October techshop

DYNAMICS 365

FOR SALES AND MARKETING

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what is a CRM?

customer relationship manager

- includes leads, prospects and customer data
- tracks tasks and activities against accounts
- create quotes and orders, and send invoices
- forecast sales and manage pipeline
- manage ongoing customer relationships
- manage products and pricing
- ability to automate tasks

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CRM best practices

how to choose the right CRM for your business

1. define goals
2. do your research
3. design implementation plan
4. customise CRM
5. build automation
6. provide comprehensive training
7. leverage reports and analytics
8. audit and update regularly

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keeping your data within the 365 stack

- save money
- better integration
- smarter automation
- reduce the risk of a breach
- less duplication of data

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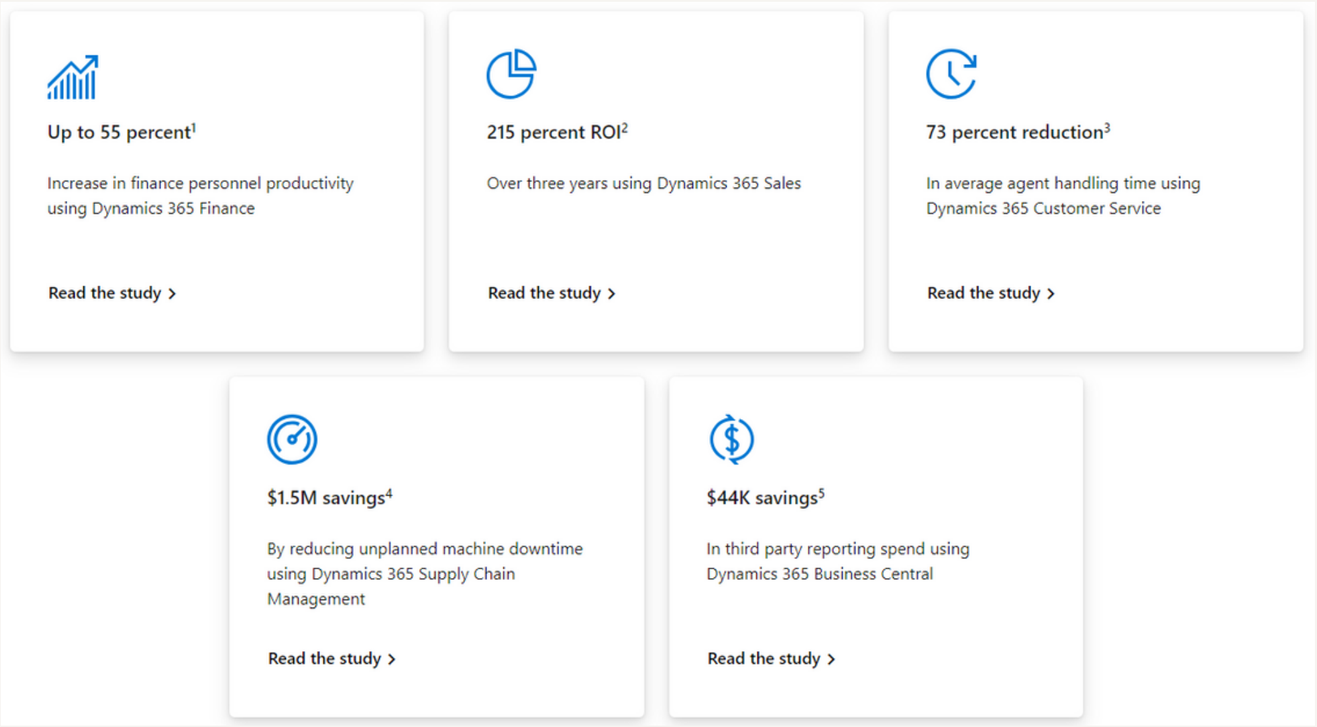
introduction to dynamics 365



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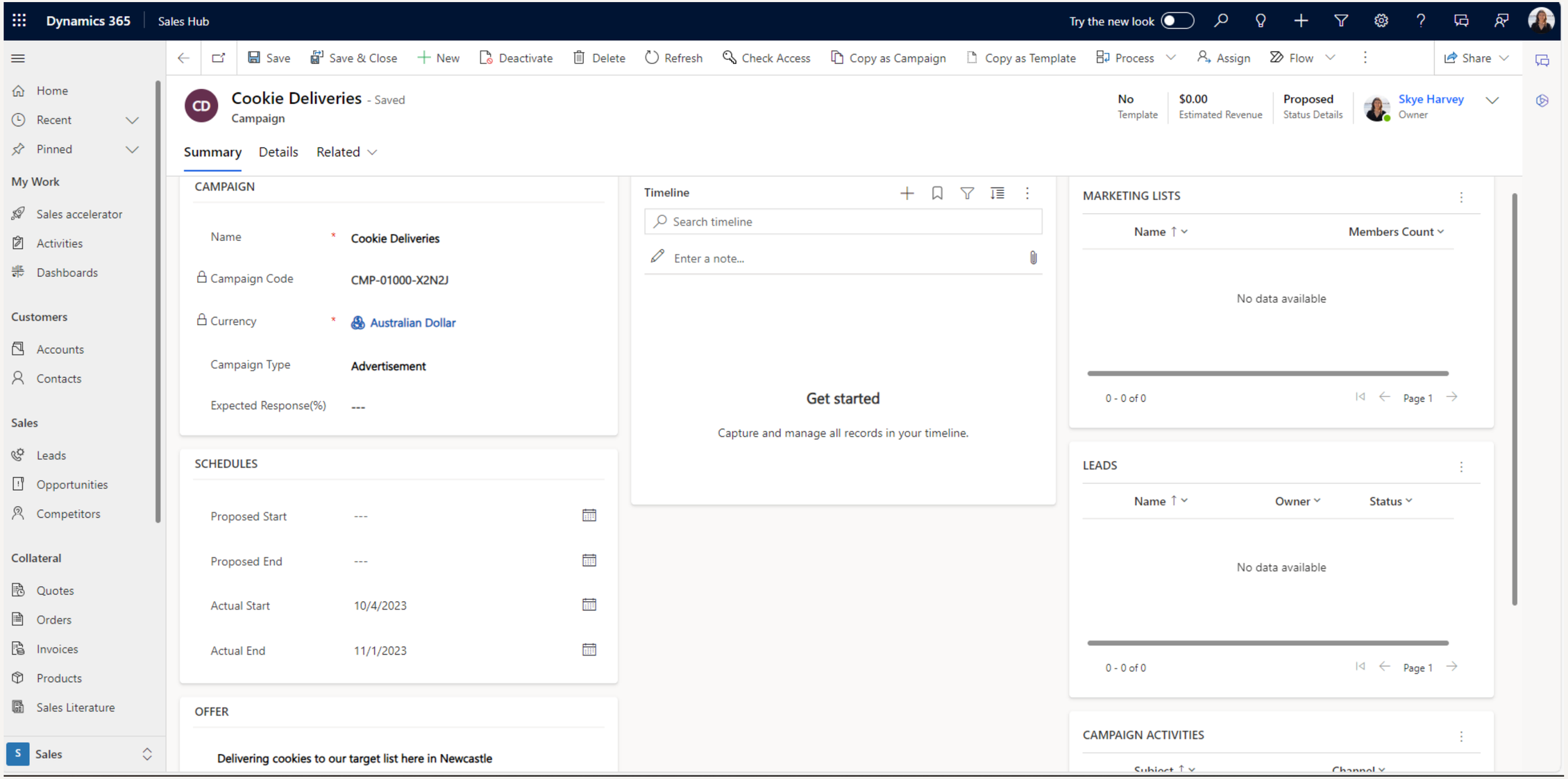

