
Phoenix 2018
Summit
CRMUG
Welcome to
ARIZONA
USER GROUPS

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 to provide highly successful D365 solutions.

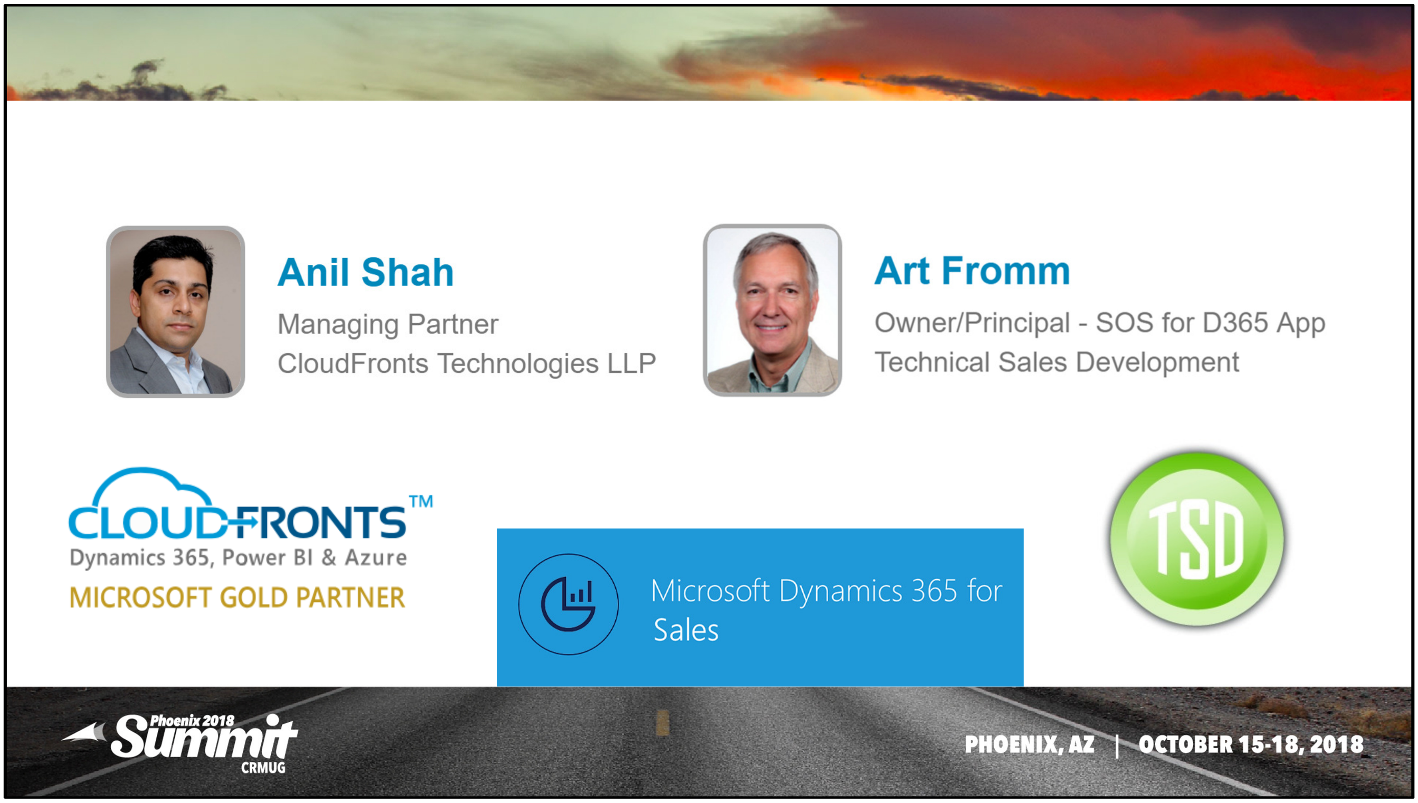
The presentation highlights a case study of a Sales Enablement client of TSD who had implemented D365 and were facing these challenges.

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, whether they do any customization or not.

