Digital transformation has reached every facet of Microsoft, including our own sales experience. And it goes beyond technology—we’ve fundamentally upended our own sales culture. The Microsoft Sales Experience (MSX)—an integrated solution built on Dynamics 365, Microsoft Azure cloud solutions, Office productivity and collaboration services, and Power BI—brings to life a curated, role-based, and connected marketing and sales experience. The MSX portfolio is intuitive and streamlined, reduces many seller tools to a few, eliminates hours of administrative processes, and empowers sellers with innovative, integrated tools.

The tools are powerful, but it’s the interaction between them that makes the sales experience shine. Artificial intelligence in MSX deeply integrates our people who sell Microsoft products and services—our sellers—with Microsoft product and service marketers. MSX automates tasks, validates opportunities, and normalizes data across the entire selling organization. We’re using the passion of a growth mindset to reinvent the very culture of our sales organization, transforming it in concert with our tools. Above all, we put customers first, and we prioritize time with customers, simplicity, and coaching. Put simply, MSX gets out of the way and lets sellers do their job.

### Complexity hampered productivity and agility

Customer relationship management (CRM) systems are critical to any business. Microsoft uses CRM to track customer interactions as part of the sales opportunity pipeline, and to accelerate deals. The effectiveness and efficiency of sales business processes and CRM systems directly affect the bottom line, because direct sales represent about 50 percent of total Microsoft revenue.

Before MSX, Microsoft used eight on-premises instances of Dynamics CRM 2011. Each was highly customized and complex. The system hampered productivity and required a large, disparate set of processes, tools, and technologies that didn’t align with our core business priorities.

Customization and complex data synchronization across the sprawling system had a negative impact on the business and slowed the entire ecosystem. Over the years, we had added so many custom features and processes that the system had become too complex—so much so that it affected our ability to sell, and it hurt morale. Support demands and a lack of automation delayed upgrades, and agility suffered. Every system upgrade took months and cost upward of $1 million.

By 2014, our sellers were spending as many as 1.5 days per week—30 percent of their time—on administrative tasks, using as many as 32 different tools, instead of connecting with customers. Every tool had unique needs and reporting processes. Here’s a particularly painful example: Researching and entering data for one opportunity took up to 12 minutes.

Managers were equally hampered. They had to navigate up to 44 tools to get their work done. Data synchronization issues, multiple data sources, and a variety of business intelligence (BI) platforms translated into inconsistency. It made it nearly impossible for our sales team managers and sales operations managers to get a consistent view of business operations. Not surprisingly, pulling data for leadership meetings was challenging and time consuming.

It was clear that we needed to simplify our selling processes and deploy a unified and more powerful CRM system. We needed to reduce multiple CRM instances to a single system where we could quickly take advantage of powerful new out-of-the-box Dynamics functionalities and keep up with the rapidly evolving needs of our customers. In bringing MSX online, we reduced multiple instances of Dynamics CRM 2011 to a single instance of Dynamics CRM
Online—and later Dynamics 365—and we streamlined business processes and reduced the data entry burden on our sellers.

**Our culture needed to change**

Our sellers were justifiably frustrated. Talented and hard-working, they wanted to deliver value to our customers and partners, but we made it really hard for them to do. Over the years, we added on cumbersome business reporting, prioritized roll-up reporting over coaching, and allowed a lack of sales discipline to go unchecked. We knew this had to change. We struggled to move from product selling to solution selling, and our business wasn’t predictable. The sales organization couldn’t participate in digital transformation along with the rest of Microsoft unless we evolved how we worked, optimized for standardization and consistency, and reset accountability.

We decided to create a coaching culture. Coaching aligns with our growth mindset, which emphasizes a passion to learn and to bring our best every day. Our growth mindset believes that ability can be developed, and stresses:

- Commitment over compliance.
- Questioning and listening over telling.
- Encouraging and empowering over discouraging and control.

We want to our sellers to be confident and self-reliant, and our customers expect innovation and creativity. We also want to increase seller skill and retention. And finally, a coaching model has been shown to increase performance and consistency.

**Simplify, standardize, consolidate**

When we started using MSX in 2015, we created a brand new sales process. The technical foundation of MSX has always been Microsoft Dynamics products and their CRM capabilities. We mapped the sales process to Microsoft Dynamics CRM Online features, using Dynamics CRM capabilities for desktop, tablet, and mobile devices. Then we integrated Office 365 applications for collaboration and communication. The MSX launch was a big step for us—a single instance of Dynamics CRM Online to support all Microsoft sellers. Today, MSX uses CRM components of Dynamics 365; we are one of the largest Dynamics 365 tenants.

