

# Maximize opportunities to win and keep customers

 Microsoft | Dynamics 365



Are we focusing on the right opportunities?

How can we manage our sales pipeline better?

Is everyone able to access the same customer history?

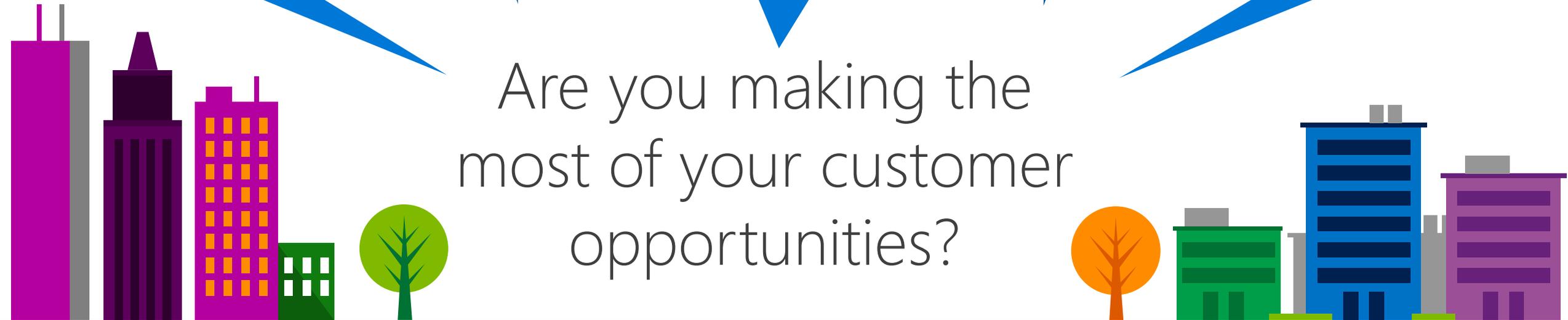
Who are our most profitable customers?

How can my sales team work better on the road?

Do I know my customers better than my competitors do?

Where will the next big opportunity come from?

Are you making the most of your customer opportunities?



# Why should a smaller business care?

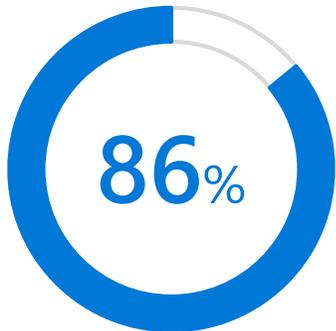
Because *customer experience* matters now more than ever

→ It's what differentiates you

→ It's how you win and keep customers

→ It's how you grow your business

...and in an increasingly connected world, your reputation is more important than ever.



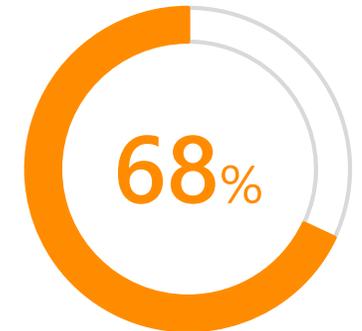
of consumers are willing to pay more for a better customer experience



