



Empowering sellers to drive personal engagement with customers

“We can use data to make data-driven decisions and communicate to our teams using actual data. Everyone here is very smart, but the additional insights — based on a single shared version of the truth — make us all smarter.”

Rick Stow
Head of CRM, Grant Thornton



The way customers interact with businesses has fundamentally changed. Today's customers are connected via mobile devices, plugged into their social network, and doing their own research. Sales teams must adapt to the new customer journey—building deeper relationships with customers and personalizing every interaction.

Overview

The way customers interact with businesses has fundamentally changed. Today's customers are connected via mobile devices, plugged into their social network, and doing their own research. They are more informed and have higher expectations. Sales team must adapt to the new customer journey by personalizing every interaction based on customer needs and intent. Microsoft Dynamics 365 for Sales enables deeper customer engagement in an increasingly complex sales environment. Sellers can take action based on insights, build strong relationships, and increase sales performance, all while maximizing productivity.

Key Benefits

GROW BUSINESS

Leverage intelligent insights and business processes to increase revenue while reducing acquisition cost

Customers are **57%** of the way through the buying process before talking to a supplier.¹

STAY FOCUSED

Reduce distractions and know where to prioritize in a fast-paced sales environment

70% of sales reps consider their jobs to be highly complex²

WIN FASTER

Close deals faster and increase revenue through sales collaboration and productivity

Reps spend more than **67%** of their time on non-selling activities.³

1. CEB, "5 Statistics Every Sales Executive Must Know," 2014.
2. CEB, Why You're Losing Competitive Advantage, 2015.
3. Microsoft & CSO Insights, How to Build a World-Class Sales Organization, 2015.

Key Capabilities

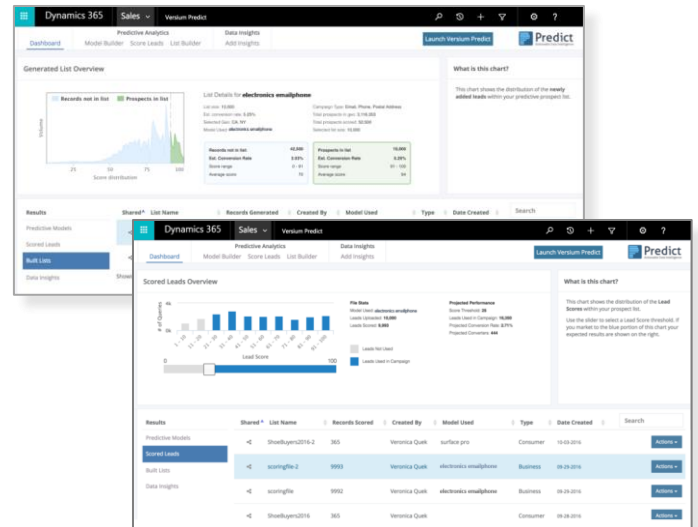
ACTIONABLE INSIGHTS

Take action confidently. Derive meaningful intelligence from large amounts of complex data to provide sellers with contextual actionable insights that are easy to understand. Insights are in context of customer relationship so it's easy to focus on the right priorities and drive personal engagement.

Prospect & Lead Prioritization

Transform your organization from diagnosing what happened in the past to predicting what will happen in the future, leading to improvements in retention, engagement, and monetization. By combining enterprise account and sales data with business and consumer LifeData and machine learning by Versium Predict, sales teams can

- Identify the most important leads to focus on
- Find new prospects
- Ensure accurate and complete data for multi-channel campaigns

