

Optimize your tech stack with LinkedIn Sales Navigator

Driving results with Microsoft Relationship Sales solution



Help your sales team close more sales faster with the Microsoft Relationship Sales solution, which combines Dynamics 365 for Sales with LinkedIn Sales Navigator's deeply immersive social data to provide time-saving predictive insights.





Table of contents

04

Put relationships at the center of the sale

05

Avoid multi-platform fatigue

07

Reinvent your company's approach to sales

10

Quickly ramp up your team on relationship selling



Put relationships at the center of the sale

Sales is no longer a short-term game. Random cold calls and templated sales pitches rarely lead to long-term loyalty. That's why leaders are embracing **relationship sales**, which prioritizes authentic, trustworthy connections to leads and customers over other sales activities.

And technology plays a key role in tracking and maintaining these relationships as they grow in number and complexity. In many ways, customer relationship management (CRM) and data from social media platforms are shortening and simplifying the sales process.

Social data from LinkedIn gives sellers access to up-to-the minute insights from over 500 million professional users, making it easier to act based on their individual interests, pain points, and priorities. With the Microsoft Relationship Sales solution, sellers get access to these insights in a highly relevant, contextual way. Leveraging this data can even improve productivity by 12 to 15 percent, according to a recent study by Nucleus Research.¹

The value of this data extends far beyond the sales team, helping your entire company be more profitable.

86%

of respondents who adopted a sales force automation tool were "very satisfied" or "completely satisfied" with their solution.²



Avoid multi-platform fatigue

Although social data can empower sales teams to nurture deeper connections, it can also create a massive administrative burden. The constant churn of checking for fresh social data and recording it—only to have it become obsolete days later—can be a costly distraction that prevents sellers from acting on what they know.

If your sellers are suffering from the fatigue of checking multiple platforms, it can contribute to some of these common and critical roadblocks:

CRITICAL ROADBLOCKS

- ✓ Difficulty identifying prospects and getting warm introductions
- ✓ Lack of response to templated sales interactions
- ✓ Missing timely opportunities to engage leads and customers
- ✓ Inability to measure the impact of sales activities
- ✓ Incomplete understanding of the buying committee
- ✓ Lost time constantly checking and making notes about social activity
- ✓ Uncertainty about the strength of relationships
- ✓ Low confidence about what steps to take to build loyalty and trust



Our new sales hires are part of the LinkedIn generation. They expect to have access to social media information in their business tools, and that's what they get with the Microsoft Relationship Sales solution. Instead of switching between Outlook, Dynamics, and LinkedIn all day, they stay in one application and get everything they need.³

Chris Adams

COO, Park Place Technologies,
Cleveland, Ohio

[Read the full story](#)

Reinvent your company's approach to sales

By evolving your sales team's workflow, you're not just saving time. You're also opening sellers up to focus on high-value activities by arming them with relevant, actionable insights.

PROBLEM

Manually updating lead information

It's not a valuable use of sales time to manually update sales activity, especially when social media provides teams with so much data on a daily basis. The administrative burden is a major contributor to sales team burnout.

SOLUTION

Synchronize relationship data automatically

LinkedIn Sales Navigator pulls in updates automatically. Your sales team won't need to scour their social feeds or worry about recording anything relevant. The latest information is already presented in the Dynamics 365 for Sales workflow. They'll be able to spend less time on administrative tasks and more time on trust-building, revenue-driving activities.

PROBLEM

Constantly switching between platforms for the latest information

Complex and long sales cycles become even more so when teams spend valuable hours updating their CRMs with emails and social activity. Even though social platforms can offer a more complete picture of decision makers, the fragmentation of critical data across multiple tools is immensely difficult to reconcile.

SOLUTION

Build social and productivity data into the workflow

The Microsoft Relationship Sales solution streamlines Outlook activity and LinkedIn data into Dynamics 365 for Sales, so your team can identify their highest-priority relationships, find other members of the buying committee, discover who can offer them a warm introduction, and more. With a unified view of all sales activity, sellers can focus on providing value.



PROBLEM

Knowing how to act on social data

Data alone doesn't guarantee success: translating information into the right action is crucial. Even when a salesperson finds every member of a buying committee and secures a warm introduction, it's not always clear what would drive the most value at any given time.

SOLUTION

Incorporate intelligent insights

The Microsoft Relationship Sales solution not only surfaces up-to-the minute information on lead activity, but also uses predictive analytics to monitor the health of the relationship and recommend next steps. Its intuitive suggestions help your salespeople reach out to the right people at the right time with confidence.



Quickly ramp up your team on relationship selling

From installation to General Data Protection Regulation (GDPR) compliance, LinkedIn Sales Navigator is designed with simplicity in mind.