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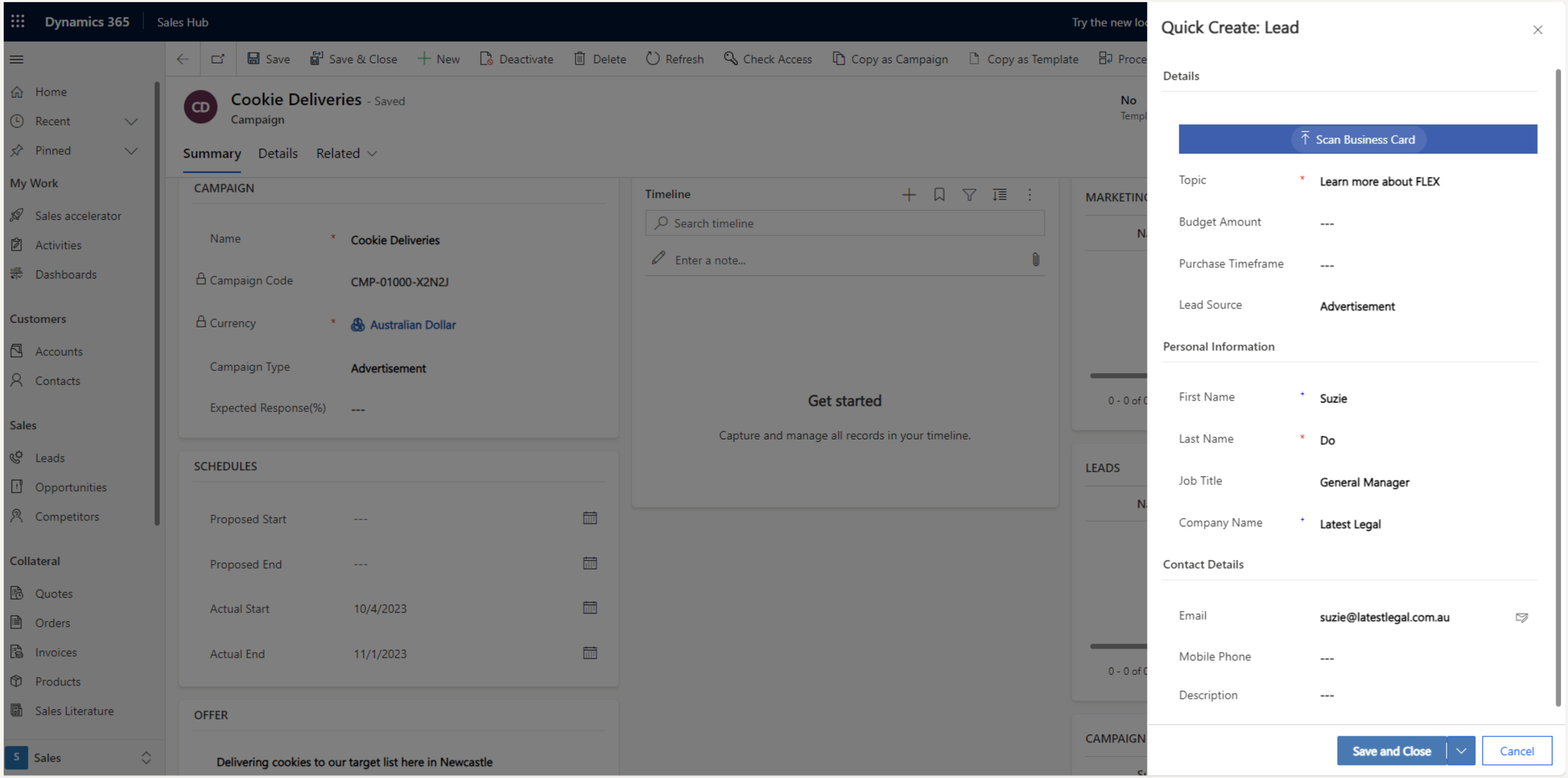

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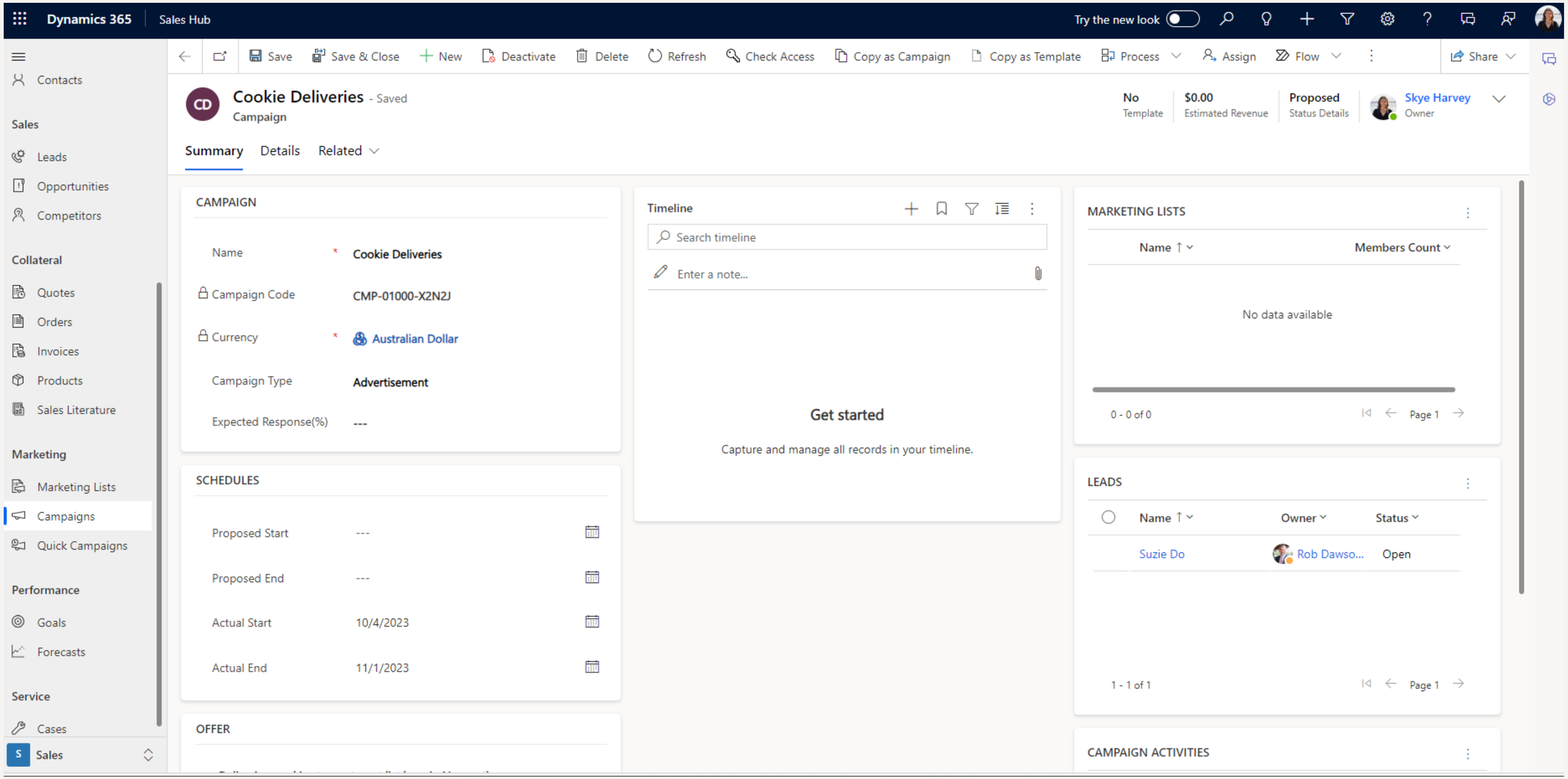

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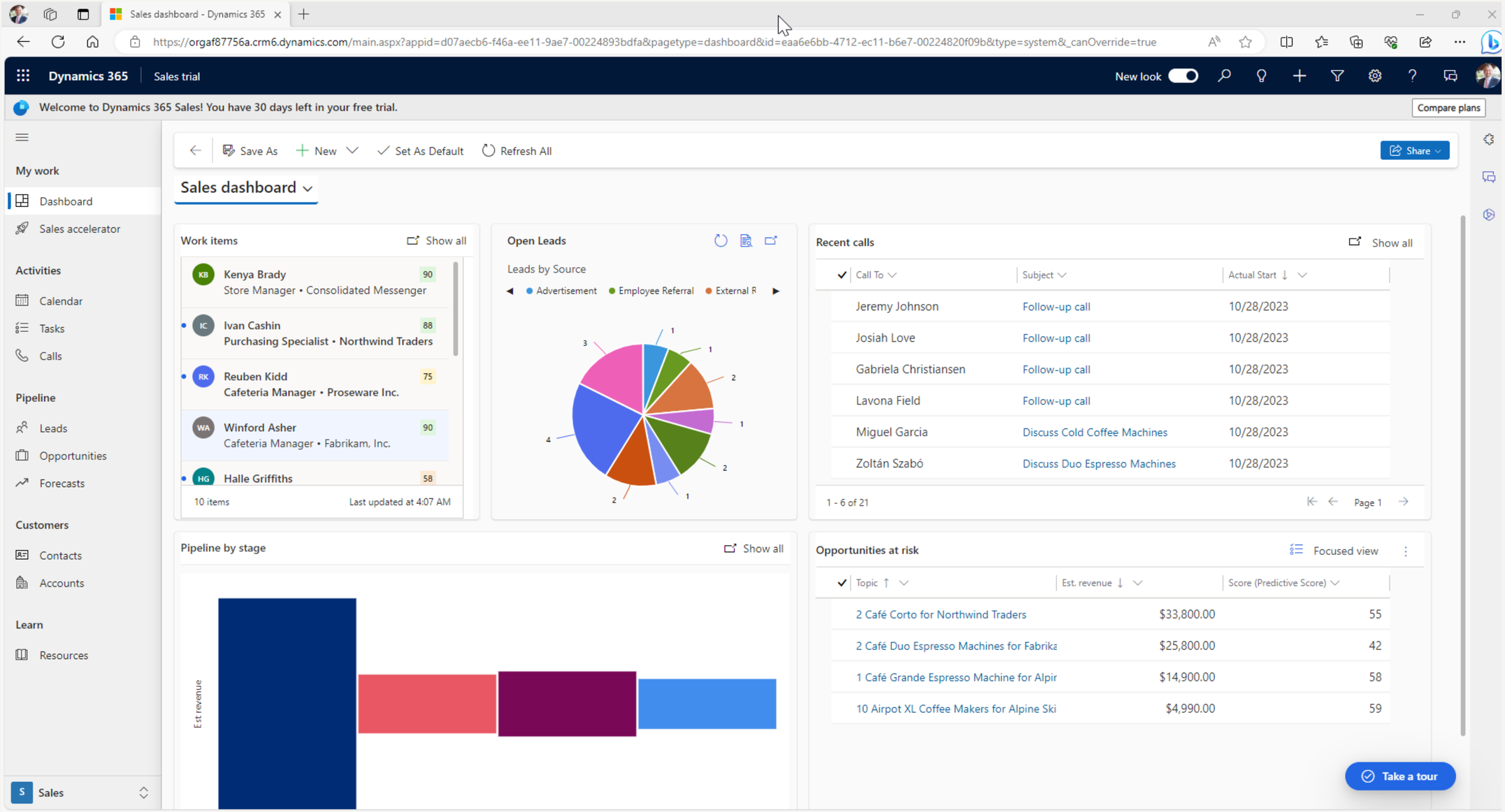