of customers have left a brand due to bad customer service



of all internet users are now active on social media



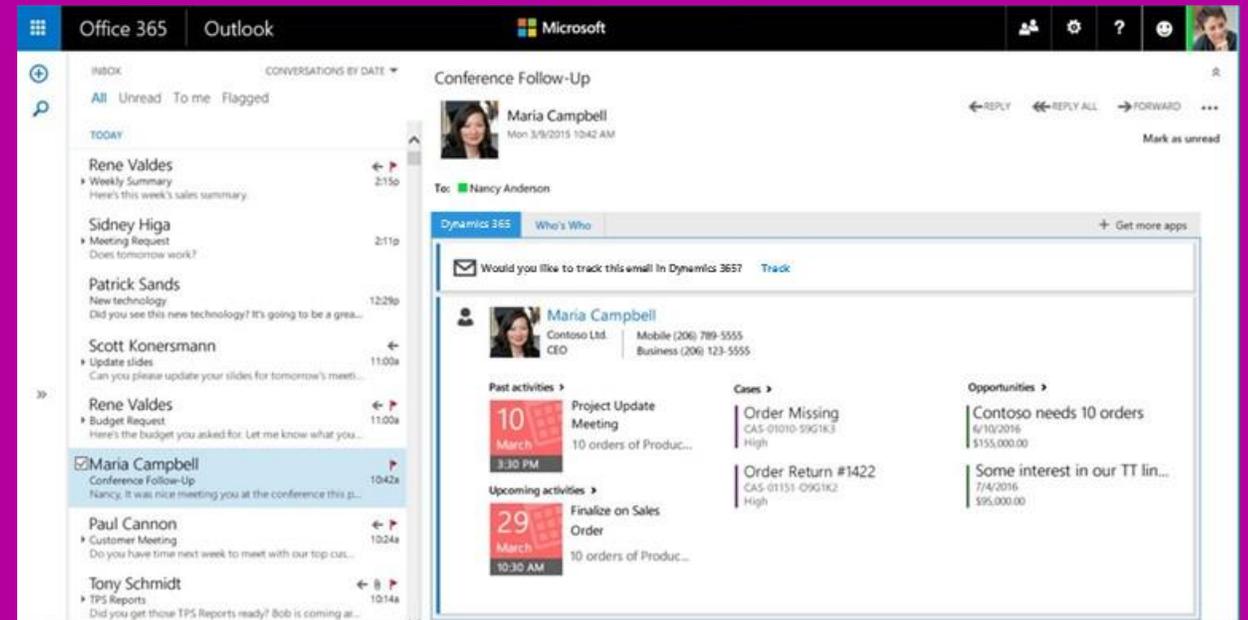
of internet users trust consumer opinions posted online

# What if you could easily manage customer opportunities as an extension of familiar tools like Office 365?

➔ Differentiate your business by delivering exceptional customer experiences

➔ Focus efforts on opportunities with the best immediate and long-term potential

➔ Close sales faster with more efficient processes and more productive teams



# Microsoft Dynamics 365 for Sales



Opportunity  
Management



Make it easy for people in your organization to get the information needed to deliver great customer experiences



Mobile  
Productivity



Empower your sales team to do their best work from virtually anywhere on any device



Business  
Insight



Get visibility into your organization to make informed decisions and grow your business



## Challenge

Everyone on your sales team needs to have easy access to consistent, detailed customer information—all in one place.

## Solution:

# Make it easy for everyone on your sales team to access complete, consistent customer information.



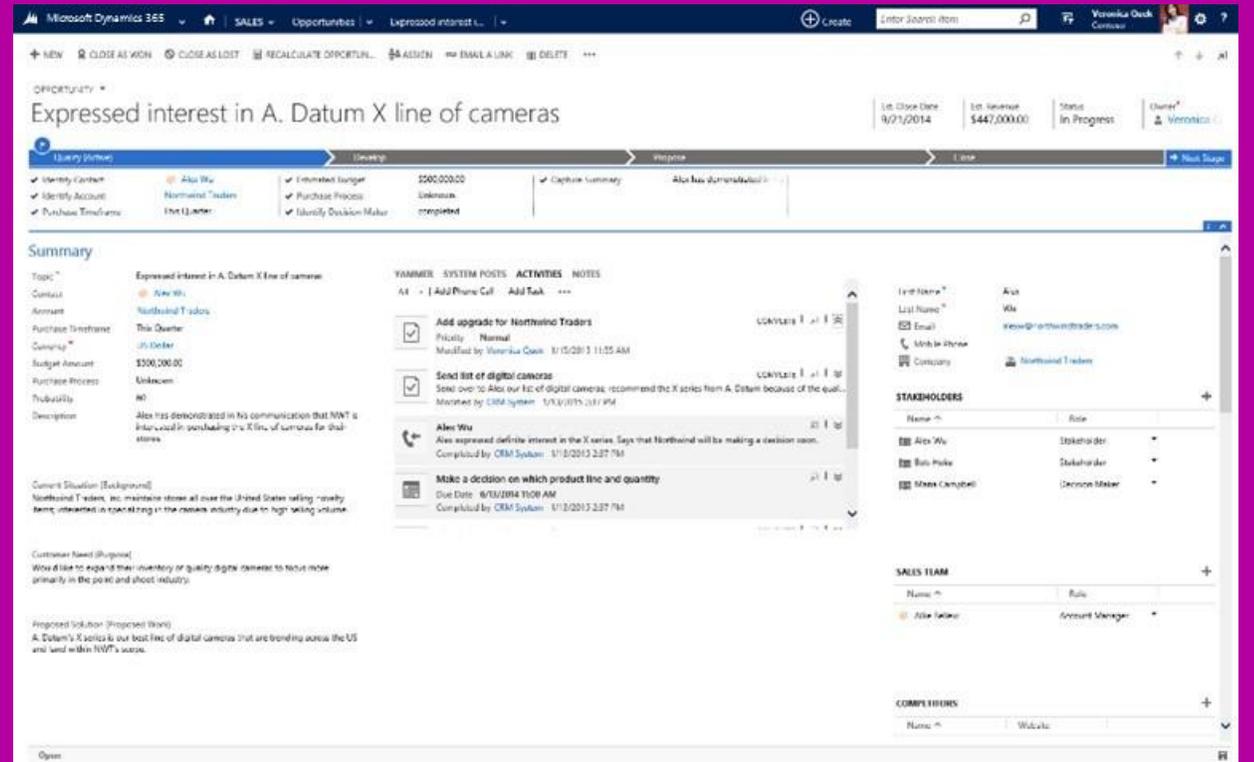
With Dynamics 365 and Office 365, sales teams can easily access information using tools they already know



