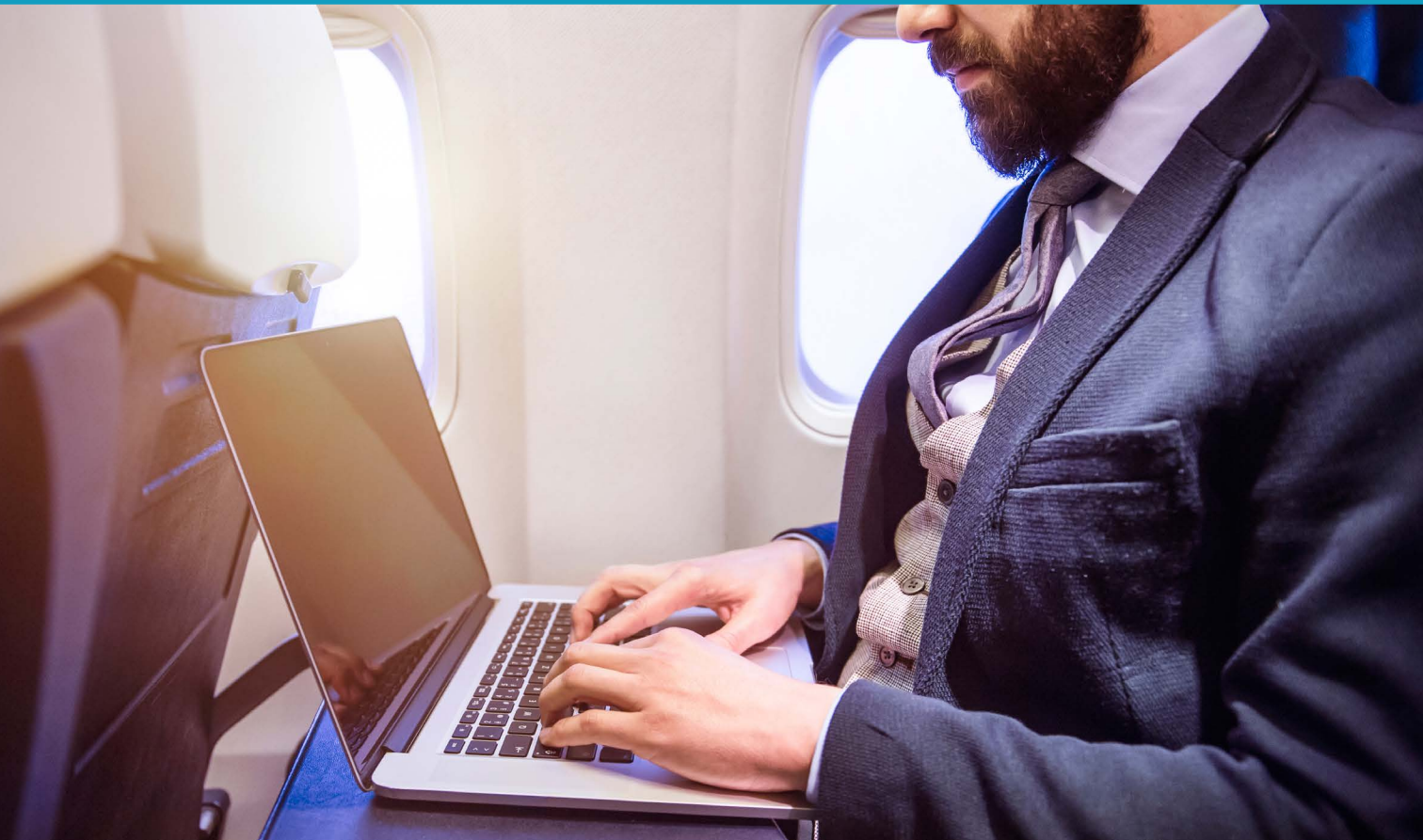


Microsoft Dynamics 365 for Sales





Microsoft Dynamics 365 for Sales

Microsoft Dynamics 365 for Sales is a business solution that can increase sales and marketing efficiency. It's an application that provides a powerful set of tools, that in combination, drive the optimisation of business intelligence, campaign management and many other key customer relationship matters.

It can help reduce costs and increase profitability by organising and automating business processes that nurture customer relationships and satisfaction across all interactions—marketing, sales, and customer service. 365 for Sales solutions can deliver return on investment (ROI) through marketing automation, customer service, and sales force automation.

