

# A New Age of Selling

Deliver amazing customer experiences



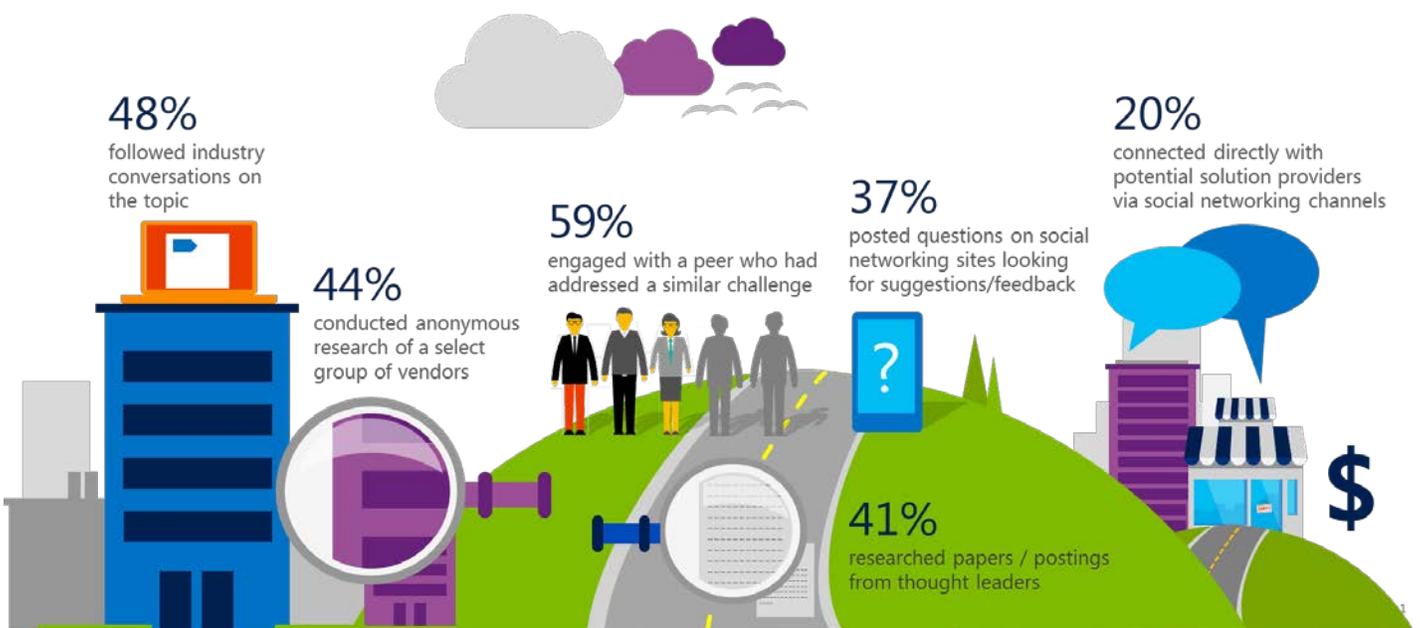
## EXECUTIVE SUMMARY

Technology has turned the sales function upside down. On the one hand, it has made selling more difficult because customers can often get most of the information they think they need online and tend to make buying decisions based on what they find. However, if used properly, technology can help sellers adapt by simplifying the sales process and making them more efficient and successful than ever before.

Information such as product descriptions, customer reviews, and competitive comparisons are now widely available on the Web or through social networks. Corporate buyers are using this information to form opinions and narrow buying choices long before engaging with vendors.

When buyers do engage with a salesperson they expect fast responses that are precisely tailored to their organization's needs. To respond effectively to these better informed and more demanding buyers, sales organizations and sales professionals need to change. They need to embrace social media to take advantage of relationships, and use technology to quickly respond to buyers. This paper presents Microsoft's vision for sales organizations to use technology to close more deals with less effort. It provides concrete examples showing how successful sales leaders are transforming the way they sell with their Microsoft solutions.

## TODAY'S BUSINESS-TO-BUSINESS BUYER



On the road to purchase for a B2B buyer<sup>i</sup>

Salespeople already know what doesn't work today: cold calling. A telesales representative has a 3 percent chance of getting a prospect to answer a call. A marketing email has less than a three percent response rate.<sup>ii</sup> Calling on a prospect without knowing exactly what they need is far too likely to be unsuccessful.