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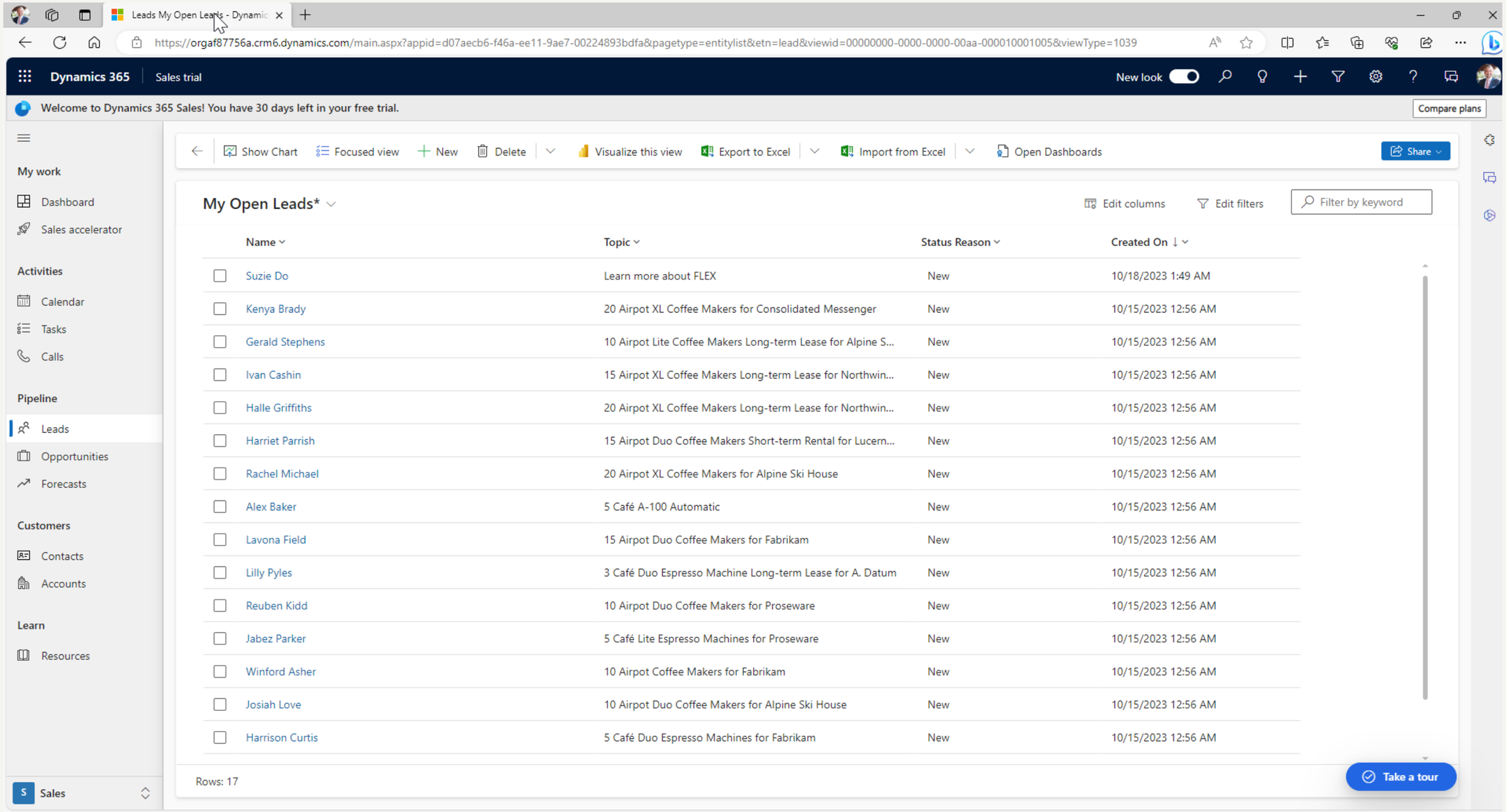

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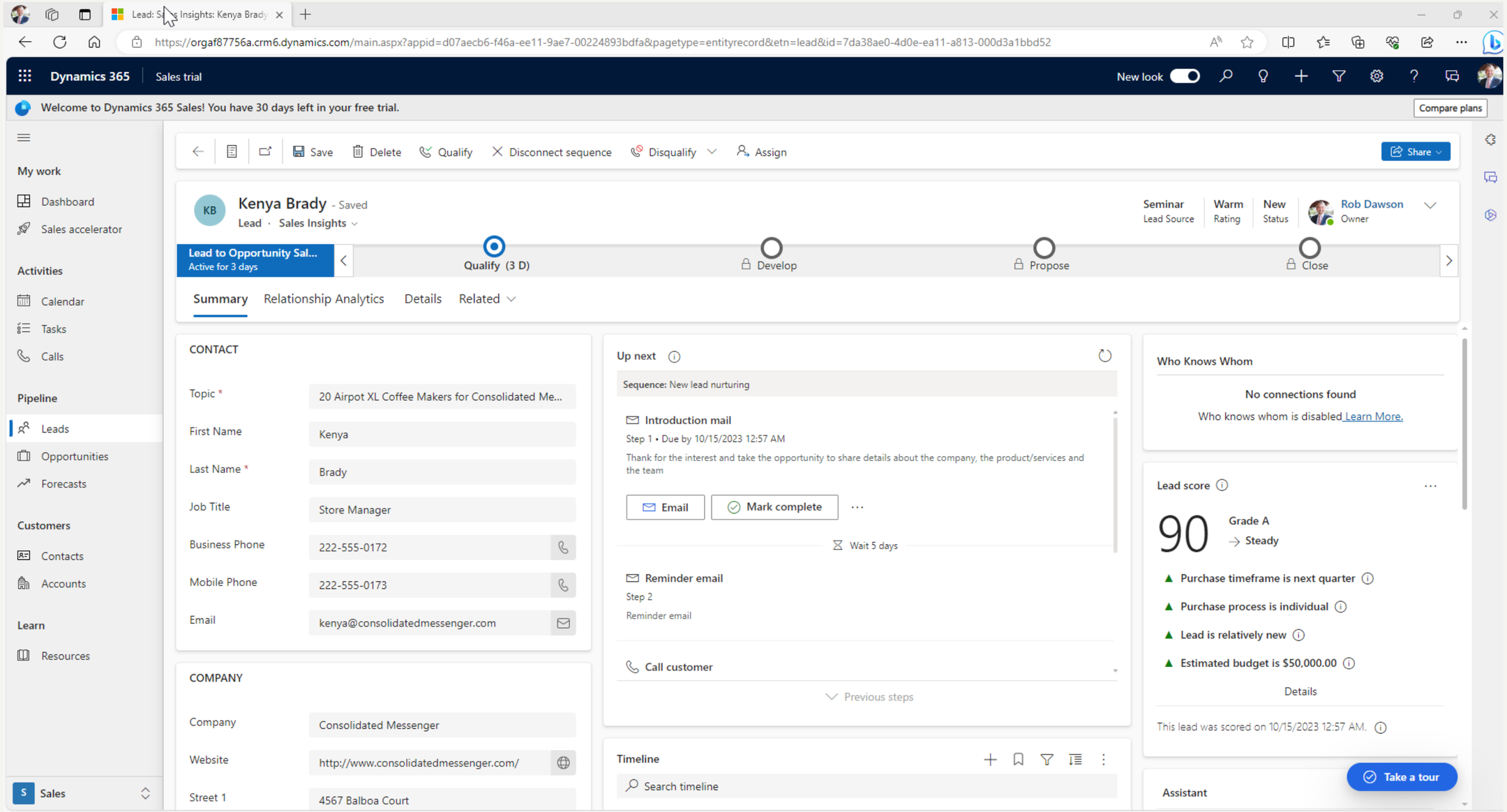