To create the most holistic sales experience in MSX, we needed to support other components, along with Dynamics. We developed an application portal using the Universal Windows Platform (UWP) to support other important selling functions, such as forecasting and analytics with Power BI.

The portal makes MSX a curated, role-specific system that enhances the seller experience. It offers vital, user-targeted notifications, guides sellers to context-appropriate readiness materials and support, and simplifies the connection between business systems. The apps and tools that a seller sees in MSX are specific to their role. This focus eliminates unproductive searching and gives sellers a simplified, comprehensive view.

We knew that MSX was a major improvement in 2015, but within about a year we knew that we needed to do more. The way that we engage with customers and the way we make products available has changed. Digital transformation drove the strategic thinking behind the evolution of MSX, and is reflected in today’s MSX and its components.

**Digital transformation drives sales transformation**

Before we continue our MSX journey, let’s look at the concept of digital transformation. The digital world advances with amazing speed—and it’s all connected to the cloud. Transforming means adopting new ways of connecting people, data, and processes, and creating more value for customers. We’re committed to fundamentally changing how we do business. One aspect of our journey is described in [Collaborative events highlight digital transformation at Microsoft](https://www.microsoft.com/en-us/microsoft-365/blog/2020/06/15/collaborative-events-highlight-digital-transformation-at-microsoft/). Transformed companies are managed to meet customer expectations and support their digital—and especially mobile—behaviors. To put this in context, organizations that embrace digital transformation generate an average of $100 million (or 8 percent) more annual operating income than those who lag behind. In other words—to succeed, business leaders must embrace digital transformation.

Transforming sales at Microsoft

We are transforming, as are our customers. At the highest level, we want to help sellers spend more time engaging with customers (people who buy and use our software and services) and partners (companies that sell and support Microsoft solutions). We also want our managers to be great coaches who can support a modern sales force.

When we brought MSX online in 2015, it was a good start. It managed opportunities and brought some big improvements, like a single forecasting solution—eliminating 14 others. Since then, the MSX role-based experience has evolved significantly, and we drive increasingly relevant functionality to users. Other improvements include:

- Deeper, more fundamentally integrated reporting and dashboard features for specific roles.
- Improved relationships between sellers and managers based on enhanced change management and a new coaching model.
- New functionality like qualified leads, predictive machine learning, and tightly integrated sales and marketing teams.

The explosion of the cloud has changed how software is delivered—as a service. We had to engage with customers far beyond the sale.

Engage customers

We’re building stronger customer relationships by harnessing data. We can pull actionable intelligence and predictive insights that let sellers deliver personalization at scale. And pipeline management is now a collaborative effort between sellers and partners.

Our partner co-selling system makes it easier for partners and sellers to effectively work together, and it increases selling time. For example, a partner can enter a specific customer engagement as an “active opportunity” to let our sellers know they are active in that customer account. The seller is encouraged to reach out and have a conversation about the scope of the potential co-selling opportunity.

We combine consumption data—statistics on how customers are using our services—with business intelligence to give sellers higher-quality time with customers. Focusing on how customers use our products, rather than on sales alone, creates tighter partnerships. We shifted from selling more seats to partnering with customers to come up with innovative ways to drive usage of those seats.

With Customer Insights, we created a new connection between our sales and marketing organizations. We’ve automated how leads are delivered to sellers, and we’ve seen how customers engage with Microsoft through interactions with our products and services, such as trials and demonstrations.

Selling services

The pivot here is for our customer relationships—and the management of those relationships—to go beyond the opportunity pipeline and initial purchase. We incorporate and track ongoing and critical new types of information, such as:

- How the service is being rolled out and used.
- The continuity of the service.
- Usage and consumption metrics.
- Projects built on the service.

And the way that customers expect to be engaged is different. Digitally savvy companies don’t expect an account manager at their doorstep. They demand a multifaceted-channel approach, and want to reliably experience a company through electronic communications and social engagement. It’s essential that those channels be reflected in a CRM system.
Customers expect more end-to-end solutions from a vendor like Microsoft, and we need to be poised to support them. For example, we needed to have systems in place to collaborate quickly and easily with experts within the company.

