

Tele Sales Guide D365 Sales Professional

Feb 2019



Dynamics 365 for Sales Professional - Elevator pitch

Target Audience:



VP Sales/Management



Sales Operations



Influencing roles:
CMO, CFO, CIO

Quick Pitch: Boost seller productivity with a modern solution that works with familiar tools such as Office 365. Increase conversion, win rates, and seller productivity by enabling sellers to focus on what's most important!

Customer Benefits

- 1. Focus on what's most important.** Provide sellers with specific steps to move a deal forward and with the context to tailor customer interactions
- 2. Streamline seller workflows.** Empower seller with powerful sales capabilities that are intuitive and integrated into familiar tools,
- 3. Sell anytime, anywhere.** Work on the go, with modern mobile apps that provide contextual news, social data and task flows.
- 4. Start with what you need.** Get up and running quickly with pre-packaged applications, without the need to set up and deploy capabilities you don't need right now

Questions (to set the trap)

Question	Answer
Do your sellers struggle with figuring out what to focus on?	<i>Timeline</i> -Sellers juggle an increasing number of stakeholders, it gets harder to tailor and personalize interactions. <i>Business process UI</i> – To prevent distractions, organizations need to narrow down the optimal choices. <i>Reports, charts, dashboards</i> - Many sales reps are unclear of what's expected of them 88% of customers will expect personalized sales by 2020 Walker . 10 people are involved with the average purchase decision (Gartner, Eliminating B2B Buying Complexity On and Offline)
Do you your sellers complian around too many disconnected tools?	<i>Seamless sales tools</i> - New sales tools, if not intuitive and integrated into the sales rep's daily routine and workflow, will become a distraction. <i>Mobile apps</i> - Today's sales reps work on the go. Modern sales tools need to support this. <i>Collaboration</i> - With more and more people involved in sales deals, sellers need new ways to collaborate. 60% of companies lack a well-designed sales process TOPO . #1 customer request: speed up interactions with sales, which is mentioned 2x as often as price McKinsey
Sales Force automation takes too much time and effort?	Microsoft's Business Application Platform - <i>With Dynamics 365 Sales Professional</i> , organizations can start simple – with just the capabilities sales teams need now. 92% of sales organizations rank sales engagement platforms as critical to their success TOPO . 90% of sales leaders plan to invest in tech to help sellers engage with buyers more effectively TOPO . CRM pays back \$8.71 for every dollar spent Nucleus Research

Dynamics 365 for Sales Professional – At a glance

MOMENTS OF TRUTH

- Changing sales leadership
- Acquisition or consolidation of sales organization
- Organization under pressure as growth has flattened
- Sales transformation initiative in flight
- Salesforce.com relationship under stress due to cost, lack of adoption, complex integrations

SOLUTION CAPABILITIES

- Provide sellers with **actionable insights** like lead score and relationship health based on intelligence
- **Strengthen relationships** by helping sellers be relevant with up to the moment data and insights from Office 365, LinkedIn, and Dynamics 365.
- **Optimize effectiveness** by transforming from data entry to guiding sellers' people to the next best action to take with the customer
- Prioritize your pipeline and **accelerate success** with real-time analytics.
- **Onboard new sellers** with streamlined workflows that tell the sellers pending actions before closing deals.

CONVERSATION STARTERS

- **Decision making is changing** including 73% of Millennials are involved in product and service decision-making. Do you know who is making decisions and how to engage?
- **77% of buyers don't believe that the salespeople they deal with understand their business.** Are you proactively giving your sellers the best tools to have the right conversations?
- **67% of rep's time spent on non-selling activities.** Are you proactively giving your sellers the best tools that empower them to engage with their customer?
- **59% of sales forecasts are wrong.** How do you prioritize your pipeline on those most likely to close?

WHY MICROSOFT

- Industry leading SFA by Forrester and Gartner for ability to **move beyond sales management to empower sellers**
- End-to-end (**Prospect to Cash**) business application solution with integration with Business Central and seamless integration with M365 offerings such as email, Word, Teams, Excel, and others
- **Complete cloud vision** – infrastructure, platform, applications and data: Azure, Office 365, Dynamics 365 and LinkedIn

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Open the call

Sample Email Copy 1

Subject: Make your sales teams more productive

Hi <NAME>

My name is NAME. I'm a part of your Microsoft account team. I am writing to share information around innovating your sales productivity, which I believe could be impactful for your sales performance.