Customers have typically identified their needs and are actively seeking to find the best solution before ever engaging with vendors. To gather information they are researching vendor websites, questioning peers, and initiating and following conversations on social media.

Given all of the information customers can acquire on their own, it should come as no surprise that customers can be 57

percent through the buying process before they actually make contact with the company they are researching.<sup>iii</sup> In fact, 80 percent of buyers initiate first contact with their prospective supplier, and when they do reach out, they often have an idea of the solution they need.<sup>iv</sup>

The idea of losing control over more than half of the sales process and waiting for prospects to call when they are interested should not make any sales leader happy as they may be missing many opportunities. However, Microsoft has the solutions required to modernize sales processes to match this new reality.

## SELLING THE MICROSOFT WAY

With the right sales productivity solution in place, sales organizations can transform the way they sell. The Microsoft sales productivity solution improves sales capabilities in five main areas: social, insights, collaboration, process automation, and mobile. The results of improving these capabilities within a holistic solution are the ability to zero in on targets before the competition, win faster by working as a team to create compelling and differentiated customer interactions, and ultimately sell more.

Microsoft provides a streamlined experience with Microsoft Dynamics CRM Online and its interoperability with Microsoft Office 365 and Yammer. Salespeople can go to one place for all of their tasks from viewing sales leads, researching companies, finding social connections, communicating with prospects, reviewing sales insights, and creating sales proposals. This eliminates all of the application flipping by giving sales reps contextual information in a modern user experience.

 <p><b>Sales executives</b></p> <ul style="list-style-type: none"> <li>▪ True business insight and visibility</li> <li>▪ Ability to spot new opportunities</li> <li>▪ Customer-centric sales organization</li> </ul>	 <p><b>Sales managers</b></p> <ul style="list-style-type: none"> <li>▪ Tools to plan and manage against key KPIs</li> <li>▪ Insights to outsmart the competition</li> <li>▪ Productive sales reps who win as a team</li> <li>▪ High conversion and win rates</li> </ul>	 <p><b>Sales professionals</b></p> <ul style="list-style-type: none"> <li>▪ Qualified leads</li> <li>▪ Insights to close more deals faster</li> <li>▪ Holistic 360-degree view of customers</li> <li>▪ More time selling, less busy work</li> <li>▪ Access to CRM anywhere</li> </ul>
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**The Microsoft sales productivity solution meets the needs of the entire sales organization<sup>v</sup>**

## TURN SOCIAL INSIGHTS INTO SALES

Your customers are using social networks to learn about you and your products. Shouldn't you also use them to gain social insights about your customers? You may learn that a prospect is dissatisfied with a competitor's product or you may learn that they are dissatisfied with yours. You may learn that your customer has recommended your services to a contact and get a new lead. Your sales team can now have real-time insight into the social activity of your contacts and accounts, and they can engage with their customers on LinkedIn and Twitter without ever leaving CRM.

With social network data from LinkedIn and Twitter integrated right into

the CRM system it becomes a natural part of the sales process. CRM delivers the latest market buzz and news along with corporate data so that you are always up to date on your customer's activities. Getting this information in real time can make the difference between being ahead or behind your competition.

In addition, Social Listening helps salespeople gain early insight into issues customers are facing while connecting with the most influential voices in the community. It also provides social buying signals. When people send the signal they're looking for something, are dissatisfied with

**An e-mail sent by LinkedIn InMail that leverages a 2nd degree connection — meaning you know someone who they know and you reference that connection in the InMail — has a whopping 67% response rate!<sup>vi</sup>**

their current solution, or need more information on a topic, that's an opportunity for a seller to engage. With the Microsoft solution, Social Listening capabilities are built-in so they are available to all users.

With Yammer, salespeople can hold conversations with customers using a dedicated online workspace that keeps conversations off of the public Internet. With Microsoft Lync and

Skype embedded in CRM, salespeople also gain a tremendous advantage. With Lync Federation or Lync-Skype Connectivity, the communications environments between you and your customers are connected — meaning presence information, chat, and conferencing is always available. Your customers are just a click away.

## SELL AS A TEAM

In most cases, salespeople can no longer operate individually. Since buyers expect solutions to bridge sales, operations, and service, salespeople depend on the entire organization for their success.