**Artificial intelligence refines data and qualifies opportunities**

We’ve worked Azure-powered artificial intelligence and machine learning into MSX, helping us to continuously refine customer data. MyDataHealth scores the quality of account and contact data, and pushes integrated recommendations to fix data quality issues. This ensures real-time data updates and continuous learning. For example, a seller might not be sure if a contact’s role is appropriate. Using MyDataHealth, a seller can quickly verify account information to ensure they have the correct contacts—such as a CIO—for a specific opportunity.

Our marketing automation system uses machine learning to automatically push qualified opportunities to our sellers. Marketing Automated Qualified Leads (MAQLs) deliver high-quality opportunities to our sellers that are prioritized, scored, and enriched with details about the customer’s interaction with Microsoft. MAQLs tighten integration between our marketing and sales roles.

MAQL notifications help sellers quickly evaluate and understand their customers, review campaign details to understand the specific context of the opportunity, and evaluate whether the opportunity is worth pursuing. Insight from MAQLs can be used to customize the approach and customer engagement, fine-tune discussions around the customer’s business objectives and interest in Microsoft products, and increase the probability of closing. This year alone, the marketing organization has generated 597,000 MAQLs for US-based sellers, producing 12,877 qualified opportunities and 3,654 wins.

![Figure 1. Pre-qualified leads accelerate wins](image)

**Empower employees**

We wanted to deliver seller tools that fuel collaboration and productivity while mitigating the risks that come with freedom and space. Powerful tools and completely normalized data means that our managers can transition to a coaching role rather than monitoring sellers.

At the same time, we wanted to improve sales discipline and support sellers so that they could prioritize the time they spend selling. We wanted to offer automated, standardized, and personalized insights—by role—to enable sellers to act quickly and reduce the need for custom BI solutions or shadow IT. And managers have automated roll-up for coaching or to support the business rhythm.
Richer customer relationships
Better information and more time lets our sellers have deeper relationships with customers and invest the time to learn about their needs. For example, our Dynamics 365 account team was in discussions with a corporate CIO who had declined to continue the sales process. The account manager went to MSX, and through Customer Insights they could see that there were three Dynamics 365 trials underway at the company, which the CIO was unaware of. When we told the CIO of the trials, he re-engaged.

Selling software as a service, rather than as a product, creates an ongoing relationship that’s naturally more complex. It’s a new dynamic. Sometimes, multiple people are involved in the sales process at a single customer site. MSX keeps everyone in the loop and aware of sales interactions with that customer.

Optimize operations
We integrated and aligned marketing and sales capabilities to connect the two and to maximize our marketing investment. We have automated integrated capabilities—like MAQL automated lead generation—to drive efficiency.

We also simplified our sales processes and radically reduced the number of sales tools to give sellers more time with customers. MSX is an efficient launching point for sellers because it consolidates and streamlines all seller tools into one place.

Modular workflow accelerates capabilities
MSX loosely couples standalone apps—yet connects business processes—so that Core Services Engineering (CSE, formerly Microsoft IT) can quickly deliver modular workflows and capabilities. Apps can be developed and plugged in to the MSX interface. The modular app model enhances CSE responsiveness and lets us use out-of-the-box Dynamics 365 features and functionalities without costly customization.

Figure 2. The curated, role-based Microsoft Sales Experience (MSX)

The Universal Windows Platform is a portal to support multiple roles across the sales organization, from individual sellers all the way up to senior leaders. MSX separates non-CRM functions from the CRM system, but it presents them side by side in a cohesive view. Apps and Power BI reporting options are specific to role and geography, for a personalized sales experience. The filtered focus eliminates churn and offers a simplified, comprehensive view.
Silent installations add new apps to MSX. Sellers are alerted to the new functionality, and are directed to what we call *content in context*—appropriate supporting materials like training videos or documentation. We also sell through social channels, and have integrated the LinkedIn Sales Navigator for our sellers around the world.

MSX unifies sales tools—among them pipeline reporting, forecasting, and a partner solution library—into one place, so sellers and managers can easily navigate from one task to another. It supports core capabilities as well as providing the related tools that sellers need to be successful, such as:

- Role success guides.
- A rollup of business priorities.
- Targeted alerts.
- Feedback opportunities.

**Context genie connects teams**

Within MSX, information can easily pass between apps. (Before, separate apps were required or the CRM system was heavily customized to achieve the same result.) Now we have a new way to connect Dynamics 365 CRM functions to other systems that aren’t supported by CRM. We call this functionality the *context genie*. The context genie lets sellers jump to the other system, pass along context about what they were doing in CRM, and it serves up relevant information.