With a 365 for Sales system, everything from customer accounts to sales opportunities to customer leads and account activity in the cloud, plus relationships involving mobile sales, come into easy view for collaboration and rapid decision-making. Store and leverage data and analytics for the big picture on your business from many angles. Or drill down into the 365 for Sales system's features and tools specifically for sales, service, marketing, and social intelligence.

Organisations like yours need a 365 for Sales system that drives sales and empowers selling capabilities, all while increasing productivity and helping your team discover social insights that lead to overall customer success.

Microsoft Dynamics 365 for Sales also offers a full range of software with product integration not only for Office365 and Power BI, but also Yammer, Lync, Skype and importantly, Microsoft Dynamics NAV.

365 for Sales has extensive and flexible functionalities including but not limited to:

- sales
- marketing
- customer service
- project service
- social engagement



Sales Functionality



Sales Functionality

Sell effectively with Microsoft Dynamics 365 for Sales

Sales for Microsoft Dynamics 365 for Sales provides a complete and intuitive solution that can help salespeople be more productive so they can focus on what's most important—delivering amazing customer experiences.

The combination of Microsoft Dynamics 365 for Sales Online, Office 365, and Power BI drives sales productivity by making teams highly connected and collaborative so they can close more deals, faster.

Key benefits



Stay focused

Focus on the right prospects and customers. Improve visibility into sales performance. Make better decisions based on insight.



Build trust

Anticipate your customer's needs. Align buy and sell cycles to drive personalised, proactive engagement. Interact consistently with customers across touch points.



Win faster

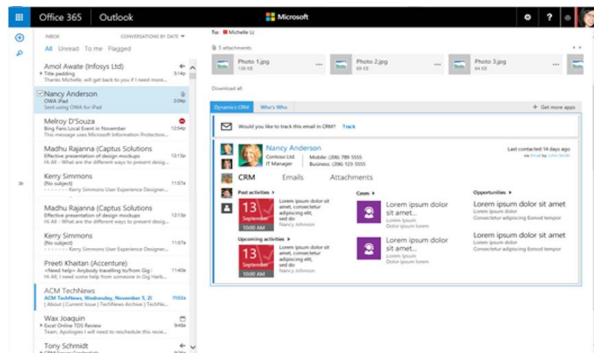
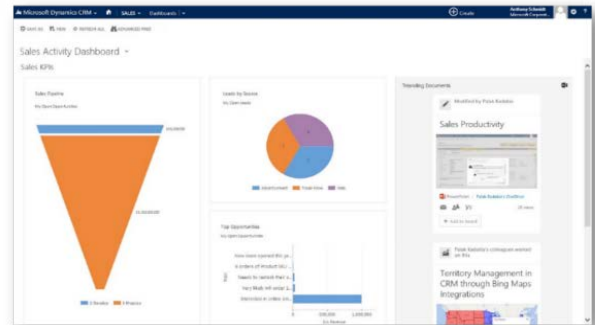
Work more efficiently with seamless, familiar, easy-to-use solutions. Engage and collaborate around strategic deals. Work anytime, anywhere.



Sales Functionality - key capabilities

Opportunity management

Manage customers anywhere you work. Stay informed with accurate 3rd party firmographics, news, and compelling events from Insights, powered by InsideView. Increase visibility and productivity with channels by using a partner portal to manage opportunities, communications, and resources. Close more deals when you connect, discover, and share ideas via Office 365. Know what steps to take next with embedded business process UI and an overview of daily priorities from Cortana.

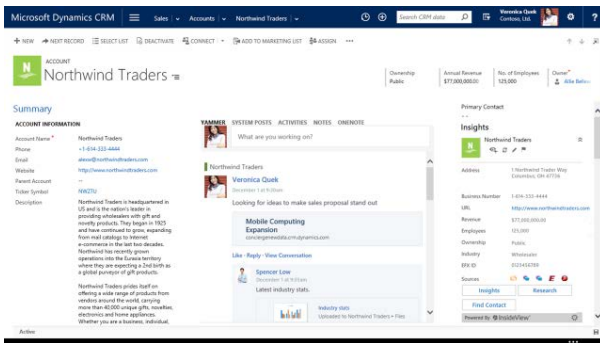


Content collaboration

Create personalised sales documents as a team with Word templates and real-time co-authoring through Office 365. Manage contextual 365 for Sales documents across SharePoint, Office 365 Groups, and OneDrive for Business. Relevant content comes to you with Delve based on what you are working on and who you're working with.



