The main theme of this presentation is that Out of the Box "CRM" is boring and not useful for Sales Professionals, making it challenging for management to get the data they need for pipeline management and coaching, and for Microsoft Partners/Sales Enablement to provide highly successful D365 solutions.

The presentation highlights a case study of a Sales Enablement client of TSD who had implemented D365 and were facing these challenges.

The presentation describes what their situation was, what they wanted, and how a customization was developed to solve their need, generating tremendous business results.

This was only possible because of the rich architecture of D365 which allowed for the customization including very engaging graphics and useful feedback for the Sales Professional, enticing them to use the system, thus giving management what they needed.

We then highlight the main themes for making D365 more useful, with practical take-aways that everyone who attends can use.

While the type of customization of D365 that we cover in this customer success story can be done by anyone with the right skills and resources, we engaged a Microsoft Partner – CloudFronts – to do the customization, and solution was so successful we decided to offer it as an App if someone wants to avoid the hassle of figuring it out or can't afford to do it themselves. See the final page for more information.

SESSION OUTCOMES

- For Sales Professionals
  - Achieve Quota, Increase Win-Rate, Deal Size, Customer Satisfaction, Margins
  - D365 for Selling
- For Sales Management
  - Achieve Quota, Cleaner Pipeline, Better Forecasts, Decrease Turnover
  - D365 for Coaching
- For Partners & Enablement
  - Increase D365 Implementation Success
  - Increase Revenues/Funding

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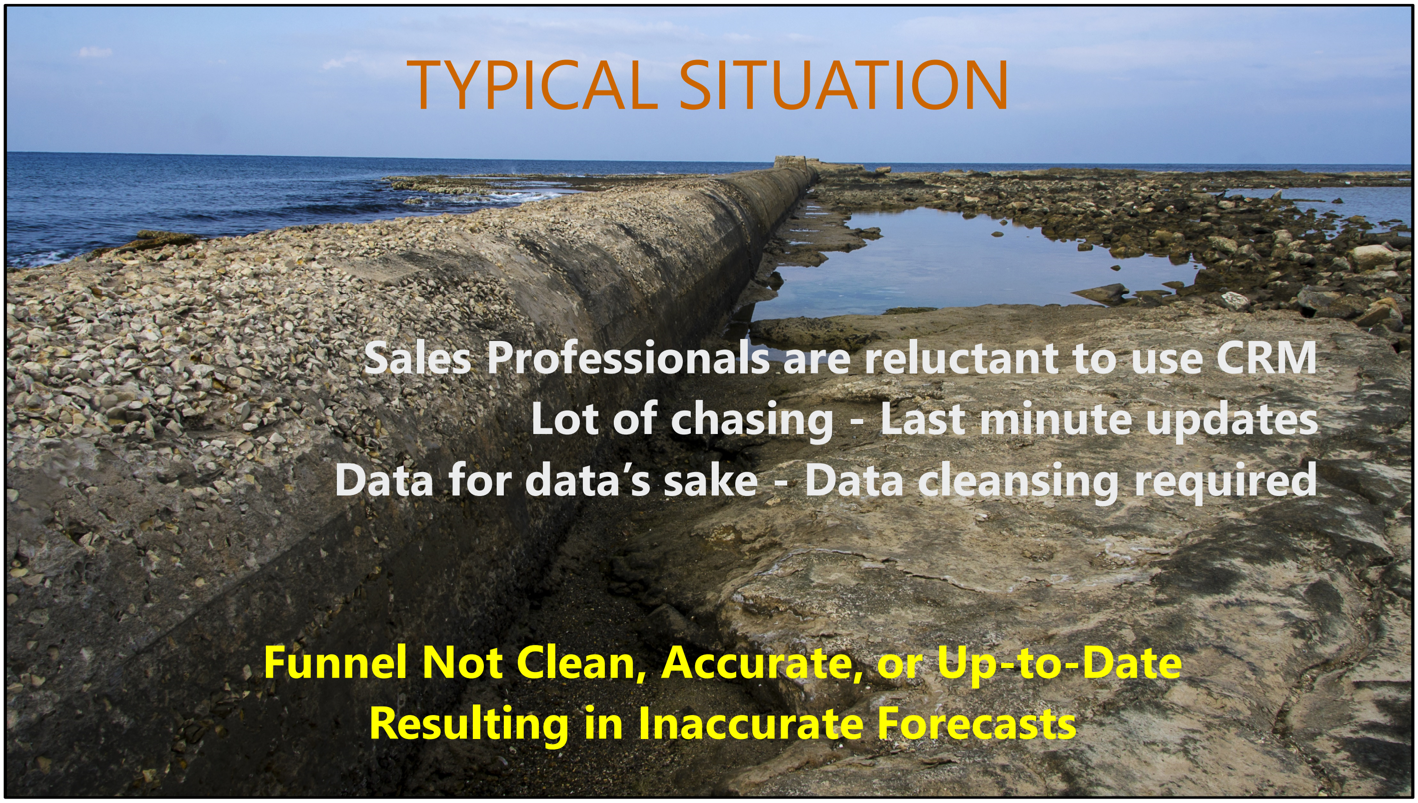
Hopefully something for everyone in attendance