Consider escalation issues. In the past, when a seller wanted to escalate an issue to a manager, they would have to go into another tool to copy and paste the information. Now, the seller simply clicks *Send an escalation* in MSX.

If a seller is working on a Dynamics 365 engagement and they click *Accelerate opportunity*, MSX returns relevant Dynamics 365 resources from a research website that’s outside of MSX. The context-specific content can help move the opportunity forward, for example, by offering a Dynamics 365 webinar or white paper.

**MSX Insights drives actions**

MSX Insights is a single cloud-based, personalized dashboard that replaces more than 20 manual reports and dashboards. It’s at the center of driving actions from data. It inspires coaching conversations and consolidates all reporting into a single, user-specific dashboard. With MSX Insights, we’ve merged or eliminated local BI solutions. It uses Power BI to serve up sales information and reports in a single platform. MSX Insights gives our sellers the data they need to have more productive conversations with their managers, and more effective conversations with customers.

Our sellers use MSX Insights to get a holistic view of their business in one place. It identifies trends, gaps, and patterns in data—helping sellers better predict their business and plan for adjustments and improvements. For example, a seller might notice that their qualified pipeline coverage (QPC) rate is 110 percent. Historically, the seller closes 80 percent of their pipeline, so they see that they really need a QPC rate of 125 percent to meet their quota. That knowledge motivates the seller to add more opportunities to their pipeline. Then, the seller notices that most of the deals in their pipeline are managed by an account management group. The seller can talk to another group (product management) to see if they can help drive some new deals that will raise the QPC above 125 percent.

Managers use MSX Insights to get information specific to their team. The data helps managers achieve business targets, set expectations, and have the right conversations with sellers about pipeline health, opportunities, accounts, and leads. For example, knowing a customer’s current utilization and consumption of Azure helps our sales managers to quickly make informed business decisions.

**MSX Insights views**

There are four role-based views in MSX Insights:

- **The Leader** view lets us run the business. Leaders can drill all the way down to the field seller level if they want. For example, if a large, crucial opportunity is underway and leadership can help, the leader can see the details, decide if the opportunity is solid, and jump in to help.

- **The Manager** view gives front-line managers the data that they need to coach sellers. Qualified pipeline coverage tells managers if their team or an individual seller has enough deals in the system to meet their targets.
- The **Seller** view lets sellers manage their accounts and helps them understand the actions they need to take. For example, they can see consumption—actual usage—statistics on the seats that they've sold. And, importantly, everything that the seller sees is also visible in the Manager view, which helps drive conversations.

- **Generic** views offer advisory assistance for managers and sellers. This view lets operational and sales excellence teams manage across the sales organization, and offers the data that helps managers prepare for coaching conversations.

**Normalized data brings efficiencies**

Before MSX, data rationalization created a lot of churn and extra work. People had to normalize numbers between different reporting mechanisms. KPI Lake, which is used across MSX, solved this issue.

KPI Lake pools many data sources, and delivers data to our Power BI leadership dashboards and scorecards, and to our internal business management tools. It lets us drill into data sets, from worldwide totals to individual sellers. KPI Lake also maintains security requirements from data sources. For example, an MSX Leader Insights view is determined by the user’s MS Sales profile. It level-sets all data used by MSX and creates a single, consistent data source for MSX Insights and other reporting mechanisms.

It’s a large instantiation of a tabular model, or cube, built on SQL Server Analysis Services. KPI Lake maintains more than 1,600 KPIs—such as variances against revenue attainment, budget, or forecast—to help us manage services across the company. KPI Lake supports information for multiple business groups like Office, Marketing, and Finance. Telemetry reports over 20 million queries against KPI Lake per month. KPI Lake is instantiated using Azure virtual machines, which allow it to scale worldwide.

**Transform products**

We wanted to reinvent our products, services, and business models using digital content to capitalize on emerging revenue opportunities. We wanted to drive innovation and improvement within Microsoft products and solutions to support increased sales. We’re in close partnership with the Dynamics 365 and Power BI product groups; for example, our sellers raised a productivity issue to the Dynamics 365 product development group. The sellers were unable to create a fresh opportunity using data from an existing opportunity. This functionality has been since been added.

We also wanted to highlight how we use Microsoft products and solutions in our own digital transformation.

**A seller’s life today**

Today, we’ve given back our sellers time, and they work very differently. We’re also working to reduce the number of seller tools to only three, and so far, we’ve retired about 10. The rate at which we retire tools varies depending on circumstances like geography. Also, some of our early adopters are much further along in the process and have retired many legacy tools.

