



Enable Smarter Selling

Drive Results by Combining Office 365,
Dynamics 365, and LinkedIn Sales Navigator



Building relationships is essential in today's sales environment, but many sellers fall short when managing multiple complex relationships.

Introduction

Customer relationships are becoming more complex all the time. Managing just one relationship requires finding the right customer, cultivating a deep understanding of their business, tracking their progress through the buying cycle, and engaging them with the right content when and how they want it. And sellers have to do that successfully across many relationships at different stages with different needs all the time. When you consider the scope of this task and the multitude of demands on a seller's time, it's likely your relationships aren't as good as they could be.

Even if you employ relationship selling as your sales approach—where a seller focuses on the personal relationship with a customer rather than the features or cost of the offer—chances are you could be doing more. Just ask the customers: While 36 percent of sellers think they provided an excellent customer experience during the sales process, just 23 percent of customers would say that's true.¹

Why does the state of your relationships matter? Because, put simply, stronger relationships mean more sales. Employing relationship selling to drive a sale

can result in 5 percent higher win rates and lead to 35 percent larger deals.² Sellers who use relationship selling add value by learning about each customer's business needs, providing personalized content and solutions, and building trust for a long-term relationship. Sellers are more successful because they're targeting more strategic deals and building relationships that lead to more sales. Smart relationship selling can also boost revenue by allowing sellers to find more lead pipeline. Relationship selling tools help reps target the right types of accounts.

The Microsoft Relationship Sales solution combines the power of the Microsoft Dynamics 365 customer relationship management (CRM) tool with LinkedIn Sales Navigator and integrates Microsoft Office 365 to give sellers an end-to-end view of sales activities with improved efficiency. Better yet, it empowers sellers to turn relationships into revenue. With Microsoft Relationship Sales, you can find the right leads, view relationship health, shorten sales cycles, and build lasting sales relationships to grow your business.

¹ Topo Research

² Interview with Brian Galicia, director, Microsoft Dynamics

Sales teams that emphasize engagement are

2.3x

more likely to hit their quotas.
That's 43 percent compared to 18 percent.

Does today's customer even want to interact with a sales rep?

Relationship selling provides an answer to the challenge sales reps face as technology becomes more powerful and ubiquitous: Customers' expectations and processes for making purchasing decisions have changed.

Customers have more data and information than ever before. Think of the specialized forums, reviews, thought leadership content, and social media recommendations available to every decision-maker, from the everyday consumer to the enterprise C-suite. In fact, some research finds that customers are 57 percent of the way through the buying process before talking to the supplier. Gartner predicts that by 2020, customers will manage 85 percent of their relationships with the enterprise without ever talking to a human. But when interacting with specific vendors, customers want to talk to a sales rep—67 percent of all customers say sales rep engagement is important to them, and 74 percent of high-value customers consider it important.³ It's not that customers shy

away from engagement with sales reps; they just want it when it adds value for them.

They aren't interested in making time for tone-deaf sales reps who aren't doing a good job of getting to know them and their business needs. Cold calls and emails don't appeal to customers who are looking for personalized options and education. In fact, 90 percent of top decision-makers say they never respond to cold calls. And nearly 40 percent of customers say they dislike being "sold to."⁴

Customers are also used to increasingly simple and interconnected technology in their personal lives. They can buy consumer goods with one click and have access to services on any device they own. They have high expectations for every buying experience. You have to provide both a seamless transaction and useful interaction.

More than ever before, the process is about what the customer wants, not what the seller wants to sell. Sellers have to work smarter to understand their customers' needs and desires, focusing on meaningful interaction, if they want to be successful.

The good news is that while advances in technology have changed the buying process and made sellers rethink the best methods for reaching customers, these innovations can also empower sellers to build lasting relationships and boost engagement with customers.

Only 10 percent of top decision-makers say they respond to cold calls.⁵





Engagement leads to more sales

Still not convinced that improved relationship selling is key to your organization's success? Consider this data: Sales teams that emphasize engagement are more than twice as likely to hit their quotas⁶, and sales reps at high-growth organizations spend 67 percent or more of their day on customer engagement. Reps at low-growth organizations? Just 43 percent.⁷

Realizing the benefits of engagement requires understanding what it really means to today's customers. Engagement isn't just about personal interactions anymore; it requires a seller to map every action to where each individual customer is in the sales journey. This is the new sales engagement model. Customers are looking for the right interaction, at the right time, and relevant to the customer's unique needs. They want relationships.