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, our customization 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.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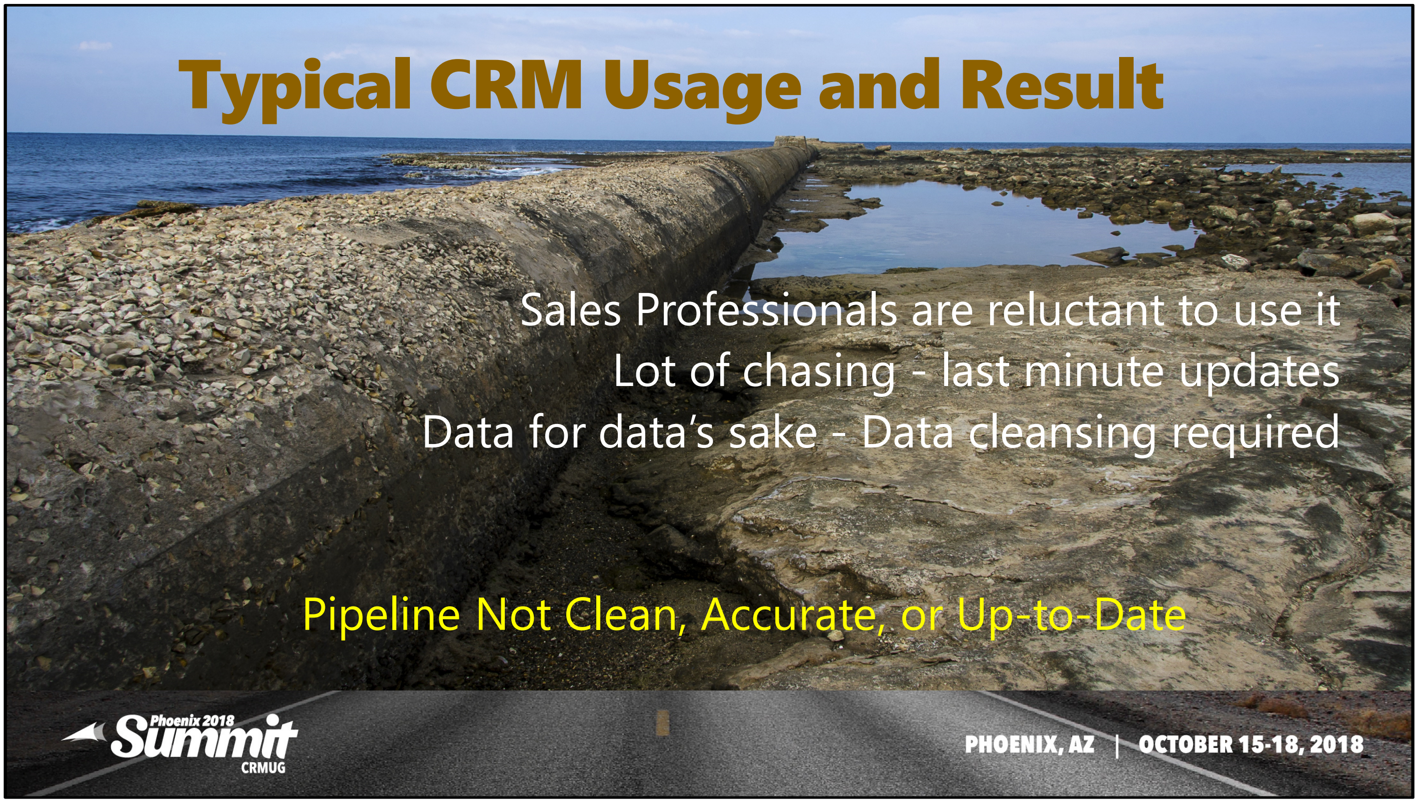
Session Outcomes

- 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

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

Solution Demo

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Sales Improvement Initiative

Job Functions: Sales Management and Sales Professionals

Critical Issue: Sales goals at risk

Challenges:
- D365 limited in helping with deal qualification & strategy to win (or exit)
- Incomplete, inconsistent, inaccurate data affects forecasting and coaching