Because almost everything in MSX is based on Dynamics 365 features, extra processes and steps have been stripped away. And because MSX uses one set of data, data synchronization and inconsistencies are no longer an issue. We have dramatically simplified the way we work. For example:

- **Streamlined toolset.** We’ve retired many of our tools, and they’re all synchronized. Anything our sellers do in one tool carries over to the others.  
- **One set of data.** All our tools use the same data from Power BI.  
- **Simplified business reviews.** Seller preparation for regular business reviews used to take about eight hours. People had to analyze spreadsheets, repeatedly refresh, and validate again. Rinse and repeat. Now, it takes about an hour to prepare. The time savings is great, but another real benefit is being able to think about strategy and long-term planning instead of obsessing over endless data entry and processing tasks.  
- **Coaching emphasis.** Our managers used to spend most of their meeting time with sellers, combing through their data and checking results. Today, our managers can help sellers grow their business and their careers.  
- **From inspection to vision.** We’ve transitioned from a feeling of inspecting everything—and being beholden to a dozen tools—to talking strategy and vision. Our sellers are excited about our big goals.
• **Customer focus.** Our toolset is tightly integrated, interactions are closely coordinated between sellers and partners, and customer data is prequalified and vetted. This lets us tailor customized consumption plans for our customers, with specific and measurable milestones and dates that make sense to both sellers and customers.

**Unified tools and processes enhance focus and productivity**

Today, tools and processes have been unified in MSX, giving our sellers more focused time with customers and enhancing their productivity. Specifically:

• **Lead handoff** gives sellers guidance, helps them decide the best way to manage quality leads, and builds a healthier pipeline.

• **Partner connection** connects sellers with partners for opportunities and selling as a team. Seller and partner collaboration will increase as we bring in partners with specific expertise—such as finance, government, and manufacturing—to our engagement process.

• **Consumption engagement** is a simplified experience that integrates with Power BI to enable more seller time with customers, and seller productivity.

• **MSX Insights** are delivered through role-based, customized, and automated Power BI dashboards. MSX Insights helps sellers understand the value of their opportunities—and helps prioritize leads that are already qualified—which helps them meet goals.

• **Forecasting** is hosted on a single platform that spans multiple segments. Our sales managers use forecasting to plan the business, and to prepare to and talk publicly about where we anticipate our business going.

• **Close plans** are automated and dynamic, and require significantly less data entry. In the past, sales teams would build close plan documents offline, and describe the actions of team members. Those plans weren’t centrally stored or managed, and only the immediate team members could look at them. Today, close plans are integrated with Dynamics 365, and a close plan is automatically loaded with an opportunity. The plans are available to everyone, they capture opportunity data, and they simplify the process.

**Collaborative selling**

Even in medium-sized customer engagements, multiple Microsoft experts work together, such as solution experts, technical experts, account executives, and partners. Team selling is the future, and MSX has become a collaboration and information-sharing platform to discuss status, progress toward decision making, and for partner interaction.

Our sellers now can see everyone who has touched an account. Before, sellers might not know if other sellers had already talked to the account or what they discussed.

**Measuring results**

There are several ways to look at the value MSX gives us. Operational data shows how MSX helps us drive higher quality deals, faster. We’re using MSX to help drive sales of Dynamics 365 and related products. And finally, we’re seeing productivity and sentiment results from our sellers.

**Operational excellence**

We’re seeing fewer data quality issues on deals that are in our pipeline, and we’re delivering on a higher close rate. Importantly, the time needed to close deals is shorter—our sellers are more efficient. We’re able to pull in resources and people faster, and find key information—like customer references—faster. For example, if a seller has an opportunity with a bank, MSX automatically delivers approved references from other banks in the system.

**Walking the talk**

We’re able to better convey the success of the products that we use. With more than 16,000 active users, MSX is one of the largest enterprise Dynamics 365 tenants. The data in MSX lives in the same Azure datacenter where a
customer’s data would reside. Our sellers use what they sell and can demonstrate it to customers. We’re easing customers into their own digital transformations, and it helps drive our business.

**Productivity**

Before MSX, our sellers were spending about as much time in data entry and management tools as they were talking to customers. Today, it’s a different story.

