



HOW MICROSOFT DYNAMICS CRM TRANSFORMS THE WAY YOU SELL

Today's sales leaders and sales teams are dealing with a highly connected and empowered generation of customers who are by nature, dynamic. Microsoft Dynamics CRM is one of the best tools in the market that allows sales professionals to gain mastery over the new and changed paradigms.

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Intro”

For any sales organization to taste success, they need to continuously outdo their competitors by leveraging their sales tactics from time to time. Today's sales leaders and sales teams are dealing with a highly connected and empowered generation of customers. The way you engage with your customers is undergoing a drastic shift every moment. Rather than just adapting the sales tactics, you need to have a robust Customer Relationship Management platform as it lays the strong foundation for a growing business organization.

Microsoft Dynamics CRM leverages the latest cutting edge technology, enabling enterprises to improve internal processes and productivity, and thereby sell better. Dynamics CRM helps you sell effectively with the changing era. From providing useful and essential guidance, insights and tools for the sales people, Dynamics CRM for sales also allows you to target the right customers, understand their preferences and priorities, conquer faster by collaborating with colleagues, and establish a trusted relationship with customers through personalized and pertinent engagements.

Sales and Marketing:

The changing roles and nature

The dynamic sales nature

The conventional sales process invariably started with a cold call, and progressed as the customer responded, with the marketer guiding the prospect through each stage of the marketing lifecycle, culminating in a purchase. Such a marketing model is obsolete today, considering that a telesales representative, who makes the initial cold call, has **less than 9% chance** of getting a prospect on the phone in the first place, leave alone trying to convince them, to show interest. In the age of spam filters, a cold email message has less than 1% response rate. Other web and social-based cold selling initiatives are not much successful either.

With the World Wide Web demolishing information barriers, customers are empowered, and find it very easy and convenient, to do their own research, without having to take the pains of contacting a marketer, and relying on his or her words for it. Customers can easily access information they require, regarding various choices, alternatives and options online, and make an informed buying decision on their own.

Prospects now contact marketers or the sales team after they have more or less made up their mind. A **recent CEB study** estimates customers are 57% of the way through the marketing lifecycle process before they initiate contact with the product supplier.

The changing role of marketers

In the past, marketers launched “trial balloons” or cold calls, and gathered as many contacts to their net, before working on them. Through a process of elimination, they used to engage with the promising prospects. Today, customers do the research themselves, but markets cannot afford to sit simply, and wait for the customer to eventually call.

In the changed state of affairs, marketers and sales teams need to remain on top of their game, establishing credibility in the social and other space where prospective buyers lurk, and also remain constantly updated, so that they can engage with prospects on an informed basis, once they eventually initiate contact.

In the new era of empowered customers, marketers need to:

1. Establish a credible social presence
2. Be quick and agile, with improved productivity
3. Invest in collaboration, and always remain connected with their team members
4. Have a 360 degree view of prospective customers
5. Deal with customers on a highly personalized basis
6. Get access to hidden insights of strategic value
7. Be fully prepared with the latest information on the products, and wider markets
8. Always have access to latest information
9. Ensure access to latest information in real time, on mobile devices

As a new age tool, Microsoft Dynamics CRM makes things very easy for marketers to achieve such competencies.

Establish a credible Social Presence

Today's customers have moved away from taking the marketer's word for it, and rely on the social media in a big way, to search and research products. Marketers who can establish a credible presence in social media can reap rich rewards. A case in point relates to the stats connected with cold calling. Cold email generates less than 1% response rate, whereas an InMail sent from LinkedIn, to a second-degree connection, generates a 67% response rate. The credibility of the channel is the key factor for this huge difference.

Marketers need to leverage and implement their presence in social and other new technologies in the right way, to gain the desired competitive advantage. For maximum effectiveness, the company's social tools have to be integrated with sales, marketing, and customer care processes. Microsoft Dynamics makes this possible, and also ensures such integrations are seamless. For instance, the marketer may create a new social media post, and the Microsoft Dynamics CRM may keep track of the social users, who like the post, and generate a targeted email to such prospects.

Improving Productivity with MS Dynamics CRM

Microsoft Dynamics CRM automates key processes, which boosts productivity and efficiency to no small extent. The suite identifies signals on social media and other key checkpoints, helping marketers identify more leads. It also leverages Microsoft Social Engagement to offer marketers a snapshot of key social parameters, such as embedded buzz volume, trends, and sentiment analysis.

