



Accelerate revenue with Microsoft Dynamics 365 Sales





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Introduction

Enterprise companies face several challenges that impact seller productivity and their ability to close deals efficiently. Therefore, they need a customer relationship management (CRM) solution that offers automation and built-in artificial intelligence (AI) capabilities.

These solutions will help sellers:



Deeply understand their customers



Personalize interactions



Increase pipeline



Improve productivity



In this e-book, we will take a closer look at how AI is impacting sales operations and how your organization can start unlocking the benefits of an AI-powered CRM with Microsoft Dynamics 365.

Seller challenges

In an evolving business landscape, sales leaders have several challenges they want to solve, including:

Seller efficiency

Sellers spend less than 30% of their day focused on sales activities¹

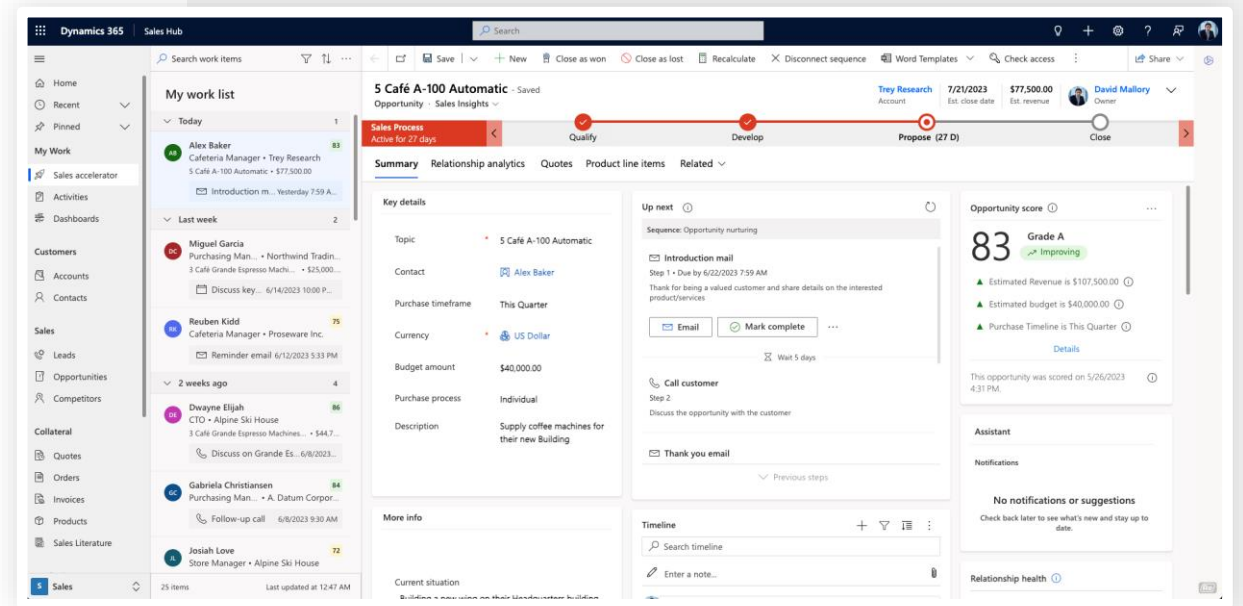
Data-backed decision making

Companies that use customer analytics see an 8% increase in revenues²

Personalizing customer engagements

Sales reps spend 440 hours each year trying to find the right content to share with prospects³

This is where an AI-powered CRM can be a game changer.



Chapter 1:

Understanding the value of AI sales enhancements

In today's media landscape saturated with discussions about AI, it is important to explore how generative AI can bring substantial advantages to sales professionals.

These benefits include:



Improved lead quality:

Identify the most promising leads based on prospects' behavior, demographics, and previous interactions.



Better customer insights:

AI provides **insights** into customer behavior, assisting sales teams to increase sales.



Reduced costs:

Save money by eliminating the need to hire more sales staff or train existing staff on new technologies.



Automated administrative tasks:

Automate tasks such as lead generation and customer data management, giving salespeople more time to focus on selling.