Sales Functionality - key capabilities

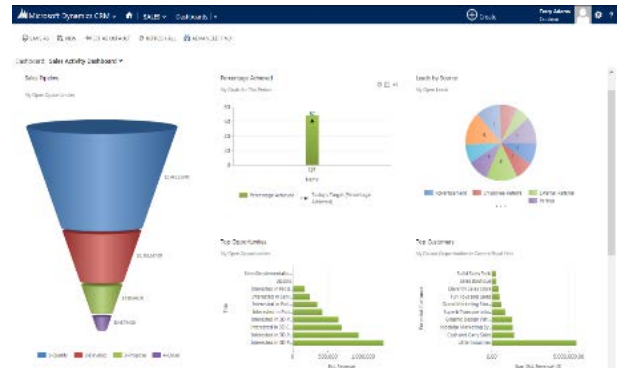


Planning and management

Hit your numbers by setting goals, monitoring results, and providing feedback and coaching in real-time. Conduct what-if analysis with Excel and pre-built templates. Motivate sales reps through creative and fun team-based competitions, with FantasySalesTeam, from Microsoft. Ease on-boarding and align sales behavior with best practices by using business process management and interactive help and documentation.

Social selling

Find more leads by using social to identify and act on buying signals and create leads based on social posts. Get a snapshot of social activities through embedded buzz volume, trends, and sentiment analysis, using Microsoft Social Engagement. Increase response rates by reaching out to new contacts through mutual connections surfaced by Insights, powered by InsideView.

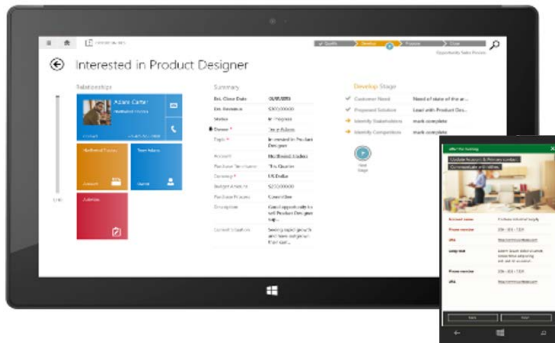
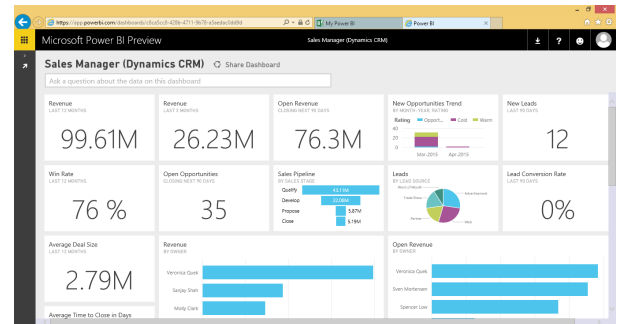




Sales Functionality - key capabilities

Mobile sales

Work on the go with rich, modern mobile apps that provide contextual news and social data, and task flows for quickly completing frequent activities. Quickly manage data using intuitive natural language voice commands to create new records, schedule meetings, set reminders, and find information. Get work done anytime, anywhere with intuitive, familiar apps for tablet and smartphone that work online or offline.



Sales intelligence

Sell smarter with lead scoring from InsideSales.com, cross-sell recommendations from Cortana Intelligence, and trending documents from Delve inside 365 for Sales dashboards. Discover new insight with Power BI's pre-built, interactive dashboards and reports, advanced visualisations, and natural language Q&A. Gain visibility into sales performance with at-a-glance dashboards and contextual charts inside 365 for Sales.

Marketing Functionality





Marketing Functionality

Market smarter

Microsoft Dynamics Marketing is an integrated marketing management solution for marketing operations, planning, execution, and analytics across all channels—digital, social, SMS, and traditional. You can engage customers one-to-one across channels, build your sales pipeline, and demonstrate the impact of your marketing investments in real time

Key benefits



Build brand

- deliver consistent, compelling experience across touch points
- align branding, and plan across internal and external resources



Demonstrate impact

- manage marketing operations across internal and external teams
- understand marketing ROI and impact on pipeline and revenue

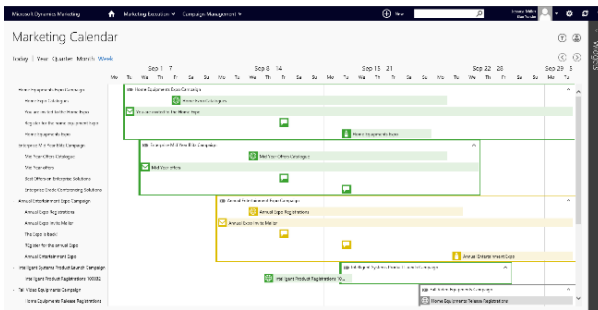


Engage one-to-one

- personalise engagement via targeted, multistage campaigns
- deliver targeted, relevant content at the right time