**Strategic preparation**

Preparation for customer conversations used to be painstaking. Many different pieces of information had to be tracked down from a variety of systems, sources, and reports. It was confusing, and the information wasn’t reliable. Now, by using a single data source, prepping for customer engagements results in less digging and more analysis. Also, administrative time after an engagement is reduced.

**Simplified processes**

We’re on our way to reducing tools and tasks to just four hours per week. We’ve improved morale, reduced process steps and duplication, and helped our sellers find the right information the first time they look for it.

Before MSX, if a seller wanted to know their pipeline coverage, they’d have to:

1. Be an expert in our internal sales reporting tool so they could look up actual and scheduled revenue.
2. Create a customized report in CRM to know what their pipeline was.
3. Gather revenue targets, both in aggregate as well as by specific product.
4. Combine all data into a one-off, unmanaged spreadsheet.

Today, this is all captured by a single data point in MSX Insights.

When we talk to customers, we want to discuss future deals, as well as what they’re using today. We’ve simplified consumption engagement. It used to require a unique application populated with CRM data. The system created engagements, which were managed in a separate database that had no relationship to the opportunity database. We had to pull reports from different systems and go through a labor-intensive process to merge it. Today, we’ve retired that tool, our consumption engagement data is integrated into MSX, and the data is represented in a Dynamics 365 record.

We’ve cut the time to create opportunities by 75 percent—from 12 minutes to 3 minutes. A lot of this time was reduced by using fewer required fields, but choice within the fields has also been simplified. For example, we culled our product lists and reorganized hierarchy to make it easier to find products.
Measuring business value

We’ve talked about how we streamlined our processes and tools. But how can we measure motivation, satisfaction, and the business value that was derived from MSX? Let’s walk through Figure 3 to see our multilayered approach.

![Figure 3. Measuring the success of MSX](image)

- **Systems health** assessments showed that our technology systems and services were robust and ready for adoption. Metrics included the percentage of completion rates for provisioning and training, the number and age of support tickets, and system performance.
- **Change management activity** gauged that we had enabled and motivated our MSX users, and that they were ready to deploy. Metrics included the percentage of training consumed and completed executive messages to the organization.
- **Application usage** showed us that our employees were actually using the system. We tracked both initial sign in and recurring usage statistics. Today, more than 36,000 sellers and sales operations staff use MSX (16,000 of them actively) in more than 100 countries/regions.
- **User satisfaction** is assessed on an ongoing basis. We use our User Voice feedback mechanism, which helps us listen, prioritize feature requests, and act on feedback. We also use the industry-standard net promoter score (NPS) to gauge satisfaction and sentiment. MSX users are occasionally prompted to answer the simple question “How likely are you to recommend MSX to your peers?” They respond using a standard numerical scale that ranges from 0 (not at all likely) to 10 (extremely likely). The simplicity of the measurement helps us take action faster to make improvements to the MSX experience.
- **Process adoption** is a key indicator that shows usage—and that our new business process is being performed as intended. For example, we can show that the rate of attached close plans has increased, the number of MAQLs consumed and used by sellers has gone up, pipeline coverage has gone up, and that more partners have attached to MSX.
- **Business value** is shown by monitoring the delivery of our promises and targets for MSX. Metrics include increased customer selling time, retiring and consolidating tools, forecast accuracy, productivity rates, and lower total cost of ownership.

It was critical to agree with our stakeholders about how we’d deliver business impact, even before the project started. For example, all stakeholders agreed on targets such as improved forecast accuracy and increased selling time. As we
went ahead with the project, everyone was crystal-clear and in agreement about our plans. Otherwise, we wouldn’t have been able to achieve—or even measure—the true value proposition of MSX.

The MSX evolution

In 2015, our first MSX deployment rolled out globally in nine months, with multiple sprints, releasing monthly and testing daily. Fast-forward to 2017, when we brought significant new MSX features and functionalities online. With our unified data set, our focus today is on closely collaborating with the sales organization to rapidly deliver small components of functionality, and making sure that our change management practices effectively support our user base. We knew that we’d be experimenting, taking risks, and finding bugs. Our Local Adoption Teams relentlessly work with the sales organization to make sure we’re delivering the highest-value scenarios.

Configure and integrate

To speed up MSX deployments and system changes, we’ve almost always configured out-of-the-box features, first of Dynamics CRM Online, and then of Dynamics 365. Configuring features instead of custom code creates a framework with built-in agility and speed, and supports continually evolving business and data management needs.

