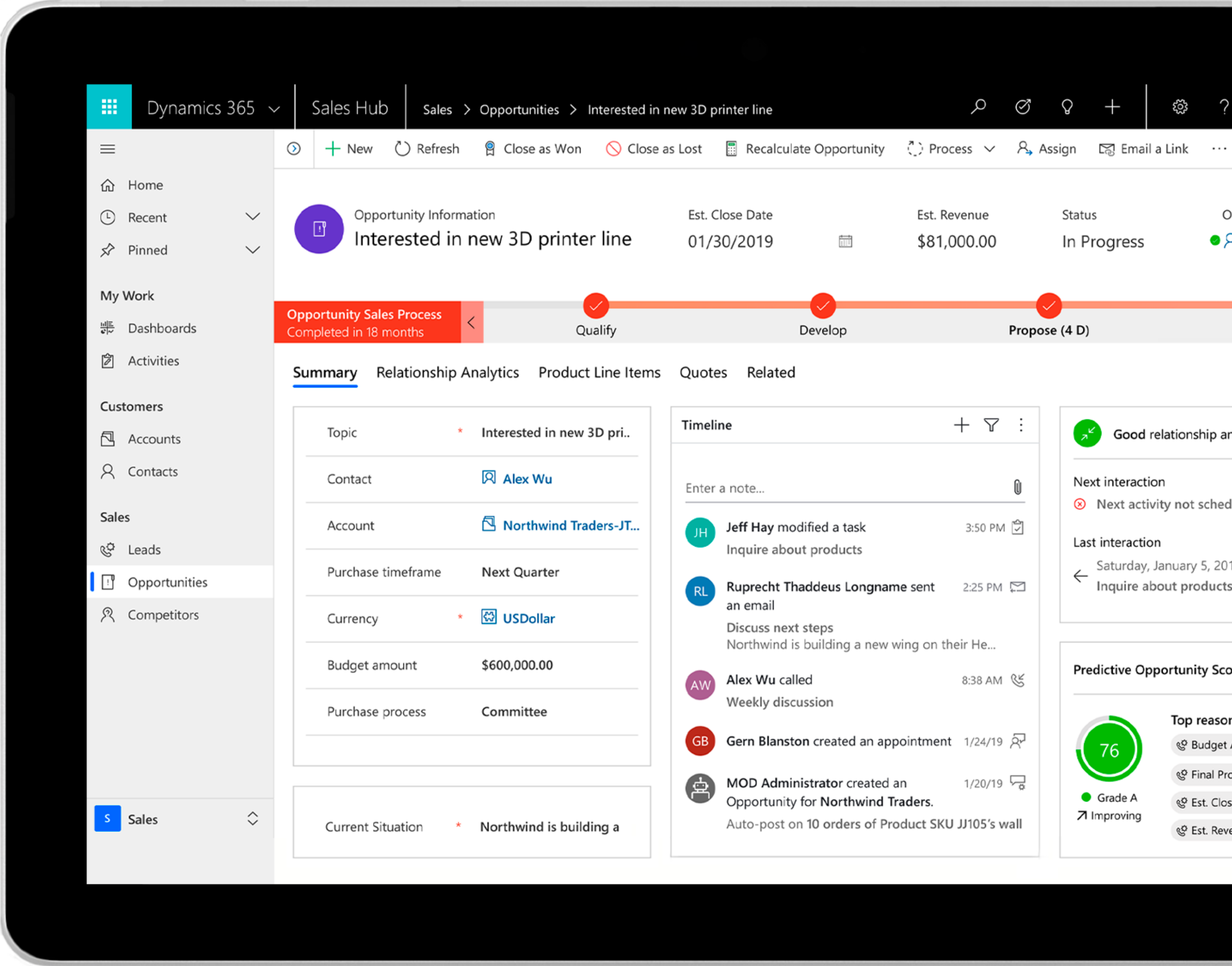


Boost Sales Performance While Reducing Costs: 7 Questions to Ask About Your CRM





1 /

Is it easy to use?

2 /

Does it support digital
and remote selling?

3 /

Does it unify your data?

4 /

Does it give you security and
control over your data?

5 /

Does it integrate AI and other
advanced capabilities?

6 /

Is low-code/no-code
customization built in?

7 /

Does it include everything
you need?

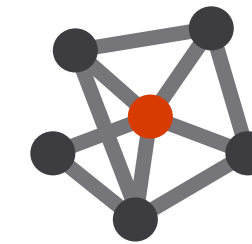


Make sure your complete selling
solution checks the right boxes

You know that to grow your sales, your sellers need support across every stage of the customer journey, from demand response to transactions to repurchases. And rather than focusing on the seller's sales processes, you want to make the buyer's process easier, too—because when buyers succeed, sellers win.