Marketing Functionality - key capabilities

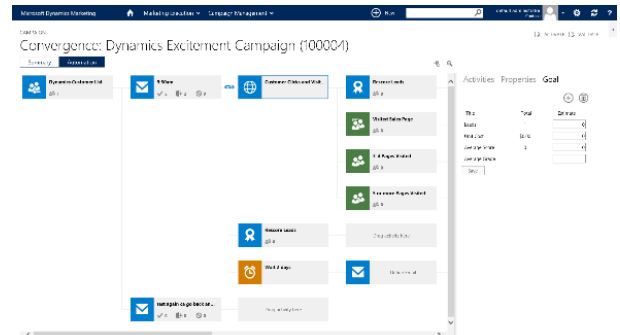


Multichannel campaigns

Engage customers with personalised, multichannel campaigns. The visual campaign designer lets you drag and drop to create and manage campaigns in a single window — across email, social, SMS, events, and direct mail. Streamline campaign creation, segment customers and prospects, and test campaign messaging to improve conversion.

Marketing resource management

Integrate planning, budgeting and tracking across all channels, including email, digital, social, SMS, and traditional. Manage projects, digital assets, workflows, and approval processes across your team and other departments and agencies — all from a single platform.

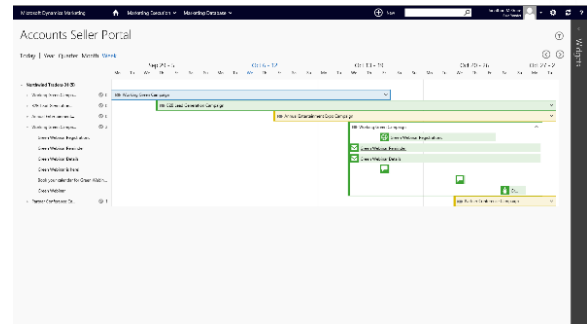




Marketing Functionality - key capabilities

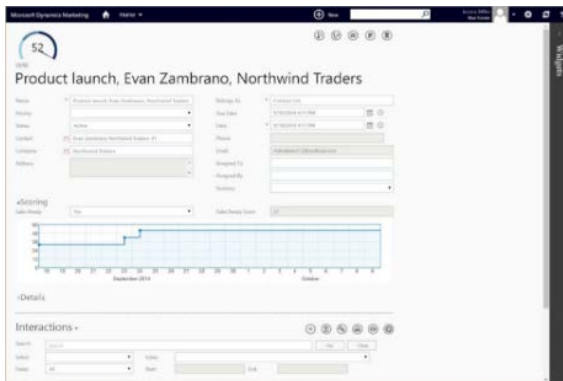
Lead management

Increase sales-ready leads with advanced segmentation and lead scoring. Boost prospect interest through multistage, trigger-based nurture programs that deliver personalised content and offers. Combine your sales and marketing funnel to better serve sales.



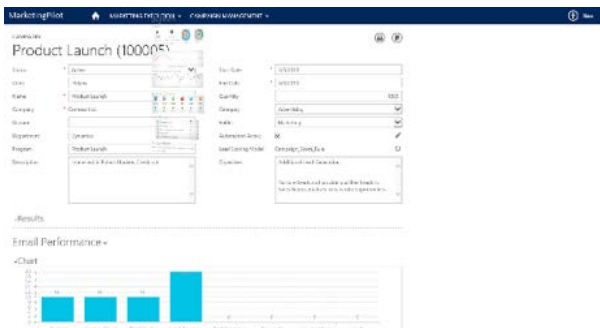
Sales collaboration

Strengthen your marketing and sales synergies by providing sales teams with visibility into the marketing calendar, and provide actionable input. Sales can now get more insights into campaigns and targeting. And both sales and marketing can share the same view of the customer journey.





Marketing Functionality - key capabilities



Marketing intelligence

Measure pipeline and revenue across every marketing investment to get a true view of your return on investment (ROI). Empower your marketers with access to data through personalised role-based dashboards, and get a clear overview of marketing results so you can quickly judge performance. Make reporting easy by giving marketers familiar tools, including Excel and Power BI, for real-time reporting.

Social marketing

Engage with customers and prospects through embedded, contextual social tools. Measure campaign performance and impact, and track your share of voice across social channels, such as Twitter, Facebook, and YouTube. Monitor your global sentiment and brand presence.



