Microsoft Dynamics 365
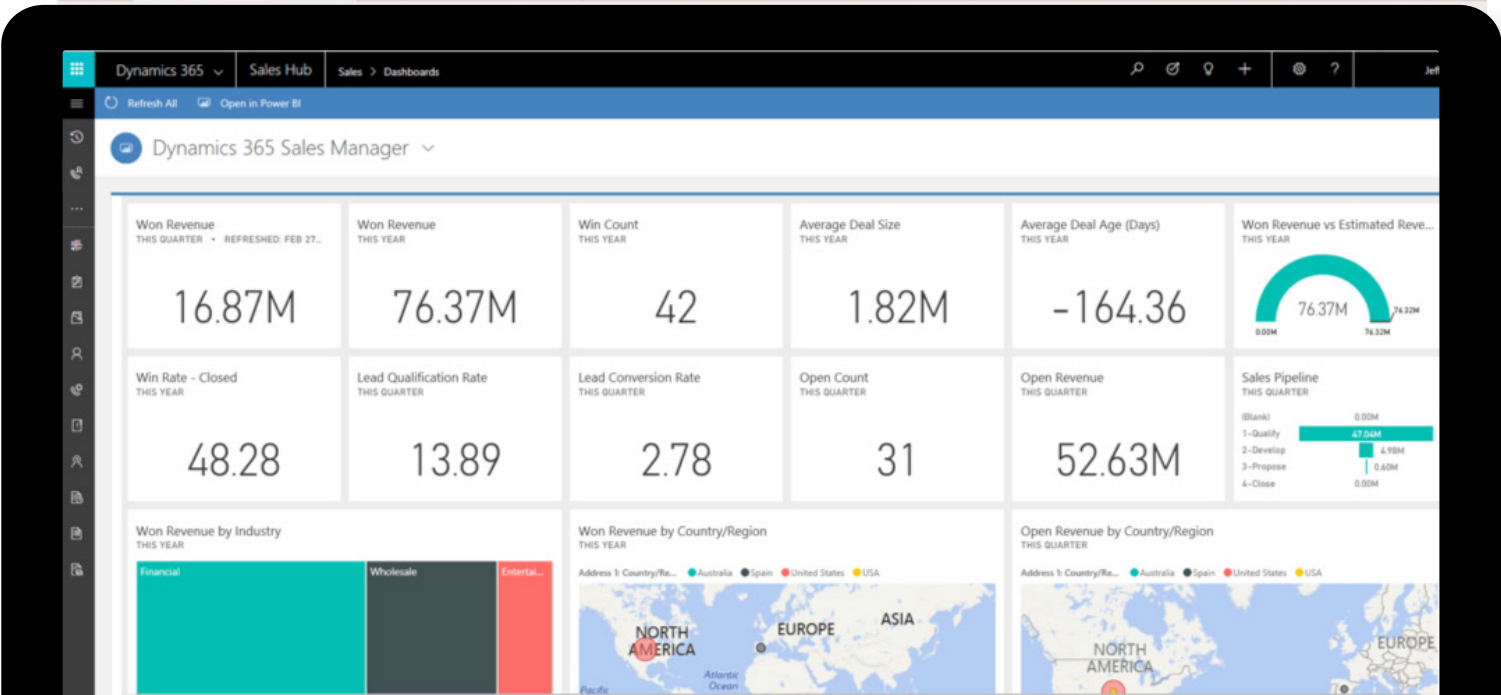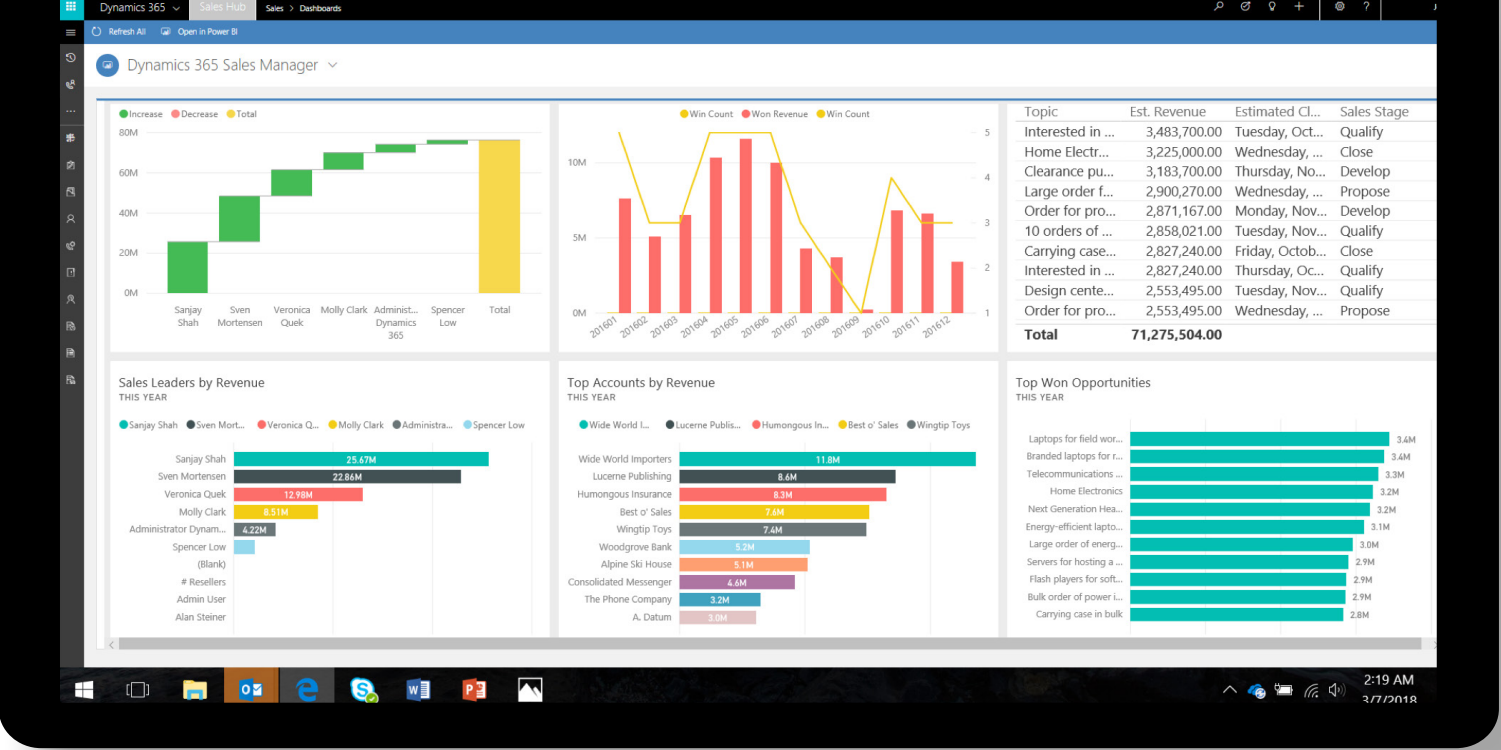
A smarter sales stack