- 77 percent of customers want a seller to provide personalized content.
- 77 percent want the seller to help them learn something new.
- 76 percent want sellers to build a personal relationship and act as a trusted adviser.
- 75 percent want to be shown how a product or service affects their business specifically.
- 74 percent want a seller to pivot a meeting to discuss the customer's interests.⁸

Successful relationship selling depends on orchestrating data, technology, people, and automation to gain deeper customer insights. In other words, strong sellers know who to contact, what they need, what to say, what to send, and when to do it.

Microsoft Relationship Sales enables deeper customer engagement in this increasingly complex sales environment. Sellers can take action based on insights, build strong relationships, and increase sales performance, all while maximizing productivity.

³ Topo Research, The New Rules of Engagement

⁴ Microsoft Research

⁵ Gartner

⁶ "A New Hybrid Sales Model: Empowering Sellers to Drive Customer Engagement at Scale": Blog post by David Held, October 25, 2017.

⁷ Topo Research: Sales Benchmark Report

⁸ Topo Research, The New Rules of Engagement

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Outdated technology means missed opportunities

Your sales team undoubtedly has tools they already use to build relationships with customers and improve productivity, so how do you know if it's the right time to invest in an upgrade? The most compelling consideration is what opportunities you could be missing to grow your business and revenue.

You know what happens when a company ignores digital transformation and is passed up by innovative competitors. To find examples, look no further than bankruptcy court documents. Think Blockbuster, Kodak, or Borders bookstores. But even if you have relationship selling tools, you're leaving money on the table by not empowering sellers with the latest integrated and intelligent technology. If you rely on outdated and disconnected technology, you are missing out on revenue in two big areas: actionable insights and productivity gains.

Two areas technology can help your business

Actionable insights

Advanced sales tools have sophisticated capabilities to gain intelligent insights from a diverse set of data sources. If you're mostly using technology for inputting data and tracking interactions, you're missing out on huge opportunities. Technology can help you understand your customers' needs better, see what sales tactics are the most successful for your team, identify weaknesses in your processes, and more. Your competition is using data to drive decisions and reach customers where they are situated in the buying journey. Using technology that doesn't add intelligent value is not only keeping you from growing your business, but it could also be putting you behind in the marketplace.

Productivity gains

The simplest—but no less powerful—benefit new technology offers is increased productivity. Research shows that organizations would like their sales reps to be spending 20 percent more time each week directly engaging with customers or prospects. By automating and integrating tasks and business processes, new tools can reduce the time sellers spend on administrative tasks like filling out forms and aggregating data into a central location. This frees up your talent to focus on what they do best: making sales. Relationship selling requires a greater time investment than transactional selling, and increased productivity through technological efficiencies gives sellers the time to research, target the right leads, and build the long-term relationships that will drive success—and revenue.

Best technology attracts best talent

An organization's sales technology also affects the quality of its sales team. And, of course, your talent has a huge impact on the revenue you bring in. When considering whether you can get by with your current set of tools, ask yourself some questions. When do you expect your top sellers to retire? How will you backfill those positions? Or where do you plan to find reps for your growing sales team? Chances are you'll be recruiting out of college or hiring millennials, and these younger sales reps expect the tools for success that they are used to. The most talented candidates are going to choose a company that uses the latest technology, setting them up for personal success now and in the future.

Today's technology can also help sellers reach their full potential and become more productive, improving both revenue and retention. Seamless onboarding and training, access to key success metrics, and guidance on next actions can push your team's success further.

And if you're reinvesting in technology for digital transformation, it makes sense to choose a company that is committing billions of dollars toward assets that work together and drive future success. Microsoft offers the integrated solution and end-to-end innovation that competitors lack.

How can technology help build personal relationships?

When looking at your current tech and exploring offerings that will boost relationship selling, consider the three main types of sales tools and how integrating them could benefit your bottom line.

While most sales organizations use some version of these three tools, having the basics in place isn't enough to grow sales and stay focused. How

a company uses these tools to build long-term relationships with potential customers is key. CRM tools can drive more meaningful interactions with customers, suggest relevant content, and ensure sellers are meeting customers where they are in the sales journey. Productivity tools should free up time to invest in relationships, while making it easy for customers to communicate in the ways they prefer.

Social research should be implemented with a focus on how to approach conversations centered on the customer's background, needs, and priorities. The end goal? Each of these tools should help you build better relationships, in turn growing sales in the long run.