All of this is even more true as sales teams look for new ways to stay connected—to customers and each other—as they adapt to increased remote and digital selling opportunities.

You need a customer relationship management (CRM) system that's up to the task. But not every CRM is built for an end-to-end digital journey that improves the customer experience, or for controlling costs while still keeping your sellers happy.



Help your teams adapt to remote selling with a complete digital solution

With centralized CRM, your sales team can track customer interactions and build better relationships, whether they're selling remotely or in-person. Plus, the right technology can keep your team connected and coordinated, so they can avoid miscommunication and drive effectively toward common goals.

A solution that supports digital selling can strengthen your team with intelligent insights that identify the right leads to focus on, proactively offering intelligent prompts that help keep prospects engaged. It automates complex tasks for greater efficiency and helps build closer customer relationships.

Doing all that requires unified data, integrated AI, and an optimal workflow. How do you know when you've found the right solution? This checklist highlights key features to look for so you can enable end-to-end digital selling, align sales and marketing, and realize more CRM value.

1. Is it easy to use?

A solution only works when people use it. Only 47 percent of businesses with a CRM solution have an adoption rate higher than 90 percent. Your sellers are much more likely to use a CRM that integrates well with their productivity tools, especially their communication and collaboration platforms for sellers working remotely.



Why Microsoft?

Your sellers are already using Office 365 solutions such as Outlook and Microsoft Teams every day. Dynamics 365 Sales works seamlessly with these tools, reducing costs by leveraging your current investments and encouraging faster adoption with less training.



[Dynamics 365 Sales](#) >



[Microsoft Teams](#) >



[Power BI](#) >



We now have Power BI set up for our executive audience, and they can access reports they need quickly because everything is in the same place."

Hugh Wellington
Director of Sales Execution
[Rockwell Automation](#)

2. Does it support digital and remote selling?

In a world where digital experiences are becoming a primary engagement model, you need a solution that understands your sales teams may often be guiding and collaborating with customers from almost anywhere. You need support for remote sellers conducting virtual meetings, immersive 3D demos, and other collaborative digital experiences.



Why Microsoft?

Dynamics 365 helps sales teams stay focused and productive wherever they're working. Support for digital communications and self-service buying experiences helps bring your products to life and removes buying friction.

While in-person interactions can't be replaced entirely, virtual collaboration and 3-D demos using Microsoft Teams make it possible to have engaging and productive interactions in a private and secure environment. Dynamics 365 Marketing even lets you run meetings and webinars using direct integration with Teams.

2x

Sales leaders say that digital experiences are now twice as important to customers as traditional sales interactions.¹

¹ "The B2B digital inflection point: How sales have changed during COVID-19," McKinsey, 2020.



[Dynamics 365 Sales >](#)



[Dynamics 365 Marketing >](#)



[Microsoft Relationship Sales >](#)



[Microsoft Teams >](#)

3. Does it unify your data?

The potential for sales and marketing misalignment is multiplied during a major economic disruption, leading to costly duplication of effort, lost opportunities, and wasted time on administrative tasks. That hurts the bottom line when you can least afford it.

Unifying your data and activating digital selling helps to align your sales and marketing teams. Common customer data, connected processes, and collaboration give you a better understanding of your customers, creating insights across departments while also reducing costs and helping you manage leads more efficiently. An end-to-end CRM solution can address all of these needs.



Why Microsoft?

Dynamics 365 unifies relationship data and processes in many different ways: Dynamics 365 Customer Insights drives personalized experiences through an even more detailed customer view, with its powerful, easy-to-use customer data platform. Dynamics 365 Customer Voice gathers and tracks customer metrics based on survey data, helping you rapidly act on new insights. Microsoft Relationship Sales integrates LinkedIn Sales Navigator and Dynamics 365 Sales. Dynamics 365 Marketing helps you use a single view of prospects to personalize customer journeys and strengthen your marketing capabilities.



With Dynamics 365 Marketing, we were able to centralize our client data, create a survey to determine their PPE needs, tabulate thousands of responses, and send all necessary delivery details to our PPE distribution partners."

Neil Browning

General Manager of Product, Platform, and Data
[Manawanui](#)



[Dynamics 365 Sales](#) >



[Dynamics 365 Marketing](#) >



[Microsoft Relationship Sales](#) >



[Dynamics 365 Customer Insights](#) >



[Dynamics 365 Customer Voice](#) >

4. Does it give you security and control over your data?

Your data should be yours—period. And it has to stay secure, especially when your customer information is on the line. That means you should be able to control it, view it, back it up, or take it out of the system whenever you want, as well as access it securely and easily even when working remotely. If your CRM vendor makes it difficult to extract your data, you might be locked in and unable to access or move data using the application you prefer.