Sales organizations need the right collaboration and communication tools to stay connected with the rest of the business. These tools must be mobile and should be integrated into the CRM system. Microsoft has integrated essential capabilities into CRM including Lync and Skype, Yammer, and Microsoft SharePoint to enable the sales professional to work with a team from within the CRM application.

Lync and Skype provide a powerful and simple way to interact with colleagues, partners, and contacts. Salespeople can quickly find subject matter experts or decision-makers and bring them into meetings to answer questions and get deals closed. Users see presence icons within CRM and can initiate an interaction with just one click.

Team members can also use Yammer to stay connected from within CRM. Yammer enables salespeople to tap into the

organizational knowledge of the entire company from any location. Conversations can be organized by contact, account, or other filters so you get the information you need from the right people at the right time.

By taking advantage of Yammer feeds embedded in Microsoft Dynamics CRM, Trek Bicycle teams share ideas, collaborate on projects, and make decisions more quickly. "Things are getting done because everyone had a new kind of awareness of what was going on in the group," says Steve Novoselac, Business Intelligence and .NET Development Manager, Trek Bicycle Corporation.<sup>viii</sup>

Managing documents and managing information is a big part of selling, and rather than forcing teams to use a different document management solution, SharePoint also works directly within CRM, ensuring that any team member working on a sales document, such as a presentation, proposal, or RFP, will be able to utilize the powerful co-authoring and version control capabilities.

**"It's all about integration. Dynamics CRM caps the stack, but behind the scenes we make sure that Yammer drives the conversations within the business; we use SharePoint to drive our knowledge-management systems; we use Lync to surface the presence of our colleagues — Office 365 is the backbone of our office infrastructure."**

— Paul Marriott-Clarke, Commercial Director  
Metro Bank<sup>vii</sup>

## TRANSFORM SALES PROCESSES

Ideally salespeople would have easy-to-use tools that provide content relevant to where they are in the sales cycle. A well-defined process can help. Process flows drive best practices and consistency across the organization while allowing it to remain agile and deliver a great customer experience.

However, traditional CRM business processes, such as opportunity management, often used workflows that were cumbersome and difficult to understand. Therefore, they required a lot of user training and were not widely adopted. Microsoft Dynamics CRM Online provides intuitive, visual process guidance using an outcome driven user interface to help ensure rapid, wide-spread adoption by sales

professionals. Because the solution tells you what to do next, the ramp-up time is fast and training costs are low.

CRM also integrates seamlessly with other Microsoft workloads, like Outlook. This gives salespeople a one-stop-shop for their calendars, email and other tools, helping transform the sales process.

"Many of the criteria identified by our teams led us logically to Microsoft Dynamics CRM. One crucial factor was the integration with the Microsoft Office suite and Outlook in particular. People did not want to have to manage two separate calendars, and they wanted to be able to store their emails in the CRM — features already incorporated within

**"We expect to roll out standard processes and workflows through Microsoft Dynamics CRM Online and make them available to everyone."**

— David Peterson  
Enterprise Collaboration Manager  
Trek Bicycle Corporation<sup>ix</sup>

Dynamics CRM," says Isabelle Dufex, Head of Institutional Client Relations, Société Générale Corporate & Investment Banking.<sup>x</sup>

CRM includes business process templates with industry-specific best practices. These process flows can then be customized or new processes can be created using a simple point-

and-click process. This allows sales organizations to be agile and responsive. If a trend is identified and the organization wants to react quickly, the business process could be changed almost instantly to reflect the newly desired steps or outcomes.

## SEE YOUR SALES DATA IN AN ENTIRELY NEW WAY

To really get a feel for the health of the business, managers need to be able to turn data into insights and then use these insights to make better, faster decisions. Microsoft solutions help sales managers focus on the right information by providing powerful dashboards with real-time visualizations.

Organizations can set up territories, teams, and price lists for optimal organizational efficiency and streamlined offer management within CRM. It also provides built-in sales reports to conduct advanced analytics without IT.

"We know the revenue we need to generate at any one time [with Microsoft Dynamics CRM



**Visual tools make it easy to view and report on business**

Online], so we can estimate our success of winning new business and its financial impact on our operations," says Jason Taylor, CIO, SAGE Automation.<sup>xi</sup>

Sales managers can interact with the charts and reports to pinpoint just the insights they are looking for to determine the next right action. For more complex analysis, data can be easily exported into Excel and analyzed using Power BI for Office 365.