Using Dynamics 365 to drive productivity and efficiency

Sales teams can fall short when asked to simultaneously maintain so many complex interactions. But if IT opts for a sales platform with a familiar look and feel—and built-in productivity and efficiency features—you can drive stronger success for your organization.

IT can drive operational efficiency with Microsoft Relationship Sales solution

The relationship between buyers and sellers grows more complicated each day. Every potential partnership requires finding the right buyer, fully understanding their business, tracking progress through the buying cycle, and engaging them with the right content—when and how they want it. Faced with having to replicate this to meet increasingly divergent buyer needs, most sellers know relationship selling—the art of converting leads through the building of long-term relationships between buyer and seller—is a complex discipline.

Buyers can sense that complexity. While 36 percent of sellers think they provide an excellent buyer experience during the sales process, just 23 percent of buyers would say that's true.[1] As technology becomes more powerful and ubiquitous, the way buyers make purchasing decisions continues to evolve. Sales teams must urgently employ the right tools to keep pace.

A major component of what makes a modern tool functional is how efficient it can be. The average rep's productivity drops by 40 percent when they have to switch tasks. Almost two-thirds of a seller's time is spent on non-selling activities. Clearly, their time is at a premium. The objective, then, is to find tools that can maximize their time seamlessly.

This combination of effectiveness and efficiency is precisely what the Microsoft Relationship Sales solution is designed to provide. Combining the power of the Microsoft Dynamics 365 for Sales application with LinkedIn Sales Navigator, the Relationship Sales solution also integrates with Microsoft Office 365 to provide an end-to-end view of sales activities and relationship data—all from a central provider with a variety of deployment solutions.

Nucleus Research shows that sellers utilizing the Relationship Sales Solution can boost their productivity by up to 15 percent—providing your company with a quick return on investment.[3] That equates out to roughly 53 minutes of time gained per day, per seller. It's not just a dream scenario. Microsoft can make it a reality.

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-sized businesses to large multinational enterprises. Results will vary based on your CRM strategy and deployment.

1 TOPO research
2 TOPO research, The New Rules of Engagement
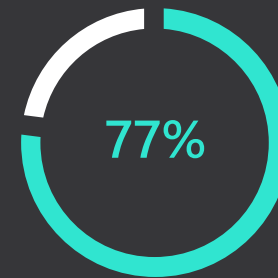3 Nucleus Research report: Microsoft Lays Out LinkedIn CRM Strategy

Microsoft Dynamics 365

LinkedIn Sales Navigator

Microsoft Office 365
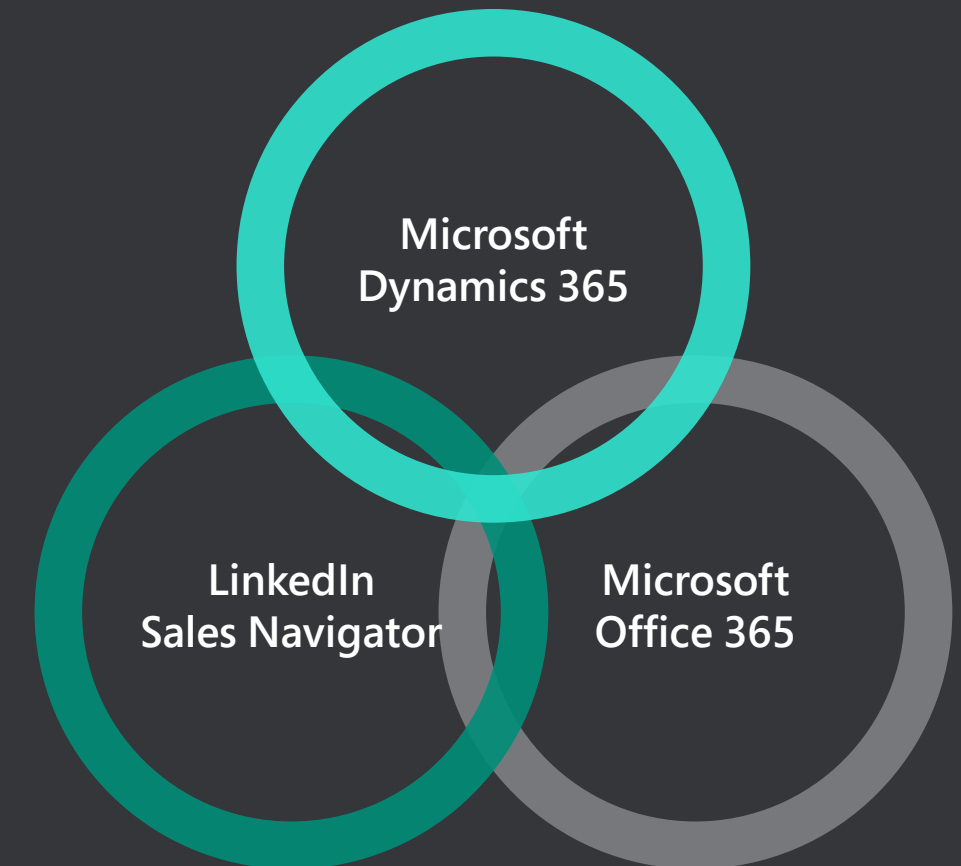
Consider this data that shows the power of relationship selling:

2x

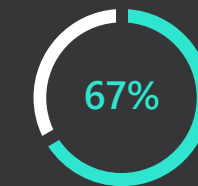Sales teams that emphasize engagement are more than twice as likely to hit their quotas[4]

77%

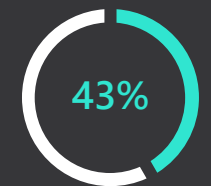of customers want sellers to teach them something new[6]

Just **23%**
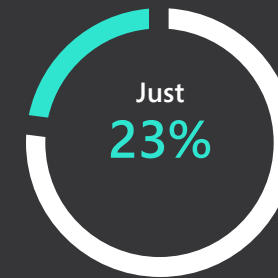
of customers say that sellers provided an excellent experience[3]

Percentage of sellers spend their day on customer engagement

67%

or more at high-growth organizations

43%

at low-growth organizations[5]

76%
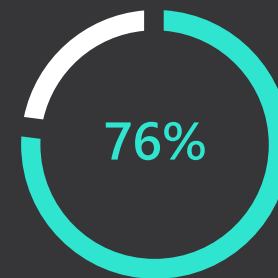
of customers want sellers to build a relationship as a trusted adviser[6]

77%
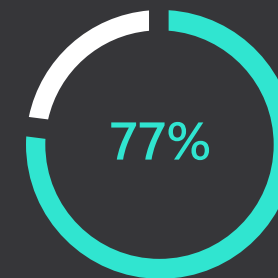
of customers want personalized sales content[6]

75%
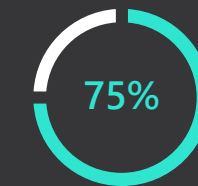
of customers want to see how a product affects their business specifically[6]

74%
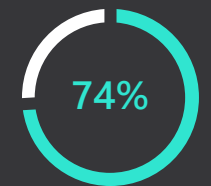
of customers want their interest to be a seller's focus[6]

3 *TOPO research*
4 *"A New Hybrid Sales Model: Empowering Sellers to Drive Customer Engagement at Scale": Blog post by David Held, October 25, 2017.*
5 *TOPO research: Sales Benchmark Report; Senior Product Manager, Microsoft*
6 *TOPO research, The New Rules of Engagement*

How can sellers build personal relationships through technology?

Rapidly evolving innovations can drive revenue for companies by unifying a sales team's three most valuable tools: CRM, productivity applications, and social networks. While most organizations have these basic capabilities in place, keeping them separate reduces the efficiency of which sellers can build meaningful relationships.

CRM tools can drive more meaningful interactions with buyers, suggest relevant content, and ensure sellers are meeting buyers at any point in the sales journey.

Productivity tools should free up time to invest in relationships and make it easy for buyers to communicate and provide feedback.

Social networks should surface insights to enable buyer conversations based on what matters most to them. The end goal? Each tool should help sellers build better relationships, boost overall sales, and **drive revenue for the company**.

Core tools for sales reps

CRM

Most sales organizations have systems for tracking and managing interactions with potential buyers. Some simply rely on spreadsheets or collaboration platforms. But low-tech solutions that don't scale risk putting them at a competitive disadvantage.

Our solution: Microsoft Dynamics 365 automates key sales features, ensuring reps have more time to tailor their approach for each unique buyer relationship.

Productivity

Collaboration with a sales team is essential, but becomes more of a challenge if internal teams are constantly on the go and don't work from one location.

Our solution: Office 365 offers tools that enable simultaneous collaboration with your team across multiple scenarios including RFPs and pitch decks in SharePoint, seamless Outlook integration, exporting to Excel, or group chats via Microsoft Teams. These are critical for decentralized sales efforts.

Social networks

Smart sellers increasingly rely on social media tools to understand more about their target buyers. Discovering buyer connections and organizational nuances can often prove decisive in propelling deals forward.

Our solution: LinkedIn Sales Navigator tool can help reps better identify target companies and their decision makers—all from within Microsoft Dynamics 365.

The problem with 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 be integrated.

But siloed tools cost time and money. Disconnected business apps mean additional vendors to manage, numerous licenses to account for, and higher costs across a less efficient buy. Most importantly, disparate vendors means different data centers and, potentially, inflexible cloud vs. on-premise solutions. Unifying sales apps through one provider offers a far more seamless experience for internal IT teams.

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 a customer relationship risks an inaccurate understanding of that relationship's health. For example, if a CRM doesn't automatically pull customer engagement history from email or LinkedIn, it can't tell which interactions have been most effective in reaching leads or closing sales.

When considering integrated sales tools, focus on these three tangible benefits:

Better opportunity targeting

Cutting through a crowded marketplace to find qualified buyers can be complicated. Modern sales tool should enable sellers to efficiently hone in on the right contacts-and source networks from them-to build the most efficient sales process possible.

The Microsoft Relationship Sales solution uses predictive lead scoring, via artificial intelligence, to help sellers find and nurture the right leads. It also gives deep insight into a contact's social network, helping teams to identify additional stakeholders and coordinate a sales strategy across a target organization.

