM administrators and customizers. Resources include articles, videos and white papers about managing users, managing data, setting up mobile and messaging functionality, and more. A good bit of the information is aimed at CRM 2016, 2015 and 2013, but 2011 admins will still find some helpful resources here as well.

Microsoft Dynamics CRM CustomerSource

2016 2015 2013 2011

The CustomerSource site offers links to a wide variety of resources for CRM users including a directory for classroom training providers, e-learning opportunities, product news and downloads. Not all resources are available for every CRM version, but there is a fair amount of information for each.

Microsoft Virtual Academy

2016 2015 2013

We have included the Microsoft Virtual Academy in our resource guide as it does offer free Microsoft training that could be useful to you. However, there is very little training specifically for Dynamics CRM on the Virtual Academy as of the publication of this guide. Let's stay tuned – hopefully more free courses will be provided soon!

Microsoft CRM YouTube Channel

2016 2015 2013 2011

YouTube as a whole is a fantastic resource for training videos, and this is Microsoft's channel dedicated to Dynamics CRM. Search for specific training topics or browse through the playlists. The content includes helpful CRM training videos and customer stories, but the channel is a particularly good source for learning about new features.
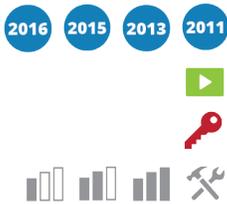
Microsoft Dynamics CRM Community Videos

2016 2015 2013 2011

The Microsoft Dynamics Community site offers a wide variety of training and new feature videos. Topics include "Microsoft Dynamics CRM Troubleshooting Errors when Viewing Reports" and "Customer Service and Care: Microsoft Dynamics CRM." Registration is free, but required to utilize all of the Community features.

Training & Adoption Kit for Microsoft Dynamics CRM

2016 2015 2013

With versions available for CRM 2013, CRM 2015 and CRM 2016, this get-started kit includes downloadable eBooks, user guides, videos and more. The eBook and help files are editable, so administrators can customize them for training users in their organization.

Microsoft Dynamics CRM Resource Library

2016 2015 2013 2011

Part of the main Microsoft Dynamics website, which is used primarily for pre-sales and evaluation of Dynamics, the Resource Library contains white papers and fact sheets about Microsoft Dynamics CRM. While these may not be thought of as training, they could be helpful resources for learning how CRM has been deployed in different vertical markets (healthcare, government) or how it can be used for various business functions (sales, customer service).

Other Resources

ClickDimensions Help & Training Site

For users of ClickDimensions, this site contains everything you need to get started and manage successful marketing campaigns. Numerous articles are available for each ClickDimensions feature (such as email marketing, campaign automation, web intelligence and more). The ClickDimensions Academy, included on the site, is a two-week training academy that covers all the features of ClickDimensions in webinar format. Advanced users can also obtain their ClickDimensions Certification through the Academy.

MSDynamicsWorld.com CRM News and Resources

MSDynamicsWorld.com's CRM Resource Center contains news, analysis and information on Dynamics CRM and third-party solutions. The site includes CRM articles, white papers and case studies. Registration is free, but required for full access to the site.

LIVE/CLASSROOM TRAINING

Do you prefer to learn in a classroom setting? Then these resources are for you! These are live, instructor-based training events. Most of the sessions are in-person classroom sessions, but instructor-led live webinars are also featured.

Microsoft Resources

Microsoft Learning: Dynamics Training

Many Microsoft Learning courses can be taken at a facility near you, or you can register for a virtual instructor-led training session. Prices vary; refer to the website for more information.

Microsoft Envision

Launched in 2016, Microsoft Envision is an annual conference that focuses on how technology can empower business transformation. Among other topics, there are sessions dedicated to CRM features and how organizations around the globe are using the product. Envision is also a great opportunity to speak with Microsoft product experts and network with other Dynamics CRM users. Recorded conference sessions are also available.