A photograph of two men in a factory or warehouse setting. On the left, a man in a dark suit and light blue shirt is looking at a tablet. On the right, a man in a grey t-shirt and blue overalls is looking at a small metal part he is holding. The background shows industrial shelving and equipment. A blue rectangular overlay is positioned over the left side of the image, containing the text 'Service Functionality' in white.

Service Functionality



Service Functionality

Care everywhere

Organisations empowered by intelligent customer service increase advocacy and loyalty to their brands by creating effortless experiences that are a natural extension of the way people engage day-to-day. The service capabilities for Microsoft Dynamics 365 for Sales empower companies to deliver end-to-end, self, assisted and onsite service. Our industry leading technologies, including machine learning, IoT and analytics, give our purpose-built solution the breadth and depth necessary for your organisation to meet the challenges of an evolving customer service landscape – and position your brand to capitalise on an everything-as-a-service economy.

Key benefits



Earn loyalty

Increase brand loyalty and advocacy by providing personalised, contextual interactions across the customer journey on any device through self, assisted and onsite service channels.



Stay agile

Adjust at the pace of innovation through actionable insights that anticipate the rapidly changing needs of customers and your brand.



Empower agents

Provide your agents with everything they need to deliver a more personalised, effective standard of service – using tools that are at their fingertips, from a single application.



Service Functionality - key capabilities

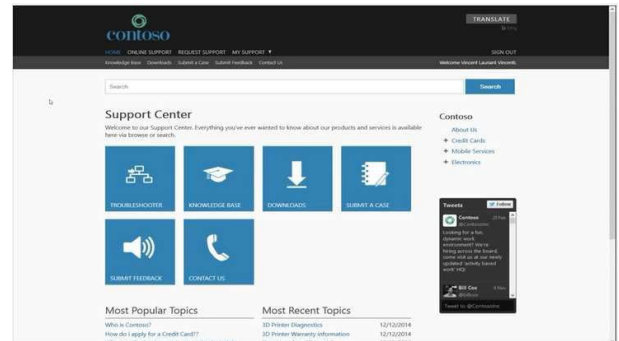


Omni-channel

Enable end-to-end customer service engagements across self, agent assisted, and onsite service — through any channel and using any device. A unified platform ensures context across channels and engagements, delivering personalised service with minimal customer effort.

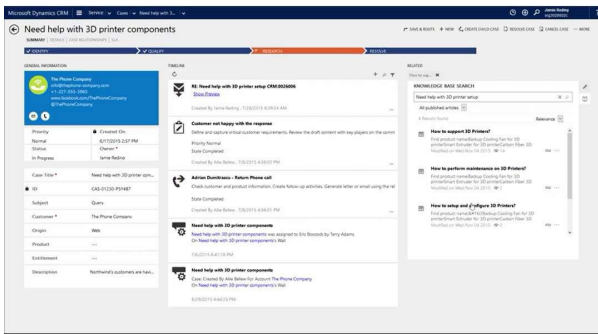
Portal

84% of consumers use web or mobile self-service to find the answers they need on their own. Provide branded self-service options that deliver consistent, up-to-date answers and personalised information, and a community experience to connect with peers and subject matter experts.





Service Functionality - key capabilities

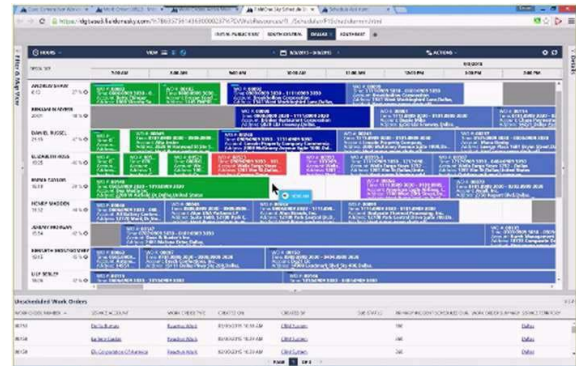


Onsite service

Leverage a comprehensive set of tools and insights designed for high-touch interactions. Field service capabilities keep the customer at the center of your business through smart scheduling and optimised resource utilisation. Project service automation capabilities unite people, process and technology to deliver on-time, on-budget professional engagements.