Give sales a single, centralized source of the truth with all their customer information in one place



Build trust with customers by delivering personalized experiences no matter who they talk to in your organization



The screenshot displays the Microsoft Dynamics 365 interface for an Opportunity. The title is "Expressed interest in A. Datum X line of cameras". Key details include: Estimated Budget of \$200,000.00, Status of "In Progress", and a Due Date of 9/27/2014. The page is divided into several sections: "Summary" with a table of key fields (Topic, Contact, Address, etc.); "Activities" with a list of tasks like "Add upgrade for Northwind Traders" and "Send list of digital cameras"; "Stakeholders" listing Alex Wu as Stakeholder and Mike Campbell as Decision Maker; and "Sales Team" listing Alex Walker as Account Manager. The interface is clean and modern, with a dark blue header and a white main content area.

*Solution:*

# Make staying in touch with customers a seamless part of your sales team's day-to-day activities.



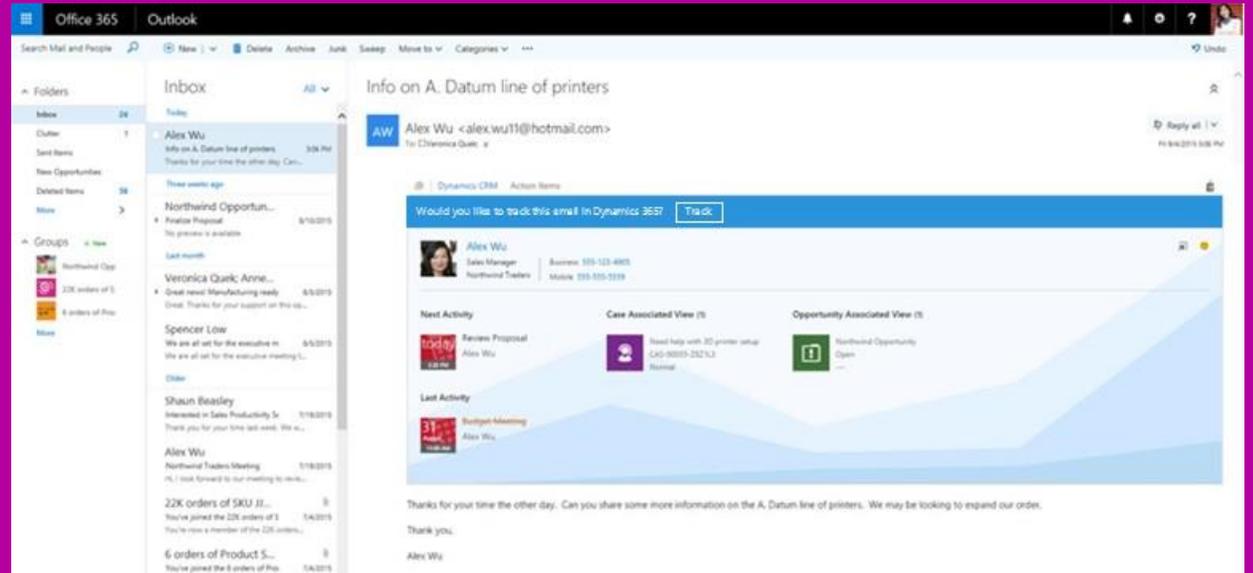
Review customer information, plan your day, and connect with customers in a few clicks



