

# Maximise 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?

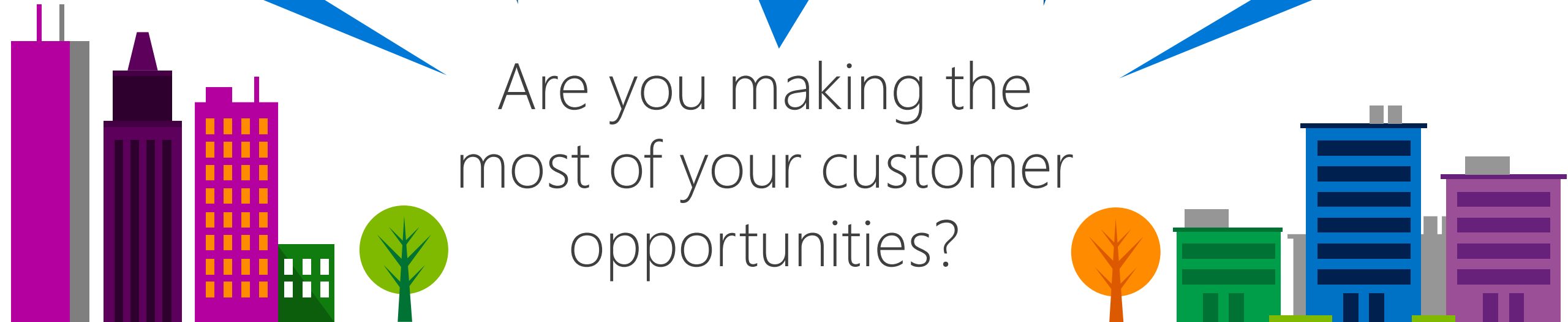
Who are our  
most profitable  
customers?

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?

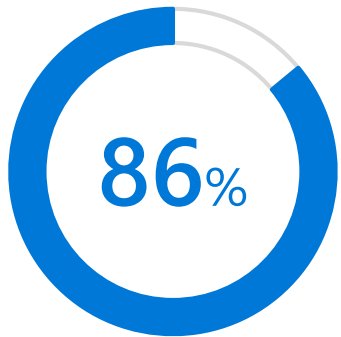


# Why should a smaller business care?

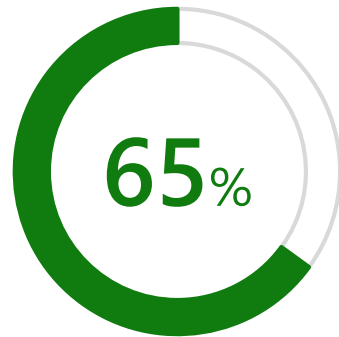
## Because *customer experience* matters now more than ever

- It's what differentiates you
- It's how you win and keep customers
- It's how you grow your business

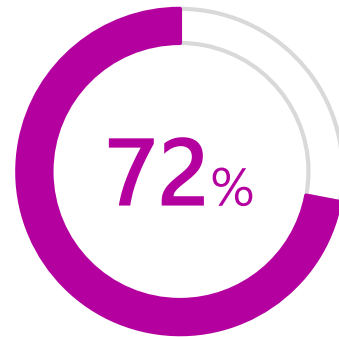
...and in an increasingly connected world, your reputation is more important than ever.



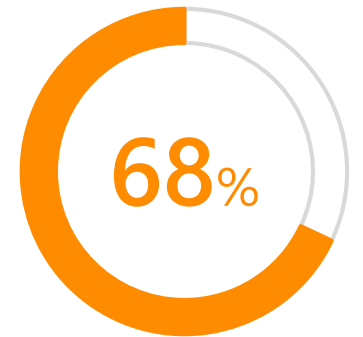
of consumers are willing to pay more for a better customer experience



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?