Core management tools sales reps use

CRM

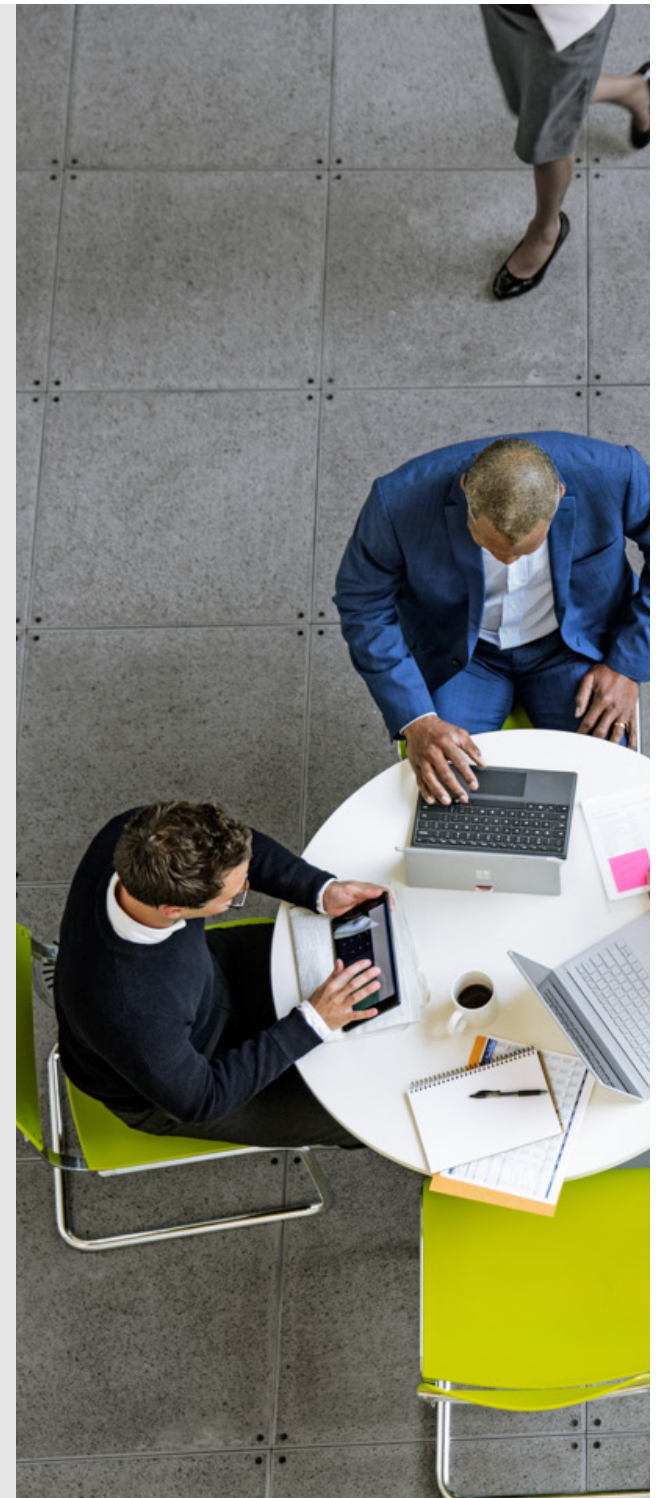
Any sales organization has a system for tracking and managing interactions with prospective customers. Customers may use something as sophisticated as Microsoft Dynamics 365, which automates sales management, or something as simple as a spreadsheet or collaboration tool. But low-tech solutions don't scale as a company grows and can become unmanageable.

Productivity

Collaboration with your sales team members is essential, but it becomes more of a challenge if you and your team members are constantly on the go and don't work in the same office. Office 365 offers tools that enables simultaneous collaboration with your team on RFPs and pitch decks, and deep predictive sales performance analysis, so your team can transform to digital sellers to optimize their sales performance.

Social research

Sellers are using social research tools daily to get a better idea of who they're reaching out to, meeting with, and selling to. Whether it's getting basic insights with something like the free version of LinkedIn or digging deep with a tool as sophisticated as LinkedIn Sales Navigator, sales reps are researching customers online to understand companies' backgrounds and decision-makers. They can discover connections, priorities, and insights on the organization's structure to help move toward a deal.