Improved sales data analysis:

Gain insights into customer **behavior and preferences using predictive analytics** to enable sales teams to make **informed decisions** for each interaction.



Better sales training:

AI improves sales training by analyzing data on sales performance and providing **customized** training based on individual needs enabling sales leadership to focus on mentoring and value-added coaching.

AI can help streamline the sales process, improve customer relationships, and enable data-driven decisions, all on a secure, proven platform.

Chapter 2:

Introducing Microsoft Dynamics 365 Sales, an AI-powered CRM

Microsoft Dynamics 365 Sales is a cloud-based Customer Relationship Management (CRM) and Sales Management (SM) solution assists businesses in improving their sales processes and customer intimacy. With built-in AI and Copilot capabilities, you get the full benefit of AI, on a proven, reliable platform.



Enterprise-ready as the only CRM built on a fully connected data platform with built-in AI capabilities.

Scale capabilities to solve sales, marketing, and service challenges with one solution.

Built on Microsoft Azure cloud platform for low maintenance.

Microsoft Teams integration allows collaboration at no additional cost.

Microsoft Teams helps put collaboration in context and provides actionable next steps using AI-driven insights, allowing sellers to be more productive and build stronger customer relationships.

14 data security and compliance certifications

Fourteen data security and compliances certifications for Azure, including: ISO 27001, ISO 27018, SOC 1, SOC 2, SOC 3, FedRAMP, HITRUST, MTCS, IRAP, ENS, GDPR, HIPAA, HITRUST, and FERPA.⁷

The merging of AI capabilities with your CRM empowers you to streamline the sales process, improve customer relationships, and enable data-driven decisions.

AI driven CRM/Sales automation enables



Streamlined sales processes.

Automation provides \$13.3M in improved seller productivity and \$4.7M in sales manager productivity.⁴

Sales automation and CRM systems provide businesses with a **scalable** and **flexible** platform that **automates** routine tasks such as lead management, sales forecasting, and reporting, streamlining sales processes, reducing administrative overhead, and allowing sales teams to **focus on revenue-generating activities**.



Improved customer relationship.

64% of businesses believe that AI will have a positive impact on customer relationships.⁵

By **centralizing** customer information, sales automation, and CRM systems enable organizations to **personalize** interactions with customers, **respond** to their needs more effectively, and **build stronger relationships** with them, accelerating innovation built on prior experiences with customers to stand out from the competition.



Enabled data-driven decisions.

87% of AI adopters said that they were using or considering using AI to improve sales forecasts and email marketing.⁶

Sales automation and CRM systems empower companies to **accelerate sales** by utilizing customer, marketing, and sales data to identify **ideal customer targets**, provide sales guidance, and collaborate with peers, enabling data-driven decision-making, **optimized sales strategies**, and **improved overall business performance**.



We will modernize our brand.”

– Brand Marketing



We will deliver more personalized and timely communications to prospects and customers.”

– Sales



We will use one system that centralizes all our data, automates key processes, and provides a single, unified view of our customers.”

– Sales and Marketing Operations

Copilot in Dynamics 365 Sales automates sales tasks

Copilot uses AI to reduce the time your sales team spends on mundane tasks, allowing them to focus on connecting with customers. In fact, it is estimated that 30% of sales tasks can be easily automated.⁷

Unlock sales productivity

Email assistance:

Get AI assistance to write emails and propose meetings utilizing data from Dynamics 365 Sales and Microsoft 365 Graph

Automated summaries:

Get AI-generated email and meeting summaries with follow-up tasks

Intelligent transcriptions:

Eliminate manual notetaking with meeting transcriptions and recordings with competitor mentions and action items



Personalize customer interactions

Call insights:

View real-time tips, related information, and suggested answers to customer questions during Microsoft Teams calls

Meeting preparation:

Get AI assistance to prepare for meetings with summaries of relevant customer and opportunity details and past activities

Conversation intelligence:

View customer sentiment analysis and KPIs like talk-to-listen ratio, talking speed, and conversation switches during calls in Microsoft Teams

Stay in the flow of work

Customer record syncing:

