



[SEE CORRESPONDING WEBINAR BROADCAST HERE \(CLICK\)](#)

## MAKING CRM DESIRABLE AND VALUABLE FOR SALES TEAMS



**Art Fromm**

Owner/Principal - SOS for D365 App  
Technical Sales Development



Microsoft Dynamics 365 for  
Sales

MEMBERSHIP HAS ITS BENEFITS

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



Hopefully something for everyone in attendance

## CHALLENGES WITH TYPICAL CRM SYSTEMS

CRM is just a tool



CRM has a bad reputation

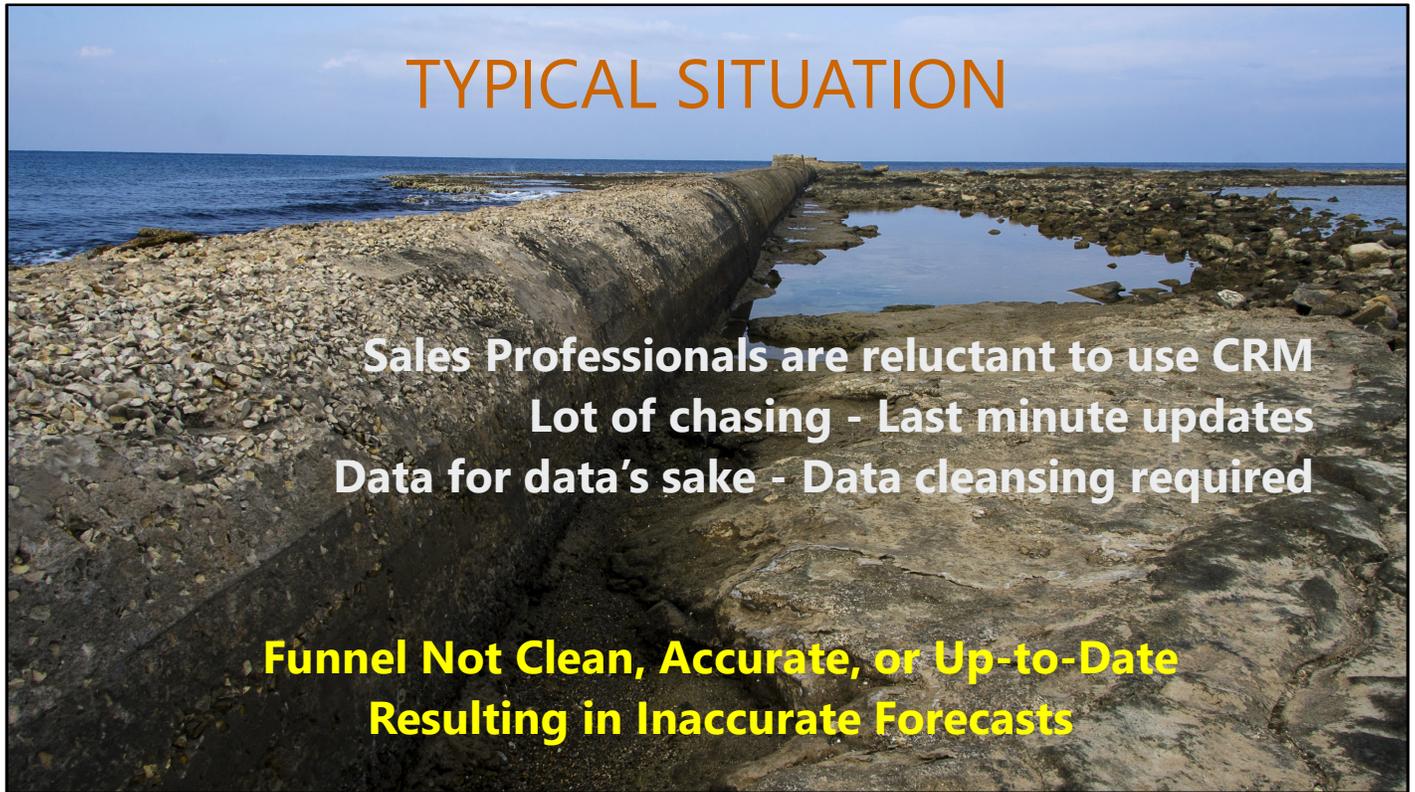


Sales Professionals feel CRM  
Is not helpful and slows them down



@CRMUG

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 screenshot displays the Dynamics 365 CRM interface for an opportunity record titled "Consolidation Project for Simple Machines". The browser address bar shows the URL "crm.dynamics.com/main.aspx#947365082". The navigation pane includes "Dynamics 365", "Sales", "Opportunities", and "Consolidation Project...". The main header shows the opportunity name, "Est. Close Date" (12/1/2018), "Est. Revenue" (\$1,000,000.00), "Status" (In Progress), and "Owner" (Pat Jones). Below the header is a progress bar with stages: "Qualify", "Develop", "Propose (Active for 1 day, 2 hours)", and "Close". The left sidebar lists fields such as "Topic", "Contact", "Account", "Purchase Timeframe", "Currency", "Stage", "Budget Amount", "Purchase Process", and "Description". The main content area is divided into "POSTS", "ACTIVITIES", and "NOTES". The "POSTS" section shows a recent post: "Consolidation Project for Simple Machines" with the text "Competitor: Factory Floor Solutions added to Opportunity by Crm Admin On Consolidation Project for Simple Machines's wall 10/9/2017 10:35 AM". The "STAKEHOLDERS" and "SALES TEAM" sections are currently empty, displaying "No stakeholders found." and "No sales team members found." respectively.

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

# MAKING D365 FOR SALES DESIRABLE & VALUABLE

## Lead the Change

Sell it – WIIFM

Top Down - Managers use system

Regular "Test and Review" sessions



## MAKING D365 FOR SALES DESIRABLE & VALUABLE

### Ensure Success

Train on process/methods, not just tool

Reward proactive use

Report back to team on results



## 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



**Sales Opportunity Snapshot®**

**SOS for D365**

<http://bit.ly/SOSforD365>

art@technicalsalesdevelopment.com



**CRMUG**  
DYNAMICS CRM USER GROUP

@CRMUG

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