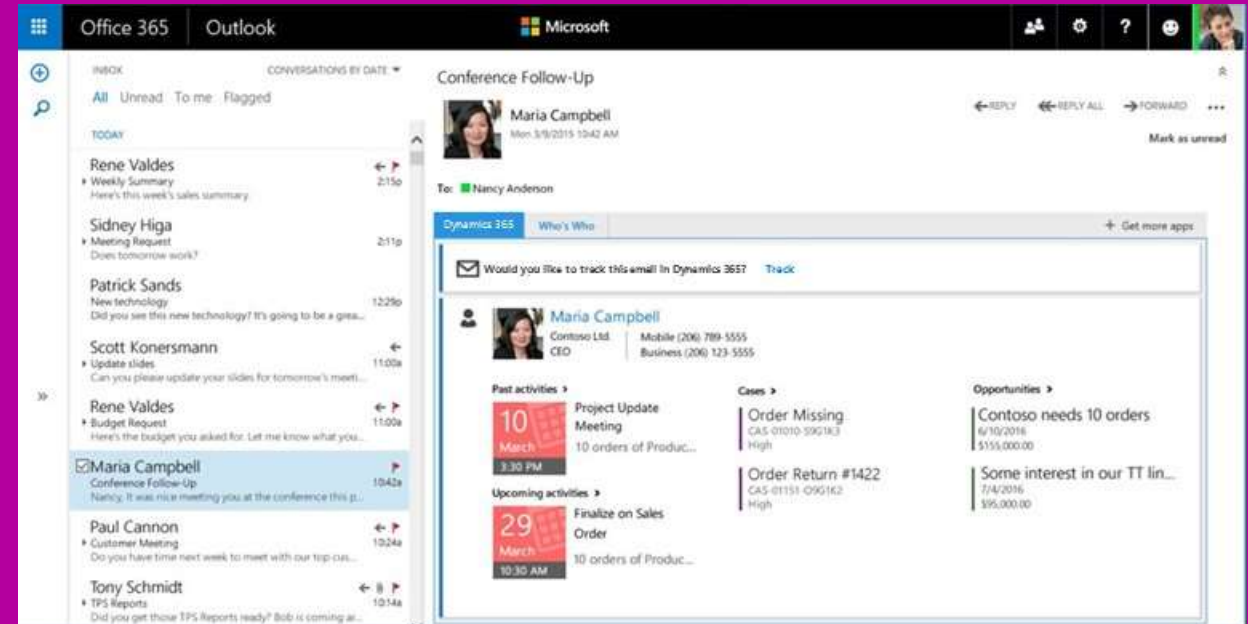
Differentiate your business by delivering exceptional customer experiences



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.



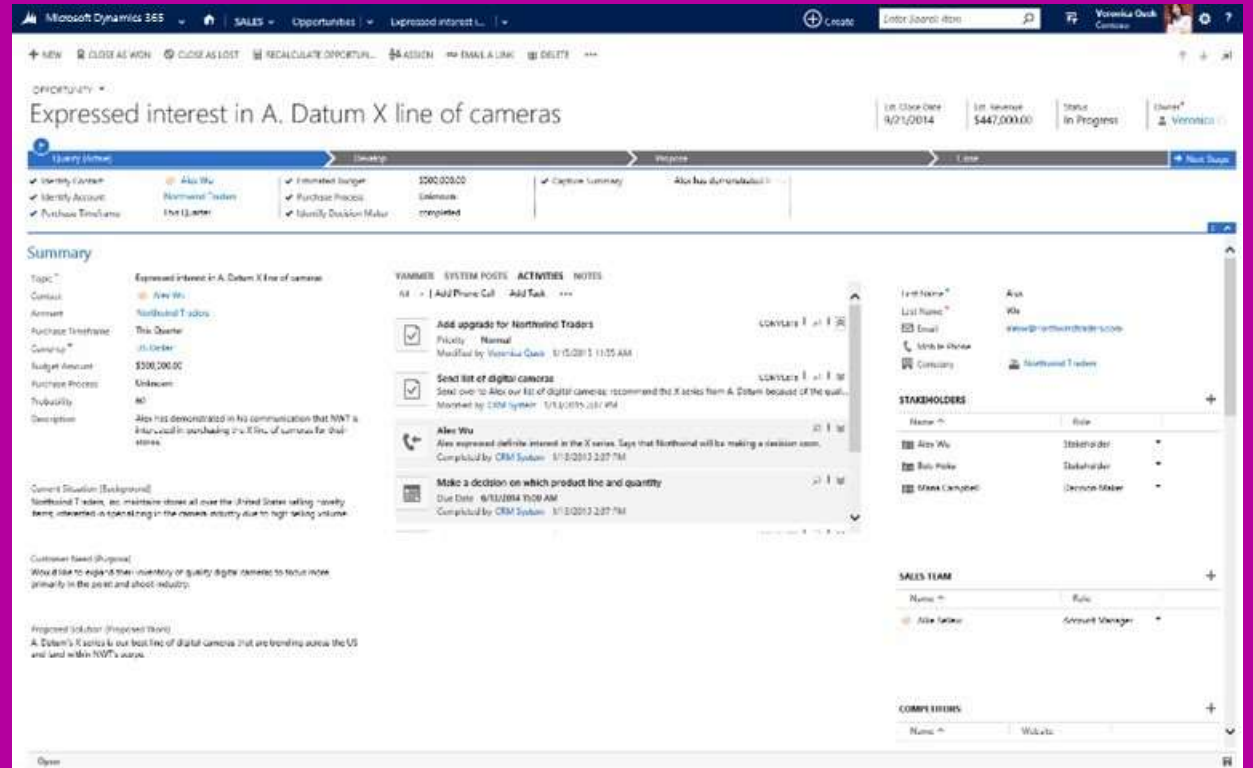
With Dynamics 365 and Office 365, sales teams can easily access information using tools they already know