Get AI assistance to add and edit customer details directly in Microsoft Teams and Outlook and sync to Dynamics 365 Sales

Customer cards:

Easily surface and share contact, opportunity, and account information from Dynamics 365 Sales in Microsoft Teams and Outlook

Collaboration spaces:

Create collaboration spaces in Microsoft Teams with pre-built templates like deal room and integrated access to Dynamics 365 Sales data



Chapter 3:

Realizing the full value of AI-enabled CRM through partners

To realize the full benefits of AI, you need a system that can be configured to run the reports you need based on up-to-date data. By working with Microsoft partner, you can realize the full potential faster with service offerings such as:

Data Configuration and Migration:

- Configuring and migrating data from legacy systems or other CRM platforms to Dynamics 365 Sales.
- Ensuring data integrity, mapping data fields, and performing data validation.

Digital Transformation:

- Adapting existing sales processes and workflows to align with Dynamics 365 Sales and AI capabilities.
- Identifying areas where AI and Copilot can enhance sales efficiency and effectiveness.

User Adoption and Training:

- Teaching employees how to effectively use Dynamics 365 Sales and leverage AI and Copilot features.
- Encouraging user adoption and addressing any resistance to change.

Customization and Configuration:

- Tailoring Dynamics 365 Sales to meet the specific needs of your business, including creating custom entities, fields, workflows, and reports.

Integration with Other Systems:

- Integrating the Microsoft Dynamics 365 suite of solutions including Microsoft 365, Dynamics 365 Finance, Dynamics 365 Supply Chain, Dynamics 365 Field Service, Dynamics 365 Customer Insights, and Dynamics 365 Customer Service.
- Integrating Dynamics 365 Sales with other business systems, such as third-party ERP systems, marketing automation platforms, or customer support tools, to ensure seamless data flow and process automation.

Ongoing Support and Maintenance:

- Providing ongoing support and maintenance services to address any issues, updates, or enhancements required for Dynamics 365 Sales and AI features.

As a Microsoft partner, we are committed to your success

As Dynamics 365 Sales experts, we must meet and maintain certain requirements while undergoing specific training related to AI and Copilot capabilities.

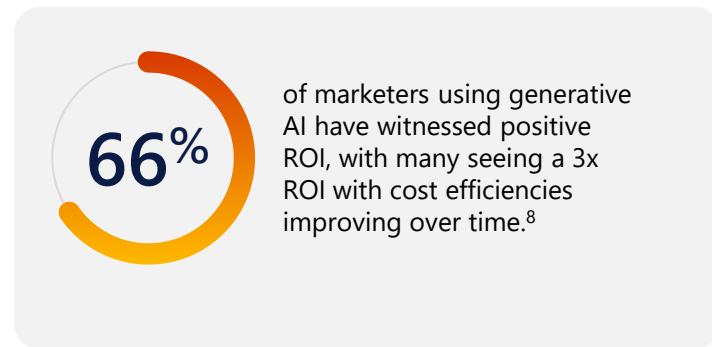
Microsoft continuously measure and recognize experts at delivering solutions with Dynamics 365

- Microsoft measures and recognizes Microsoft Solution Partners who have proven high broad technical capabilities and demonstrated success delivering technology solution.
- Partners need to demonstrate expertise in selling and implementing Microsoft Dynamics 365 solutions, including Copilot in Dynamics 365 Sales.
- Partners need to stay up-to-date with the latest product releases and enhancements to maintain their certifications.



Unlock the possibilities of an AI-powered CRM

We have seen that organizations that implement AI for sales have seen positive impacts, including:



While employees estimate AI to save them:⁹

21%
of their time listening to voicemails

23%
of their time coaching or training other team members

23%
of time in meetings to recap customer interactions

27%
of time building reports analyzing customer data

25%
of time transcribing and writing notes

28%
of time manually transferring or inputting data



This is all time that your sellers can now spend on selling!

Leverage our expertise to realize the full value and potential of Dynamics 365 Sales.*

* It is important to note that the effectiveness and time-saving benefits of Copilot may vary depending on the specific implementation and usage within an organization. Proper training and adoption of the feature by sales representatives will also play a role in maximizing the time redirected to direct customers' and sales activities.