In 2017, features of the Microsoft Dynamics 365 Sales module were used extensively. In all, we created only nine custom entities, and 16 custom plug-ins were developed. We’re using what we sell, and that makes a powerful impression on customers.

We’ve continued to integrate MSX with many Office products to support collaboration and productivity. Group opportunities are supported with Yammer, and we use OneNote for group collaboration.

We’re also heavily invested in integrating Power BI dashboards and reporting. Power BI is the unified business intelligence system for MSX. It offers reports that the account team can act on. Role-based Power BI dashboards offer the optimal experience for sellers, managers, and our leadership teams.

Partnerships are key

Partnership with IT was critical. CSE earned the trust of sellers by making our deployment deadlines and minimizing disruption. We showed the seller community that our rapid deployment—and anticipated risk—was a quicker path to productivity.

The field rose to the challenge and was willing to use cutting-edge features. At Microsoft, our growth mindset means that we have a passion to learn. We’re always striving to improve our tools and processes. Working in a production environment, there’s always a risk that new features will affect functionality. And in continual deployment, as we had with MSX, the risk of disruption was great. With a direct connection to the Dynamics 365 product development team, we could refine on the fly.

We held listening sessions to find out what sellers needed, what marketers needed, and ways to better connect the two groups. We held preview sessions where we presented our mock-ups and vision for feedback. Two months later, we previewed and piloted the deployment.

We identified 80 champions across the sales organization, covering many roles. Half of them were very active in testing and offering feedback. We used a DevOps approach, where we tested together, held two calls a week, and maintained a direct link to the Sales IT group. At all times, we captured feedback and updated our champions about issues solved and what’s coming next. It was a very collaborative experience.

Executive sponsors continue to be critical to our success. Our leaders got behind the project and supported our efforts to provide a fundamentally new seller experience.

Change management supports agile deployment

When we brought MSX online in 2015, we had significant data complexity issues that required a phased rollout and included consolidating our data. Rolling out MSX functionality today is not a monolithic, one-time event. Our data is
unified, which lets us roll out broadly. We’re extending MSX services and we rapidly deliver small components of functionality—sometimes on an ongoing basis. We use an agile sprint development model, and deploy production releases approximately once a month. For MSX Insights, the technology is changing so rapidly that we deploy updates daily.

We’re focused on preparing and supporting our people and teams so that they’re productive and effective in this agile and rapidly changing model. Our communications cadence focuses on just in time, just enough content. For example, MSX delivers notifications when new functionality is available. Frequent, short educational videos bring sellers up to date on the latest features.

We don’t want to overwhelm our users, but rather let them consume new features and functionalities on an ongoing basis. We’re continuing to roll out around the world, and local constraints are being resolved as we go.

Local adoption teams focus on high-value scenarios

We’ve always used local adoption teams (LATs) in the field to create enthusiasm for MSX within our sales teams and to get a quick start. LATs serve an important function between CSE and the sales organization, helping features resonate for both groups. For example, we wanted to create forecasting reports within the MSX Insights tool. The LAT was tasked with finding out what the sellers need, what will work well, and how CSE will deliver it. The LAT creates guidelines for the feature, and paints a picture of what the feature needs to do. LATs coordinate and centralize adoption efforts and operations, paying specific attention to subsidiary needs.

Each LAT includes the following members:

- **Area capability leads (ACLs)** partner closely with local sponsors to ensure their involvement and input in key decisions and activities. The ACL offers a portfolio view of all landing activities, and shows dependencies between initiatives and impact on field roles.

- **Field solution managers (FSMs)** are dedicated CSE resources who coordinate engagement between the global program team and the LAT. They resolve critical issues, elicit input from local super users, and drive adoption in the local user community.

- **Subsidiary sponsors** approve subsidiary participation and success criteria, send key local communications, sponsor local deployment events, and provide the final commitment to launch the platform.

- **Business integration leads** work on behalf of the subsidiary sponsor and the local leadership team to ensure project success. They provide direction to the FSM and segment representatives, ensure that the right local resources are engaged, and are the primary local point of contact for the corporate sales excellence team.

- **Segment representatives** represent specific business groups, such as partners, services, or the enterprise product group, during local business environment analysis. They also find and engage appropriate super users.

- **Super users** take part in early previews and give input before launch. They evangelize the platform within the sales team and their subsidiaries, and include a mix of seller and sales manager roles across segments.

When onboarding MSX in 2017, we focused on supporting high-value scenarios, rather than delivering extensive training on all aspects of MSX. The LAT comes together every couple of weeks with feature owners. Demonstrations are created for the sales organization, and people offer immediate feedback about whether the scenario is high value.