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 top navigation bar shows 'SALES' and 'Opportunities'. The main header for the opportunity is 'Expressed interest in A. Datum X line of cameras', with a close date of 9/21/2014 and a value of \$447,000.00. The status is 'In Progress' and the owner is 'Veronica'. Below the header, there's a 'Summary' section with a table of key metrics: Opportunity Name, Contact, Purchase Amount, Budget Amount, Purchase Process, and Probability. The 'Activities' section on the right lists recent actions like 'Add Phone Call' and 'Add Task'. The 'Stakeholders' section on the right lists team members and their roles. The 'Sales Team' section at the bottom lists the sales team members and their roles.

*Solution:*

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



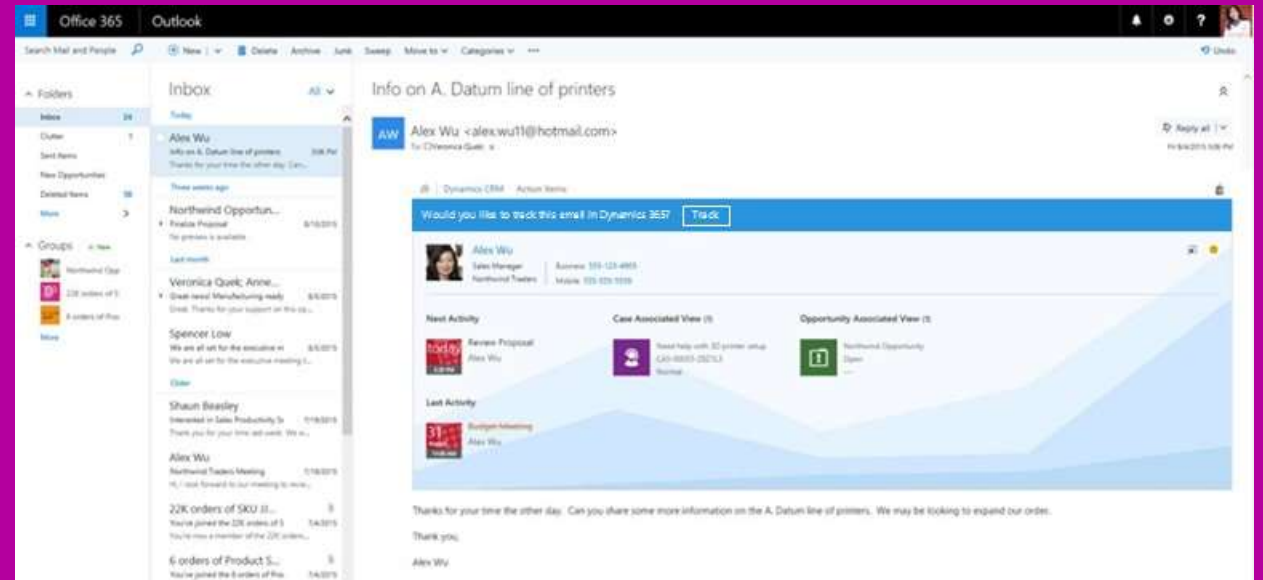
Review customer information, plan your day, and connect with customers in a few clicks



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 top navigation bar includes 'Microsoft Dynamics 365', a menu icon, 'Sales', 'Opportunities', and a dropdown for 'Tile roof design and...'. Below the navigation bar, there are action buttons: '+ NEW', 'CLOSE AS WON', 'CLOSE AS LOST', 'RECALCULATE OPPORTUN...', 'ASSIGN', 'EMAIL A LINK', and 'DELETE'. The main header shows 'OPPORTUNITY' and the title 'Tile roof design and installation'. On the right, the 'Est. Close Date' is '8/28/2015'. A progress bar at the bottom indicates the current stage is 'Develop (Active)', with previous stages 'Qualify' and 'Propose'. Below the progress bar, there are two columns of data. The left column lists tasks: 'Identify Contact' (checked), 'Identify Account' (checked), and 'Purchase Timeframe' (checked). The right column lists details: 'Eva Corets' (Identify Contact), 'Fabrikam, Inc.' (Identify Account), 'This Quarter' (Purchase Timeframe), 'Estimated Budget' (checked) with a value of '\$250,000.00', 'Purchase Process' (checked), 'Identify Decision Maker' (checked), and 'Committee completed' (checked). A 'Capture Summary' button is also visible on the right.