Use Outlook and Dynamics 365 together for scheduling, tracking, and emailing customers



Maximize opportunities by engaging customers in real-time with online meetings in Skype for Business





## Challenge

The workforce is becoming increasingly mobile, with a need to be productive anywhere. Salespeople need tools that make it seamless to work across multiple locations, whether at the office, at home, or on the road.

*Solution:*



Mobile Productivity

# Let salespeople connect with customer information wherever they are, on whatever device.



With Dynamics 365 for Sales on mobile devices, the sales team can access up-to-date customer info anywhere



Enable sales reps to work seamlessly across their tablets and phones



Let sales reps update information from the road in real-time



*Solution:*



Mobile Productivity

# Build winning sales teams by boosting productivity, freeing up more time to spend with customers.



Use consistent, streamlined processes that help sales teams be more productive



Automate repetitive tasks and free up more time to help customers



Onboard new sales staff and get them up to speed quickly and easily

The screenshot displays the Microsoft Dynamics 365 CRM interface for a sales opportunity. The title is 'Tile roof design and installation' with an estimated close date of 8/28/2015. The opportunity is currently in the 'Develop (Active)' stage, with 'Propose' as the next step. The 'Qualify' stage is completed, with sub-tasks 'Identify Contact', 'Identify Account', and 'Purchase Timeframe' all checked off. The contact is 'Eva Corets' at 'Fabrikam, Inc.' with a purchase timeframe of 'This Quarter'. The 'Develop (Active)' stage has sub-tasks 'Estimated Budget' (\$250,000.00), 'Purchase Process' (Committee), and 'Identify Decision Maker' (completed). A 'Capture Summary' task is also visible.

Task	Status	Value/Details
Identify Contact	Completed	Eva Corets
Identify Account	Completed	Fabrikam, Inc.
Purchase Timeframe	Completed	This Quarter
Estimated Budget	Completed	\$250,000.00
Purchase Process	Completed	Committee
Identify Decision Maker	Completed	completed



# Challenge

Business leaders need quick visibility into areas that require attention. They need to understand what is and isn't working, make decisions quickly, and take corrective actions to ensure they meet the goals of the business.