Technology has changed the way customers buy. Customers have more options, access to greater amounts of information, and communication channels have multiplied. As the complexity of sales increases, managing the sales process across multiple accounts can be challenging for sales teams. To better manage this complexity and help their sellers get more done, innovative organizations are modernizing their sales productivity.

With modernized sales productivity, you can leverage sales force automation capabilities to enable your sellers to better manage leads; provide intelligent solutions to accelerate deals with an end-to-end, immersive experience for opportunity management; and integrate familiar tools—like Excel and Outlook—into your sellers' workflows to help increase collaboration and productivity.

Work smarter with sales force automation tools that streamline parts of the sales process
Know what's next with personalized dashboards provide sellers with context-sensitive, event-driven guidance
Get more done with integrations with familiar tools, like Excel and Outlook, that make work easier and faster

All of this means that sellers can spend less time on busy work and more time meeting with customers, leading to more deals, higher revenue, and happier customers.

I'd love to connect to learn more about your business, share a bit more about how [Microsoft Dynamics 365 for Sales](#) can help boost your sales productivity, and tell you about our current offers. Please let me know if you're available <DATE> or <DATE> for a brief conversation.

Thank you,
<NAME>

Microsoft Corporation
One Microsoft Way
Redmond, WA 98052

If you prefer I not forward you these types of communications, just let me know. To learn how to manage your contact preferences for other parts of Microsoft, please read our [Privacy Statement](#).

Sample Email Copy 2

Subject: Make your sales teams more productive

Hi NAME,

Did you know that 55% of sales reps think their company's sales tools are an obstacle instead of a facilitator?

Technology has changed the way customers buy. Customers have more options, access to greater amounts of information, and communication channels have multiplied. As the complexity of sales increases, managing the sales process across multiple accounts can be challenging for sales teams. To better manage this complexity and help their sellers get more done, innovative organizations are modernizing their sales productivity.

With modernized sales productivity, businesses are leveraging sales force automation capabilities to enable sellers to better manage leads; providing intelligent solutions to accelerate deals with an end-to-end, immersive experience for opportunity management; and integrating familiar tools—like Excel and Outlook—into their workflows to help increase collaboration and productivity.

Focus on what's most important and **tailor interactions** with your customers
Streamline seller workflows, and **get more done** with integrations with familiar tools, like Excel and Outlook, that make work easier and faster
Start with a sales solution that meets your needs and **grows with your business**

All of this means that sellers can spend less time on busy work and more time meeting with customers, leading to more deals, higher revenue, and happier customers.

Discover how [Microsoft Dynamics 365 for Sales](#) is enabling businesses to modernize their sales productivity, see [customer success stories](#), [request a demo](#), and [sign up for a trial](#) at dynamics.microsoft.com/sales

I'd love to connect to learn more about your business, and tell you about our current offers. Please let me know if you're available <DATE> or <DATE> for a brief conversation.

Thank you,
<NAME>

Microsoft Corporation
One Microsoft Way
Redmond, WA 98052

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LinkedIn InMail Option

Subject: : Make your sales teams more productive

<NAME>,

While browsing LinkedIn, I noticed that we both [know x]/[belong to same association/alumni organization].

I have read about [your company's positive development]. That's very impressive. We have done a lot of work with other companies like yours that recognize the challenges and opportunities of today's tough sales environment. I'm curious how your sales tools are keeping up with your vision and strategy. If you would like to find out what other leading companies like yours are doing, please let me know a good time to call you or meet with you.

I look forward to hearing from you. Thank you.

Sincerely,

<Name>
<Microsoft Dynamics 365 Solution Professional>
<email>
<phone>



Email

Email **STRAY** Model:

- Attention grabbing **S**ubject line
- Why **T**hem
- **R**elevance
- Call to **A**ction
- Who are **Y**ou?
- Single line signature

Voicemail Examples

Hi Joe, I'm calling from Microsoft, and my name is _____. I got your name from [x]. And we both belong to [association, school, etc]. I did some homework on your company, and I found that Microsoft has done some work with other companies similar to yours.

I thought it might make sense for us to have a brief conversation about how satisfied you and your sales team are with your current CRM application tool.

Please give me a call at *****.

Sample Questions to Ask to Take the Conversation to the Next Level/BDMs

Audience

Do your salespeople know which opportunities to focus on?