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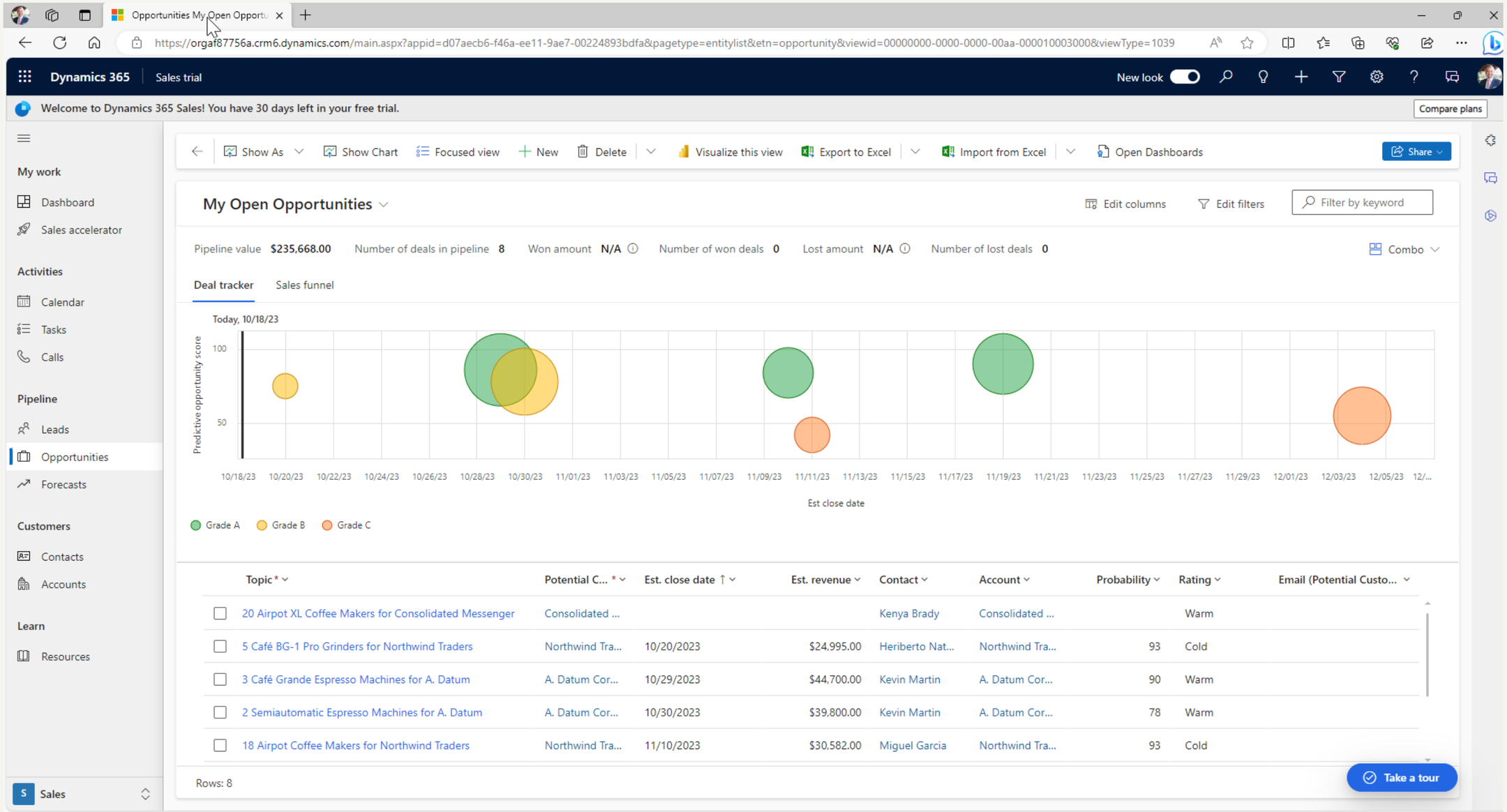

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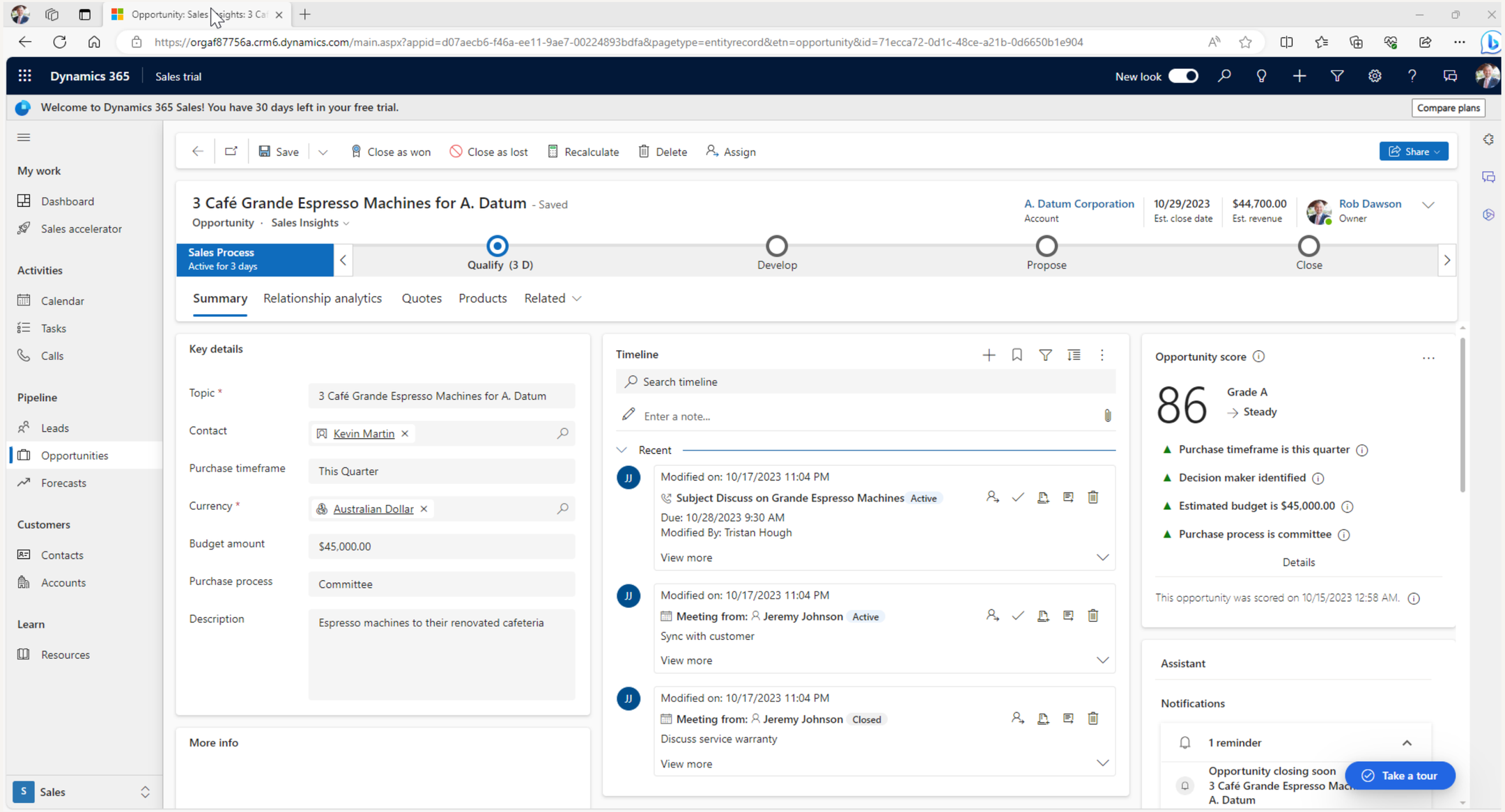