Microsoft Social Engagement feature:

Microsoft Social Engagement brings social media data directly to the CRM dashboards. It aggregates data from Facebook, Twitter, and other social media websites, and incorporates it in graphs and charts, providing visibility to emerging trends. For instance, the data helps to ascertain whether the people's comments on a trending topic regarding the brand is positive, negative, or neutral. Drilling down the data sheds light on the specifics, such as the users mentioning the brand, the exact comment, and more insights.

CRM users may opt for Social Insights controls to specify the type and nature of social data to view, and also customize the format. Microsoft Social Engagement is free for Microsoft Dynamics CRM online customers with a minimum of 10 professional users, or enterprise subscription users, with no minimum user requirement.

Other productivity enhancement tools in Dynamics

Microsoft Dynamics CRM also offers a host of other productivity enhancement tools.

Microsoft SharePoint works directly within Microsoft Dynamics CRM, allowing any team member working on a presentation, proposal, and other sales documents to utilize the powerful check-in, check-out, and version control capabilities. Sales professionals can do everything without the need for leaving the CRM application.

Sales executives may access prospect customer data directly within the Microsoft Outlook messaging and collaboration client, allowing them to focus more on selling than hunting for information. Email messages from prospects may be converted into opportunities automatically, and fed into the sales pipeline. The **new Microsoft Dynamics CRM App** for Outlook delivers a lightweight email tracking app, which pulls in contextual information from Microsoft Dynamics CRM inside the Outlook Inbox.

The system tracks every communication automatically. For instance, when a customer places an order, the Microsoft Dynamics CRM suite automatically schedules follow-up meetings, and keeps the team members updated.

The suite also offers Office 365 and mobile apps for all platforms. Office365 makes reading and generating documents on-the-go very easy. Mobile apps, apart from providing contextual news, social data, and task flows, make it very easy to complete frequent activities. It becomes possible to create records, schedule meetings, set reminders, and seek information using intuitive natural language voice commands, allowing today's busy executives to work seamlessly, when on the move.

The **latest version of Microsoft Dynamics CRM** offers preformatted Word and Excel templates to speed up document creation. A template uploaded by a system admin can be shared among team members, and used to create standard documents, such as sales forecasting, cash flow analysis, or more.

Advantages of owning MS Dynamics CRM

Improve Collaboration

Microsoft Dynamics CRM allows team members to stay connected using tools such as activity feeds. These tools offer instant notifications and allow sharing relevant information seamlessly. Conversations are organized to surface in the context of the contacts, accounts, and other records, rather than as general clutter.

Microsoft Dynamics CRM also embeds Skype for Business capabilities, allowing users to see presence icons and initiate an interaction with just one click.

The proof of the pudding is in the eating. ISS Belgium, hitherto hampered by “friendly fire activities, such as managers working at cross purposes as no one was aware what others were doing, could **reduce such incidents by 90%**, and improve conversions by 6%, after implementing Microsoft Dynamics CRM.

Get a 360 Degree View of the Customer

Marketers can ill-afford to stop targeting profiles, just because prospects are doing the research themselves, and do not respond to their cold calls. Marketers need to keep trying in other ways, and they rather need to gain even deeper insights into the customer, to engage with prospects the right way, according to their preferences, when they eventually come. With customers having choice, opportunity rarely knocks twice. If the marketer is not equipped or prepared to engage with prospects on the latter's terms, they would soon go elsewhere.

Integration with Microsoft Social Engagement offers deep insights into the social channels from within the CRM dashboard. Marketers can not only view the social profiles of prospects, to engage with them in a personalized way, but they can also easily find out what customers are talking about the brand or company, and respond accordingly.

Microsoft Dynamics CRM is a handy tool offering a holistic 360-degree view of their customers. The suite gathers data from various sources, including previous transaction history stored in CRM, history of communication between the prospects and anyone in the company, the latest updates from social media profiles and forum, and more. For instance, the dashboard makes available related LinkedIn profiles for the specific lead, and combine information contained in the CRM with information publicly available on the web.

Using the comprehensive and in-depth information on hand, the marketer can strike a chord by appealing to what the customer really wants, and build a good relationship from thereon. The insights keep on coming, with the marker aware of the customer's latest moves on social media and other online activities, allowing them to engage effectively. For instance, if the customer makes a new price comparison search, the marketer can immediately get into the act, and offer a discount.

Improve Personalization

Today's customers also prefer marketers to engage with them on a customized basis. Microsoft Dynamics not just offers in-depth information about each customer, making personalized information possible; the suite also helps to create personalized content easily. Insights offered by the integrated Microsoft Social Engagement tool makes it possible to ascertain the latest customer preferences, and their opinions, in real time.