Task	Details
✓ Identify Contact	Eva Corets
✓ Identify Account	Fabrikam, Inc.
✓ Purchase Timeframe	This Quarter
✓ Estimated Budget	\$250,000.00
✓ Purchase Process	Committee
✓ Identify Decision Maker	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:*



Business Insight

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



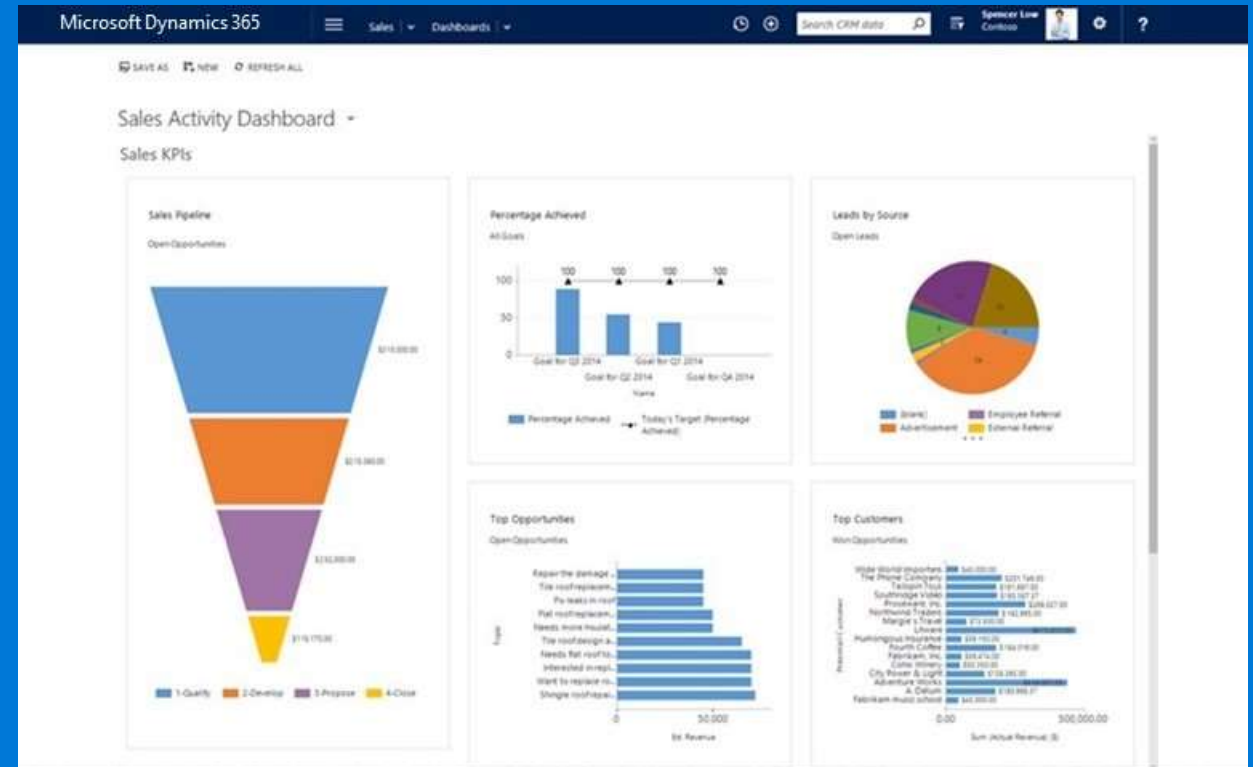
Use live dashboards and interactive reports that let you visualize how your business is doing