Actionable insights

Advanced sales tools have sophisticated capabilities to pull insights from a diverse set of data sources. Integrated technology helps sellers understand their buyers' needs better, provide relevant content recommendations, and identify at-risk relationships.

The Microsoft Relationship Sales solution uses AI to analyze data from sales, Office 365, LinkedIn, and information gleaned from CRM to provide a single relationship health score. Sellers also receive content recommendations built from a target's social behaviors or press mentions, which takes the guess work out of choosing topics for the next interaction.

Engaging at scale

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, managers can reduce the time sellers spend on administrative tasks like filling out forms and aggregating data into a central location.

The Microsoft Relationship Sales solution's flexible and configurable interface seamlessly links up small tasks to recognize significant gains. Accessing Sales Navigator information through Dynamics 365, for example, prevents sellers from having to flip back and forth between platforms for routine work.

The smarter solution: Microsoft Relationship Sales

The combination of Dynamics 365 for Sales, LinkedIn Sales Navigator, and Office 365 provides the kind of capability integration that can change the way your sales team does business—making disconnected tools a problem of the past.

- **Microsoft Dynamics 365** the collaborative relationship management tools that help sellers increase revenue, stay focused in a fast-paced environment, and close deals faster—all while reducing acquisition costs.

- **LinkedIn Sales Navigator** streamlines access to millions of potential buyers, offering both profile and behavioral information that can help sellers identify and connect with high-value targets at scale.

- **Microsoft Office 365** consolidates all of a seller's productivity tools into one software experience by combining the email and calendar functionality of Microsoft Outlook with the versatility of Excel, Word, and PowerPoint.

For more details on Dynamics 365, read the latest release notes.

Learn more

Capabilities:

- Administrators can easily control permissions, policies, and features through online administration and management consoles

- Combine and analyze data streams from all three tools using AI and machine learning

- Easily access and edit Microsoft Office 365 documents—including Excel pivot tables—from within Dynamics 365

- In the Outlook email pane, view suggestions for discussion topics based on recipient's social activity

- Map the buying community and uncover new relationship opportunities by sourcing LinkedIn connections within Dynamics 365

- Maintain key processes from all three tools in one platform, eliminating the need to switch tasks and dashboards

- Dynamics 365 includes powerful security controls for physical datacenters, network connectivity, and user access

Microsoft Dynamics 365

LinkedIn Sales Navigator

Microsoft Office 365

Benefits:

- Dynamics 365 helps enable GDPR compliance with features including Compliance Manager

- Configurable service to meet geo-specific security and compliance regulations

- Generate relationship health scores and predictive lead scoring to help sellers focus on the best opportunities

- Start smarter, more relevant conversations by reaching out to new and existing leads with customized content sourced from target's behavior

- Decrease onboarding time and maximize use adoption with contextual, in-platform help options

- Boost day-to-day productivity for sellers by streamlining their crucial tasks into one interface

- Increase win rates by following data-based recommended actions, like when to send an email to make sure it's been seen and opened

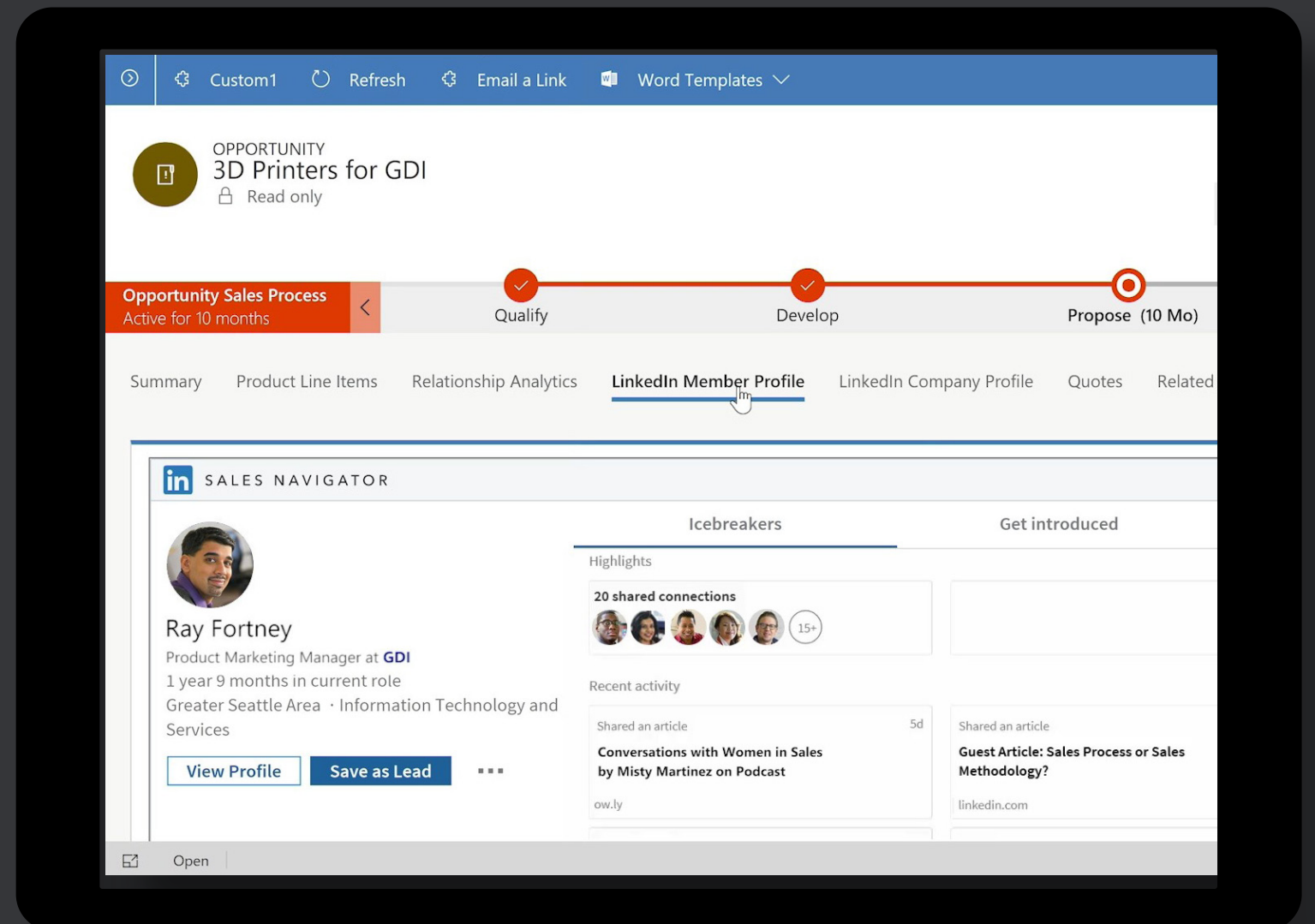# How Microsoft Relationship Sales can meet all your selling needs