Microsoft Ignite

Aimed at IT leaders, IT professionals and enterprise developers, Microsoft Ignite provides a mix of sessions that deliver insights into technology trends and those that provide hands-on experience and product education. The conference features a number of Microsoft products, including Dynamics CRM. The event site also includes recorded sessions from past conferences.

Other Resources

ClickDimensions Academy

2016 · 2015 · 2013 · 2011

If you are a ClickDimensions customer, not only do you have a powerful marketing automation and email marketing solution within Dynamics CRM, you also have unlimited access to ClickDimensions Academy. The Academy offers both live, instructor-led training sessions and on-demand, recorded webinars. Attendees of ClickDimensions Academy can also become ClickDimensions Certified if they complete the advanced training and take the certification exam.

CRMUG Academy

2016 · 2015 · 2013

The CRMUG Academy offers both online instructor-led and onsite classroom training sessions for Dynamics CRM. Access to the Academy is included as a benefit of CRMUG membership, and as of this publication, all CRMUG members receive half off of all course registration fees – both live and on-demand.

CRMUG Conferences

2016 · 2015 · 2013

In addition to their distance learning courses, CRMUG offers Dynamics CRM training at their annual conferences. These conferences also provide an opportunity to network with other CRM users. Currently, CRMUG offers two major conferences each year, the CRMUG Summit and the CRMUG European Congress.

eXtremeCRM

2016 · 2015 · 2013 · 2011
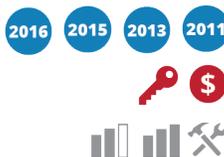
eXtremeCRM conferences are held annually in the U.S. and Europe, and serve as an opportunity to network within the Dynamics CRM community. Microsoft executives and staff, Dynamics CRM Partners, and top Dynamics CRM ISVs participate in eXtremeCRM each year. The conferences are "where the Dynamics CRM community comes together to forge relationships, gain real-world knowledge and dive deep into current and future technologies."

MSDynamicsWorld.com Events

2016 · 2015 · 2013

MSDynamicsWorld.com offers access to live and recorded webcasts that cover business needs that impact the success of Dynamics CRM implementations. These events are presented by MSDynamicsWorld.com and sponsor companies, including Microsoft CRM partners and ISVs

Microsoft Dynamics CRM Training Centers

Below is a list of companies that provide live classroom-based training for CRM. Check your local area for additional providers.

- NetCom Learning

- New Horizons

- ONLC Training Centers

- Pluralsight

- Vertech Solutions Group

PUBLICATIONS

Included in this section are books and magazines that provide training content for Microsoft CRM – most are offered in hard copy, but some eBook versions are available as well. Each book in this section is linked to Microsoft or Amazon, but may be available from other online retailers or bookstores near you. For more eBooks, see the Online Training section earlier in this guide.

Books and eBooks

Microsoft Dynamics CRM 2016 Unleashed

Marc Wolenik (Sams Publishing, 2016)

Microsoft Dynamics CRM 2016 Customization – Second Edition

Nicolae Tarla (Packt Publishing, 2016)

Dynamics CRM 2015 Basics Guide

Microsoft eBook (Microsoft, 2014)

Building Dynamics CRM 2015 Dashboards with Power BI

Steve Ivie (Packt Publishing, 2015)

Microsoft Dynamics CRM 2015 Application Design

Mahender Pal (Packt Publishing, 2015)

Microsoft Dynamics CRM 2013 Unleashed

Marc Wolenik (Sams Publishing, 2014)

The CRM 2013 Field Guide Volume Two

Joel Lindstrom, Richard Knudson, et. al. (We Speak You Learn, 2015)

2013 📖 **$**

CRM 2013 QuickStart

David Yack, Joel Lindstrom, et. al. (We Speak You Learn, 2014)

2011 📖 📄 **$**

Microsoft Dynamics CRM 2011 Step by Step

Mike Snyder, Jim Steger and Brendan Landers (Microsoft Press, 2011)

2011 📖 📄 **$**

Microsoft Dynamics CRM 2011 Administration Bible

Matthew Wittemann and Geoff Ables (Wiley, 2011)

Magazines

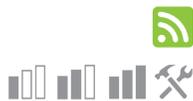**2016** **2015** **2013** 📖 📄

CRMUG Magazine

BLOGS & FORUMS

The best learning experiences often come from our peers, which is the idea behind the resources in this section. Blogs and discussion forums are great places for users to simply read about CRM topics, or to get more involved by posting or commenting about those topics.