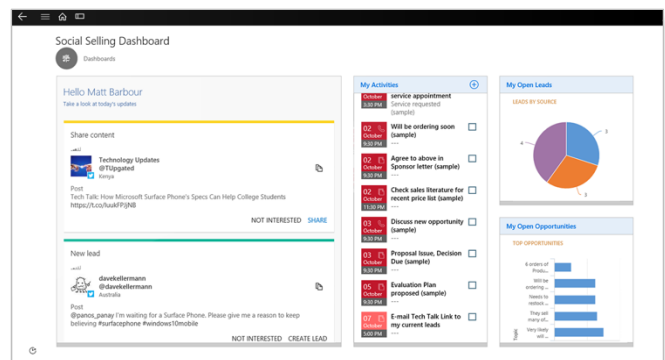


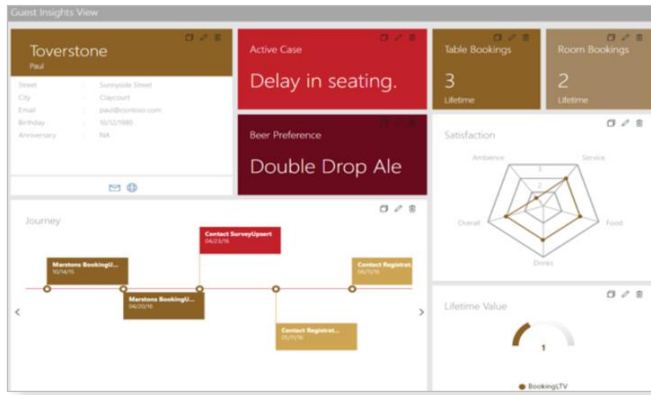
Relationship Health

Sell smarter with signals from Office 365 and Dynamics 365 that reveal relationship health, risk, and next best action, allowing sales team to focus on the most important prospects and customers. Live, pre-built dashboards and reports from PowerBI have drill-through, interactive, and visual capabilities to ensure that actionable insights are easily accessible so sales teams can make better, faster decisions.

Social media tracking

Sellers can easily leverage social selling to spot buying signals, identify competitive threats, and keep a pulse on the market. Build authority in social channels by sharing relevant content. Find more high-quality leads by using social to identify and act on buying signals and create leads based on social posts. See a snapshot of social activities through embedded buzz volume, trends, and sentiment analysis.





Customer Intelligence

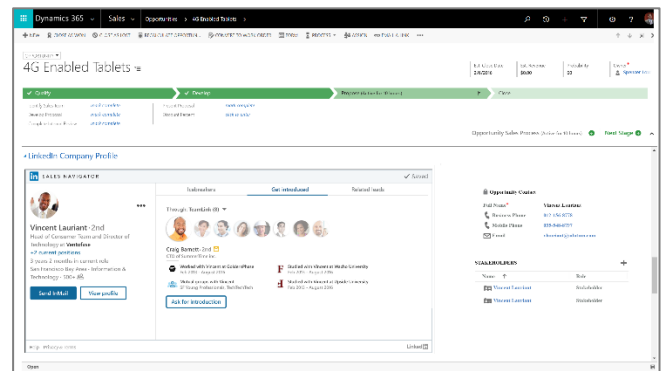
Harness the power of Dynamics 365 for Customer Insights to engage customers in more personalized and effective ways. Get everyone in the organization on the same page by using a single, easy-to-reference dashboard that's configured just for the sales team.

RELATIONSHIP MANAGEMENT

Foster relationships with buyers through authentic and personal engagement. Unify the sales experience around relationships with insights that enable sellers to deliver the attentive engagement that today's buyers demand.

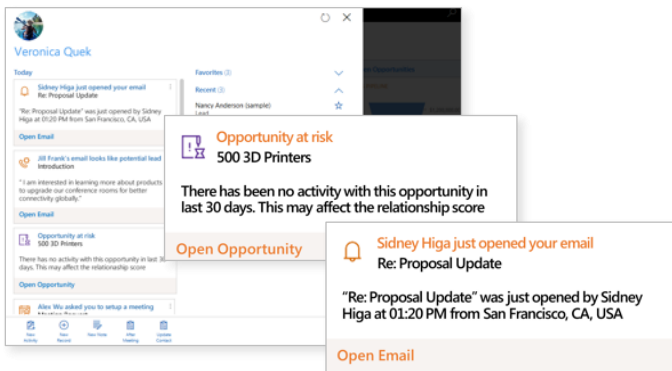
LinkedIn Sales Navigator Integration

Tap into the power of LinkedIn's network of more than 500 million professional members. Identify, understand, and connect with buyers by tapping into the power of social networks, including those of your colleagues. Build trust with continuous insights and recommendations centered on actual customer needs. Grow and expand relationships with the support of unified data and process that make it easy to manage relationships at scale.



