



# 21 Reasons Millennials Prefer Microsoft Dynamics

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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 So when the organization they work for uses outdated systems that make tasks more cumbersome and data impossible to find, they get frustrated and explore new options.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.

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<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>



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# 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.

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- 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.

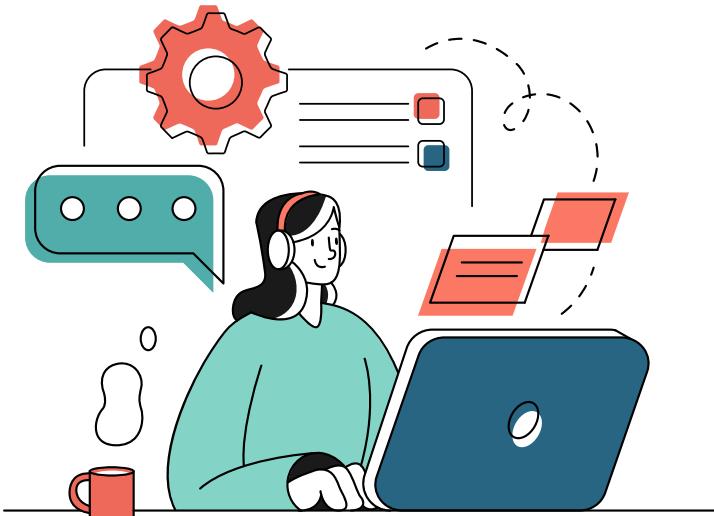
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- 2. Access to current data anywhere.** When they meet with a customer over coffee, and the customer asks how many items they ordered last time, millennials expect to look up the information instantly on their phone. With Dynamics, your sales reps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



*“All of us on the management staff look at sales stats on our phones constantly. We can scroll through screens that show sales summary, sales by customer, sales by product and a pipeline report. When I’m at home or traveling, the mobile app is my bible.”*

— CAL Business Solutions client

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- 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.

*"We have observed significant improvements in their process efficiency and in some cases, reduction in overhead due to the automation of key business processes that were previously performed manually."*

– CAL Business Solutions client

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- 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.
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- 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.



*"Prior to Dynamics GP we could effectively process about 20 orders a day per person; now we're up around 40 or 50 orders a day per person. The customer service people have information at their fingertips. When they enter an order all the customer information data, history, and order details are right on the screen."*

— CAL Business Solutions client

# 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.



*“Before Microsoft Dynamics GP we had reports that were about a thousand pages long, they were very cumbersome and time-consuming and once we switched over, our productivity increased, our reports that we were able to generate were more professional and it just was an overall very positive experience. Microsoft Dynamics with CAL Business Solutions have helped us grow and become a very professional organization.”*

– CAL Business Solutions client

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**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.

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**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.

# 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.

**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.

**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.



*"Obviously it's one thing to see a product in a demo. It's another thing to work with somebody who's dealt with it and customized it for others. CAL has helped us to understand the platform, understand what we can do with it and how to customize it to work for us. At the end of the day, for me, it's about the business problems that we're trying to address. We're trying to speed up our process, we're trying to be more efficient and drive sales with our customers. Being able to voice those issues to CAL and get the right advice has been a great help for me personally."*

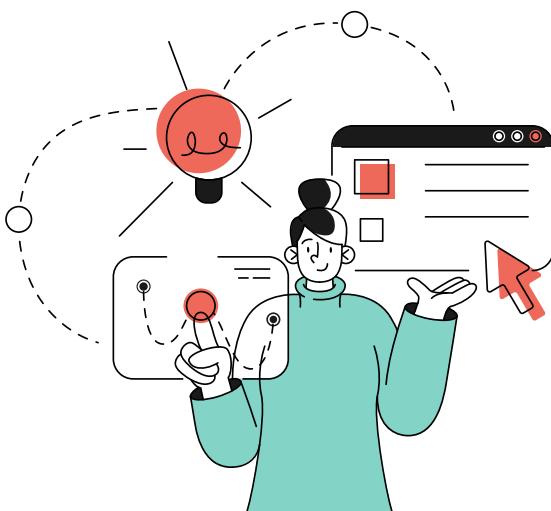
*— CAL Business Solutions client*

# 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.

"I just love the Dynamics GP system. I can't speak highly enough of it. We don't have to recreate the wheel every time we perform repetitive tasks. We get better information, faster and more efficiently. We can share it others and make better business decisions."

