Covenant TECHNOLOGY PARTNERS

7 essential CRM features

for enterprise businesses

The right CRM technology can empower your sales team to track customer interactions, build better relationships, and collaborate in person or remotely. Knowing the right features to look for when evaluating software to identify the CRM that will enable these improvements is essential.

After working with several businesses like yours, we compiled a comprehensive list of the features that enterprises businesses need to empower an effective sales team.

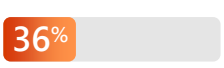
7 FEATURES

1. Intuitive interface and user experience

46% of companies want easier sales rep training regarding software.[1] A CRM solution should offer a simple and familiar interface that is easy to learn.

2. Remote accessibility

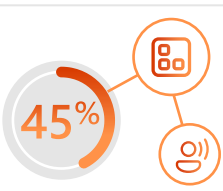
31% of sellers say they have closed deals over $500,000 without meeting the buyer face to face.[2]



Additionally, 36% of sellers say that selling remotely has made their job easier, making it crucial for any new solution to support hybrid and remote work.[3]

3. Centralized data access

45% of sellers report that incomplete data is their biggest challenge[2], so they need a solution that unifies and activates customer information across applications and processes.

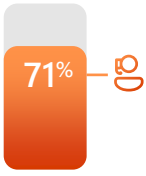


4. Built-in enterprise-grade security

$4.45M A data breach costs a business $4.45M on average.[4] It is also crucial that that when customers change their data preferences, it is automatically updated and followed across business functions.

5. Next-generation AI

71% of sales professionals say that AI has impacted how they plan to sell[5], so they need modern solutions to reach their leads effectively.



6. Configurable and customizable workflows

Business and user needs change over time, so the solution must be configured with built-in low-code applications to achieve desired outcomes faster.

7. Able to integrate with other systems to create one version of truth

50% of sales reps think they're required to learn too many tools.[1] A new CRM should integrate with existing applications to unify processes in one interface.

Microsoft Dynamics 365 Sales effectively addresses these common concerns. Leverage our Microsoft expertise to configure and deploy Dynamics 365 Sales to address your business challenges to support a productive and successful sales team.

Schedule a call to learn more!

Contact us!

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1. "The Sales Enablement Technology Report," Allego, 2022
2. "Global State of Sales 2022," LinkedIn, 2022
3. "Is Remote Sales More Effective Than In-House Sales? [Data from Hundreds of Sales Pros]," HubSpot, 2022
4. "Cost of a Data Breach Report 2023," IBM, 2023
5. "7 Mundane Sales Tasks You Can Skip with AI [& How to Do It]," HubSpot, 2023

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