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:*



Business Insight

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



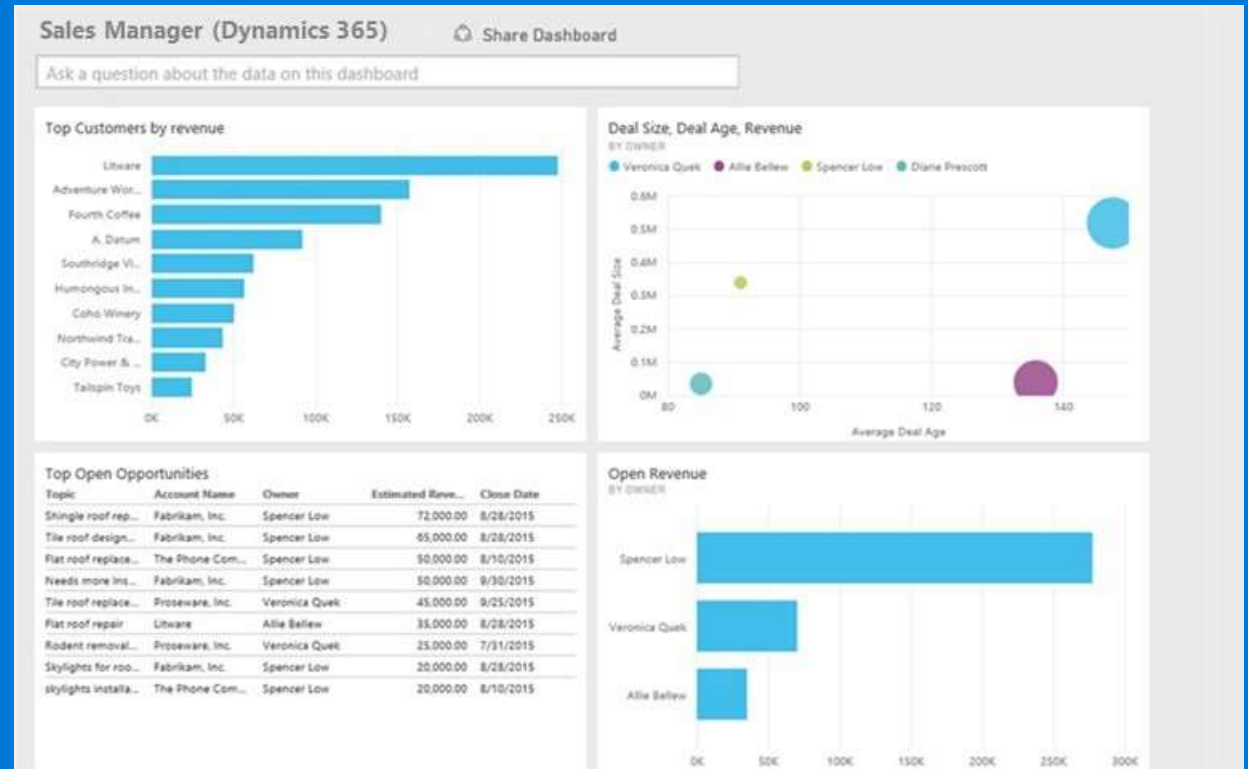
Reveal hidden opportunities with the ability to visualize new sales trends



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



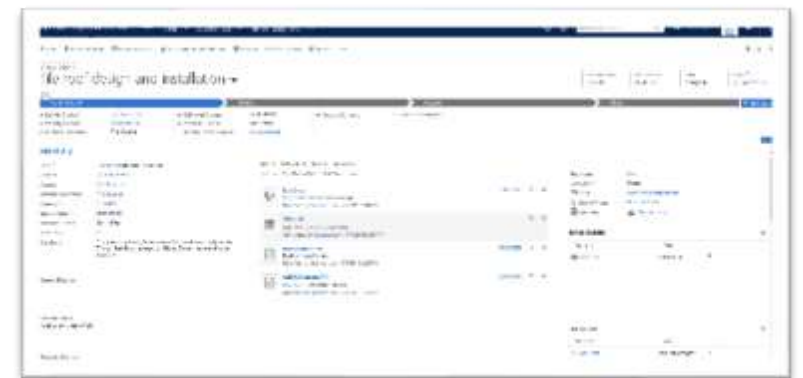
Phones



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

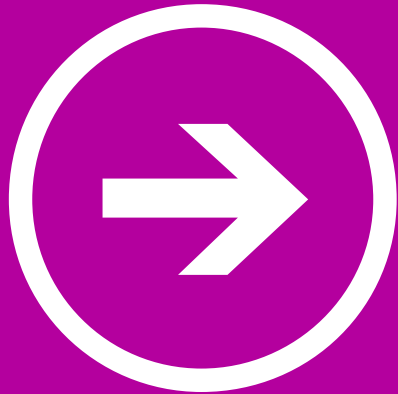
**It's affordable.** It's managed for you in the cloud, without capital expense for servers and software.

3

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

# Next steps

Let's define your  
path to success



We are here to help you make the most of  
Dynamics 365 for your business.

Contact us today to discuss how you can  
expand and improve your business with  
Dynamics 365 or to arrange a Demo.

Email: **[support@manageditexperts.co.uk](mailto:support@manageditexperts.co.uk)**

Call: **01383 722225** or **0131 2081383**

Online: **[www.manageditexperts.co.uk](http://www.manageditexperts.co.uk)**