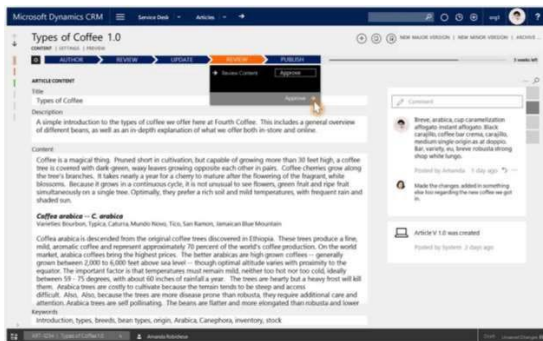
Agent enablement

Empower agents with a mobile-enabled unified experience to deliver fast, amazing customer service. Relevant and contextual information is surfaced at the point of need from a single application. Access to every source of information they need across diverse environments empowers agents to provide a more personalised, effective standard of service.





Service Functionality - key capabilities

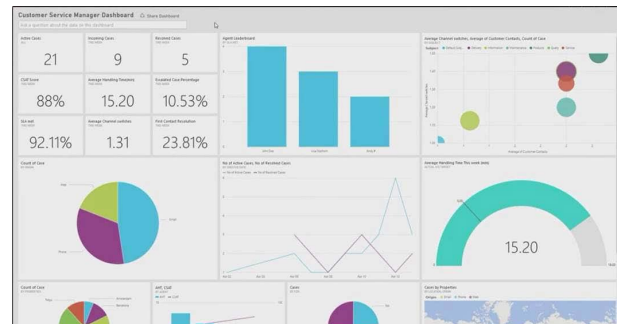


Service intelligence

Identify trends, anticipate opportunities and gain insights using rich analytics. Explore what-if scenario's and forecast outcomes through interactive charts and powerful data visualisation capabilities. The solution empowers employees at every level of the organisation to have a positive and meaningful impact on business outcomes.

Knowledge

Easily connect the right person with the right knowledge at the right time to resolve service needs. Empower customers and employees with a definitive single source of truth through unified knowledge. Ensure your knowledge is relevant by capturing and publishing across your content channels while measuring impact through rich analytics.



A close-up photograph of a male technician wearing a blue baseball cap and a dark blue long-sleeved shirt. He is focused on his work, holding a silver tablet in his left hand and pointing with his right index finger towards a component in a server rack. The server rack is filled with various electronic modules, including what appears to be a network switch or patch panel. The background is slightly blurred, emphasizing the technician and his interaction with the equipment.

Project Service Automation



Project Service Automation

Project-based organisations empowered by project service automation capabilities can improve all aspects of their business by bringing people, process and technology together. This enables them to become an integral part to their customer journey by delivering value at each interaction. On-time, on-budget service delivery excellence requires rich, collaborative experiences, efficient and effective interactions and a trusted advisory relationship. Project service automation is an end-to-end solution that provides a single system of customer engagement for project sales, resourcing, delivery and billing. It delivers an 'out of the box' experience with Microsoft productivity apps and machine learning capabilities on the device of choice empowering you to deliver personalised, predictable and profitable customer experiences.

Key benefits



Deepen engagement

Build trusted customer relationships by developing credibility and increasing customer confidence using a predictable customer responsive engagement model.



Empower professionals

Provide your consultants with a collaboration-rich experience that enables transparency across all aspects of the business.

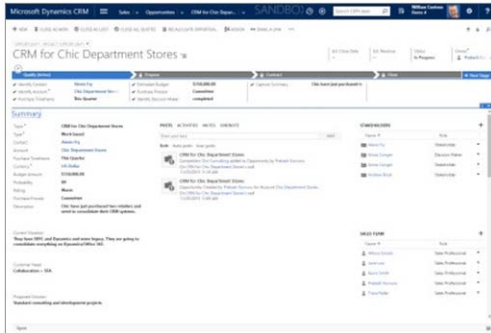


Optimise growth

Prioritise, innovate and invest in service offerings based on actionable insights that anticipate rapidly changing industry trends, customer needs, technology landscape and everything-as-a-service enablers.



Project Service Automation - key capabilities



Project planning

Make it easy for the sales manager to collaborate with project managers to estimate and define the work using standard project templates. And visualise cost, effort, and sales value of the work as she/he submits the final customer proposal. Build credibility by collaborating with customers for project planning, estimation and tracking.

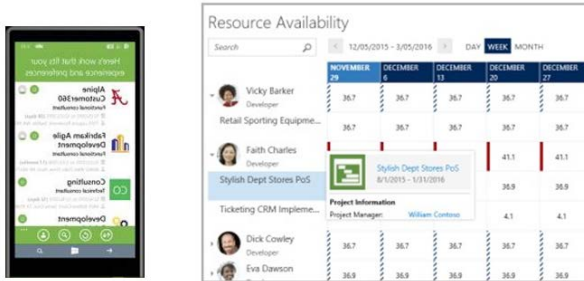
Opportunity management

Provide integrated sales dashboard with visibility to project-based opportunities, and key metrics to help forecast profitability and feasibility. Streamline and integrate the process allowing the sales manager to quickly create project contracts, track labor rates and generate SOWs.

