

E-book series

Beyond CRM: The CFO's Guide to Driving Sales Revenue and Reducing Sales Costs

 Microsoft Dynamics 365





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Improve seller
efficiency and remove
manual tasks

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Provide tools to help
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Empower your sales
management with AI
and analytics



Microsoft offers
a complete
selling solution

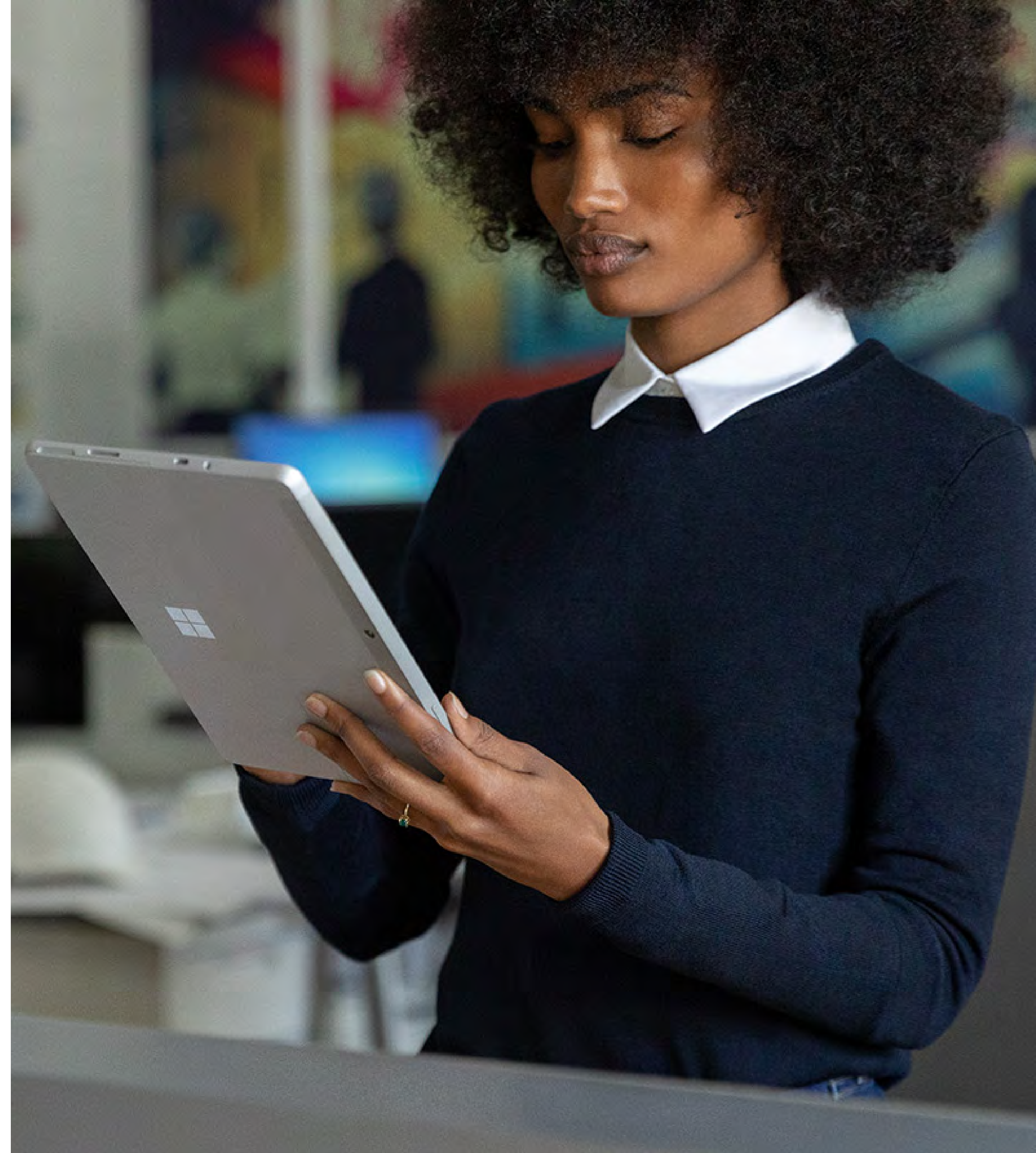


Choose a smart stack to
navigate the realities of
modern selling

Rising costs. Inaccurate sales forecasts. Expenses that are unpredictable, but still necessary for supporting the business. Any or all of these would be a CFO challenge.

Updating your CRM solution to unify customer data and keep sales and marketing aligned can make a big difference. That's even more important in a world where remote selling and digital experiences are becoming a primary engagement model. At the same time, you have to justify the ROI and ensure IT is on board.

Dynamics 365 can help you meet all of these challenges.



1. Improve seller efficiency and remove manual tasks

Sales reps may spend nearly two-thirds of their time on non-revenue-generating activities. Sales force automation (SFA) solutions can help change this. With familiar Office 365 experiences, sellers can connect and collaborate seamlessly with customers and colleagues, from any location. Efficiency improvements increase productivity and reduce costs. Context-sensitive help and an intelligent, event-driven sales process speed up results.