*Solution:*

# Stay on target with real-time visibility into your business.



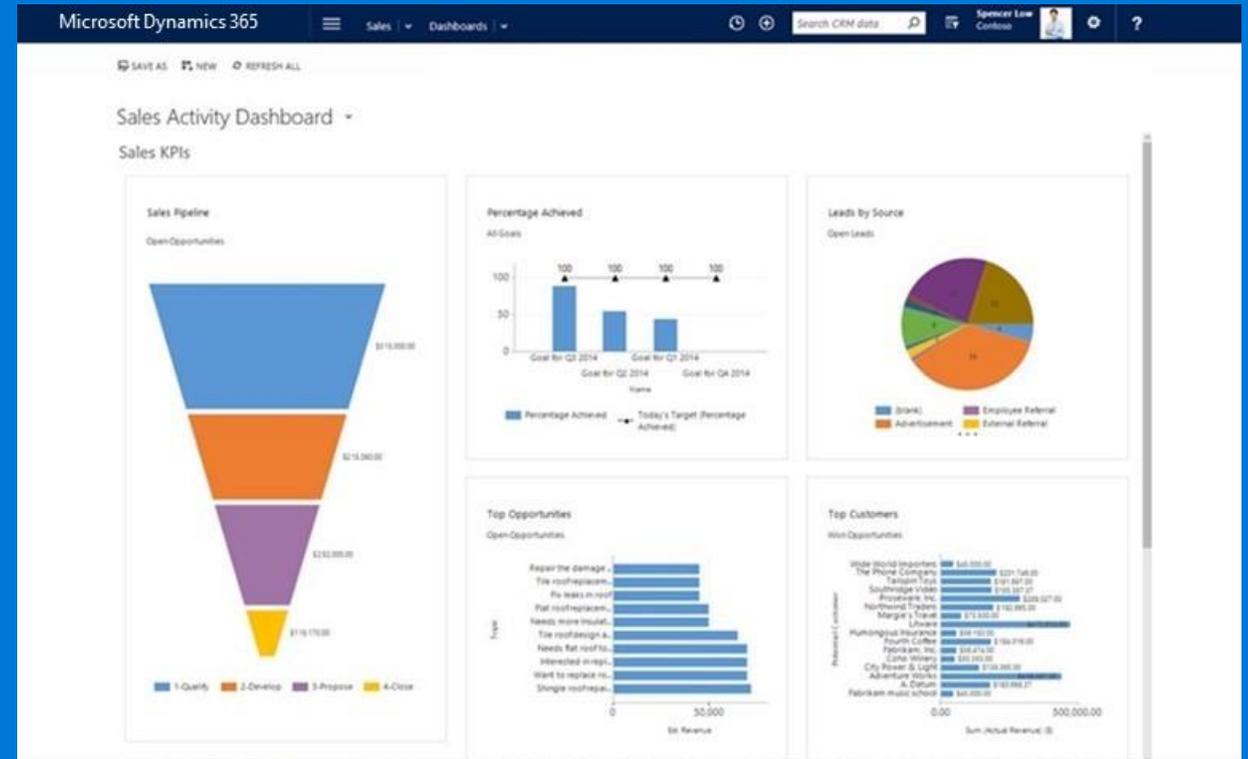
Use live dashboards and interactive reports that let you visualize how your business is doing



Identify and act on troubled areas, such as increasing sales efforts in a region where products are not selling well



Take corrective actions fast to optimize sales operations and ensure you're meeting revenue goals



