Sales Force Automation

Drive sales productivity, user adoption and consistent best practices with Microsoft Dynamics™ CRM for Sales

Streamline and automate your sales processes and enable sales people to create a single view of the customer to help ensure a shorter sales cycle, higher close rates, and improved customer retention. Microsoft Dynamics CRM business software gives sales professionals fast access to useful data online or offline so they can work efficiently and spend more time selling.

Microsoft Dynamics CRM for Sales

Optimize • Align • Qualify • Close • Grow

Sales Team and Territory Planning
Lead Management
Opportunity Management
Account Management
Forecasting & Sales Analytics

Sales Workflow

Improved Sales Productivity

The functionality outlined in the above diagram showcases the Microsoft Dynamics CRM capabilities that help organizations effectively manage their sales lifecycle and improve close rates

"It's given our advisors a daily discipline for pursuing leads and more time for personal relationships with people. We can identify our best sales people and regiment their best practices."

SHARIE ROBERTS
Membership Manager,
Equinox

Microsoft Dynamics CRM

> "One of the things that really attracted us to Microsoft Dynamics CRM is that, combined with Microsoft Outlook, it's just like one product. In anything else, you'd be duplicating efforts in two separate products."
>
> KAREN PLAYFAIR
> Director of Finance,
> Tourism Whistler

MANAGE WORK MORE EFFECTIVELY

Offer customer relationship management functionality as a natural extension of Microsoft® Office Outlook® messaging and collaboration client. Manage customer e-mail, appointments, tasks, and contacts from a single business application.

UNDERSTAND YOUR CUSTOMERS BETTER

Create a centralized, customizable view of your customer's preferences, relationships, and activity history to better understand and meet their needs.

IMPROVE SALES QUALIFICATION

Spend time with the right leads and prospects. Establish consistent follow-up processes and automate sales activities with powerful system workflow.

INCREASE SALES SUCCESS

Shorten the sales cycle and improve win rates with lead and opportunity management, automated lead routing, sales process management, and competitor tracking.

KEEP CUSTOMERS INFORMED

Use simple, wizard-driven sales and marketing features to keep your sales prospects and customers informed of new product and service offerings.

ANALYZE SALES PERFORMANCE

Use flexible reporting to forecast sales, measure business activity and performance, track sales and service success, and identify trends, problems, and opportunities.

DRIVE SUCCESSFUL CUSTOMER INTERACTIONS

Work in a familiar user interface: Manage and monitor all your interactions within a single business application. Automatically synchronize Microsoft Office Outlook e-mail, calendar, tasks, and contacts with your Microsoft Dynamics CRM database. Automatically convert e-mail messages into contacts, leads, and opportunities.

Target your communications: Use customizable templates to create and send e-mail messages to targeted prospects and customers. Quickly create and send communications using Microsoft Office Word mail merge.

Work away from the office: Access robust functionality offline or work from virtually any location over the Internet or on a wide variety of mobile devices. Update records, study customer data, carry out analysis, and print quotes even when working offline.

Improve data quality: Automatically detect and remove duplicate records to ensure the quality of your customer data.

Do business globally: Compete effectively for global deals and track sales information seamlessly across multiple currencies and time zones.
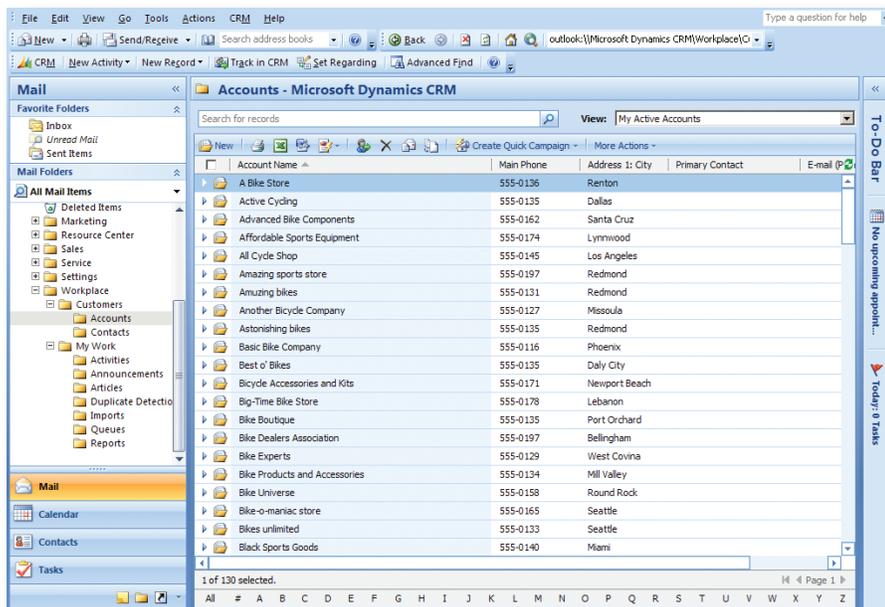
Microsoft Dynamics CRM

GAIN A COMPREHENSIVE VIEW OF SALES DATA

Gain a complete view of the customer: View and manage account activity and history, including contact information, attributes, meeting notes, attachments, communications, open proposals, and purchased products.