"The insight we're now able to gather [from Microsoft Dynamics CRM Online] is helping us identify changing market trends and spot new opportunities," says James Fleming, Group IT Director, Victrex.<sup>xii</sup>

## YOUR SALES OFFICE — WHEREVER, WHENEVER

Customers are more demanding than ever. Competition is increasing. It's no longer acceptable to let things wait until you get back to the office. Because of these challenges, CRM applications on mobile devices are now indispensable selling tools.

With CRM, sales professionals and executives stay productive and agile wherever they are. They can get real-time information on the mobile phone or tablet of their choice through a user interface that remains consistent across devices.

"[Microsoft Dynamics CRM Online] allows me as chief executive, when I'm out in the field visiting clients, to get a sense of the overall relationship with the client. That's something I couldn't do before," says Bob Gogel, CEO, Integreon.<sup>xiv</sup>

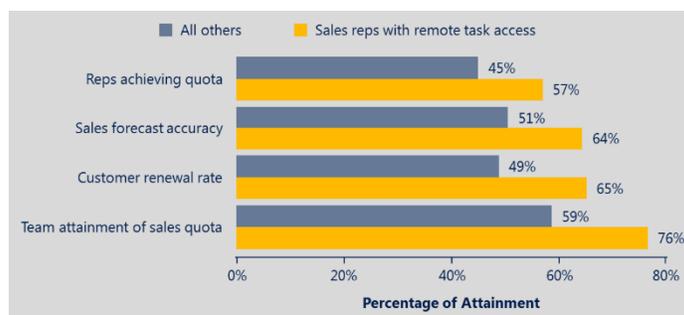
By receiving watch list notifications on their phone, salespeople know what's happening, right as it happens. They can see the question their prospect posted on LinkedIn as they are traveling to the meeting so they know the primary concern that needs to be addressed.

When salespeople update activities, contacts, and opportunities on the go, they and their team get real-time insight and increase productivity while away from the office. Posting a question to Yammer during a meeting can result in an instant response and customer resolution. All this also helps organizations stay current on the sales activities of their people.

"Microsoft Dynamics CRM Online allows us to manage, monitor, and support our sales teams remotely. When we switched to the new system, it boosted the number of calls made by the sales team because the system is integrated and easy

to use," says Nick Cassidy, Managing Director, Core Cost Management.<sup>xv</sup>

With a Microsoft sales productivity solution, salespeople gain the support of their data and their entire team while they are on the road. Key insights aren't lost, questions are answered immediately, and data is entered accurately.



**Mobile access drives sales success<sup>xiii</sup>**

## CONCLUSION

Microsoft Dynamics CRM Online and Office 365 deliver an intuitive, process-driven user experience that guides salespeople through the tasks and information they need to stay focused on closing deals. Microsoft has been a leader in productivity and collaboration for decades and CRM brings that innovation together to enable salespeople to work with their teams online or off, across the office or around the world. With Microsoft Outlook, Lync, Skype, SharePoint, and Yammer all part of the CRM experience, the people and information you need are only a click away.

With a Microsoft solution, sales reps are no longer flipping from application to application to perform all of their sales activities. All of their important information is presented contextually in a simple user experience.

- Integrated engagement with social tools including social listening capabilities
- Collaboration capabilities to speed responses and avoid overlapping efforts
- Process automation to ensure salespeople are focused on selling and using best practices

- Data visualization to make it easy to understand the state of the business and each account
- Mobile access so salespeople always have to their tools and teams through a consistent, familiar user interface

With these capabilities in place sales organizations can zero in, win faster, and sell more.

### For more information

Microsoft is committed to helping organizations transform so sales professionals sell more effectively and sales managers manage more intelligently. For more information on Microsoft's sales productivity solutions contact your Microsoft sales representative or visit <http://www.microsoft.com/dynamics/crm>

- The solution described in this white paper includes:
- Microsoft Dynamics CRM Online
- Microsoft Office 365 E3 SKU (includes Lync Online, SharePoint Online, Exchange Online, Power BI for Office 365, Yammer Enterprise, and Office 365 ProPlus)

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