

E-book series

Beyond CRM: The CFO's Guide to Driving Sales Revenue

 Microsoft Dynamics 365





05 /

Drive efficiency and
immediate impact

07 /

Get insights from
connection to cash flow

09 /

Attain operational
excellence

10 /

Select a comprehensive
solution with smart TCO

11 /

A smart stack for your
whole business

A drop in revenue is enough to make any CFO sweat. Updating your CRM solution to one that unifies customer data can make a big difference. To truly empower your sales organization to drive revenue and win deals, however, they need tools to enable **relationship selling**. The right technology helps them focus on customer connections rather than data entry. At the same time, you have to justify the ROI and ensure IT is on board.

[Microsoft Relationship Sales](#) can help you do it all.

Microsoft Relationship Sales is a complete selling solution:



Combines Microsoft Dynamics 365 for Sales with LinkedIn Sales Navigator



Works seamlessly with Office 365, maximizing your existing investment in productivity tools and the relationship data those tools generate



Unifies Office 365, CRM, and social media data, helping sellers engage with buyers in meaningful, personalized ways



Empowers your team with the right information at the right time with AI-powered insights and suggestions

On the operational side, the Microsoft cloud platform reduces cost and complexity for your IT team. Sellers can maximize efficiency through familiar experiences, helping them get up to speed with less training. Best of all, Dynamics 365 delivers more value for less money than competing sales force automation (SFA) solutions.



The tight integration across the Microsoft product family creates a compelling case for companies to switch from more expensive cloud offerings.

Ray Wang

Principal Analyst and Founder,
Constellation Research



The recognized leader

Destination CRM named Dynamics 365 the best enterprise CRM. Depth of functionality, a large partner ecosystem, and the best value put Dynamics 365 over the top.

[Read the report](#)

Drive efficiency and immediate impact

SFA solutions only work when people use them. With Microsoft Relationship Sales, familiar Office 365 experiences enable sellers to work seamlessly with customers and colleagues. Context-sensitive help and an intelligent, event-driven sales process speed up results.

Success story 1



\$1 billion global logistics company



Rapid adoption with 300 employees using Microsoft Relationship Sales within six months



Data entry time reduced to six minutes per day

[Read the case study](#)



Once we rolled out Microsoft Relationship Sales, the overwhelming response was that it's really easy to use, and it doesn't take much time.

John Jergens

Vice President of Global Sales,
Crane Logistics



The bottom line

In an independent report, Nucleus Research found that Microsoft Relationship Sales solution boosts sales productivity by 12-15% per sales professional.

[Read the report](#)

Get insights from connection to cash flow

Sales depend on relationships. But in such a fast-paced world, it's harder for sellers to connect. They need unified data to build long-term relationships with buyers. With Dynamics 365, your organization can go beyond basic CRM. It synthesizes data from LinkedIn, Office 365, and Dynamics 365, then uses AI to generate actionable insights and suggestions—helping identify the right leads to focus on, and turning them into successful deals faster.

Success story 2



Fender, an iconic guitar brand, revitalized its CRM strategy to improve relationship selling



Microsoft Relationship Sales enabled better connections between sales and service for a 360-degree customer view



Predictive insights resulted in improved customer relationships

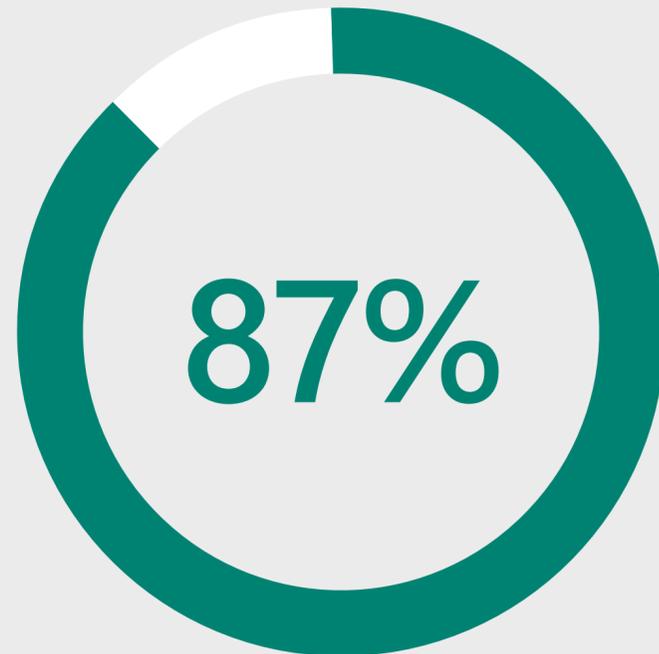
[Read the case study](#)