Drawbacks of disconnected tools

Many companies keep these sales tools separate, maybe because they bought them at different times, thought it would be simpler to consider them individually, or didn't realize they could integrate them. But disconnected tools will cost you time and money. Segregated business apps mean segregated data and processes, which, in turn, create inefficiencies and missed opportunities. Take, for example, collaboration and information-sharing between departments. From an efficiency and overall strategy standpoint, how much easier would it be to have all your tools integrated for everyone to access and share the data they need?

In terms of productivity, sellers' workload increases when they have to enter data into different apps and switch between apps to complete tasks.¹² Research shows that workers lose 40 percent of their productivity when they switch tasks. Sellers also don't have a single view of their relationships when they have to cull data and interactions from different applications. An incomplete picture of customer relationships wastes time and risks an inaccurate understanding of relationship health.

Separate tools also limit the intelligent insights you can glean from data. If your apps aren't integrated, they can't talk to each other. If they can't talk to each other, they're not sharing data and driving valuable

insights for the business. For example, if your CRM doesn't automatically pull customer interactions from email or LinkedIn, it can't tell you which interactions have been most effective in reaching leads or closing sales.

Integrated technology can also mean lower cost, considering the provider's assets and partnerships. Microsoft owns its CRM, LinkedIn, and Office 365, meaning it can offer productivity at a lower price.

Keep 2 main questions in mind

Cost is an important factor when you're looking at specific solutions, but it shouldn't be the only one if you want the implementation to be successful. Microsoft has framed its key metrics around two questions that are useful for evaluating tools you are interested in buying:

Key questions to evaluate a tool

Will they use it?

- Is it easy to deploy?
- Is it easy to adopt?
- How do updates work?
- How does training work?
- What happens if I need more or fewer seats?

Will they love it?

- Is the user experience pleasant and intuitive?
- Does it integrate with tools your sellers already use?
- Does it integrate with tools you want to use?
- Does it make business processes more efficient?
- Does it drive seller success?

How can one vendor meet your selling needs?

Microsoft is the only company that can offer a single integrated solution for relationship selling that combines a CRM and LinkedIn Sales Navigator and powerfully integrates all the Office features you already use and trust. It's called **Microsoft Relationship Sales**. Because Microsoft owns all the components—something no other provider can claim—it can offer a seamless solution that not only improves the user experience, ensuring sellers use and enjoy using the platform, but also provides new opportunities to boost sales through stronger engagement and intelligent insights.

Microsoft Dynamics 365 empowers sellers to invest in long-term relationships and increased engagement with customers by giving them actionable intelligence, automated sales processes, relationship management features, and tools to boost their success.

LinkedIn Sales Navigator provides sophisticated social research to generate lead pipeline, rank lead quality, and build relationships. Microsoft's acquisition of LinkedIn means that it can offer Dynamics 365 and LinkedIn Sales Navigator together at a price no competitor can match.

Office 365 consolidates all your productivity tools into one software experience, taking productivity to the next level by saving your files to the cloud, so you can access your latest documents from any-

where. It also enables simultaneous collaboration within teamwork hubs and uses predictive analytics so you can predict your customers' next moves.

Combining these three platforms brings all your sales data together in one place, unifying the seller experience. A holistic customer view, connected relationship data, and activity tracking provide you with information on every person or company and every interaction. And connected data points drive valuable insights to improve sales, efficiency, and collaboration among departments. No other provider is bringing an end-to-end solution to sellers, from lead to cash.

Microsoft has the essential assets to support digital transformation and is uniquely positioned to help customers transform—its teams already work together to provide an end-to-end scenario for customers, complete with benefits like machine learning and artificial intelligence. Microsoft Relationship Sales can help reps focus on the right prospects, shorten sales cycles, and close bigger deals.

Leading competitors rely on partnerships to provide LinkedIn Sales Navigator, insights, and the capabilities of productivity tools. Microsoft doesn't. Since Dynamics 365, LinkedIn, and Office are all assets of Microsoft, you get one seamless experience. One vendor, one support contract, one solution.



Increase productivity

THE CHALLENGE:

Even the most talented sales reps are only as valuable as the time they actually spend selling. Currently, 67 percent of a rep's time is spent on non-selling activities. Administrative activities and switching between tasks can take away precious hours from their day, leaving little time to build lasting relationships. Reps need an easy-to-use platform that houses the most powerful features available on the market, increasing efficiency, sales, and speed of the sales cycle.