What's uniquely powerful about the combination of these three tools is the **unification of data**. Sellers can now access critical data points from disparate platforms in a central location—and, more importantly, obtain crucial insights extrapolated from aggregated data. Sellers and managers can assess pipeline health and lead scoring compiled by AI processes, resulting in sales team productivity boosts of up to 15 percent.[8]

Such gains come from a platform-wide integration of data. Key LinkedIn Sales Navigator information isn't simply housed in a widget within Dynamics 365—it's utilized throughout the platform to provide relevant and contextual analysis on a buyer's behavior. This data stretches beyond just accounts and contacts; it reaches into recommended seller actions, including when to move toward a potential closed deal.

But the Relationship Sales solution can also deploy based on a company's existing stack, including cloud, on-premises, or hybrid options. No matter the need, Microsoft has the essential assets to engineer digital transformation—its teams already work together to provide a total-package scenario for sales organizations. And it does so without traditional CRM enforcements like metered usage, paywalls, or multitenant governors.

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 Microsoft assets, you get one seamless experience. One vendor, one support contract, one integrated solution.

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8 *Nucleus Research: Microsoft Lays Out LinkedIn CRM Strategy, July 2017*

Microsoft's Relationship Sales tool provides a comprehensive environment for sellers to contact, nurture, and close leads—all from within a central platform. Here's how it works:

1

Step 1: Identification

While checking the progress of several key client relationships in Microsoft Dynamics 365, a sales rep realizes that, according to integrated Sales Navigator data, they all share a common connection—who just so happens to be a decision maker at a high-value company.

2

Step 2: Contact

Still within the Microsoft Dynamics 365 platform, the sales rep uses Sales Navigator to assess the new lead's recent social activity. Equipped with content ideas based on the lead's recently shared articles, the rep sends a LinkedIn note introducing themselves while tying in the suggested topics. The initial contact is logged in to the CRM.

3

Step 3: Dialogue

Intrigued by the rep's timely and tailored message, the initial lead responds to the rep via email the next day. Microsoft Dynamics 365 automatically alerts the rep that they have received an email through its Microsoft Office 365 integration. With the conversation officially underway, the rep uses Sales Navigator profile suggestions to include other key company contacts into the dialogue.

6

Step 6: Monitor

The sale has officially been made, but the company relationship is still growing. The rep turns to the integrated Power BI dashboard for team-wide data revealing products most likely to cross-sell along with recommendations of how long to wait before making a second approach. The rep marks dates to remember in their Outlook calendar so as not to miss the next opportunity.

5

Step 5: Close

With the sales opportunity now primed for conversion, the rep customizes a templated contract in the CRM through the Microsoft Office 365/Microsoft Dynamics 365 integration. The sales manager opens a pivot table in an immersive Excel experience from within Dynamics 365 to evaluate the latest team numbers, and then approves the proposal for sending. The rep follows up and the buyer seals the deal with a series of digital signature.

4

Step 4: Nurture

Now engaged with several of the company's key stakeholders, the rep keeps a close eye on the overall bond through Dynamics 365's AI-generated relationship health score. Using predictive analytics, the Dynamics tool suggests the relationship is ready for a more formal sales push. Our rep conducts a Skype call with the primary decision makers directly from the platform to talk next steps.

Increase seller productivity

The challenge:

Even the most talented sales reps are only as valuable as the time they spend selling. But as much as 67 percent of a rep's time is spent on non-selling activities. Too much time doing administrative chores and switching between tasks risks leaving reps with zero time to build lasting relationships. They need a platform capable of automating unnecessary tedium out of the workday while delivering integrated tools, innovation, and efficiencies across the sales cycle.

The solution:

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] With tools that guide sellers to the next best action to take with buyers, rather than simply offering data-entry technology, teams can prioritize what matters most and minimize administrative tasks.

The advantage:

- Sellers can send InMail messages or emails directly from Dynamics 365, as well as view LinkedIn profile data for leads—where they work, what they do, where they went to school—directly in the Outlook inbox. LinkedIn invites can be sent directly from Outlook, all without leaving the workflow.

- With immersive Excel Online integration, users can edit CRM data in Excel. Reps can also stop alt-tabbing to other applications with the single-pane application provided by unified service desk.

- Sales reps can create contracts or RFPs right in the CRM and start conference calls with the Skype for Business integration. Sellers can even use Power BI dashboards in Dynamics 365 to view buyer data in the CRM, saving valuable time finding relevant content and products to upsell or cross-sell.

- The AI for Sales app easily connects data with prebuilt connectors, giving you valuable insights immediately.

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-sized businesses to large multinational enterprises. Results will vary based on your CRM strategy and deployment.