Dynamics 365 provides salespeople with predictive lead scoring – a powerful, but easy-to-understand metric that encapsulates predictive intelligence to accurately predict which customers will buy. This kind of actionable insight allows salespeople to invest and focus on the right customers. And this is just one example of the way Dynamics 365 empowers salespeople through meaningful intelligence.

Sales Executive, Sales Manager

Can your sales organizations identify new prospects?

Dynamics 365 builds your pipeline by generating new prospects. Dynamics 365 does the heavy-lifting of building custom predictive models that analyze CRM data, demographic/behavior data, and machine learning to identify businesses or consumers most likely to buy. Also, you can generate more quality leads with various solutions with LinkedIn (from LinkedIn Sales Navigator or LinkedIn campaigns).

Sales Executive, Sales Manager

Do salespeople have visibility into sales triggers, compelling events/activities, or news for their accounts?

Dynamics 365 provides embedded customer insights that help salespeople engage at the right time with the right message, which is especially important in a fast-paced sales environment. The data comes from 3rd parties, such as LinkedIn, InsideView, Versium, D&B.

Sales Executive, Sales Manager

Do salespeople have to flip back and forth between their email, CRM system, and other reporting tools to close a deal?

Dynamics 365 offers an integrated lead to cash solution without ever leaving Outlook through Office 365, reducing time spent switching between stand-alone apps and streamlines seller workflow by collaborating on deals through Microsoft Teams, Office and Dynamics 365 mobile app. Sellers can refresh data in Excel without having to return to the financial system and both sellers and their managers can get an end-to-end view of their business and built-in intelligence through Power BI

Sales Manager, Sales Operations Manager

Do your salespeople find their sales tools easy to use?

Understandably, most salespeople don't want to spend their time in training or figuring out how to use sales tools. They expect and need intuitive solutions. Dynamics 365 is built with that in mind. Dynamics 365 has a new, highly intuitive interface with Microsoft Office 365—embedded capabilities, so salespeople are already familiar and comfortable with Microsoft's sales tools. Salespeople can continue working with their preferred tools like Outlook for managing customer communications, Excel for pipeline analysis, and Word for generating quotes and proposals, and PowerPoint for co-authoring presentations.

Sales Manager, Sales Operations Manager

How motivated are your sales teams?

Traditional sales incentives have limitations. That's because they only motivate a small fraction of the organization for a short period of time. And that's if they even work at all. Dynamics 365 is unique in that it energizes and engages more employees, resulting in significant, lasting improvements to morale and performance.

Sales Executives, Sales Manager, Sales Operations Manager

How often do salespeople find themselves on the road and needing to make look up customer history or make updates to their quotes while visiting customers?

With Dynamics 365 for Sales Professional, salespeople really can work anywhere anytime. The Sales Pro SKU enables sellers to work anytime, anywhere with intuitive and convenient mobile applications. Sellers stay productive with mobile-optimized capabilities like voice-enabled commands and task flows that make it quick to conduct sales activities while on the road.

Sales Manager
Sales Executive

PAIN

SOLUTION

Does your sales team have the time, insights, guidance, and tools to engage, develop, and build customer relationships?

Microsoft Dynamics 365 for Sales Professional: Product & Customer Value

Sellers don't know what to focus on

- Sellers have limited time. In deciding how to focus their time, they rely on guesswork or intuition. That leads to sub-optimal decisions and actions when interacting with customers or completing the sales process.

- Sellers get guidance toward optimal outcomes. Directly inside the sales records they are working on, sellers see the specific steps needed to move the deal forward. Real-time dashboards for sellers and leaders align the sales team around common goals
- Shorten sales cycles with contextual help and guidance so sellers know what steps to take next to move deals forward.

Too many separate sales tools

- It takes multiple and separate sales tools to complete a sale. Sellers have to switch between tools or enter data in multiple systems in order to manage customer communications, update opportunities, and collaborate with customers and colleagues, taking away time from selling.

- Sales data and capabilities are embedded inside familiar tools such as Office 365 where sellers already work. Sellers can work anytime, anywhere with the mobile application across web, smartphone, and tablet.
- Increase seller productivity with tools that work seamlessly with Office 365.

SFA takes too much time and effort to implement

- Typical SFA implementations may take many months and extensive resources to complete. And in the end, the sales team only uses a fraction of the capabilities. That's wasted time and money as well as prolonged time to value.