Chapter 4:

How customers benefit from Dynamics 365 Sales

Companies have seen improvements in their sales operations across:

Sales & lead generation:

- 59% reported improved sales quota achievement¹⁰
- 75% of respondents said their cost per conversion decreased when they implemented CRMs¹⁰

[Read how DP World increased its revenue with Dynamics 365 >>](#)

Enhanced customer relationships:

- 82% of B2B buyers want personalized communications from all brands or brands they give permission to¹¹
- Centralized customer data allows for improved customer experiences across marketing, sales, and service departments

[See how Natuzzi redefined a luxury customer experience >>](#)

Data-backed decision making:

- Increased revenue opportunities with centralized sales and marketing data
- Accurate measuring of the ROI of sales and marketing campaigns
- Optimized marketing, sales, and service processes

[Learn how Leatherman got closer to its customers leveraging data insights >>](#)

Supercharge your sales team!

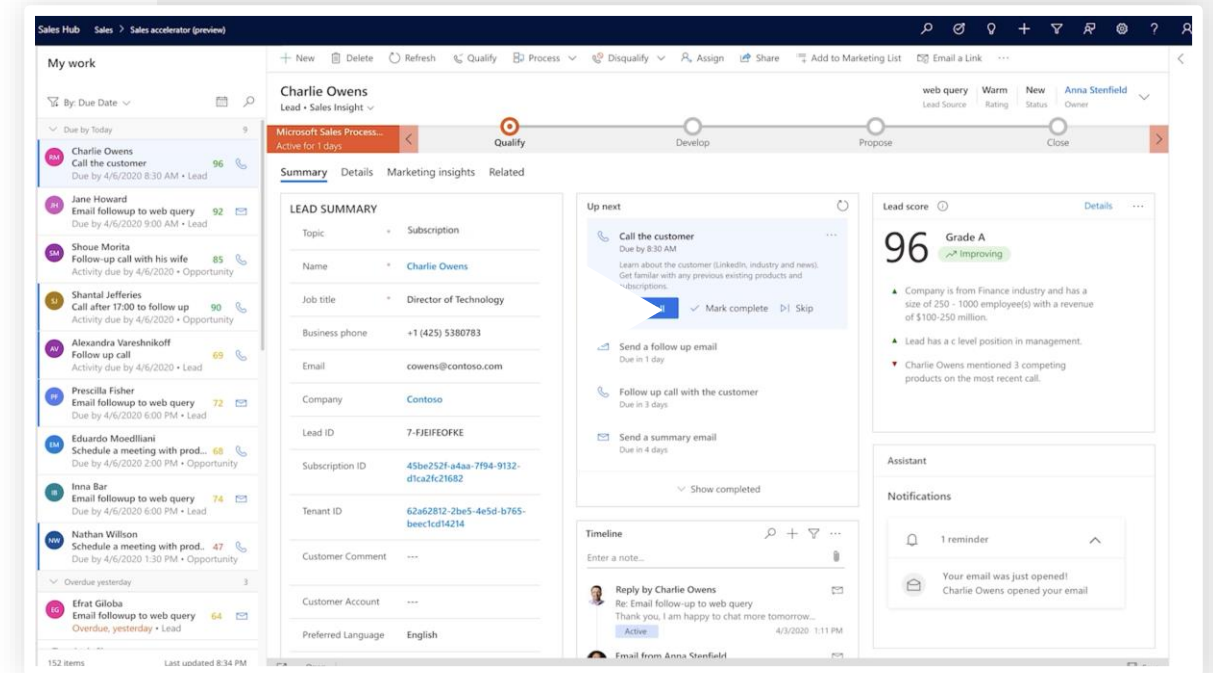
Copilot in Dynamics 365 Sales helps businesses manage and track leads, opportunities, and sales pipelines. With reduced manual work and automated tasks, sellers save time and can focus on closing deals.

AI assisted sales technology enables your organization to optimize sales efforts through intelligent reporting, data-driven decision-making and a guided sales approach.

To get started, contact us!

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