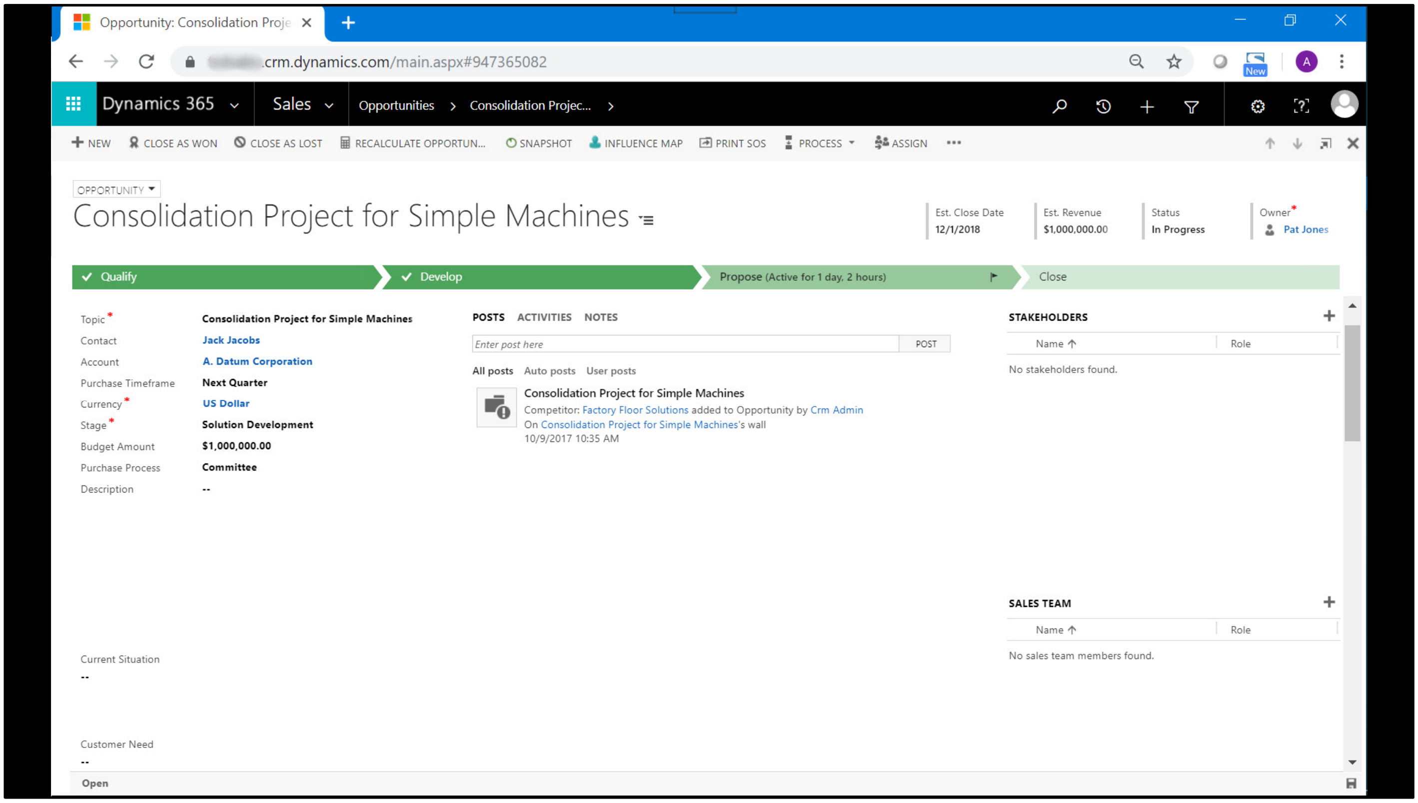
Needs:
- Integrate sales methodology with D365 - help Sales Professionals sell
- Make D365 easier and more desirable for Sales Professionals to use
- Utilize data for funnel management, analytics, and coaching