Success story 1



\$6.7 billion global industrial automation company Rockwell needed to improve collaboration between 1,600 sellers, 400 sales managers, and 800 subject matter experts.



Rockwell reduced manual processes, supported collaborative selling, and connected lead management with sales.

[Read the story >](#)



Our sales team uses Dynamics 365 Sales to respond to questions with real-time insights, be proactive about opportunities, and get proposals generated more quickly than before.”

Tom Forster

Director of Global Sales Strategy and
Commercial Readiness
Rockwell Automation



Tools that sellers use

Rockwell has a very high adoption of Dynamics 365, with 71 percent monthly active usage and reduced manual processes, better support for collaborative selling, and lead management that's more connected with sales.

2. Provide tools to help sellers work with customers remotely

More than ever, your sales teams need to be able to guide and collaborate with customers from almost anywhere. When you make the buyer's process easier, buyers succeed and sellers win. Microsoft Dynamics 365 solutions are specifically designed to support remote selling with digital communication and experiences. These give customers more ways to buy independently, so sellers are free to focus on customers who need more attention.

A single workspace with everything remote sellers need



Virtual meetings and collaboration with Microsoft Teams enable engaging and productive interactions with buyers in a private, secure environment. Integrated insights from LinkedIn Sales Navigator help you find and work with the right leads remotely, more easily checking in during key changes, such as job promotions, and tailoring your content and conversations based on what's currently resonating.

[Watch a demo >](#)



[Dynamics 365 Sales >](#)



[Microsoft Teams >](#)



[LinkedIn Sales Navigator >](#)



3. Centralize account information to reduce time spent across multiple tools

Sales depend on relationships. That can create intense pressure, whether sellers are working with buyers remotely or in-person. Sales teams need unified data to make smart choices about where to deploy time and talent.

Organizations need to bring together customer data across the full range of available sources, from licensing to marketing engagements to service requests. This helps them become more customer-centric, with marketing, sales, and service professionals getting the insights they need to personalize engagement across all touchpoints.

Success story 2



Dynamics 365 helped the Miami Heat basketball team and American Airlines Arena optimize their digital transformation to gain proactive and relevant customer insights.



End-to-end data management connects disparate data sources to build a unified brand engagement for customers, partners, and employees.



Dynamics 365 Customer Insights enables a deep understanding of fans in a 360-degree view with every touchpoint, enabling the organization to predict attendance and revenue several months ahead with just a 3.5 percent margin of error.

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[Dynamics 365
Sales >](#)



[Dynamics 365
Customer Insights >](#)



[Power Apps >](#)



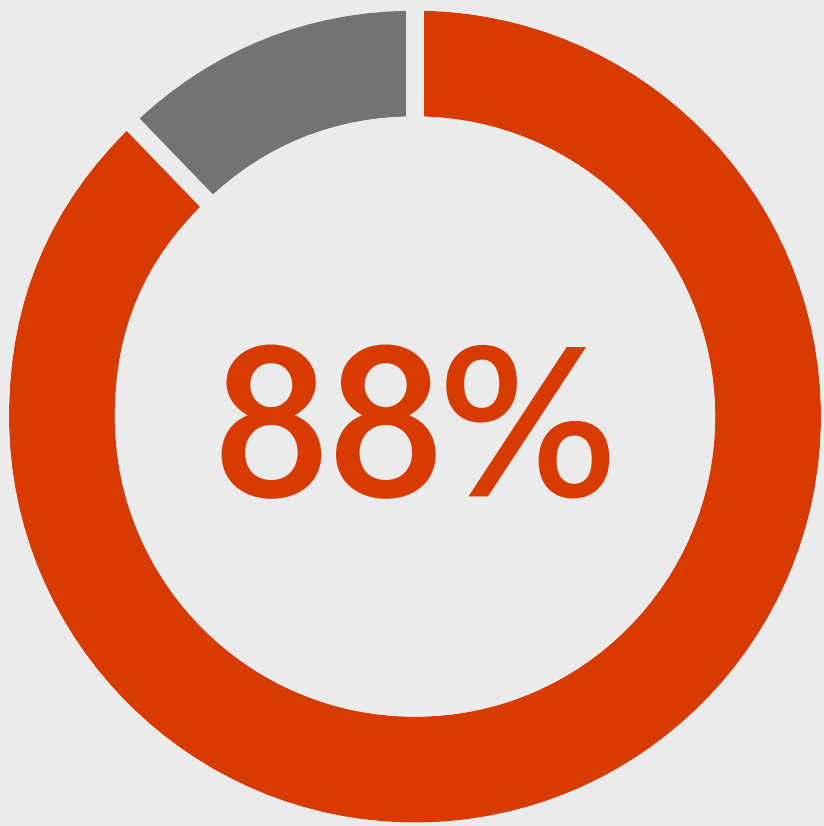
[Power BI >](#)



This is not just about technology. It's not enough to just put a ton of data in front of your people. You have to make it relevant to them, simple to understand, and make them keep coming back—so that they get out of their spreadsheets and into things like Power BI and Dynamics."