9 *Microsoft Research*
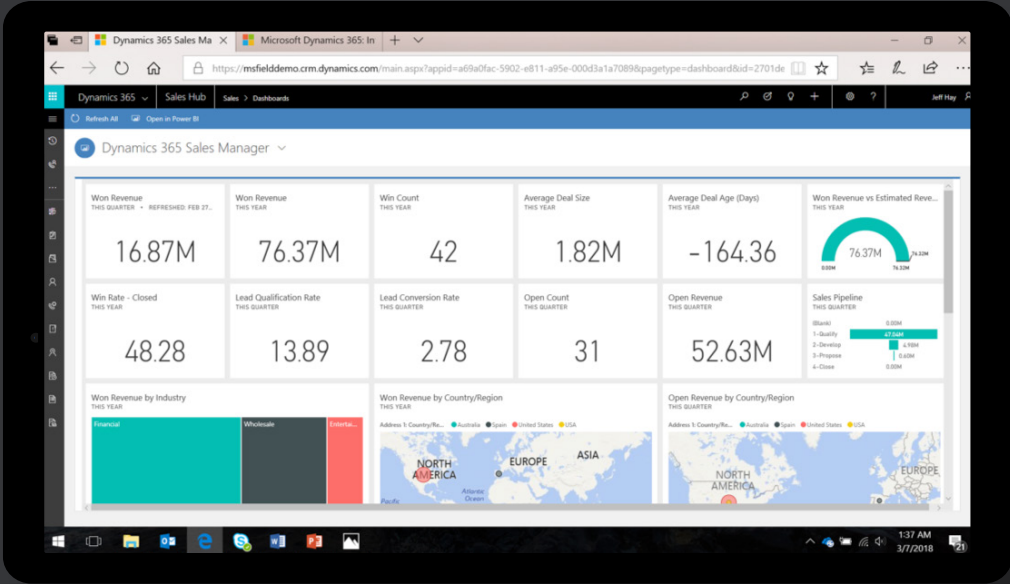
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15%-20%

which means each seller would gain an average of 53 minutes each day.[9]

# Manage sales teams

The challenge:

If reps are challenged to gauge the health of multiple complex relationships, a manager's challenge is multiplied by the need to get a top-level view of those relationships across many sellers. Managers need a way to get an accurate view of team activity to ensure sellers are reaching their potential, craft an effective onboarding process, provide tools that guide consistent sales process workflows, and—most importantly—help sellers reach their potential.

The solution:

The Microsoft Relationship Sales solution automatically captures team activities in Dynamics 365 from integrated business apps and generates customized reports and dashboards to give leaders the information they need. Guided sales process flows drive consistency across opportunities and executions, while lessening the need for daily hands-on IT management.

The advantage:

- With integrated advanced analytics/visualization, managers get a clear picture of business functions and performance.

- Managers can use PowerBI within Office365 to create sales forecast reports, understand sales trends, build performance dashboards, and track sales pipelines in real time across all Dynamics 365 data. They can easily customize regular reports, saving the time it would take an IT team to engineer a more bespoke solution.

- Reps can establish a consistent approach to opportunities with guided sales process flows. Sellers can solidify data and execution coherence across their sales processes and run additional workflows on entry or exit of a stage.

- New sales reps can train 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 Path can also be adjusted for different users depending on their role in your company. Managers can add rich content in the app's sidebar, or make the team onboarding process more engaging with gameification.
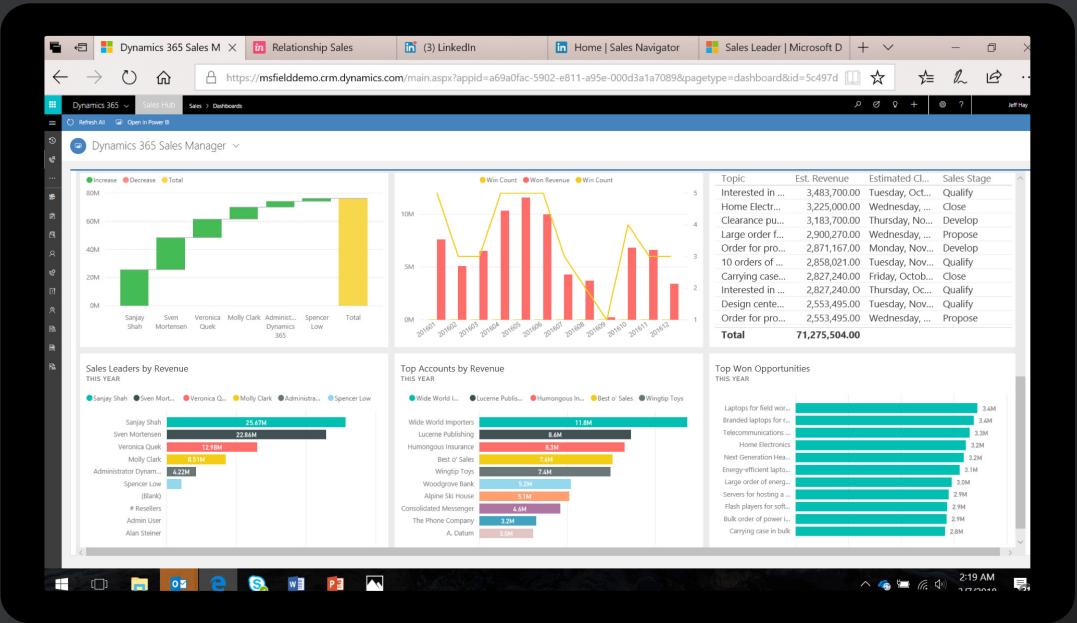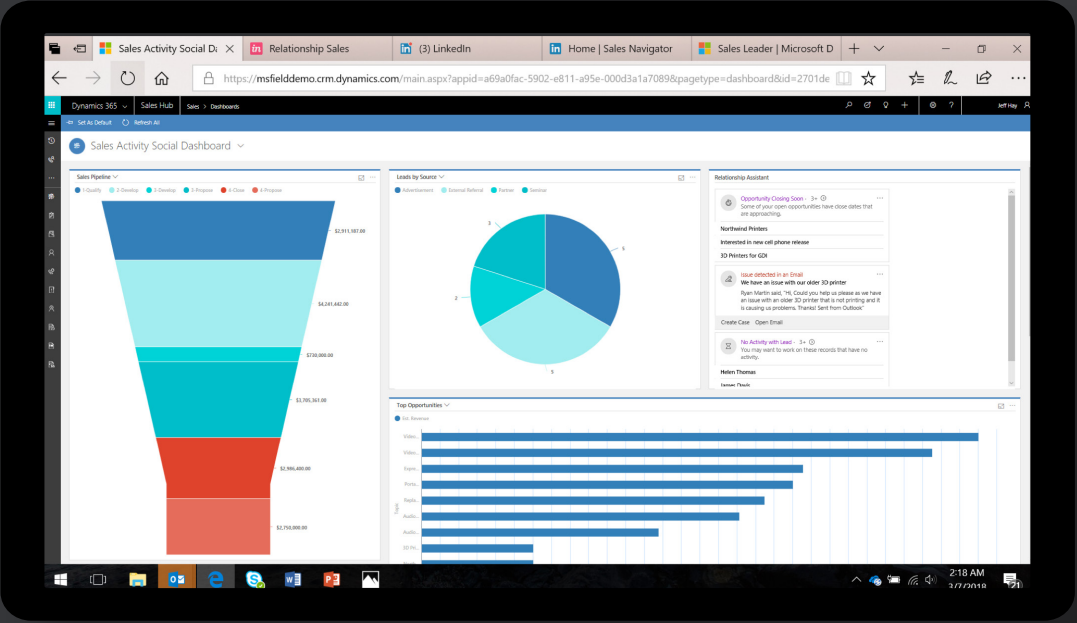
Identify and reach better leads