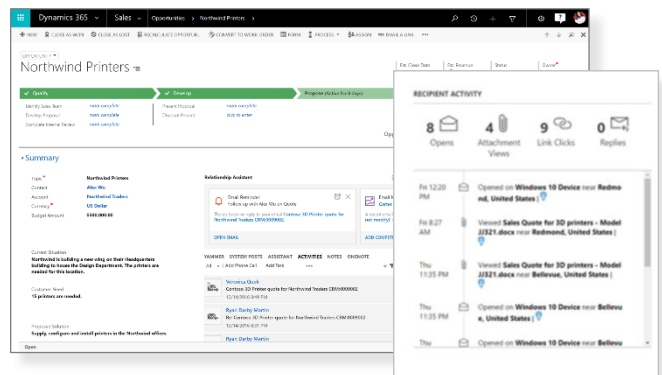
Relationship Assistant

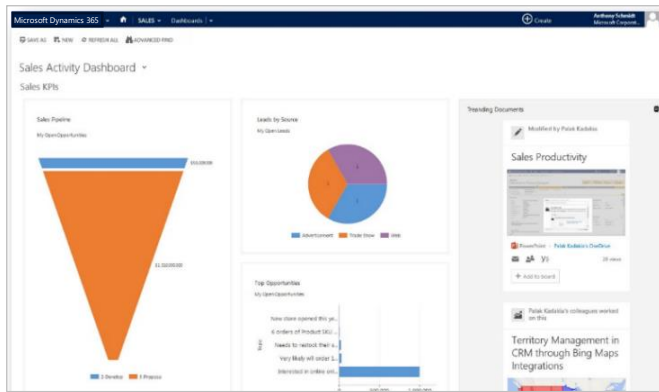
Get a clear picture of each customer relationship with a single relationship health score, calculated from large amounts of data representing transactions, customer sentiment, emails and content exchanged, and frequency and level of customer interactions brought together from CRM, email, and social networks. See the strength and trend of each relationship to proactively focus on the relationships that need extra attention.



Email Intelligence

Gain insights from email interactions with customers. Find out which email recipients opened, replied, or opened attachments, so you know which contacts are most receptive to being engaged.





Content Personalization

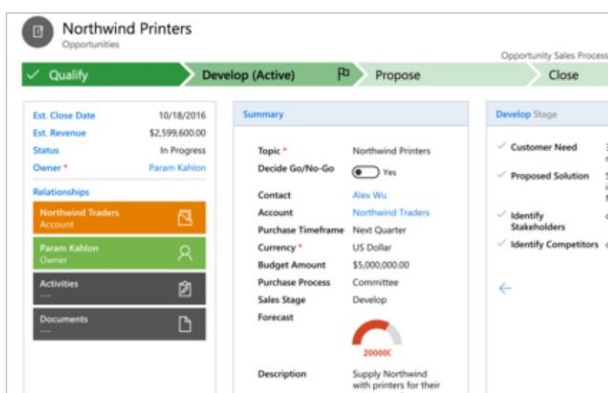
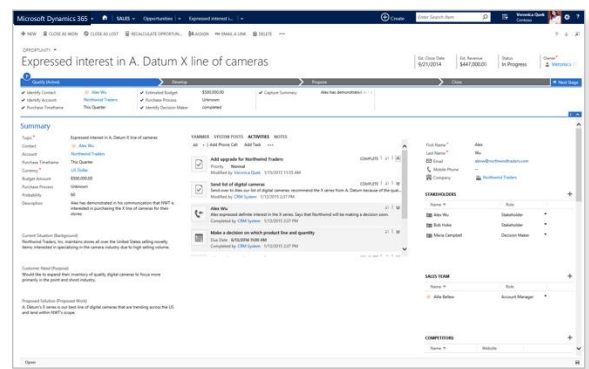
Reduce the time and effort searching for and creating personalized sales documents. Relevant content comes to you based on what you are working on and who you are working with. Personalize content with familiar Office 365 tools that enable simultaneous collaboration and editing. Provide access to sales documents directly from the opportunities you are working on.