THE SOLUTION:

Microsoft Relationship Sales offers connectivity with all the tools sellers need to grow their business, allowing them to perform tasks in one workflow. Send InMail messages or emails directly from Dynamics 365. View LinkedIn profile data for leads—where they work, what they do, where they went to school—directly in your Outlook inbox, calendar, or contacts, and send LinkedIn invites directly from Outlook, all without leaving your workflow.

With immersive Excel Online integration, users can edit CRM data in Excel. You can also stop alt-tabbing to other applications with the single-pane application provided by Unified Service Desk. Create Office documents such as contracts or letters right from the CRM, and start conference calls with the Skype and Skype for Business integration. You can even use Power BI dashboards in Dynamics 365 to view customer data while working in the CRM, and save valuable time finding relevant content and products to up-sell or cross-sell using intelligent recommendations.

Microsoft Relationship Sales also saves reps time by facilitating lead generation and ranking and prioritizing prospects.

THE ADVANTAGE:

Dynamics 365 can reduce administrative time by 15 to 20 percent, which means each seller would gain an average of 53 minutes each day.⁹ Relationship Sales brings together LinkedIn Sales Navigator and Office 365's familiar tools with Dynamics 365 to make performing tasks simpler and faster. Teams can prioritize what matters most and minimize administrative tasks, with tools that guide sellers to the next best action to take with customers rather than simply offering technology for data entry.



⁹ Relationship Sales

Identify and reach better leads

THE CHALLENGE:

Finding and building relationships with the right leads is key to any seller's success. It's not just a numbers game: You want to sell to people who will actually buy your product. But many sellers struggle with identifying customers who are likely to convert. And that's just half the battle. Once you've found who to target, you have to figure out an effective way to introduce yourself to them so you can start building that foundation of trust. Decision-makers receive cold calls and unsolicited sales pitches frequently, so smart sellers tap into their networks to find a way in. Reps need tools to generate leads, rank them, and make it simple to start the conversation.

THE SOLUTION:

LinkedIn Sales Navigator shows how you're connected to a target lead. It reveals both first-degree connections who know the lead and indirect connections—who work for your company but you don't know personally—who are connected to them. You can reach out to those people and ask for a warm introduction, improving the likelihood of lead engagement.

When you combine LinkedIn Sales Navigator and Dynamics 365, your leads, contacts, and accounts data are synced, allowing you to find and follow leads and accounts in Sales Navigator and receive lead recommendations and insights. The system notifies you when a colleague can introduce you to a customer, when your contact leaves a company, when a prospect has interacted with an email you sent, and more.

Once leads have been identified, Microsoft's Versium Predict feature scores them and calculates a predicted conversion rate so sellers can intelligently prioritize and nurture the prospects that are most likely to be successful. Using predictive models, Predict helps sellers find new leads, identify prospects that match customer profiles you consider successful, and accurately anticipate how customers are likely to behave.

THE ADVANTAGE:

In Dynamics 365, you can see LinkedIn account and customer profiles and get lead recommendations, while viewing people within your company who are connected to your prospect with LinkedIn Sales Navigator.

The Relationship Sales tool can also show you people similar to those you've been targeting to grow your list of prospects. Combining LinkedIn Sales Navigator and Dynamics 365, the Microsoft Relationship Sales solution lets sellers leverage LinkedIn's network of 500 million professionals to find and target high quality leads.



Build strong relationships

THE CHALLENGE:

Relationship selling requires navigating the complex desires of customers and understanding their specific problems. It also involves knowing what information would be useful, and when and how that information would have the most impact. And that has to be done for every customer. It's no wonder sellers struggle to build powerful relationships at scale. Sales reps need tools that provide them with a deep understanding of a customer's business and pain points, guide interactions, and evaluate the strength of each relationship—all at a glance so they can spend time actually investing in those relationships.

THE SOLUTION:

Up-to-the-moment data and insights from the integration of Office 365, LinkedIn Sales Navigator, and Dynamics 365 help sellers strengthen relationships and stay relevant.

The Relationship Assistant provides you with a single view to stay on top of what's important in your pipeline and see actionable intelligence. The Relationship Analytics dashboard analyzes data across apps to provide relationship health scores, so you know if a prospect is at risk or you're close to a sale. LinkedIn, PointDrive, email and other interactions are used for relationship analysis and to determine relationship health scores and recommended actions.