— CAL Business Solutions client



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.

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.

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.

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**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.

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**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.




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**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.

*"Millennials generally prefer to be in control, they like self-service solutions over assisted service. Microsoft Dynamics gives millennials the power to resolve their own problems and get their own answers. They can log in securely to see time cards, vacation time and other personal information."*

- George Mackiewicz, President,  
CAL Business Solutions

# 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.



*“A great thing about Dynamics GP is that you are able to catch a lot of information and play with it, sort it, print it out, do all kinds of things to get information to people that need it, and to help management run the business better.”*

– CAL Business Solutions client

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- 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.

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- 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

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- 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.
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- 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 those opportunities. And the regulatory compliance built into Dynamics reduces the risks when entering new markets.



*"We put together a dream list of technologies we wanted to implement. CAL Business Solutions researched our dream list realistically and brought to the table solutions that were forward-looking, could be implemented in a realistic timeframe and at a budget that made sense. CAL Business Solutions has delivered everything they said they would. They've succeeded in making us self-sufficient."*

*— CAL Business Solutions client*

# Next steps and resources

Buying new ERP software is an important decision that will have a dramatic impact on your business. For many buyers it is a new and overwhelming experience. CAL Business Solutions is here to assist you every step of the way – from the initial research to the final decision.

The first step is to schedule an ERP software discovery call. This preliminary discussion can help you formulate your software requirements, your budget and your timeline – even in the earliest stages of your accounting software research.

[Schedule an ERP software discovery call now](#)

During a 45-60 minute conference call, George Mackiewicz, the owner of CAL Business Solutions, will ask questions about your business processes, current systems and goals for a new system. Based on 30+ years of experience working with financial software George will help you determine if Microsoft Dynamics is a good fit for your needs. You will also receive estimates for a realistic project budget and timeline including options to deploy on-premise versus in the cloud. Remember, there is no commitment and the points reviewed during this call can help you compare all options as a more educated buyer.

*"Thank you for discussing our needs and being straight forward that we might be served better by another solution. Your honesty & integrity are appreciated; it makes me wish that we could have worked together, because I admire these qualities."*

- CFO, Connecticut Healthcare Company

We encourage you to invite the millennials on your team, to get their unique perspectives on a modern ERP system.

[Review Testimonials from CAL Business Solutions Clients](#)

[Contact CAL Business Solutions](#)

# About CAL Business Solutions

Founded in 1982, CAL Business Solutions is a Connecticut based company focused on Microsoft Dynamics GP (Great Plains) and Acumatica accounting software.

- Microsoft Dynamics GP Highlights: [www.calszone.com/gp](http://www.calszone.com/gp)
- Acumatica Cloud ERP Highlights: [www.calszone.com/acumatica](http://www.calszone.com/acumatica)

One client described us as the “nuts and bolts guys.” We don’t wear fancy suits or close deals on the golf course. We are just a practical, hardworking team that has built our reputation by implementing the right software system to solve our customers’ issues at the right price. We don’t try to sell you extra bells and whistles that you don’t need, just because they look nice. We don’t speak in “techno jargon” or bore you with fancy PowerPoint slides. We will give you honest advice, clear goals, straightforward answers, and a software system that works.

- Get to know our team, our offices and our business values in the short video [“Meet the CAL Team.”](#)
- [Read success stories](#) outlining the business challenges, solution and benefits experienced by CAL Business Solutions clients.

If you are considering new ERP software, upgrading your existing system, or if you currently use Microsoft Dynamics GP (Great Plains) or Acumatica and want the best local support and training, contact CAL Business Solutions.

## Contact CAL Business Solutions:

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