Microsoft

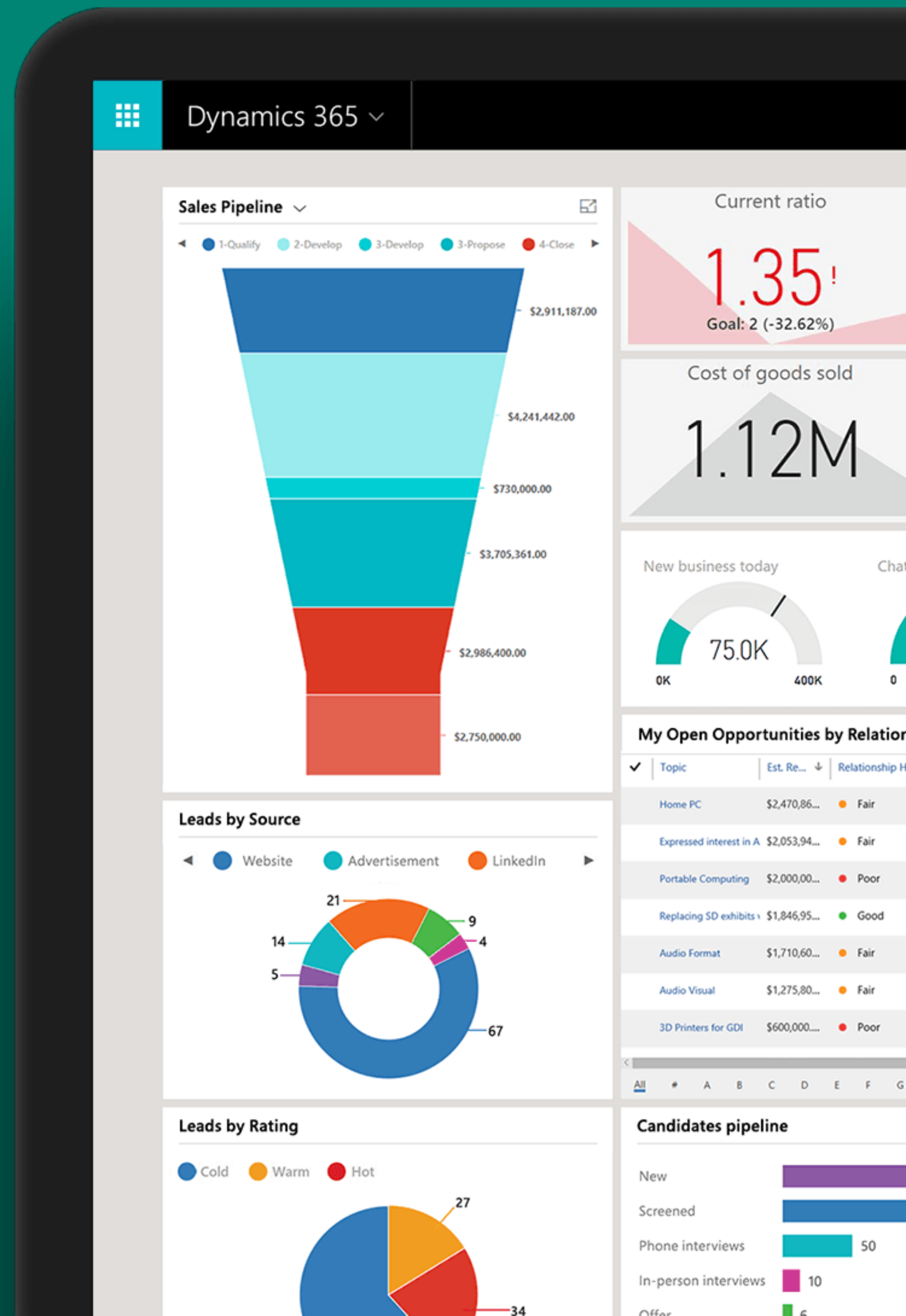
Modernize sales productivity with Microsoft Dynamics 365

Guidance

Typical SFA implementations may take many months and extensive resources to complete. And in the end, sales teams may use only a fraction of the capabilities. This amounts to wasted time and money as well as prolonged time to value. Use this guide to introduce customers to the Microsoft Dynamics 365 sales force automation solution and to upend this common misconception.

Solution overview

Microsoft Dynamics 365 modern sales productivity solutions help maximize seller productivity and improve customer satisfaction and retention. Dynamics 365 is adaptable and built to scale, so customers can start out with just the tools that will be useful to their sellers, then add more advanced capabilities as their businesses grow.



You have less than 3 seconds to capture your listener's attention.

- Introduce yourself and ask if the customer has a few minutes to discuss implementing or upgrading their sales force automation solution.
- Ask if the customer has considered Microsoft Dynamics 365, and identify which solution pillar is most relevant to them.
- Begin questioning (open, probe, prove) with the solution pillar the customer identifies as top-of-mind.

Focus on what's most important

OPEN

- How do your sellers know what to focus on with their limited time?
- What insights drive your sellers' decision making?

PROBE

- How could your sellers benefit from seeing specific steps needed to move a deal forward?
- How do sellers tailor their actions to drive more favorable customer interactions?

PROVE

With Dynamics 365, you can:

- Leverage holistic customer data to create tailored customer experiences.
- Get contextual guidance toward optimal outcomes directly inside sales records.
- View real-time dashboards that provide insights and increase performance.

Streamline seller workflows

OPEN

- How many sales tools do your sellers currently juggle?
- What percentage of your sellers are mobile?

PROBE

- How important are integrated and familiar tools to your sellers, such as Outlook or Excel?
- How could allowing sellers to work from any device improve efficiency?
- How often do your sellers collaborate with customers and colleagues during deals?

PROVE

With Dynamics 365, you can:

- Conduct sales activities in familiar tools such as Office 365.
- Work anytime, anywhere with access from the web, smartphone, and tablet.
- Collaborate on sales documents and stay connected to customers and colleagues.

Start with what you need

OPEN

- How satisfied are you with your current SFA solution?
- Does your SFA solution allow you to add more advanced features over time?

PROBE

- How could your organization benefit from a tailored solution that works in days, not months?
- How might you redistribute your time and cost savings if you could eliminate the capabilities you don't use currently?
- How could adding advanced capabilities like predictive lead scoring aid you as your company grows?

PROVE

With Dynamics 365, you can:

- Get up and running quickly with pre-packaged applications.
- Configure the application for specific sales processes.
- Count on a platform that can meet your needs today, with the flexibility to scale and adapt to your needs in the future.

Qualifying criteria

Budget

Do you currently have budget to implement Microsoft Dynamics 365?

Authority

- Are you the decision maker for your company's sales force automation needs?
- If no, can you put me in contact with the person in your organization who has decision-making authority?

Need

What's your top priority in considering your SFA needs?

- Focusing sellers on what's most important
- Streamlining seller workflows
- Starting with what you need

Timeline

Do you plan to revise or revisit your SFA solution in the next 3–6–12 months?

Next steps

- If the customer meets three of the four qualification criteria: Thank them for their time and offer to schedule a follow-up meeting, demo, or workshop.
- If the customer is interested, but not qualified: Thank them for their time, direct them here for more information, and check back in 30 days.
- If the customer is not interested: Thank them for their time and update your CRM system accordingly.

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