Unified service desk for worldwide inside sales

Our inside sales business is managed differently. We follow a demand and response sales motion, where customers generate the lead by reaching out to Microsoft and then our inside sales representatives reach out to the contact by telephone to qualify the opportunity. It is managed with a Dynamics 365-based system that we call the Unified Service Desk (USD). There are key integration points between USD and MSX.

Like MSX, USD is configured as a cohesive set of related tools. The standard inside sales call script links out to tools and systems that are useful to help sellers prepare, like subscription information, licensing, LinkedIn, or customer websites.
Centralized function

Over the past few years, we've centralized and standardized worldwide inside sales and its tools into our corporate organization. Like MSX, USD is a cohesive portal for CRM, and it provides the related tools and resources that inside sellers need. In addition, USD hosts specific telephony controls and back-end metrics and reporting functions that are required for a telesales organization. USD hosts Dynamics 365 CRM functionality and integrates with MSX.

Inside sales roles and processes continue to evolve. Quotas and accounts are managed more like corporate account sellers. Our inside sellers are actively looking for opportunities to cross-sell, upsell, and manage portfolios.

USD and MSX integration

USD technologies and MSX integration have helped mature inside sales. Originally, a lead would land in USD, and inside sellers would call customers and qualify or disqualify leads. It's a more refined process now; inside sellers work with business groups and MSX tools to qualify leads more precisely. Here's more detail about how USD and MSX work together:

- **MAQLs** flow into USD as they do for field sellers. The lead can be passed off to a more knowledgeable seller, or to a field seller. Inside sellers can evaluate MAQL information and then confer with the account owner to decide the next contact and lead management.
- **LinkedIn integration** helps inside sellers match contacts with LinkedIn profiles to verify contact information and further qualify leads.
- **Telephony data** is tracked in Dynamics 365. When an inside seller makes a call, USD automatically pulls contact information from Dynamics 365. When the seller takes notes during the call, the notes are captured in Dynamics 365. The number of calls placed during the day is tracked, which helps build seller KPI data. And finally, the number of unanswered calls to the opportunity is tracked. This tracking is critical, because privacy and legal reasons require that we disqualify leads after three unanswered calls.
- The **Next Lead** button automatically provides the next prioritized MAQL, which is efficient for sellers and helps them move on quickly to the next call.

A maturing evolution

Inside sales offers itself as a service to field sellers and business groups. The team works with marketing to constantly refine the quality of leads that come through. This, in turn, results in stronger conversion rates and more time effectiveness. Inside sales helps establish good leads from marketing data and confirms that contact information is correct.

Lead refinement helps eliminate data redundancies and improves the customer experience. Increasingly, inside sales functions as more of a partner in the selling experience. For example, inside sales can attend to smaller tasks—giving demos for example—for a large account, while an account executive manages the rest of the deal.

Looking ahead

We're continuing to simplify and refine MSX. We want to drive more real-time notifications, visualizations, and alerts so that our sellers can make faster decisions. In other words, we want to bring machine learning to the forefront of the MSX experience. We'll continue to add more roles and experiences to Insights, especially for enterprise services; for example, supporting account executives who are responsible for delivering consulting revenue.

As we continue our transformation journey, we'll advance in dynamic ways. Today, if we're aware of a competitor risk, we tell our account team about it. Going forward, we want to use machine learning to automate risk detection and then bridge it with MSX Insights and tools. In addition, we want to be poised to immediately respond to customer input and capture sentiment from any number of channels. Our goal is to use machine learning to capture posts on social channels like LinkedIn or Twitter and give real-time alerts to our account team.

To support people on the road, we'll expand the mobile MSX experience and create just-in-time experiences that can help sellers. For example, MSX could push a last-minute incident or opportunity to the seller before an appointment.
After the appointment, the seller can use MSX on their phone to quickly summarize actions and send them to the account team. And if an executive is receptive to a proof of concept idea, MSX can quickly find the right Microsoft expert or partner.

We want to be able to showcase and demonstrate how we are transforming and selling, like we've done in this story.

For more information

Microsoft IT Showcase
microsoft.com/ITShowcase

Taming the turbulence: Bumpy Microsoft sales process hits smooth air
Beyond CRM: Extending Dynamics 365 to manage contracts
Dynamics 365 automates complex transactions and business processes
Reusable enterprise app code library powers digital transformation

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