Track when and where your customers open emails to optimize responses, and get recommended templates and times to send emails based on email send performance. Receive recommendations of content to share and smart up-selling and cross-selling suggestions based on your customer's needs and where they are in the buying cycle. By monitoring engagement, you can reach out at the right time for the most impact.

Microsoft Relationship Sales allows sellers to engage at scale by synchronizing relationship data across systems. When you connect Sales Navigator and Dynamics 365, your data is synced between the apps, allowing you to locate and track leads and accounts in either application and get lead suggestions and feedback.

THE ADVANTAGE:

Microsoft Relationship Sales provides sellers with tools to easily keep up with multiple complex relationships and insights to guide next actions. Artificial intelligence and machine learning add unique value by analyzing the health of each relationship based on integrated data sources and providing recommendations to make the most impact.



Manage sales teams

THE CHALLENGE:

If reps are challenged to gauge the health of multiple complex relationships, managers' challenge is multiplied by the need to get a top-level view of these relationships across many sellers. In the past, managers had to rely on a seller's perception of a relationship to evaluate how close a deal was to closing. Unless the manager took the time to study the interactions with a prospect, an inexperienced seller could mistake the health of a relationship and not take necessary actions. Managers are also tasked with ramping new reps quickly and driving consistency among sales processes to achieve measurable results. Managers need a way to get an accurate view of team activity to ensure sellers are reaching their potential and leveraging tools, an onboarding process that's effective and enjoyable, and tools that guide consistent sales process workflows.

THE SOLUTION:

With Integrated Advanced Analytics/Visualization, managers get a clear picture of business functions and performance. You can use Power BI within Office 365 to create rich reports and dashboards across all your Dynamics 365 data, customizing to address your specific needs. Evaluate data and ask questions using natural language, such as "What are the top accounts in the East?" to get the exact information you need.

Drive sales consistency for all opportunities with guided sales process flows. You can establish data and execution coherence across your sales processes and run additional workflows on entry or exit of a stage.

Train new reps quickly and easily with embedded Learning Paths so they can close sales faster. Customizable in-app support services and step-by-step instructions help users learn your company's specific processes. Learning Paths can be adjusted for different users depending on their role in your company; and you can add rich content in the app's sidebar. Make the process and adoption more engaging with gamification for team onboarding and motivation.

THE ADVANTAGE:

Microsoft Relationship Sales automatically captures team activities in Dynamics 365 from integrated business apps and generates customized reports and dashboards to give you the information you need. Guided sales process flows drive consistency across opportunities and executions. And gamification makes it simple to onboard new reps, while also ensuring they have in-app support tailored to your organization.



Drive revenue

THE CHALLENGE:

Increasing profits is top of mind for any sales organization. Closing larger deals faster will always be a central goal for your sales teams, but finding the right strategy and tools to accomplish that feat can be elusive. You also have to set up your company for success tomorrow with next-generation sales planning.

THE SOLUTION:

With Relationship Sales, reps can gain control of end-to-end business processes, from prospect to cash. Boost productivity, lead generation, lead pipeline, and revenue per customer. By focusing on the right targets and activities through data-driven, actionable insights across business apps, sales teams can shorten sales cycles and close more deals.

Microsoft ties its success directly to the success of its customers. As a leader in CRM, productivity, intelligence, analytics, infrastructure, development, and more, the company has made a huge research and development investment across technology and the digital transformation road map, ensuring that it can provide the best integrated solutions for sellers' success today and tomorrow.

THE ADVANTAGE:

Microsoft Relationship Sales' integration of Dynamics 365, Office 365, and LinkedIn Sales Navigator drives revenue by keeping sellers focused on the right opportunities, shortening the sales cycle and leading to larger deals.

Take this example: Using relationship selling with Dynamics 365 and LinkedIn, Infosys was able to achieve 30 percent higher win rates. Thirty-one percent of deals closed were sourced from relationship selling. The company also condensed its sales cycle by three months. In terms of revenue, Infosys saw a year-over-year sales increase of 87 percent and a £\$7.7 million revenue increase each year using customer insights.¹⁰



¹⁰ Relationship Sales

Better together

Relationship selling is the key to driving revenue in today's complex sales environment. Customers expect personalized touch points along their purchasing journey, and sellers need to effectively engage customers at scale. Microsoft Relationship Sales integrates Microsoft Dynamics 365, LinkedIn Sales Navigator, and Office 365 to provide an end-to-end sales solution. Combining data and processes across apps, it adds value that can't be found with the