**Because we are having
the right conversation
with the right data, we are
more prepared than ever
before to help grow our
dealers' business.**

Tammy Van Donk

Senior Vice President of Sales,
Fender Musical Instruments



Percentage of customers who had a favorable impression when a salesperson was introduced to them through their network.

Source: [The Power of Relationship Selling](#), Heinz Marketing



Beyond the handshake: How Dynamics 365 supports relationship selling

- Uses predictive lead scoring to build relationships with the most promising prospects.
- Finds and connects with decision-makers and influencers from more than 610 million LinkedIn profiles (and growing).
- Connects to buyers by showing sellers contacts who can provide a warm introduction.

Attain operational excellence

Efficient operations support better margins. Free your company's sellers to do what they do best with Dynamics 365. They can save time with contextual prompts, align to best practices using repeatable techniques, and minimize their training time with a guided experience.

Success story 3



Software division of 10,000-person company with contracts valued at US \$65M to \$100M



Consolidated 10 CRM instances into a single instance of Microsoft Dynamics 365



Translated sales playbooks into automated prompts and workflows

[Read the case study](#)



It's one thing to create a playbook and make it available to your sales teams, but embedding it in Dynamics 365 for Sales means that your best practices become second nature.

Kit Burcham

Divisional Sales Operations Lead,
Capita Software

Select a comprehensive solution with smart TCO

High-performing organizations use analytics and AI to boost seller success. Microsoft Relationship Sales embeds intelligence into daily workflows in a cost-effective solution. It helps sales teams:



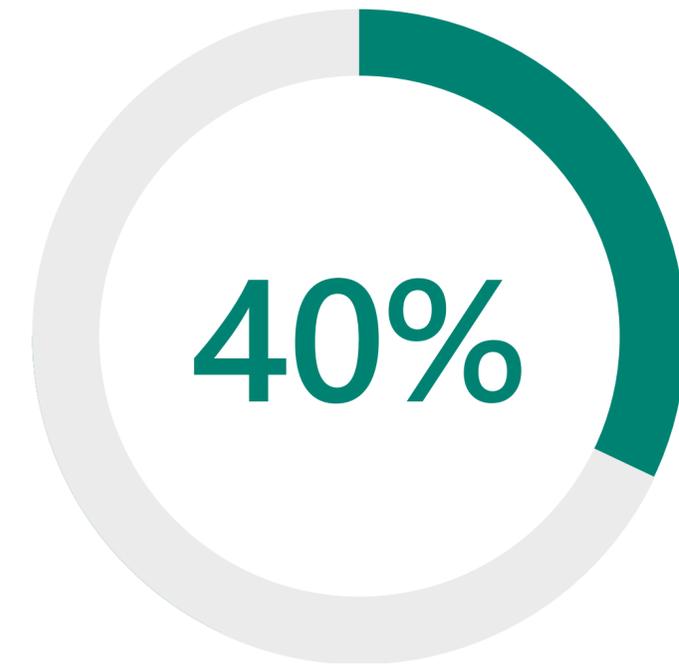
Increase conversion and win rates with lead and opportunity scoring



Get recommendations for personalized talking points and next best steps



Focus on high-priority customers with relationship health scores



Three-quarters of organizations believe that AI will transform their companies within three years. Yet 40 percent of executives indicate that they feel AI technologies and expertise are too expensive.

A smart stack for your whole business

Looking for a solution that drives revenue and meets the needs of finance, sales, and IT all at once? Put Microsoft Relationship Sales on your shortlist.

[Learn more about Microsoft Relationship Sales](#)