Compliance is another critical point. You need peace of mind that your solution supports compliance with the General Data Protection Rule (GDPR), as well as other industry-specific requirements.



Why Microsoft?

You own the data you store and process with Microsoft Office 365 and Dynamics 365. We use your data only to provide the services you want. Plus, we invest over \$1 billion annually in cybersecurity and provide advanced compliance capabilities.

[Learn how your data stays in your control >](#)

\$1.06 billion

Attacks where customers' personal financial information is stolen result in \$1.06 billion more loss in equity value than if personal financial information is not compromised.

Source: Fisher College of Business²

² "Risk Management, Firm Reputation, and the Impact of Successful Cyberattacks on Target Firms," Fisher College of Business, Ohio State University, Working Paper No. 2018-03-004, 2018.

5. Does it integrate AI and other advanced capabilities?

A McKinsey survey [showed that](#) AI adoption in sales and marketing use cases has led to reduced costs for 36 percent of companies and increased revenue for 80 percent.

Evaluate the AI and automation capabilities of a CRM system based on the value they will provide to your sellers. They should provide intelligent insights at the right moment and automate mundane tasks to free up seller time, reducing costs and increasing productivity. Also, make sure the vendor has a clear AI roadmap and industry leadership.

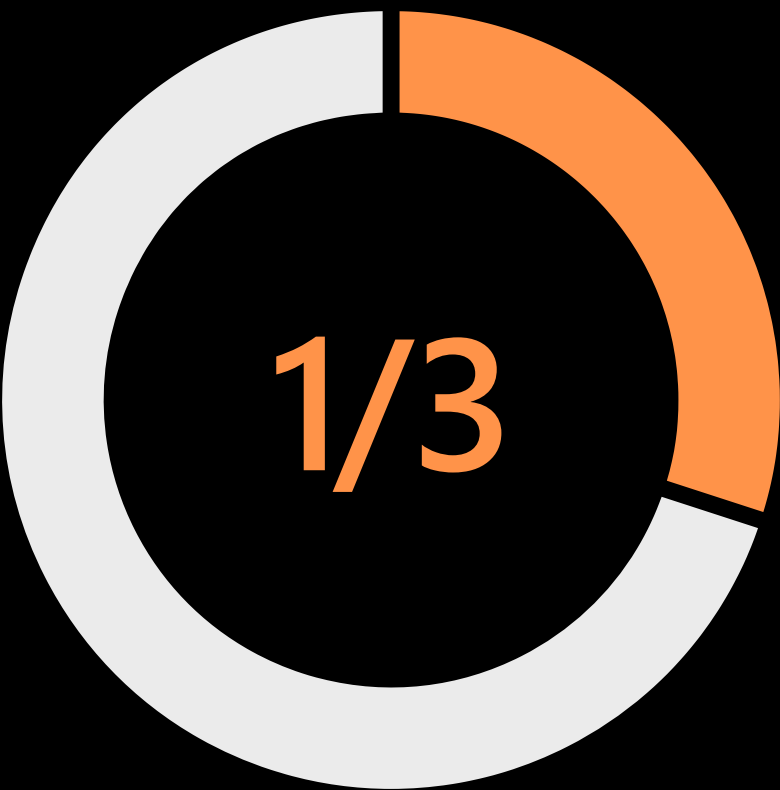


Why Microsoft?

Use AI to generate actionable insights to orchestrate a meaningful customer journey, create stronger connections with customers, and drive personalized engagement and proactive decision-making.³ Our [roadmap priorities](#) include sales performance and productivity, onboarding and recommendations, and AI-driven insights.

[Discover Dynamics 365 Sales Insights >](#)

³ Some AI-related features in Microsoft Relationship Sales are add-ons and are available at an additional cost.



Approximately one-third of sales and sales operations tasks can be easily automated.⁴

Source: McKinsey

⁴ ["Sales automation: The key to boosting revenue and reducing costs,"](#) McKinsey, May 2020.



[Dynamics 365 Sales >](#)



[Dynamics 365 Sales Insights >](#)

6. Is low-code/no-code customization built in?

Tailoring your CRM to your business processes and sellers’ needs increases efficiency and helps control costs. However, some systems use proprietary languages or rely exclusively on third-party add-ons for customization. This increases cost and time to development, resulting in lower ROI.