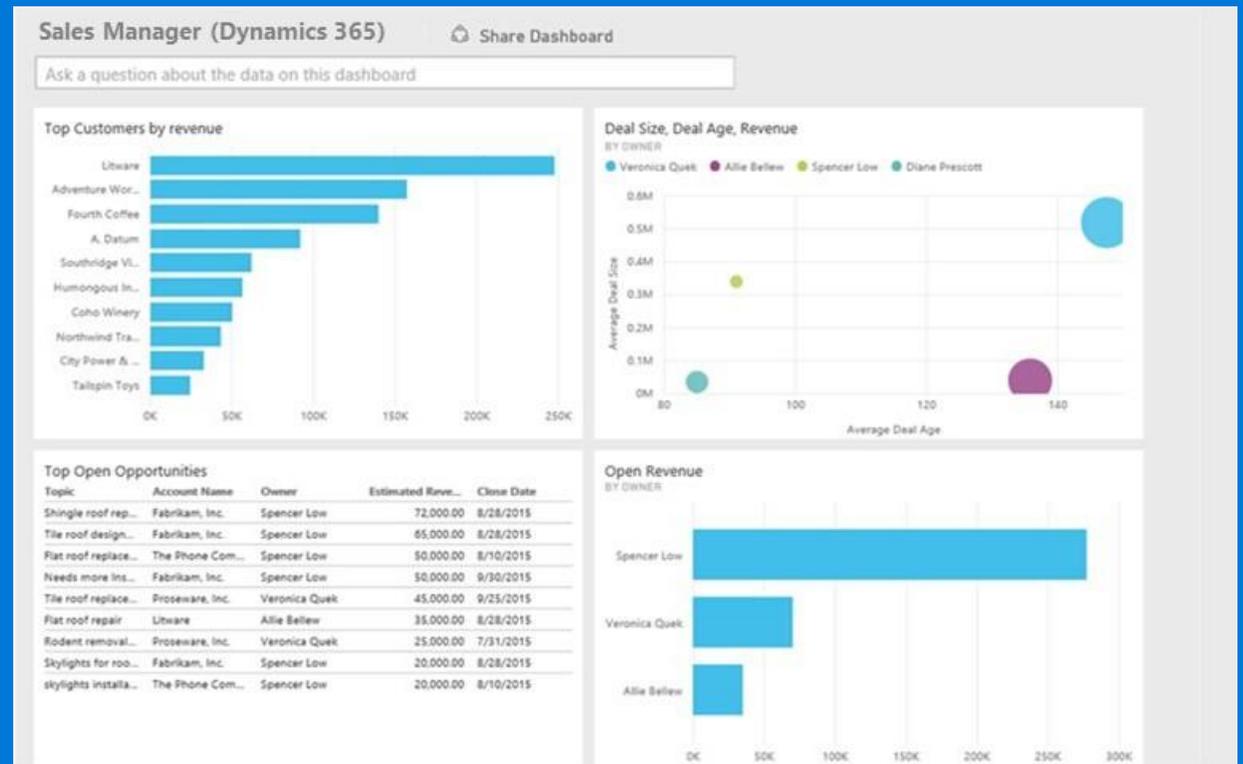
*Solution:*

# Uncover new opportunities and drive business growth with deeper insights.

➔ Reveal hidden opportunities with the ability to visualize new sales trends

➔ Anticipate customer needs and sell them new products and services they are likely to purchase

➔ Ensure your sales team is focused on opportunities that are most profitable—and most likely to close



# Adding value to your business with Microsoft



## Opportunity Management

Access complete, consistent customer information  
Stay in touch with customers



## Mobile Productivity

Give employees access anywhere on any device  
Free up more time to spend with customers



## Business Insight

Get real-time visibility into your business  
Uncover new opportunities

# Dynamics 365 for Sales

Part of a family of products from Microsoft designed to work together across all the areas of your business



Use business apps that work seamlessly with familiar tools, like Outlook and Excel



Access customer history, set up meetings, and connect with anyone in a few clicks



Manage financials, streamline operations, and grow your business



Rely on an affordable enterprise-class cloud infrastructure from Microsoft



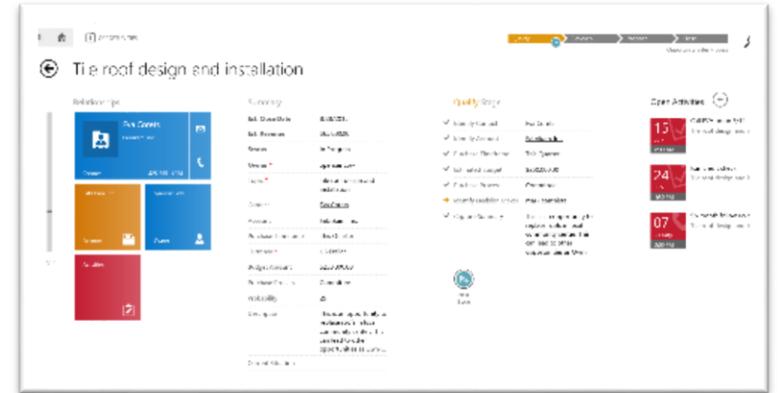
# Microsoft Dynamics 365 with access anywhere, anytime



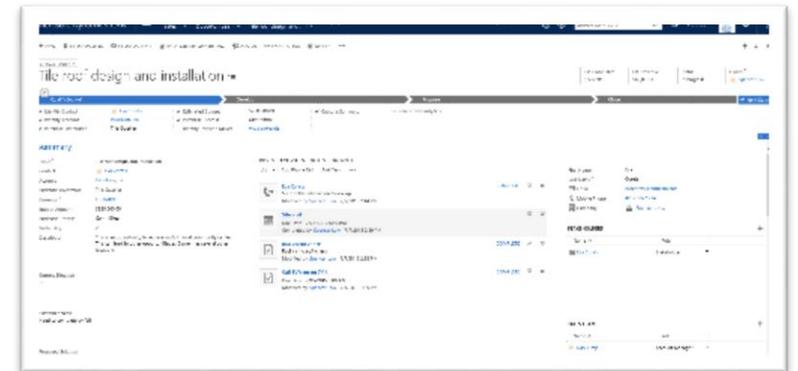
Phones



Outlook



Tablets



Traditional Web access

# 3 reasons to get started now



1

**It's easier than you think.** Employees catch on quickly with easy, familiar tools.

2

**It's affordable.** It's managed for you in the cloud, without capital expense for servers and software.

3

**It's time.** Realize gains quickly in productivity, sales effectiveness, and customer service excellence.