Microsoft Resources

2016 **2015** **2013** **2011**

Microsoft Dynamics CRM Team Blog

Part of the Microsoft Developer Network (MSDN), the MS Dynamics CRM Team Blog contains information, guides, training and tips about CRM. All of this helpful information is direct from the Microsoft engineering team.

2016 **2015** **2013** **2011**

Microsoft Dynamics Community Blogs & Forums

The Microsoft Dynamics Community is a great place to see an aggregate of the latest posts from a variety of CRM blogs – not only from Microsoft (such as the Microsoft Dynamics CRM Team blog), but also from experts across the CRM community (including the CRM Software Blog and CRM Tip of the Day). The forums on the Community site are also a helpful way to get answers to your questions from CRM experts. Registration to the site is free, but required to utilize all of the Community features.

2016 **2015** **2013** **2011**

Dynamics CRM Support Blog

An essential resource for CRM technical information, the Dynamics CRM Support Blog "was created to provide insights, knowledge, and techniques that support engineers around the globe." Topics include common errors and fixes, best practices and how-to articles. Articles are written by Microsoft's support teams.

**2016** **2015** **2013** **2011**

Microsoft Forums for CRM

Primarily geared toward CRM developers and administrators, Microsoft's discussion forum for Dynamics CRM can provide helpful answers to your CRM questions or technical issues.

Channel 9

2016 2015 2013 2011

Channel 9 is a community site from Microsoft that contains discussion forums and video podcasts from the people "behind the scenes building products at Microsoft."

Other Resources

ClickDimensions Blog

2016 2015 2013 2011
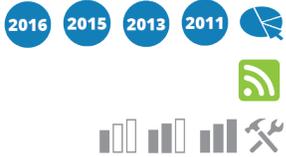
The ClickDimensions blog not only contains posts about using ClickDimensions, but also includes tips and best practices for marketing with Microsoft CRM. Any marketer who uses CRM as a part of their company's marketing efforts can learn from this blog.

CRM Software Blog

2016 2015 2013 2011

CRM Software Blog features posts written by a panel of experts from across the CRM community. Members of the CRM Software Blog are Microsoft Dynamics CRM Partners located in the U.S. and internationally. In addition to the blog articles, the Free Resources section has white papers, case studies and other information that would be helpful in learning about CRM.

Dynamics CRM Tip of the Day

2016 2015 2013

CRM Tip of the Day is run by a group of CRM MVPs, authors, trainers and experts. A quick tip for Dynamics CRM is published every weekday. The tips are generally for an advanced audience, but intermediate users will benefit from reading the tips as well.

CRMUG Communities

2016 2015 2013 2011

Members of the Dynamics CRM User Group (CRMUG) have access to CRMUG Communities, a resource for member blogs and discussion groups. Many of the forums are based on geography, allowing users to connect with other Dynamics CRM users in their area. Other groups where users can ask and answer Dynamics CRM questions include one for CRM tips and tricks and the popular Open Forum.

Donna Edwards – MSCRM Dynamics

2016 2015 2013 2011

Donna Edwards is a Microsoft MVP and Dynamics CRM subject matter expert. On her blog, Donna discusses CRM implementation, features, tips and tricks, free utilities and vendor solutions. Her goal is to provide information that "helps the community implement, configure, understand, more fully leverage the application and improve user adoption."

That CRM Blog

Leon Tribe is a Dynamics CRM MVP and consultant based in Sydney, Australia. His blog covers topics such as CRM workflows, product/software reviews and competition in the CRM marketplace.