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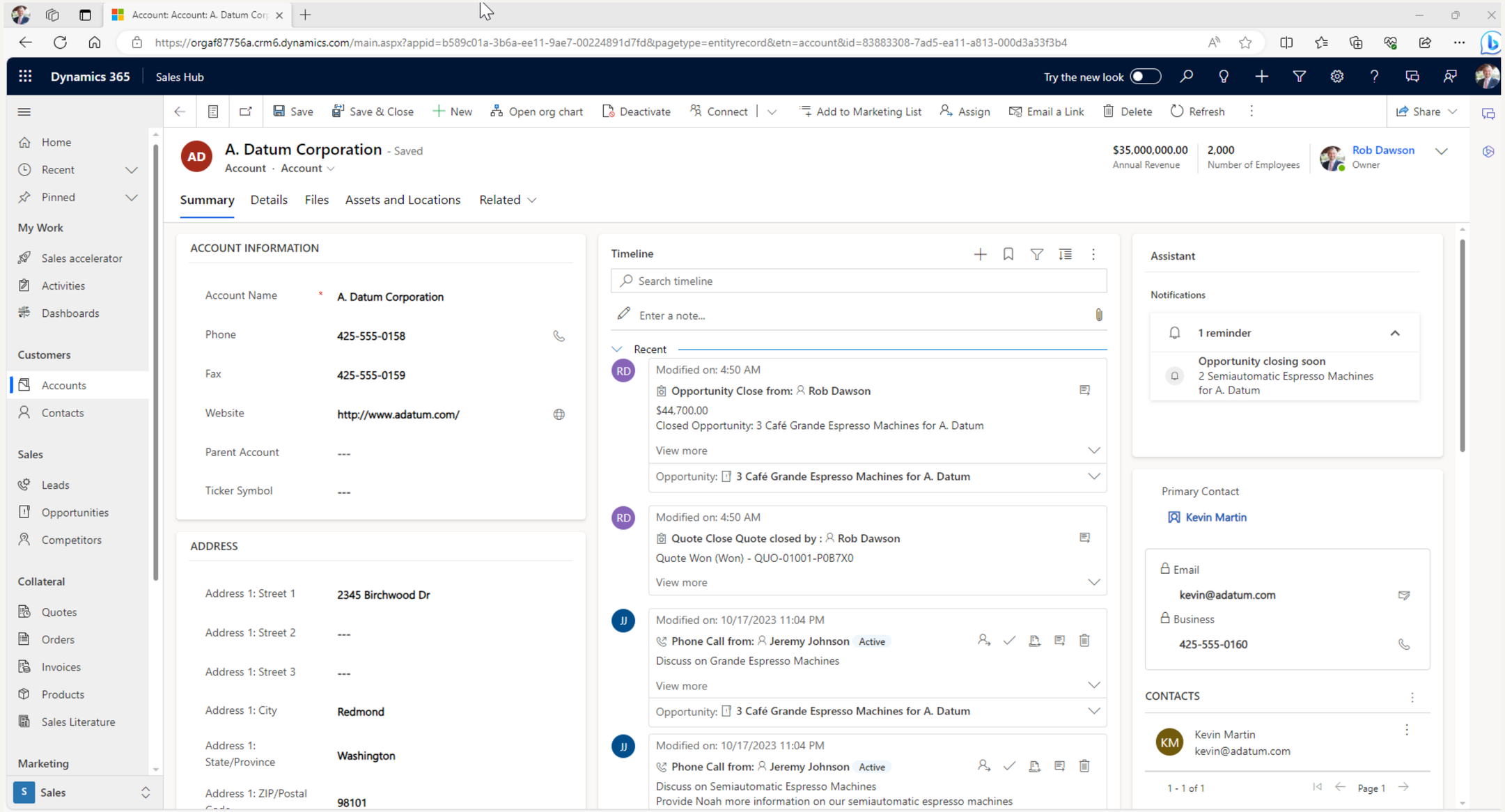

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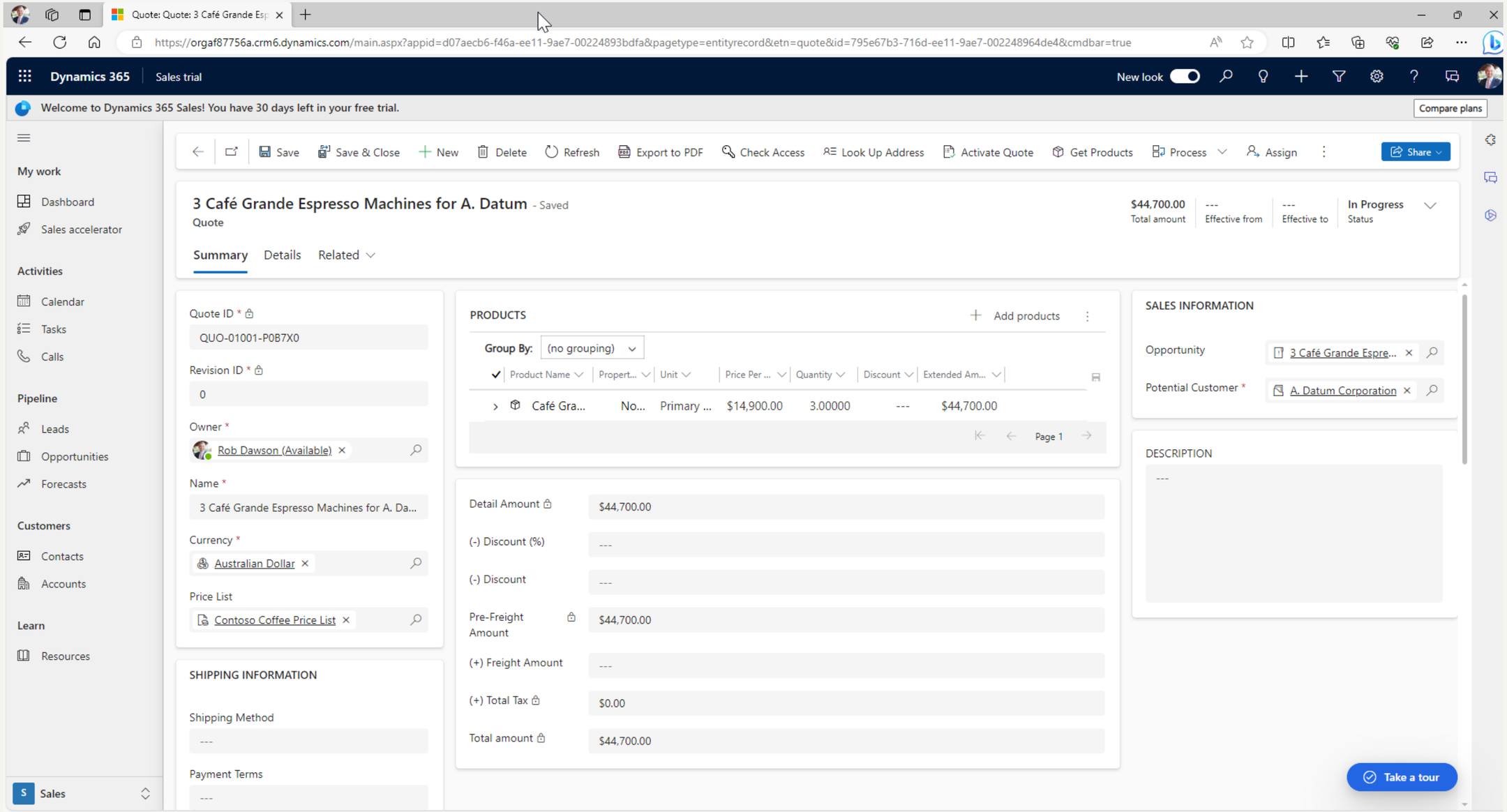

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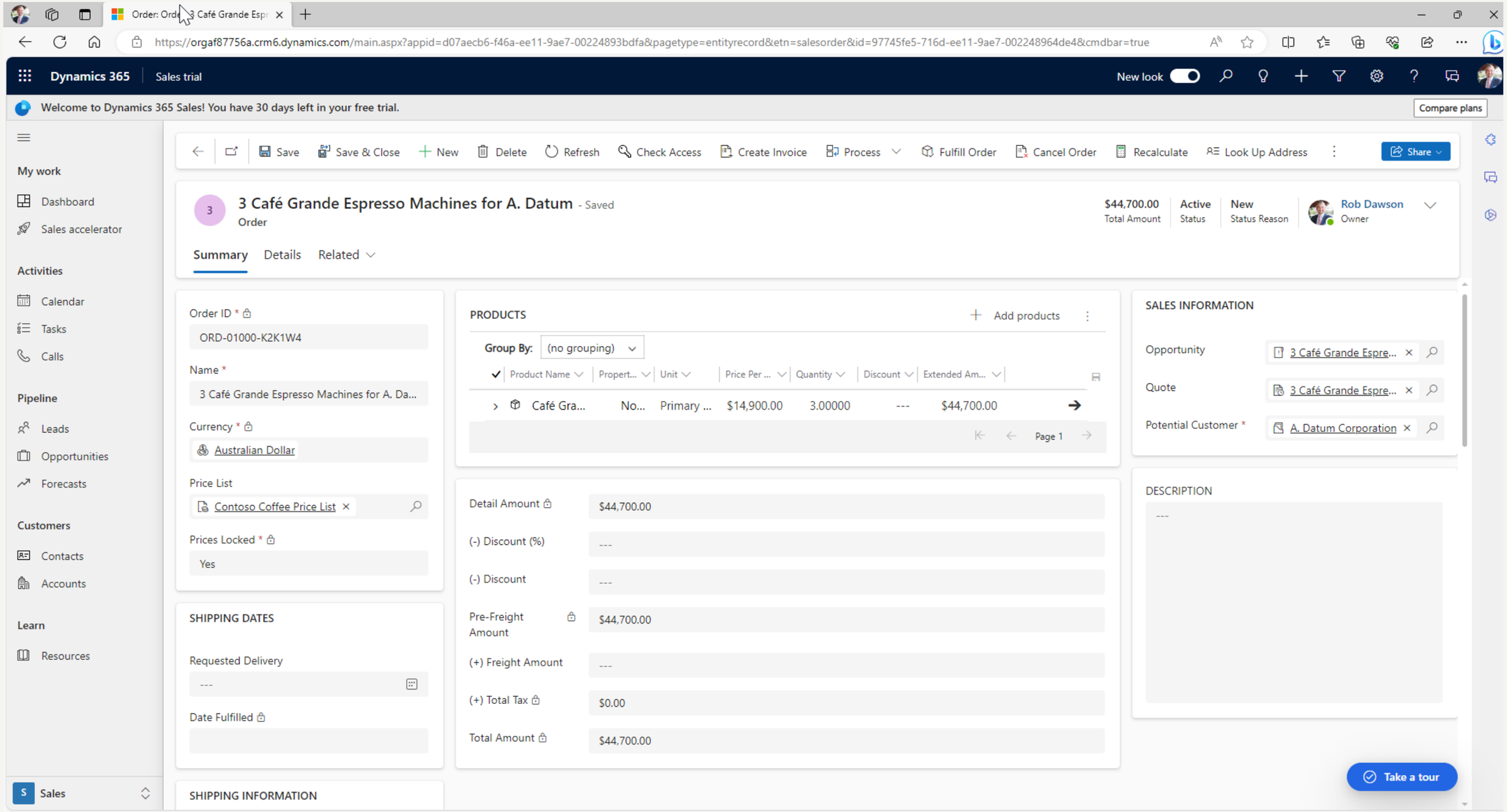