Sales Professionals are not naturally drawn to want to use CRM systems



As a result the CRM data is suspect and less than reliable or dependable for Sales Management.

CUSTOMER SUCCESS STORY

A Global Outsourcing Company

Challenge, Solution, & Result

Demo

SALES IMPROVEMENT INITIATIVE

Job Functions: Sales Professionals and Sales Management

Critical Issue: Sales goals at risk

Challenges:
- D365 limited in helping with deal qualification & strategy to win (or exit)
- Missing sales data or data is incomplete, inconsistent, inaccurate

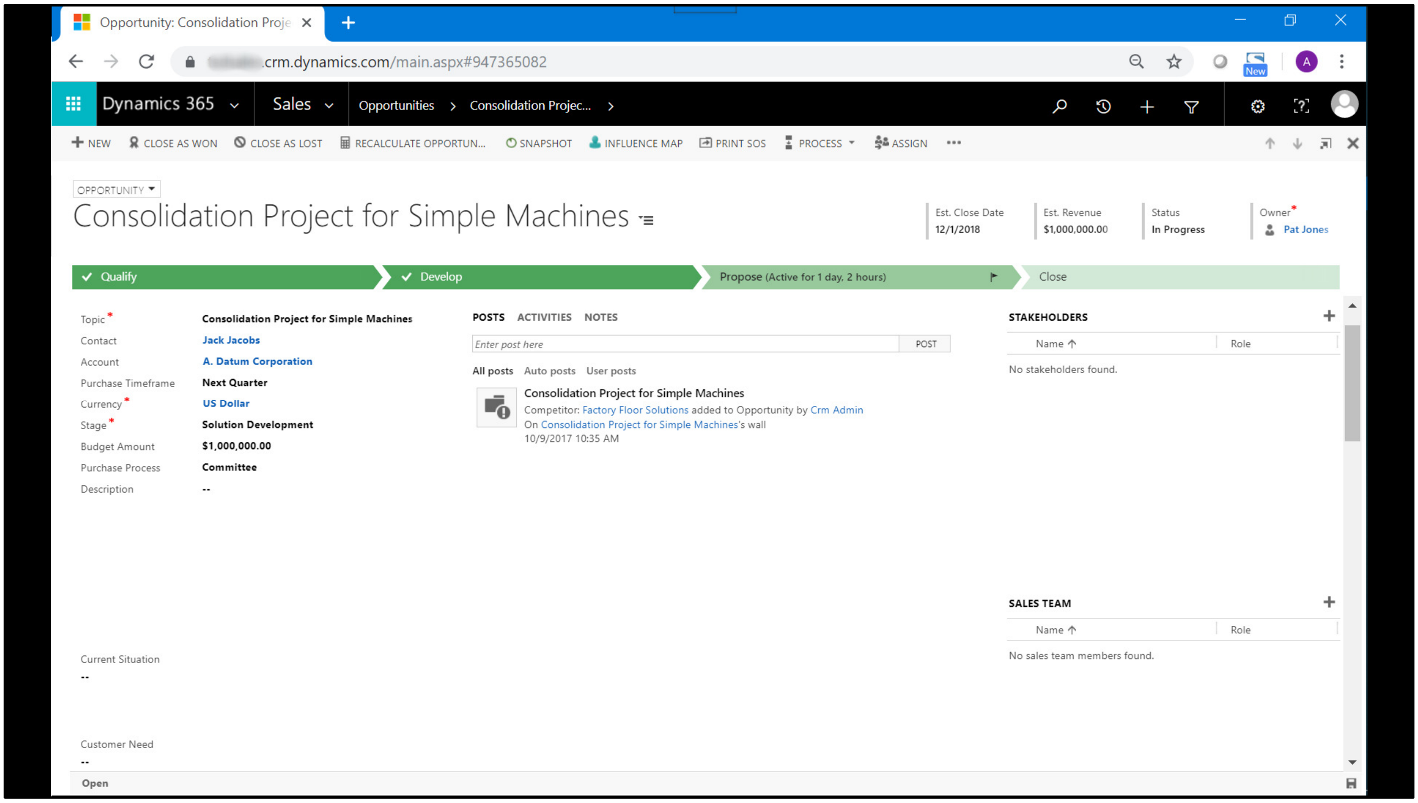
Needs:
- Integrate sales methodology into D365 that helps Sales Professionals sell
- Make D365 easier to use and provide useful data for Sales Professionals
- Better funnel management, data analytics, and management coaching