MSDynamicsWorld.com CRM News

MSDynamicsWorld.com publishes integrated content for Dynamics users, partners, ISVs and consultants. The CRM News blog contains stories and information that is relevant to these audiences. Posts can be sorted by industry and/or business need to easily find topics that are specific to your needs. Access to the site is free, but requires registration to utilize all available features.

Naked CRM

Naked CRM is a personal blog hosted by Steven Foster, an experienced CRM product manager located in New Zealand. Steven explains that "Naked CRM" means a CRM system that is "configured for the business user with the customer in mind. It's all about keeping it simple." Posts tend to be focused on real-world business scenarios and solutions using CRM.

Surviving CRM

Surviving CRM is a personal blog from Jukka Niiranen, a Microsoft Dynamics CRM MVP from Finland. Jukka writes about all things related to Microsoft Dynamics CRM, including news, tips and issues surrounding CRM.

Hosk's Dynamic CRM Blog

A Dynamics CRM developer based in the United Kingdom, Ben "The Hosk" Hosking blogs about functional and technical topics related to CRM. Many of his posts are best suited for advanced users or admins/developers of CRM, but intermediate users may find some "#HoskWisdom" that speaks to their experience level as well.

CRM Audio

Hosted by three Dynamics CRM experts, this podcast covers new features, tips and tricks, interviews with other CRM experts, CRM use cases and news surrounding the CRM landscape. As of this publication, new episodes of CRM Audio are typically released twice per month.

CERTIFICATIONS

Once you have undergone training, certifications can demonstrate your knowledge and proficiency in a software product or platform. Certifications are also a valuable professional credential. These resources can guide you to certifications for and related to Dynamics CRM.

Microsoft Certification

Microsoft Dynamics Certification

Microsoft offers a number of Microsoft Specialist exams for Dynamics CRM, which allow users to demonstrate proficiency in a specific module or area of CRM. This resource allows you to search and register for CRM exams in your area or find an online proctored exam, when available. You can also view the current list of retired exams and certifications for CRM.

Other Certifications

ClickDimensions Certification

Users of the ClickDimensions marketing automation solution for Microsoft CRM can obtain certification from ClickDimensions, demonstrating their knowledge of the system's broad range of tools and features. Testers must attend the ClickDimensions Academy before completing the certification exam. All ClickDimensions customers and partners have unlimited access to the online ClickDimensions Academy.

SOCIAL MEDIA

It seems like everyone is on social media today, including many of the organizations and individuals included in this guide. Below you will find a listing of social contact information for many of the resources featured in the Training Resource Guide, as well as a few additional CRM-related social accounts that are worth a follow.

Organizations

Microsoft Dynamics CRM

Microsoft Ignite

ClickDimensions

Microsoft Learning

Channel 9

Microsoft Press

CRM Audio

Microsoft Support

CRM Software Blog

Microsoft Virtual Academy

CRM Tip of the Day

MSDynamicsWorld.com

Dynamics CRM User Group

eXtremeCRM

Microsoft Envision

Individuals, Authors and Bloggers

Geoff Ables

Leon Tribe

Ulrik Carlsson

Matthew Wittemann

Donna Edwards

Steven Foster

Ben Hosking

Joel Lindstrom

Jukka Niiranen

Mitch Milam

Mahender Pal

Mark Smith

Jim Steger

CLICKDIMENSIONS RESOURCES

The resources below are specific to the ClickDimensions email marketing and marketing automation solution for Microsoft Dynamics CRM. If you would like to request a short, personalized demonstration of ClickDimensions, please contact us at +1 888.214.4228, sales@clickdimensions.com or www.clickdimensions.com/request-demo.

ClickDimensions Training

ClickDimensions Help & Training Site (includes ClickDimensions Academy and ClickDimensions Certification)

ClickDimensions Blog

ClickDimensions Forums

ClickDimensions Webinars

Other Resources

ClickDimensions Website

ClickDimensions 7-Minute Demo Video

ClickDimensions Product Tour

ClickDimensions eBooks and Premium Content

ClickDimensions Newsletter

ClickDimensions Partner Directory