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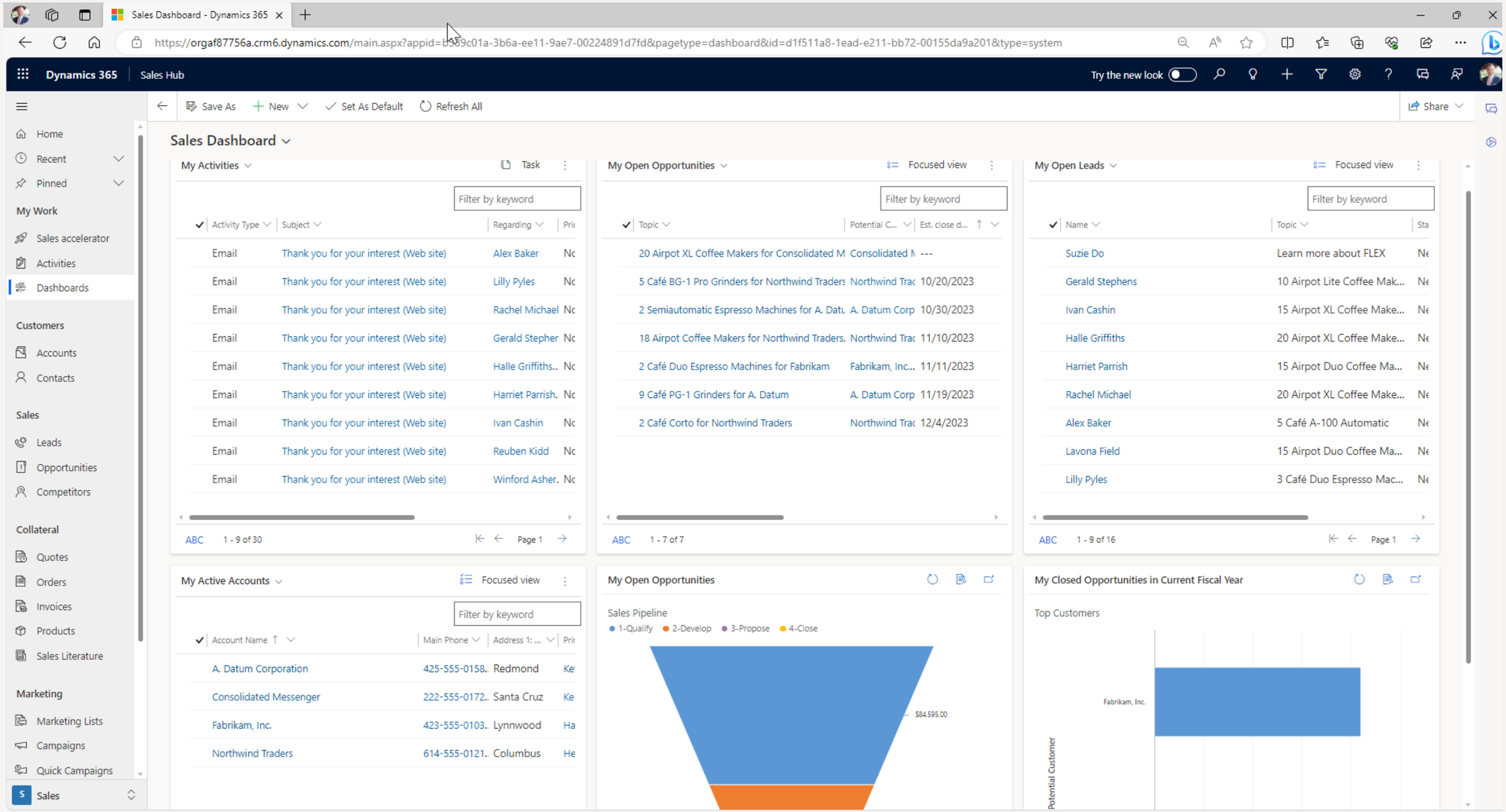

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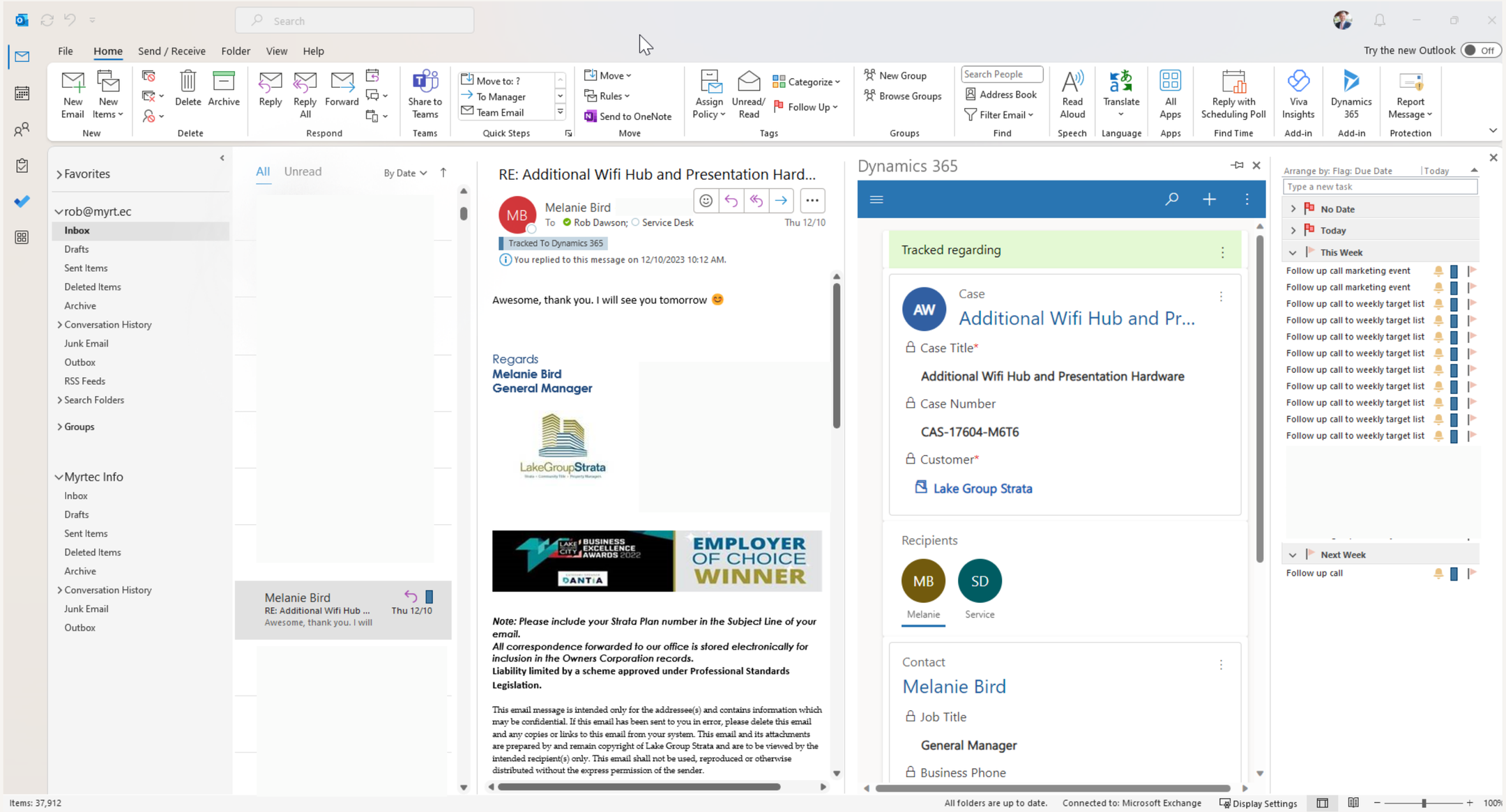

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other useful features

- data export and visualisation
- territory management
- products and price lists
- sales literature and document management (SharePoint)
- native power automate integration for automations
- goals and forecasting

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top 5 benefits

- microsoft stack rationalisation
- customisable to capture the data you need
- integrates with your other apps and software such as mail, linkedin, payments
- AI capability
- customer service / ongoing relationship management

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customisation integration & automation

- capture different types of data
- change the look and feel of the system
- sync data to different external systems
- automate business processes

To explain these, we are going to look at the example of Contoso Coffee, a company that produces coffee machines.