Microsoft Dynamics CRM suite delivers rich features, such as ability to generate documents automatically, and co-authoring in real time. Marketers can also manage CRM documents across other suites, such as Office 365 Groups, SharePoint, and OneDrive for Business. All these make customization very easy.

Get Access to Hidden Insights of Strategic Value

The importance of sales intelligence can never be understated in today's hyper competitive age.

Most companies have customer information spread across multiple systems and silos, obscuring complete vision. Marketers need to bring all such information together, to improve their marketing efficiency. Microsoft Dynamics makes it possible to integrate CRM with other information sources. It offers WebAPI services. The Web API framework makes it very easy to reach out to external browsers and mobile devices.

Microsoft Dynamics not just gathers information from all possible source and silos, but also leverages the power of analytics to offer in-depth insight into the business, and anticipate customer needs proactively. The analytics obtained from the combined insights from all sources throws up business opportunities not apparent otherwise.

Power BI offers intuitive features, such as interactive dashboards, advanced visualizations, pre-built reports, and natural language Q&A. These features unlock insights not apparent before. The suite also leverages analytics, to identify trends, and offer marketers cross-sell recommendations and lead scoring information.

It is now possible to **add Office Delve** to the dashboards. Office Delve searches through the available documents and locates relevant documents that helps marketers close the sale quickly.

Always Have the Latest Information

In the age of hyper competition, marketers need to remain on top of their game, and access to the latest information, such as market developments, trends, sales figures, and other information is of critical importance. Microsoft Dynamics helps, by making all such information readily available, in an easy to consume way.

Microsoft Dynamics CRM integrates with third-party services such as InsideView to deliver the latest market buzz and news, corporate data, and other critical information. Such sales intelligence is presented within the CRM application, allowing sales professionals to take better informed decisions, and have more targeted and relevant sales conversations.

Microsoft Dynamics CRM offers powerful and interactive dashboards, with real-time, in-context visualizations, to allow sales personnel to make the best use of such information. Sales managers can easily pinpoint the insights they seek, to determine the next course of action. They do not have to waste time navigating to different screens. Rather, they can drill down, or filter within the dashboard, to work on records. This powerful feature improves convenience, productivity, and accuracy.

Getting such up to date information, in real time, often makes the difference between being ahead or behind the competition.

Get Access to Real Time Information, Anywhere

It is not enough that marketers get access to the latest information, at their leisure. Speed is of critical importance today. When a customer comes calling, the marketer can ill afford to say, “Hold on. Let me get back to my office, and I’ll respond in a while.” In the age of choices, the customer would have initiated contact with three or four competitors by the time, and maybe even closed the deal.

Microsoft Dynamics leverage the power of the cloud, to allow marketers to access latest cutting edge information, be it on market information, information on customer, or anything else, in real time, through their mobile devices.

The latest- MS Dynamics CRM 2016

The **latest version of Microsoft Dynamics CRM** brings some improvements, which further enhances the ease to access relevant information. It is now possible to export data to Excel from the mobile apps, and then open the same with Excel app on the mobile device. It is also easy to email a link to a page, to colleagues in a group.

Checkout our **blog** that gives a comprehensive overview of MS Dynamics CRM 2016 features.

Today's customers are connected through multiple devices, are always logged on to social media, and like to do their own research. Such behavior has changed the rules of the marketing game, and it is now a case of the marketer remaining prepared to serve the customer whenever they come calling, rather than the marketer trying to identify prospects, and push sales. Only those marketers who understand this changed reality, and take effective measures to cope, succeed. Microsoft Dynamics CRM is one of the best tools in the market that allows sales professionals to gain mastery over the new and changed paradigms.



About Suyati

Suyati provides marketing technology and integration services for companies that wish to combine the best of breed solutions and create a unified approach to customer acquisition. This unified digital marketing approach requires system integration between various CMS and CRM platforms, and a slew of e-commerce, Marketing Automation, Social Media Listening, email and social marketing, and customer service systems. Our specialized knowledge in Salesforce, open source and .Net based systems enables us to build effective custom integrated solutions for our clients.

Suyati's custom technology solutions have been deployed in companies in the US, Western Europe and Australia, and have helped many enterprises leverage the web/cloud/mobile technologies to acquire customers through integrated digital marketing. Suyati is based in Chicago with product engineering capability out of the US and India.

More at: **www.suyati.com** Get in touch: **services@suyati.com**

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