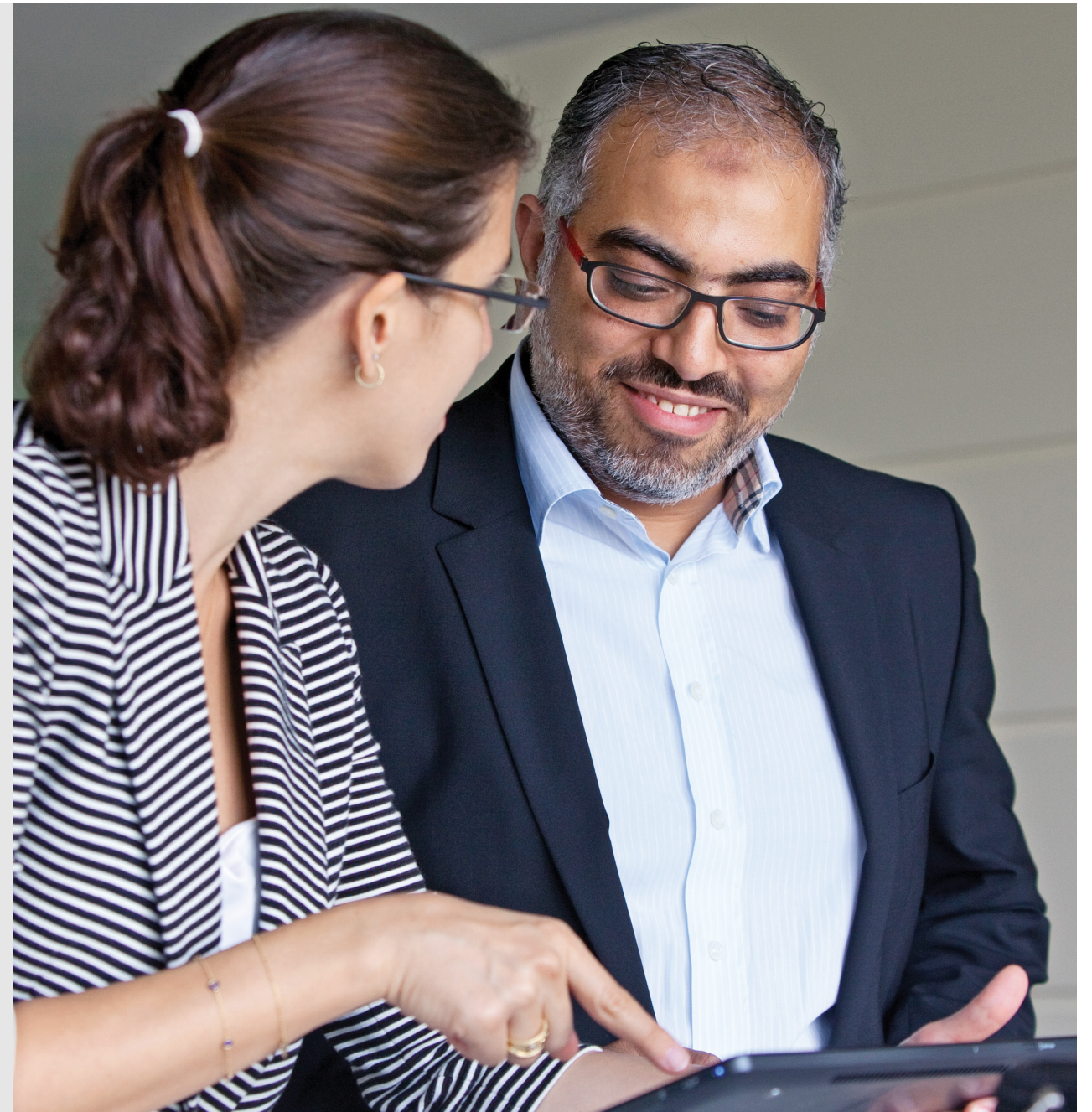
applications individually—or with any other sales force automation tool on the market. Improved productivity, facilitated lead pipeline and relationship building, and intelligent insights drive seller success by focusing sales activities, shortening sales cycles, and growing business.

Find out how to improve your relationship selling by contacting a Relationship Sales expert today.

Ready to watch the Microsoft Relationship Sales solution in action?

[Request a demo](#)

For more information, visit the [Relationship Sales solution website](#).



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