The challenge:

Finding and building relationships with the right leads is key to a seller's success. It's not just a numbers game: Sellers want to sell to people who will actually buy their product. But many sellers struggle with identifying buyers who are likely to convert, so they need easily-managed tools to generate leads and start conversations.

The solution:

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

The Relationship Sales solution can also provide reps with pro les that match their target scenarios. Combining LinkedIn Sales Navigator and Dynamics 365 lets sellers leverage LinkedIn's network of 575+ million professionals to find and target high quality leads by leaning into modern technologies (like AI and machine learning) at a fraction of the standard market cost.
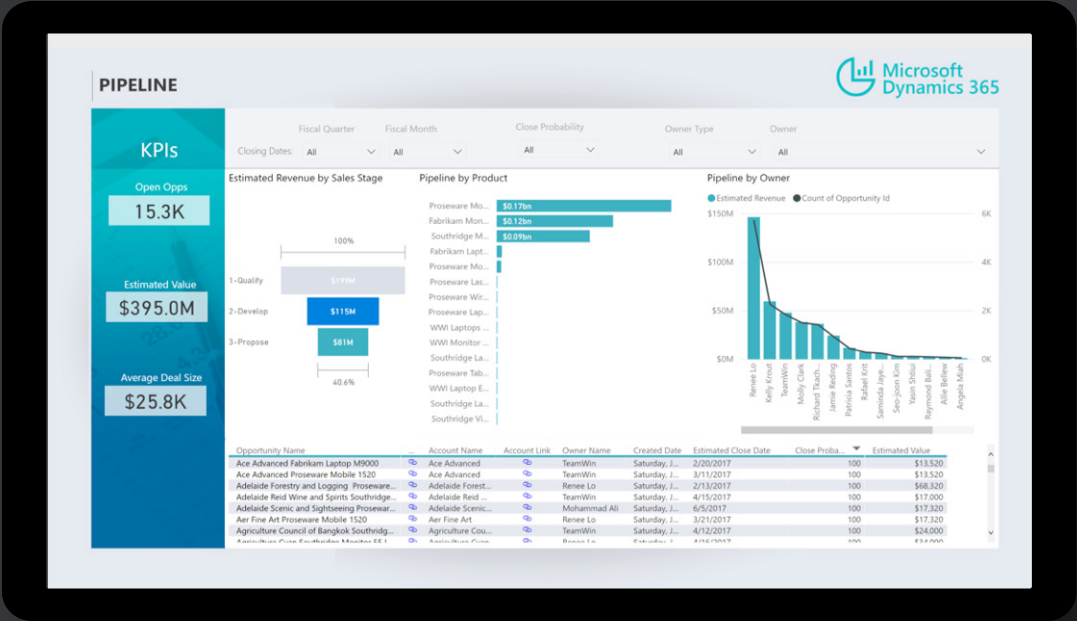
The advantage:

- The joint power of LinkedIn Sales Navigator and Dynamics 365 gives sellers actionable content recommendations based off a target's social media behavior, ensuring reps can reach them with smart, relevant content.

- When reps combine LinkedIn Sales Navigator and Dynamics 365, their leads, contacts, and accounts data are synchronized, allowing them to discover and follow leads and accounts in Sales Navigator and receive lead recommendations and insights. The system notifies them when a colleague can introduce them to a buyer, when your contact leaves a company, or when a prospect has interacted with an email they sent.

- Microsoft's Versium Predict feature scores identified leads 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, the Predict feature helps sellers find new leads, identify prospects that match buyer profiles, and anticipate how buyers are likely to respond.

The Infosys story:

Take this example: By enabling 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]

Infosys saw a year-over-year sales increase of

87%

10 Customer Stories *https://customers.microsoft.com/en-us/story/infosys-it-manufacturing-dynamics-365*

Build stronger relationships

The challenge:

Relationship selling requires navigating the complex desires of buyers. It also involves knowing what information would be useful, and when and how that information would have the most impact. Sales reps need tools that provide them with a deep understanding of a buyer's business and pain points, guide interactions, and evaluate the strength of each relationship—without relying on a complicated and expensive tech stack.