SALES PRODUCTIVITY

Increase revenue, boost productivity, and reduce costs when you automate sales processes through a highly-intuitive interface and Microsoft Office-embedded capabilities.

Sales Process

Optimize the sales efforts with process automation and a guided sales process based on best practices. Know what steps to take next to close deals faster with embedded business process. Increase user adoption with rich, context-sensitive help and guidance across the web and mobile apps.



Opportunity Management

Manage customers and deals where and how you work, whether it's web apps or Outlook across smartphone, tablet, PC, and Mac.

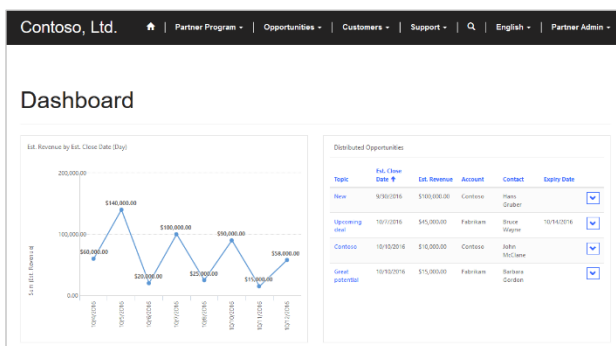
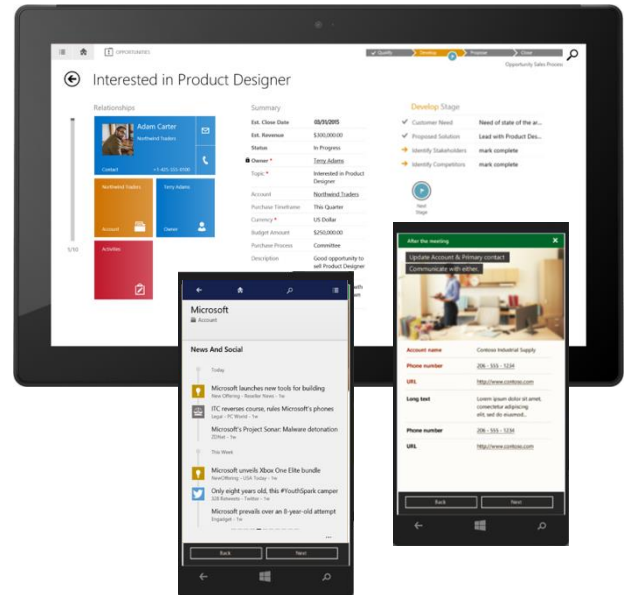
Office 365 apps work seamlessly with Dynamics 365 for Sales, so salespeople can complete tasks in familiar, preferred tools. Track incoming emails inside Outlook and Outlook Web Access and see contextual sales data, such as activities, cases, and opportunities, as part of emails.

And when it's time to conduct what-if analysis, just open sales data in Excel, make changes, and save the changes back to Dynamics 365 for Sales, all without switching between applications. Qualify leads quickly or walk into customer meetings informed with accurate 3rd party firmographics, news, and compelling events, embedded directly inside accounts, contacts, leads, and opportunities.

Sales Mobility

Sell smarter - anytime, anywhere, even offline. Work on the go with rich, modern mobile apps that provide contextual news, social data, and task flows for quickly completing frequent activities. Quickly manage data using intuitive natural language voice commands to create new records, schedule meetings, set reminders, and find information.