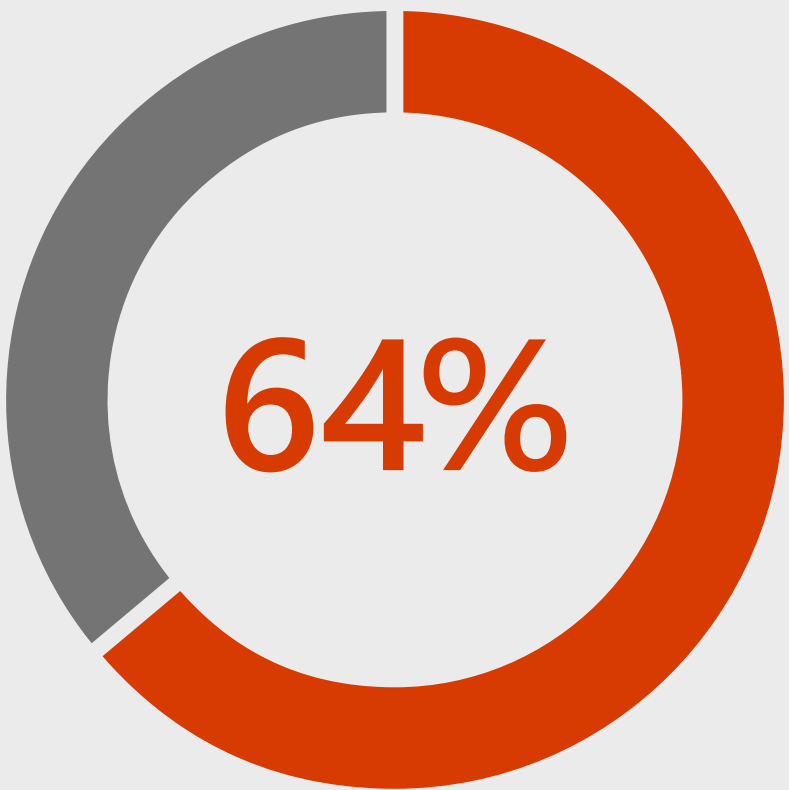
Selecting a CRM that can be customized using standard languages and tools—and which includes low-code/no-code app solutions built in—helps you get what you need faster.



Why Microsoft?

Drive innovation with an adaptable and scalable sales solution that’s easy to tailor, extend, and connect to other applications and services you already use. Use Power Apps to easily build the business apps you need and extend or customize the apps you already use, including Microsoft Teams, Office 365, and Dynamics 365.

[See how easy it is to customize Dynamics 365 Sales >](#)



64% of sellers manage 4 to 10 sales-related tools, and 50% say they are overwhelmed with tools.

Source: MarTech Advisor/Ciara⁵

⁵ MarTech Advisor survey in association with Ciara, 2019.



[Dynamics 365 Sales >](#)



[Dynamics 365 Sales Insights >](#)



[Power Apps >](#)

7. Does it include everything you need?

A CRM solution is an essential investment, but costs can vary widely. Many organizations are increasingly looking for cost savings. Comparing features on the platforms and plans that you’re considering can help. It’s especially important to understand what additional costs may be required to get what you really need—including at renewal time.



Why Microsoft?

Our sales solution is consistently ranked one of the best values in the industry. It includes a wide range of functionality for one subscription price. Unified data, intelligent insights, seller-focused automation, and more.

[Read analyst reports >](#)



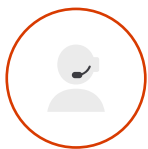
[Dynamics 365 Sales >](#)



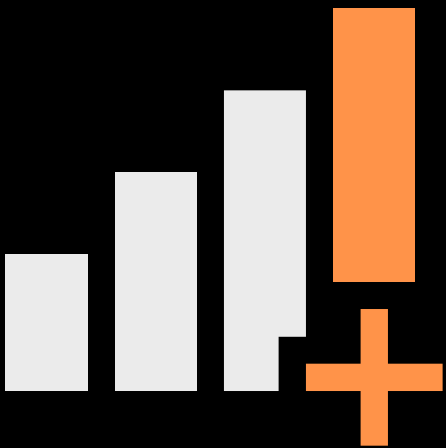
[Dynamics 365 Marketing >](#)



[Microsoft Relationship Sales >](#)



[Dynamics 365 Customer Insights >](#)



Destination CRM named Dynamics 365 the best enterprise CRM. Depth of functionality, a large partner ecosystem, and the best value put Dynamics 365 over the top.⁶

⁶ “CRM Magazine Names the Winners of the 2018 CRM Market Awards,” Destination CRM, 2018.

Make sure your complete selling solution checks the right boxes

The way customers interact with businesses has fundamentally changed. Buyers want to be able to connect through digital experiences, often via mobile devices. They're also doing their own research, making them more informed and creating higher expectations. Your sales team must adapt to each customer's journey by personalizing every interaction based on customer needs and intent.

Microsoft sales solutions help your sellers stay better aligned and connected with their teams. Sellers are empowered to drive more personalized and meaningful engagement with customers, even when selling remotely. At their heart, Microsoft sales solutions provide an efficient, powerful end-to-end buying experience with unified relationship data and built-in AI.

[Contact us >](#)