Matthew Jafarian

EVP of Business Strategy
Miami Heat and American Airlines Arena



of buyers agree that the salespeople they ultimately buy from are “trusted advisors.”

Source: [The LinkedIn State of Sales Report 2020](#)



Trust matters: How Dynamics 365 strengthens customer relationships

- Use predictive lead scoring to build relationships with the most promising prospects.
- Find and connect with decision-makers and influencers from more than 610 million LinkedIn profiles (and growing).
- Use LinkedIn insights to better understand what customers need and to tailor content and conversations based on what’s currently resonating.
- Connect to buyers by showing sellers contacts who can provide a warm introduction.



[Dynamics 365 Sales](#) >

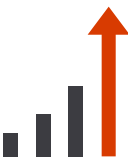


[Microsoft Relationship Sales](#) >

4. Simplify operational excellence

Efficient operations support reduced costs and better margins. Free your company's sellers to do what they do best with Dynamics 365. They can save time with contextual prompts, align to best practices using repeatable techniques, take advantage of processes and tools that support remote selling, and minimize their training time with a guided experience.

Success story 3



Flex wanted to unify its marketing and sales teams with better visibility and process automation.



Dynamics 365 Marketing helped Flex unify sales and marketing activities, boost efficiency, increase visibility, improve employee self-sufficiency and collaboration, and drive the next phase of its business development.



The unified Dynamics 365 interface gives marketers complete visibility into where the best opportunities lie for sellers—and vice versa—and sellers always know each account's current position in the sales cycle.

[Read the story >](#)



[Dynamics 365
Sales >](#)



[Dynamics 365
Marketing >](#)



[Power BI >](#)



We use the segmentation and other marketing automation capabilities in Dynamics 365 Marketing to help us be far more efficient and harness our Dynamics 365 Sales data for smart marketing campaigns."

Malik Shamsuddin

Head of Marketing
Flex (Flexible Benefit Service Corporation)

5. Empower your sales management with AI and analytics

High-performing organizations use analytics and AI to boost seller success, and [up to 30 percent of B2B companies](#) are augmenting at least one of their prime sales processes using AI. Dynamics 365 Sales embeds intelligence into daily workflows in a cost-effective solution. It helps sales teams:



Increase conversion and win rates with lead and opportunity scoring.



Get recommendations for personalized talking points and next best steps.



Focus on high-priority customers with relationship health scores.



Find new ways to support digital and remote selling.

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[Dynamics 365
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We've created and captured more than 14,000 individual sales opportunities in the first six months, and we've increased the quality of data on potential sales opportunities by 89 percent."

Jennifer Stocco
Director of CRM
C.H. Robinson

Microsoft offers a complete selling solution



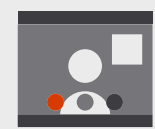
Help your sales teams connect and collaborate, even when selling remotely, through close integration with Microsoft Teams and Outlook.



Collaborate seamlessly with Office 365 while maximizing your existing investment in productivity tools and the relationship data those tools generate.



Align sales and marketing by unifying Office 365, CRM, social media, and other data to engage with buyers in meaningful, personalized ways.



Run meetings and webinars using direct integration with Microsoft Teams and Dynamics 365 Marketing.



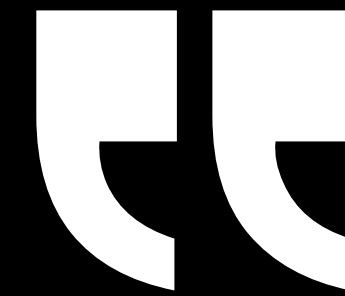
Deliver the next best action to support customers by effectively capturing their feedback and conducting sentiment analysis.

On the operational side, the Microsoft cloud platform reduces cost and complexity for your IT team. Sellers can maximize efficiency thanks to familiar commands and interfaces so they can get up to speed with less training. Integration with collaboration tools that your sellers already use can help them avoid miscommunication and missed opportunities, even when working remotely. Best of all, Dynamics 365 delivers more value for less money than competing sales force automation (SFA) solutions.

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The tight integration across the Microsoft product family creates a compelling case for companies to switch from more expensive cloud offerings."

Ray Wang

Principal Analyst and Founder
Constellation Research



10% lower cost of sales

Since Microsoft deployed Dynamics 365 to its Digital Sales Team, the team's revenues have risen consistently for the past three years and have reduced the cost of sales by 10 percent.

[Read the story >](#)



Choose a smart stack to navigate the realities of modern selling

Looking for a solution that drives revenue, cuts costs, aligns sales and marketing, and meets the needs of finance, sales, and IT all at once? Put Dynamics 365 on your shortlist.

[Contact us](#) >