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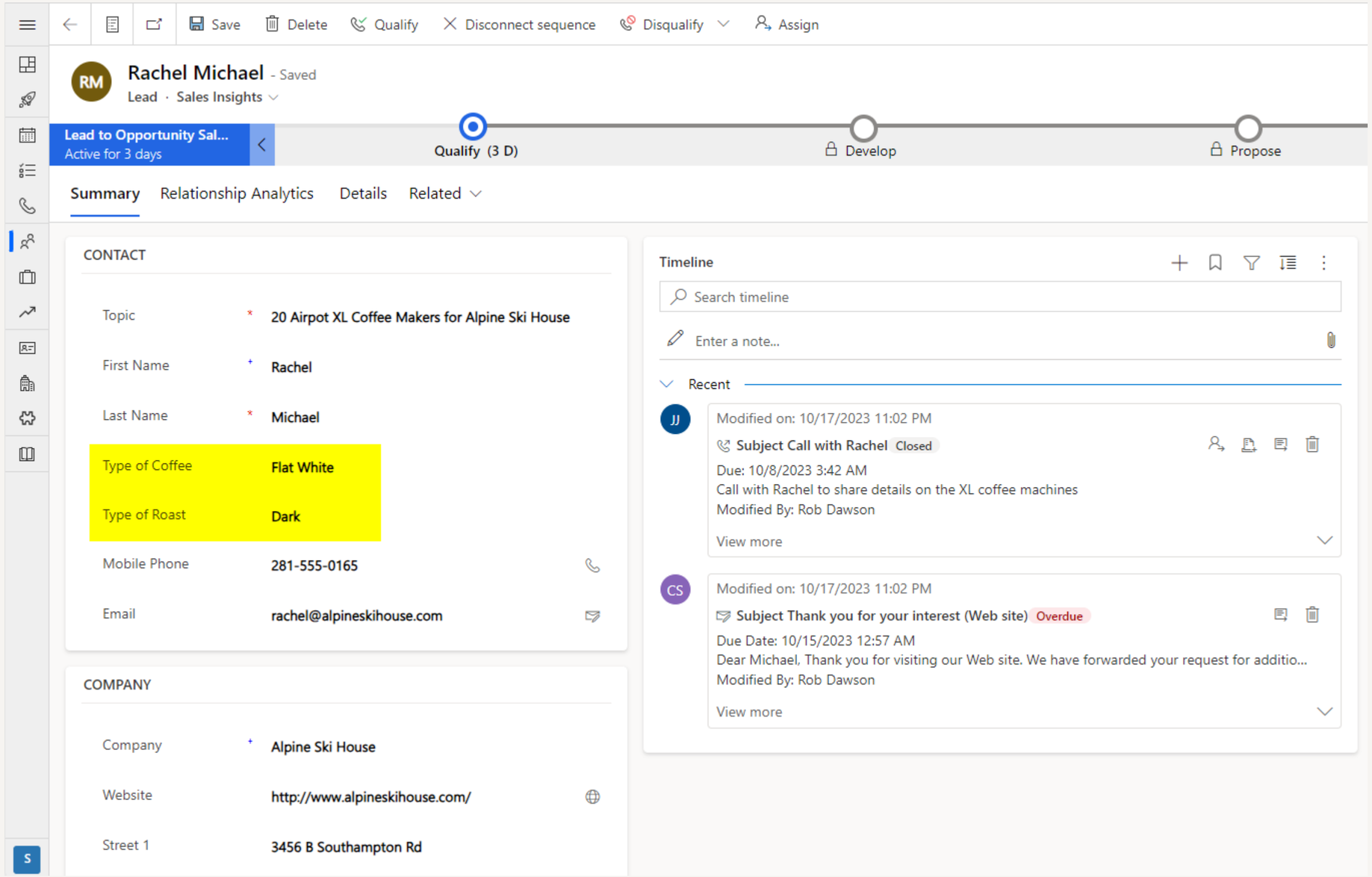
Middle name, title and main phone removed.

Coffee type and roast type added.



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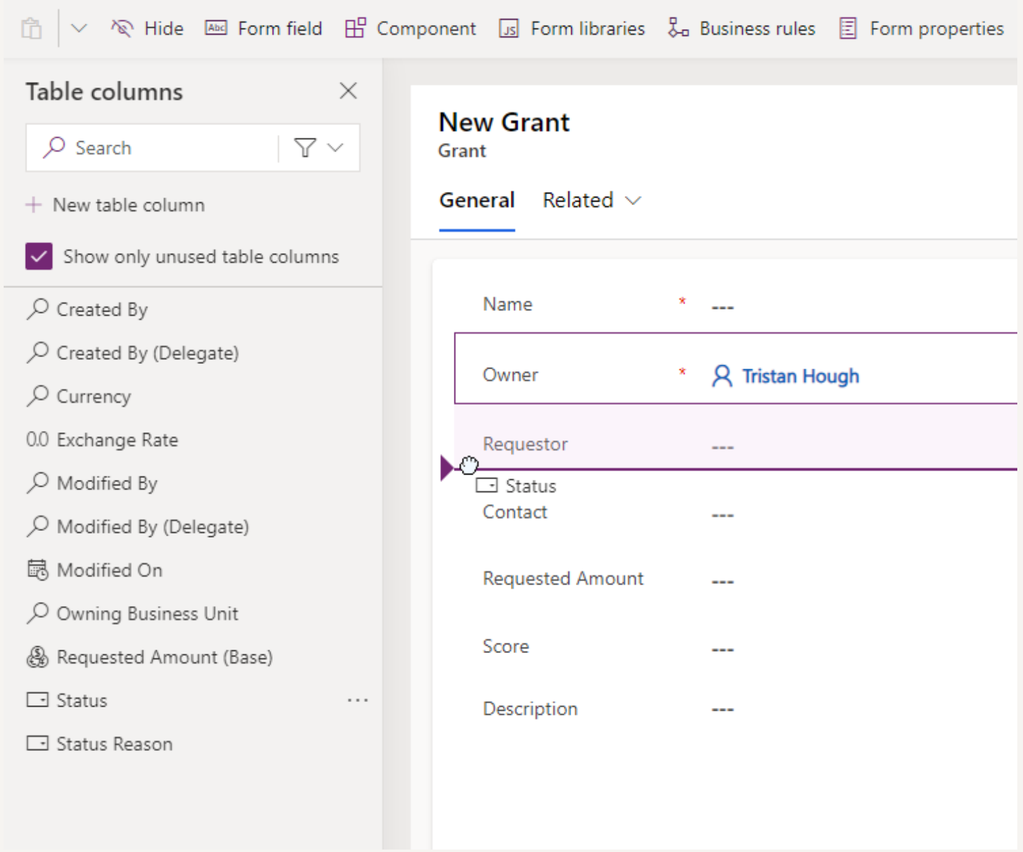
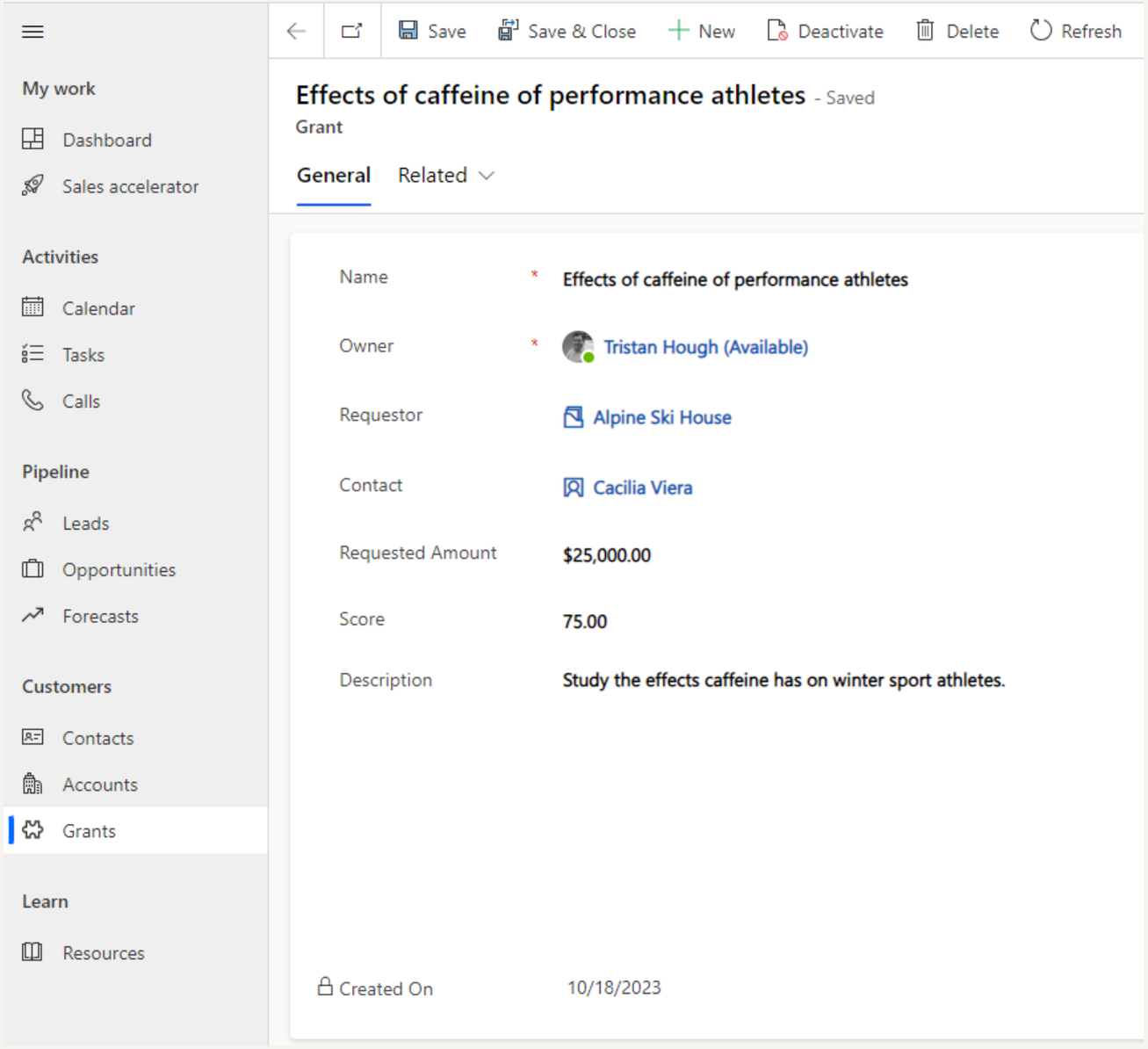
We are also not limited by the default type of records. Contoso now wants to offer grants for research into caffeine.