- Get up and running quickly with pre-packaged applications, without the need to spend extra time and resources setting up and deploying capabilities they don't need. Configure the sales application for specific sales processes, without technical resources.
- See immediate sales results with a streamlined SFA solution that works in days, not months. Meet needs today and scale and adapt to needs in the future

Objection Handling

Already using a competitive solution

I would like to show you how Microsoft's solution is unique and share with you some case studies from companies similar to yours that have used other solutions. Microsoft Dynamics 365 offers many unique benefits that are not possible with the competition. Microsoft Dynamics 365 offers far greater value. For example, data enrichment, predictive lead scoring, prospect generation, and gamification are included at no additional charge. When would be a good time to schedule a follow-up call?

Not enough budget

That's ok. I would just like the chance to share more information with you and find out if we can help your organization. Microsoft delivers transparent pricing options without hidden costs and allows for more flexible licensing options with mix and match capabilities. With a solution from Microsoft, more of our customers are able to take advantage of their existing technology investments. We typically see deployments pay for themselves many times over. With our cloud offering, there is no large upfront investment, only a stable and low monthly fee. Can we schedule a short follow-up call for me to show you the solution?

You need to talk to IT about this

I'd be happy to talk to the CIO about this — could you make an introduction? Before I speak with your CIO, I'd like to make sure you understand the business justification for Microsoft Dynamics 365. Can I spend a couple of minutes going over how we solve some key business challenges for organizations like yours?

Confirm customer needs/recommend next steps

Thank the customer for their time and confirm what interested them. Follow-up by sending them content.

Customer Ready: Grab and Go

Modernize Sales Productivity – Customer Videos

- [Modernize sales productivity with Microsoft Dynamics 365 for Sales Professional](#)
- [Streamline seller workflows with Dynamics 365 for Sales Professional](#)

[Modernize Sales Productivity Handout](#)

- The Handouts have been designed to provide customers with a high-level overview of this Sales Play

[D365 for Sales Pro: Demo and Demo Script](#)

- Demo script, talk track as well as screen shot to demo the Professional SKU to customers and partners.

[Modernize Sales Productivity Webinar](#)

- Note this is gated content, customer will need to fill out form! Webinar is 20 min

[6 Strategies to boost Sales Productivity](#)

- E-Book

Customer Ready O365 & Dynamics Sales “better together” Resource

- ETA April

PointDrive

Microsoft Dynamics 365 for Sales

Created by:
Microsoft Dynamics
Marketing at Microsoft

Email me

Thank you for your interest in Dynamics 365 for Sales. Below you'll find several resources that provide more information about our Sales application, including product information, case studies, and how to start a free trial. Please don't hesitate to contact me if you have any questions.

Contains 8 assets below

<p>Dynamics 365 for Sales features</p> <p>Explore some of the key capabilities of Dynamics 365 for Sales, and see how it can improve relationship management, sales productivity, and sales performance.</p> <p>Type: Video Length: 2m 32s</p>	
<p>Dynamics 365 for Sales Datasheet</p> <p>Discover the many capabilities and benefits of Dynamics 365 for Sales.</p> <p>Type: File Number of pages: 2</p>	
<p>The Forrester Wave Report</p> <p>Read "The Forrester Wave": Sales Force Automation Solutions, Q2 2017" to learn more about the leading sales force automation providers.</p>	

Sales pricing and functionality

Pricing

<p>Dynamics 365 for Sales Professional</p> <p>Core sales force automation (SFA)</p> <p>\$65 Per user/month</p> <p>BUY NOW ></p> <p>LEARN MORE ></p>	<p>Dynamics 365 for Sales Enterprise</p> <p>Industry-leading SFA with embedded intelligence and advanced customization capabilities</p> <p>\$95 Per user/month</p> <p>BUY NOW ></p>	<p>Customer Engagement Plan</p> <p>Dynamics 365 for Sales Enterprise, Marketing, Customer Service, Field Service, Project Service Automation</p> <p>\$115 Per user/month</p> <p>BUY NOW ></p>	<p>Microsoft Relationship Sales</p> <p>Dynamics 365 for Sales Enterprise + LinkedIn Sales Navigator</p> <p>From \$130 Per user/month Requires 10 seats minimum</p> <p>CONTACT US ></p> <p>LEARN MORE ></p>	<p>AI for Sales*</p> <p>Additional AI-driven insights embedded in Dynamics 365 for Sales</p> <p>\$50 Per user/month</p> <p>BUY NOW ></p> <p>LEARN MORE ></p>
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<https://dynamics.microsoft.com/en-us/sales/overview>