Sales Results: Win-rate improvement from 58% to 74% - a 16 Point increase

Increase revenue by 22%

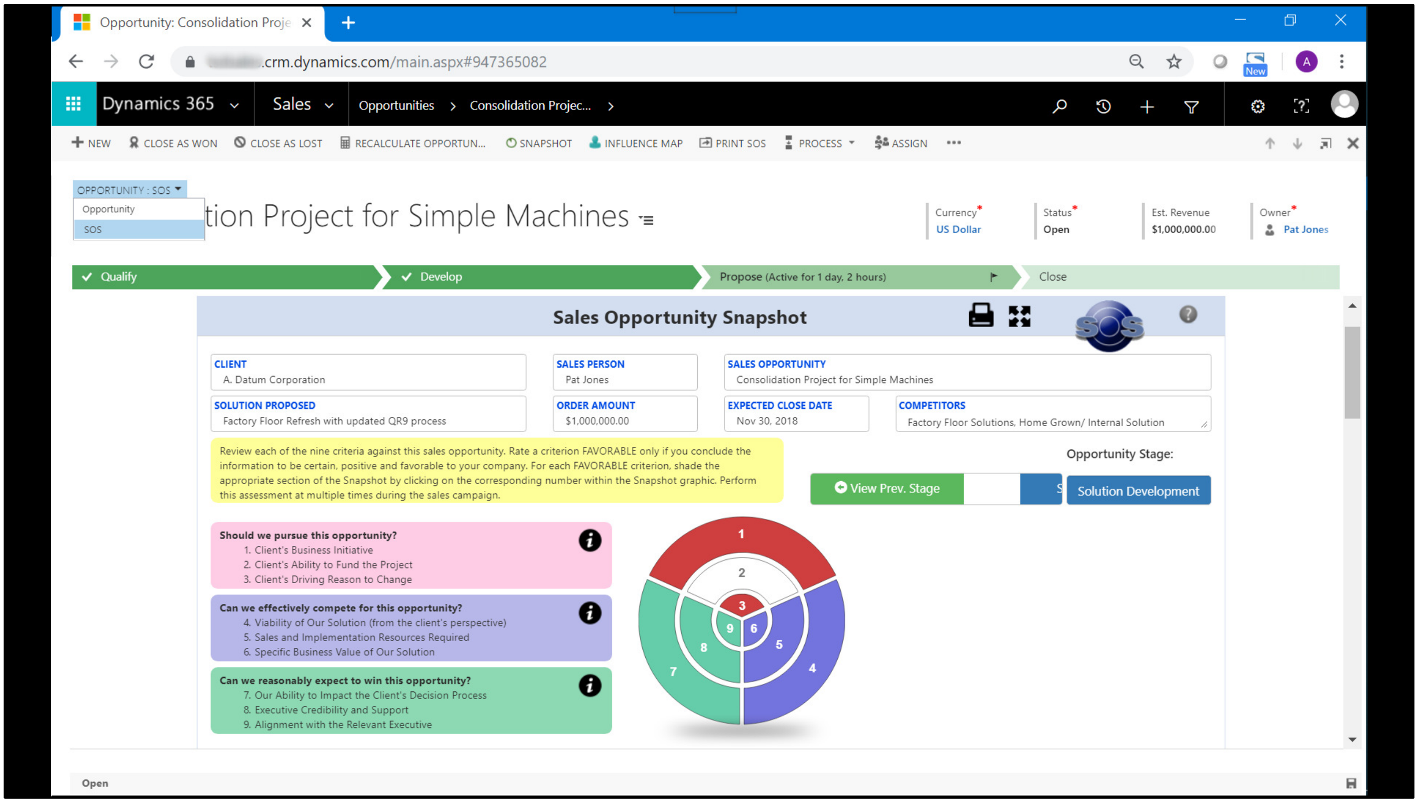
Reliable data for improved forecast accuracy, analytics, and coaching

Customer case study
- TSD Client who was experiencing the challenges mentioned
- Summary of their situation – does this sound familiar to you?
- Results of implementation of the solution that was implemented



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 visible 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

CloudFronts not only did the programming for TSD, they also use the ustomization for all of their opportunities.

Anil showed SOS for D365 in action for a live CloudFronts opportunity, and highlighted the power of D365 for Sales as a development platform to customize the environment.

For more information about CloudFronts please click here: https://www.cloudfronts.com/

Making D365 for Sales Desirable & Valuable

Make it Easy to Use

Help Sales Professionals Sell
Make it visual
Leverage historical data

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Making D365 for Sales Desirable & Valuable

Lead the Change

Sell it – WIIFM
Top Down - Managers use system
Regular “Test and Review” sessions

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Making D365 for Sales Desirable & Valuable

Ensure Success

Train on process/methods, not just tool
Reward proactive use
Report back to team on results

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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 key areas of focus to accomplish this outcome, showed how we did this for a customer, and how it is used by a Microsoft Gold Partner to manage their opportunities.

And since this worked out so well, we've provided it as an App – available now on AppSource.

If you are interested and feel it will help you can find out more information here:
http://bit.ly/SOSforD365

Or Contact Art Fromm – art@technicalsalesdevelopment.com


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