The solution:

The Microsoft Relationship Sales solution 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.

The advantage:

- 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 them with a single view to stay on top of what's important and see actionable intelligence.

- AI for Sales analyzes data across multiple apps to provide relationship health scores, so sellers know if a prospect is at risk or close to a sale. The app analyzes LinkedIn, social networks, customer sentiment, email and more to recommend next-best actions giving sellers the opportunity for smarter selling.

- Reps can track when and where buyers open emails to optimize responses, get recommended templates, and suggest the best times to send emails based on performance. Receive recommendations of content to share along with smart upselling and cross-selling opportunities, based on a buyer's needs and where they are in the buying cycle.

- The Microsoft Relationship Sales solution allows sellers to engage at scale by synchronizing relationship data across systems. When you connect Sales Navigator and Dynamics 365, sales data is synchronized between the apps, allowing reps to locate and track leads and accounts in either application. Offline solutions allow for on-the-go selling.
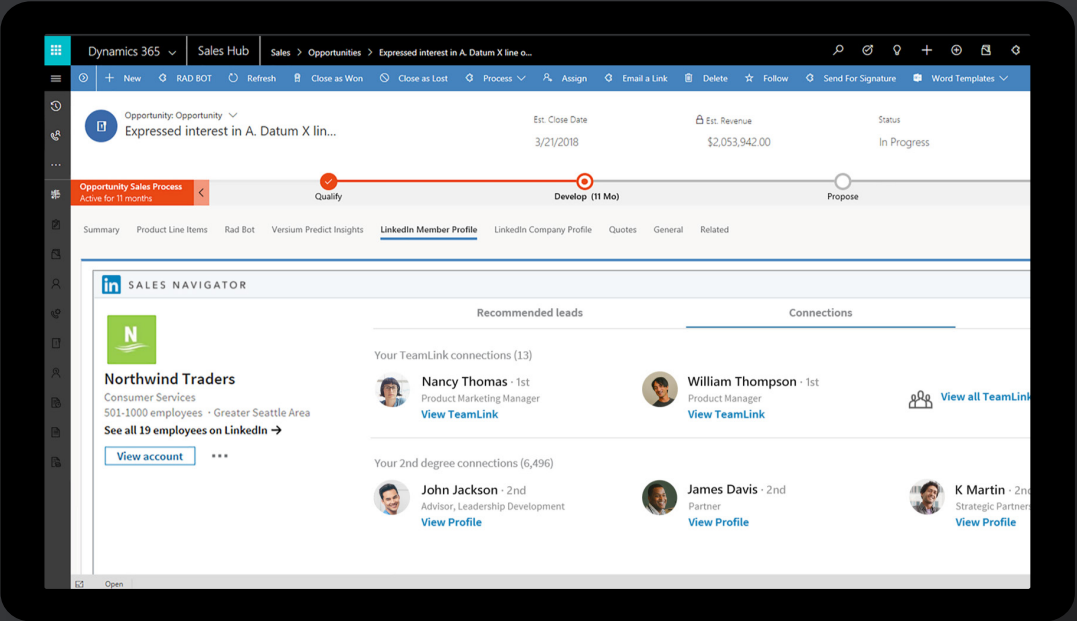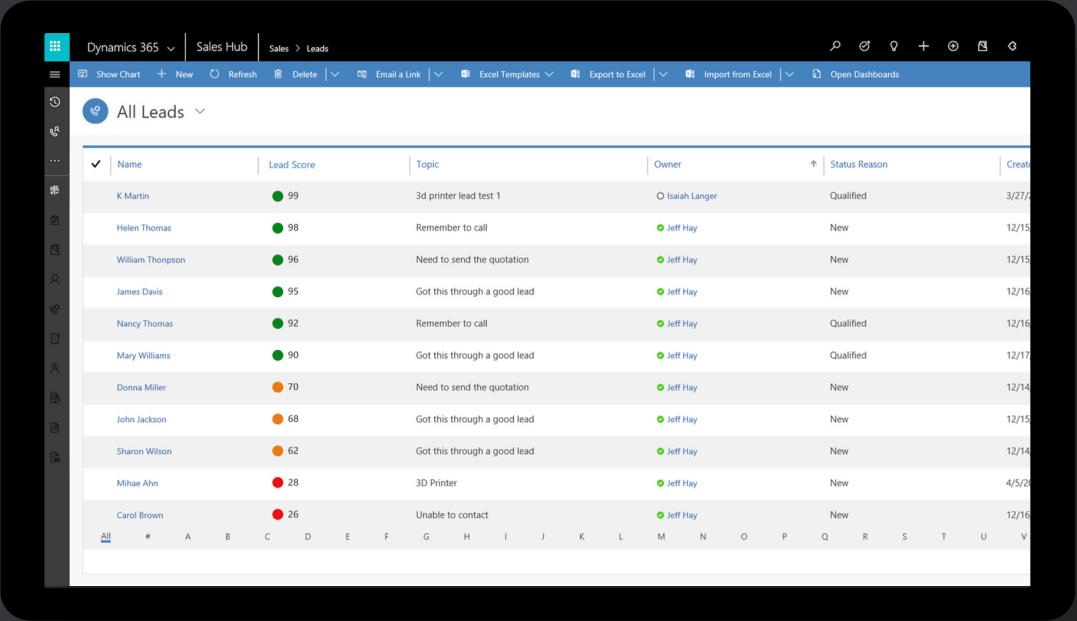
Better together

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 do just that.

Combining data and processes across apps 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, tighter relationship building, and more effective sales management 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 at https://www.microsoft.com/relationship-sales.