Task	Start	End	Phase	Value	Cost	Profit
Predefined template						
Project Kickoff	1/1/2018	1/15/2018	Functional cost	1,000.00	2,000.00	1,000.00
Discovery	1/15/2018	2/15/2018	Functional cost	1,000.00	2,000.00	1,000.00
Plan	2/15/2018	3/15/2018	Functional cost	1,000.00	2,000.00	1,000.00
Design	3/15/2018	4/15/2018	Functional cost	1,000.00	2,000.00	1,000.00
Test	4/15/2018	5/15/2018	Functional cost	1,000.00	2,000.00	1,000.00
Planning meet	5/15/2018	6/15/2018	Functional cost	1,000.00	2,000.00	1,000.00
Project Close	6/15/2018	7/15/2018	Functional cost	1,000.00	2,000.00	1,000.00
Android (2.1)						
Design	1/15/2018	2/15/2018	Architect	1,000.00	2,000.00	1,000.00
Design	2/15/2018	3/15/2018	Architect	1,000.00	2,000.00	1,000.00
Developer (2.2)						
Develop	3/15/2018	4/15/2018	Developer	1,000.00	2,000.00	1,000.00
Develop	4/15/2018	5/15/2018	Developer	1,000.00	2,000.00	1,000.00



Project Service Automation - key capabilities

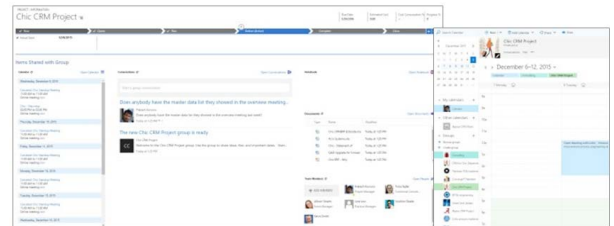


Team collaboration

Provide powerful, easy-to-use, mobile-ready Office365 productivity tools for Project teams and customers to communicate and collaborate. Enable Office groups to access documents and monitor status on project deliverables. Empower project managers by providing real-time status updates for risk management.

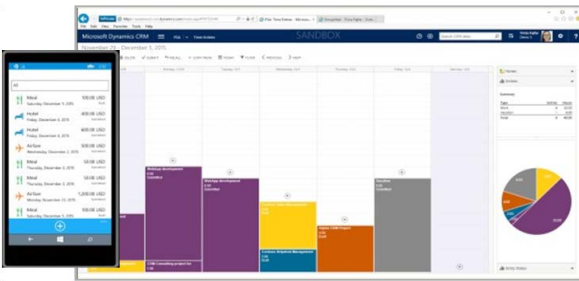
Resource management

Leverage azure machine learning to recommend right resources for the right work based on updated skills and availability of consultants. Simplify the engagement model between sales, project management and resource managers to forecast demand and resource allocation. Empower consultants to apply directly for open and relevant project roles.





Project Service Automation - key capabilities

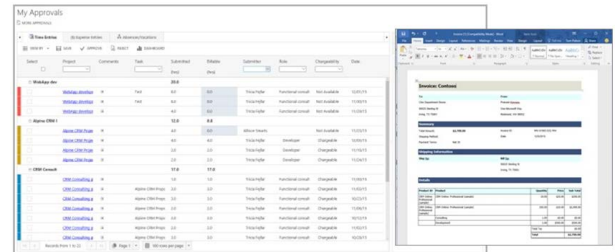


Customer billing

Provide project managers a one-stop-shop dashboard to review, override, track overruns and approve all costs and time impacting their projects. Ensure the Project invoices reflect the terms of the contract and the approved work and expenses and customers have visibility to projected v/s actuals budget. Automate generation, approval and distribution of accurate and reconciled invoices in email and on the web. Enable integration with best-in-class back-office applications for financials.

Time and expense management

Make it simple, effective and efficient to manage and track estimated and billed project time by integrating the tasks and deliverables on the calendars. Connect the right person to the right tool through the right device and right experience to enter time and expense, and update project status and skills profiles. Provide real-time financial insights to customers and empower them to take collaborate on timely corrective actions.





Project Service Automation - key capabilities



Analytics and integration

Empower management to embrace change with a unified system with 360 degree visibility to project and portfolio metrics through robust analytics and interactive dashboards providing proactive insights like resource utilisation across the organisation. Ensure integration with back-office financial systems including Dynamics NAV and others for profitability, revenues, accruals, and inter-organisation expenditure tracking by enabling a strong basis for reporting, integration, and analytics.