Sales Results: Win-rate improved from 58% to 74% - a 16 Point increase

Increased revenue by 22%

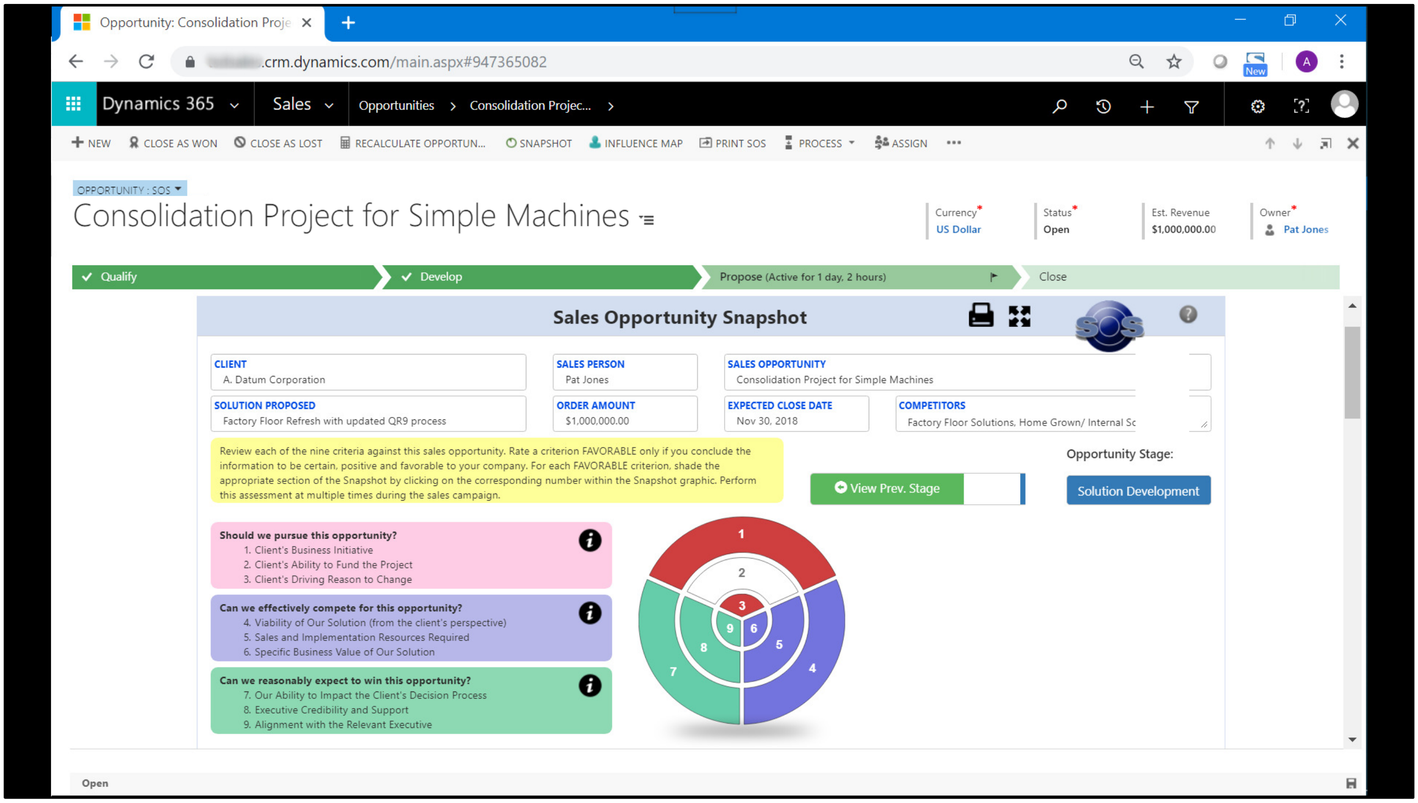
Reliable data for improved forecast accuracy, analytics, and coaching