Get work done even when there is interruption in connectivity. Create, update and delete records while offline. Automatic playback of offline actions helps synchronize local changes. Experience a seamless transition when switching between connected and offline modes.



Partner Management

Recruit, onboard and strengthen your partner channel through deeper enablement and activation. Accelerate your partnership's time to revenue and work to reach the strategic goals of your channel strategy. With the partner dashboard, give partners a quick view of their interactions across opportunities, cases, and other relevant information that their vendor has granted access to.

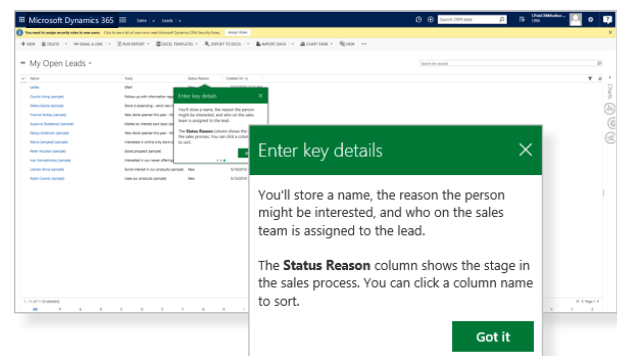
Provide early pipeline visibility to vendors through deal registration, which provides deal protection and authorization for additional discounts, rebates, and benefits to help win the deal. Allow multiple partners to collaborate on the same opportunity to maximize selling and implementation expertise.

SALES PERFORMANCE

Create a culture that nurtures success. Accelerate sales performance with real-time analytics based on historical data and predictive information. Inspire, onboard, coach, and motivate your team to achieve more.

Seller Onboarding

Ease onboarding and align sales behavior with best practices by using business process management and interactive help and documentation. It's not just for learning how to use the Sales application. It's also ideal for driving your organization's specific sales processes and immediate priorities.





Reports and Dashboards

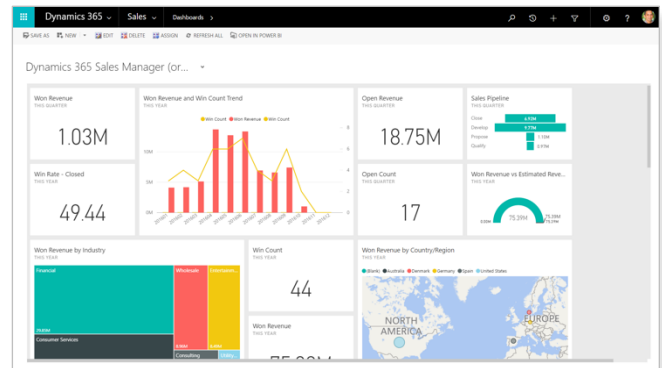
Get answers fast with natural language Q&A. Conduct all the analysis independently, without having to rely on any technical resources. Use pre-built Power BI Sales Templates to get up and running quickly.

In addition to Power BI, sales managers can use the at-a-glance dashboards and contextual charts and graphs right inside Dynamics 365 for Sales to get insights quickly about sales performance. Or create new charts and graphs on the spot.



Sales Effectiveness

Hit your numbers by setting goals, monitoring results, and providing feedback and coaching in real-time. With quota setting and analytic dashboards, easily set goals, monitor results, investigate deviations from plan, and take corrective action. Conduct what-if analysis with immersive Excel and pre-built templates, all without leaving the Sales application.



Gamification

Boost performance, productivity, and business application adoption. Fun, engaging team-based competitions energize employees and engage everyone in the organization. Hold everyone accountable by making results highly visible with web, mobile, and TV monitors.

Ready to get going?

Connect with Microsoft Dynamics 365 for Sales

Sign up for a free trial of Microsoft Dynamics 365 and use our intelligent sales solution free for 30 days. Discover what Dynamics 365 can do for you.

For more information, please visit: <https://www.microsoft.com/en-us/dynamics365/sales>