Social Engagement



Social Engagement

Social for everyone

In a socially connected world, engagement with your customers can happen anywhere or anytime. Microsoft Social Engagement puts powerful social tools in the hands of your sales, marketing, and service teams — helping them connect on social media with your customers, prospects, and partners right within Microsoft Dynamics 365 for Sales or with a stand-alone app. Find social insights about your brand, products, and services to gain a true understanding of sentiment about your business.

Key benefits



Listen everywhere

Listen everywhere and understand how people really feel about your business and how you stack up against your competitors.



Drive engagement

Drive engagement to foster conversations about your brand and gain insight to shape your messaging and sales strategy more effectively.



Analyse sentiment

Analyse sentiment to determine your share of voice across social channels and know who your key influencers are.



Social Engagement - key capabilities

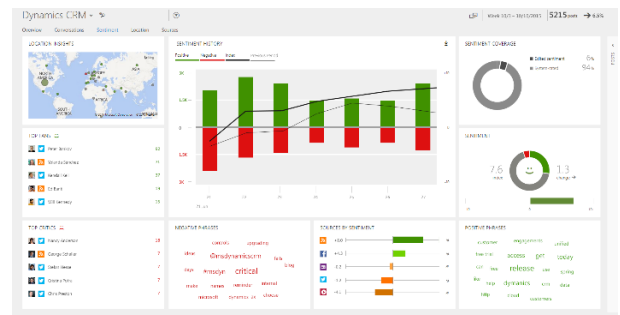
Source	Number of Posts	% of Total	Trend
Twitter	8037	70%	↗ 15.0%
Facebook	902	8%	↗ 182.3%
Influencers	801	7%	↗ 516.3%
News	467	4%	↗ 864.3%
Most important blogs	14	1%	↗ 576.3%
YouTube	1	1%	↘ -84.4%
Blogs	1	1%	↗ 5.4%
Competitors	1	1%	↗ 25.4%

Social listening

Listen to what people are saying around the world in 20 languages across Twitter, Facebook, Instagram, Blogs, Boards, Forums, Videos, news syndication and custom sources via RSS. Know who your key influencers are and stay informed with alerts about trending topics.

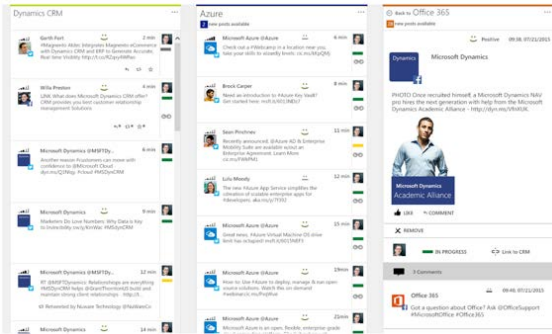
Intelligent social

Gain more insights at a glance with rich analytics including share of voice, location, and tag cloud visualisations. Microsoft's unique sentiment analysis uses a machine learning model to evaluate keywords in posts to determine whether they are positive, negative, or neutral. Automatically detect intention in social posts and route them as cases or leads into 365 for Sales.





Social Engagement - key capabilities



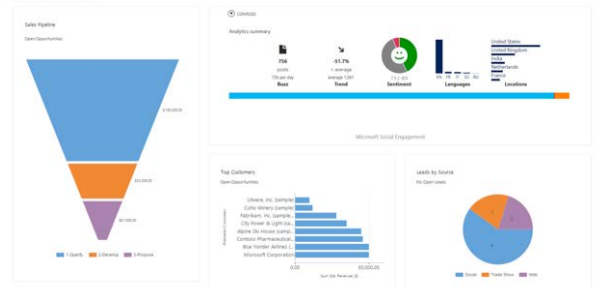
Social 365 for Sales

Put powerful social tools in the hands of sales, marketing, and service teams. You can add social data in Microsoft Dynamics 365 for Sales or Microsoft Dynamics Marketing—on dashboards or on any forms, like accounts or campaigns. Integrate social interactions into an end-to-end customer experience, with the ability to create leads or cases from social posts, right within Microsoft Dynamics 365 for Sales.

Social engagement

Improve your social media presence by engaging with social communities with rich multimedia – replying and publishing. Enable teams to collaborate using office groups for assigning posts and sharing streams and social profiles. Create an end-to-end customer experience by creating 365 for Sales actions from social posts – cases, leads, and any custom entities.

My Sales Dashboard





The Choice of Leaders

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