Easy installation

The LinkedIn Sales Navigator widget works directly within Dynamics 365 for Sales and installs in less than 30 minutes. Just follow these simple steps:

1. Install [LinkedIn Sales Navigator from AppSource](#).
2. Select the Sales Navigator Controls for Dynamics 365 Unified Interface.
3. Review the terms of service and select **Get**.
4. Follow the setup wizard.

[See the full installation instructions](#)



Security

Dynamics 365 has built-in security features like user authentication and device management to help protect your company's data from internal and external threats. From role-based privileges within your team to the physical security of Microsoft's datacenters, your data remains accessible without sacrificing integrity and privacy.

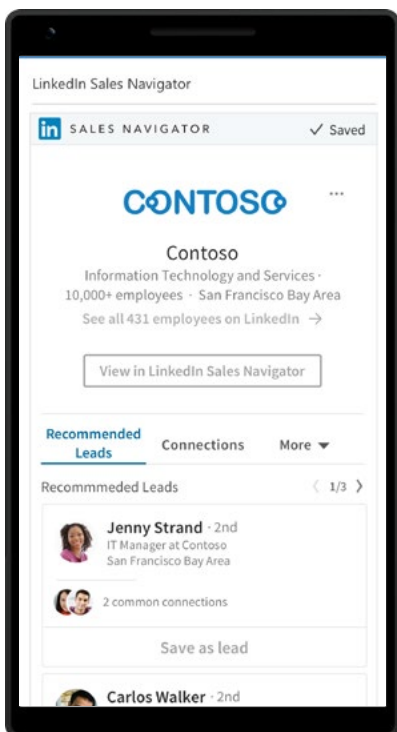
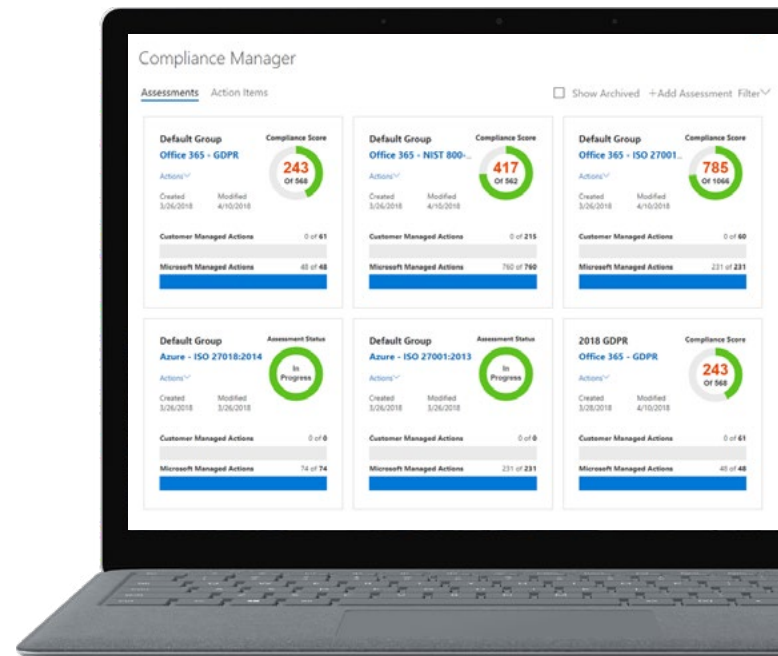
[Learn more about security in Dynamics 365](#)



Compliance management

Meet your compliance obligations—including GDPR—with Compliance Manager in Dynamics 365, which allows you to view a compliance score and get insights on how your organization can improve.

[Learn more about how Dynamics 365 supports GDPR compliance](#)



Intuitive interface

Dynamics 365 uses responsive design and consistent patterns to make it easy for sellers to learn and use the application on any device.

Get started with the Microsoft Relationship Sales solution

Microsoft Relationship Sales makes it easy to incorporate valuable, actionable social insights into the sales workflow. Empower your team today by giving them the tools to build stronger, more profitable relationships.



Learn more about Microsoft Relationship Sales

[Request a demo](#)

1. Nucleus Research, *Microsoft Lays Out LinkedIn CRM Strategy*, June 2017. Claims based on a 2017 study by Nucleus Research that analyzed more than 50 ROI case studies on CRM deployments from 2015 to 2017. Companies ranged in size from small and medium-size businesses to large multinational enterprises. Results will vary based on your CRM strategy and deployment.
2. Gartner, *Magic Quadrant for Sales Force Automation*, July 9, 2018.
3. Microsoft, *"Global Hardware Maintenance Provider Supercharges Sales Team with Relationship Selling,"* March 5, 2018.