Customer case study
- TSD Client who was experiencing the challenges mentioned due to implementing D365 for Sales
- Summary of their situation – does this sound familiar to you?
- Results of implementation of the solution that was implemented



The challenge is that out of the box D365 is largely text and Sales doesn’t feel it is useful for them

- A lot of BLANK and non-useful fields
- Boring
- Noting in it for the sales person
- Fill in text fields
- Put data in and get little back



LIVE DEMO

What you are seeing is a qualification methodology that is highly visual and easy to use. It helps Sales Professionals to analyze the opportunity and determine whether it is worth pursuing, whether they can effectively compete, and whether they can win.

Each section of the snapshot corresponds to a set of 3 key questions with additional sub-questions to help evaluate whether the criteria is 100% confirmed and in favor of the Sales Professional. If not, it does not get colored in, which helps to evaluate the state of qualification and identify areas that need to be explored in order to determine how to proceed or decide to withdraw in pursuit of better qualified deals.

This helps the sales professional by:

- Giving guidance
- Helping manage deal
- Alerting to things they've forgotten or are unaware of

At the same time information is being filled in which benefits Sales Management in coaching and managing the pipeline

This is just 1 of 5 key pieces of the customization. The other four are:

- Competitive Strategy – evaluating the competitive landscape and determining the strategy needed to win
- Influence Map – mapping out the stakeholders and their relative level of influence which can be used to move the deal forward
- Value Prop – the value of the solution based on addressing the business needs of the stakeholders
- Action Items – assignment of actions to move the deal forward

MAKING D365 FOR SALES DESIRABLE & VALUABLE

Make it Easy to Use

Make it graphical
Get more out than put in
Leverage historical data

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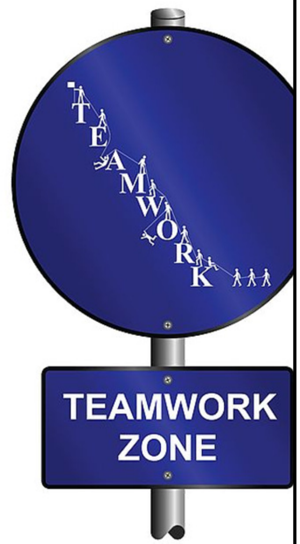
Dynamics CRM User Group

MAKING D365 FOR SALES DESIRABLE & VALUABLE

Lead the Change

Sell it – WIIFM
Top Down - Managers use system
Regular “Test and Review” sessions



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MAKING D365 FOR SALES DESIRABLE & VALUABLE

Ensure Success

Train on process/methods, not just tool
Reward proactive use
Report back to team on results

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In summary, we showed how the D365 architecture can be used to provide a customized experience for Sales Professionals which will make CRM more useful and impactful – helping them sell.

We've provided 9 Key areas of focus to accomplish this outcome, and how we applied this for a D365 customer.

Ideas like this can be implemented on your own if you've got the time and capability, or you can use a partner like CloudFronts, as we did for this project. The main point is that D365 is very robust and can be customized in ways that make it more useful for Sales and Management.

Since this worked out so well, if it suits your needs, we've provided it as an App – available now for free trial on the AppSource.

If you are interested and feel it will help, you can find out more information here:
https://bit.ly/SOSforD365

Or Contact Art Fromm – art@technicalsalesdevelopment.com