Find information quickly: Use Advanced Find and global search to instantly zero in on key nuggets of information.

Make the right offers: Effortlessly track all interactions, offers, orders, contracts, and relationships associated with your account so that you can offer the right product or service at the right time.

Uncover hidden opportunities: Intuitively track relationships between customers, partners, influencers, and suppliers so you can uncover new opportunities. Understand and leverage complex business scenarios with enhanced support for many-to-many relationships.

Take a holistic and coordinated approach to the management of customers.

MANAGE AND AUTOMATE SALES PROCESSES

Improve lead handling and routing: Easily promote qualified leads to new opportunities with a single click. Automatically deliver the right lead to the right person according to product, territory, dollar amount, or any other criteria.

Manage quotes and orders: Easily create quotes, convert them to orders, then track and manage them throughout their life cycle from proposals to invoices.

Manage territories: Create territories for salespeople, enabling them to manage and evaluate territory-based sales processes and results.

Manage sales and marketing lists: Import purchased lists to fuel your sales efforts. Measure effectiveness and maintain lists for annual sales campaigns.

Manage contracts: Easily add, edit, and track contracts associated with individuals or companies, including maintenance contracts and renewal notifications.

"As the CEO of a global company, Microsoft Dynamics CRM allows me to log in to all of our remote sites to get a snapshot of what's going on. I can get a snapshot of what any of my business units are doing, real time, any day of the week."

NATHAN BUZZA
CEO,
Commtech Wireless

Microsoft Dynamics CRM

Ensure sales methodology relevance: Initiate, track, and close sales consistently and efficiently with workflow rules that automate sales stages, lead routing, notifications and escalations. Empower salespeople to create their own workflows with workflow tools designed for end users.

COMMUNICATE INFORMATION EFFECTIVELY

Create campaigns quickly: Use wizard-driven tools to keep your customers informed and aware of your new products and services.

Track competitors: Maintain detailed information on competitors associated with opportunities. Track competitor activity by product, region, or other criteria.

Keep a product catalog: Work with a full-featured product catalog that includes support for complex pricing levels, units of measure, discounts, and pricing options.

Manage sales literature: Create, manage, and distribute a searchable library of sales and marketing materials, including brochures, white papers, and competitor information.
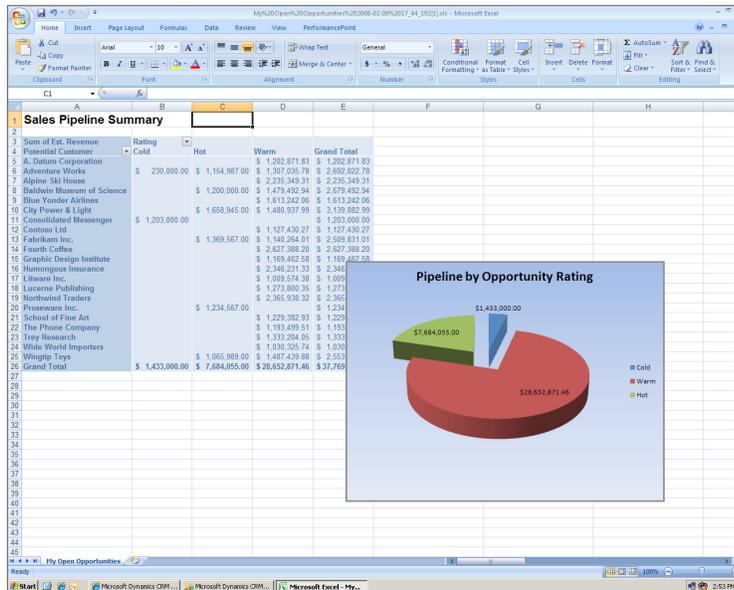
Utilize the report wizard to create custom reports, or leverage Microsoft Office Excel™ to quickly view, analyze and synchronize customer data using familiar productivity tools.

TRANSFORM INFORMATION INTO SALES INTELLIGENCE

Generate and use reports: Create, view and sort a wide range of reports to identify trends, measure and forecast sales activity, track sales processes, and evaluate sales performance. Easily share reports with co-workers.

Make data relevant: Create insightful and focused reports for executives and top constituents that adeptly highlight key sales metrics and sales performance.

Track pipelines: Execute complex pipeline queries easily so you can gain insight into leads and opportunities at every stage of the sales cycle.

"We've embarked on building a world-class sales organization, and we couldn't have done it without a world-class sales force automation tool. Microsoft Dynamics CRM is playing a central role in achieving this goal.""

JAY DEVERS
Director of Technology Solutions,
Best Buy

For more information about Microsoft Dynamics CRM, visit:
www.microsoft.com/dynamics/crm

Microsoft