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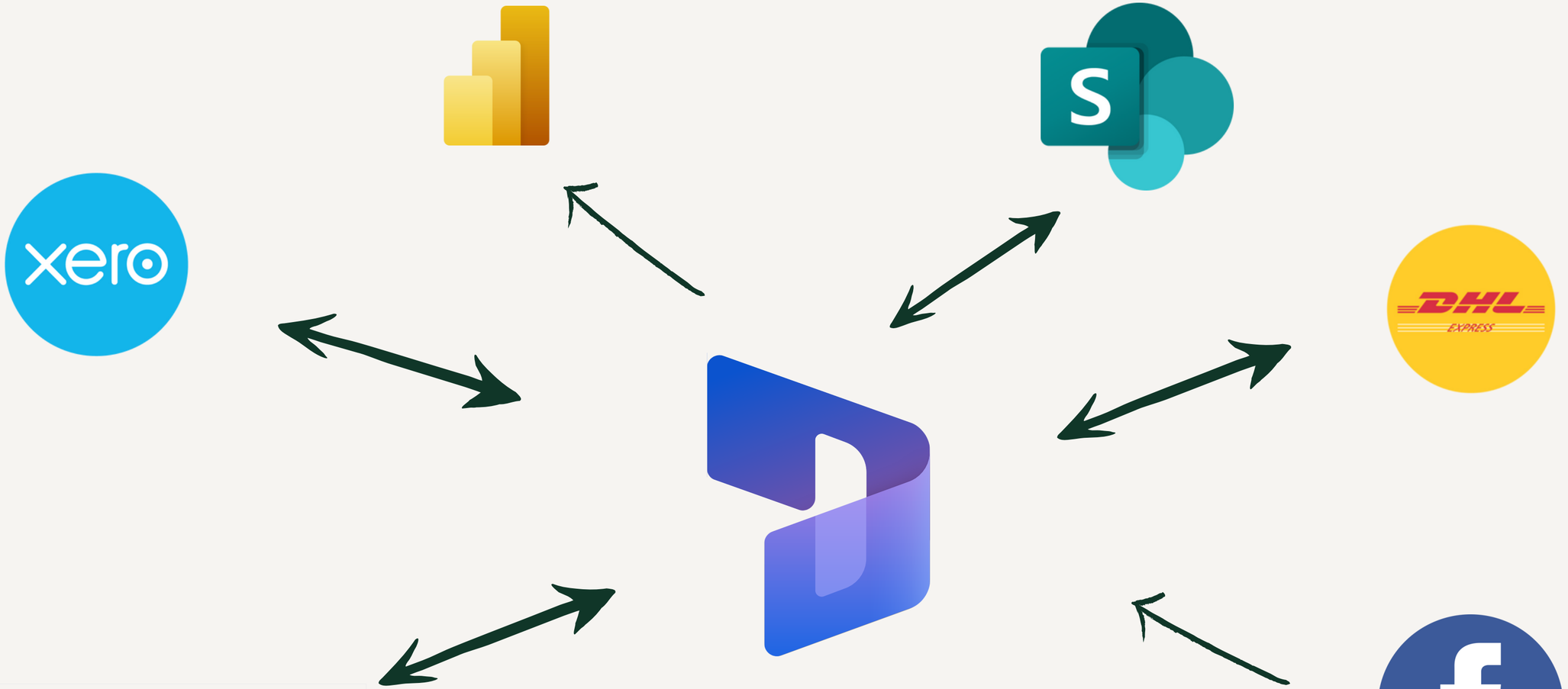

Sync data in both directions, just in or just out from Dynamics, but Dynamics remains the single source of truth.

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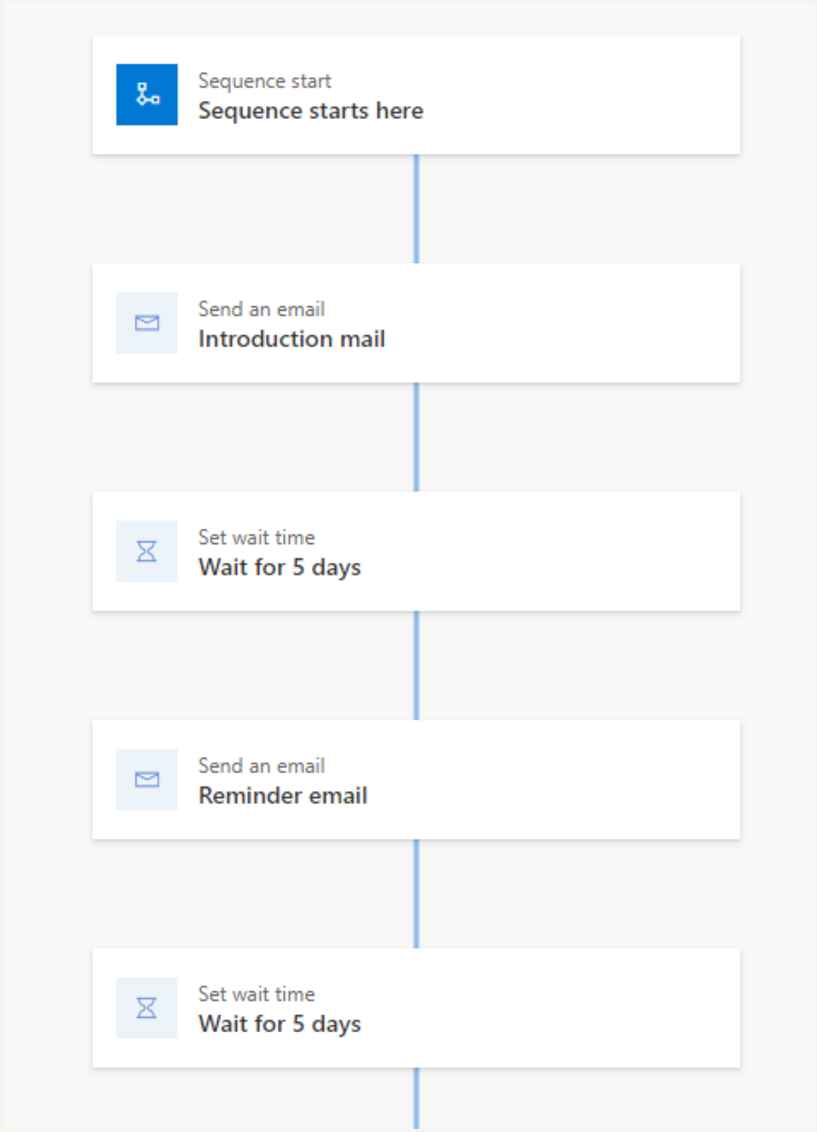

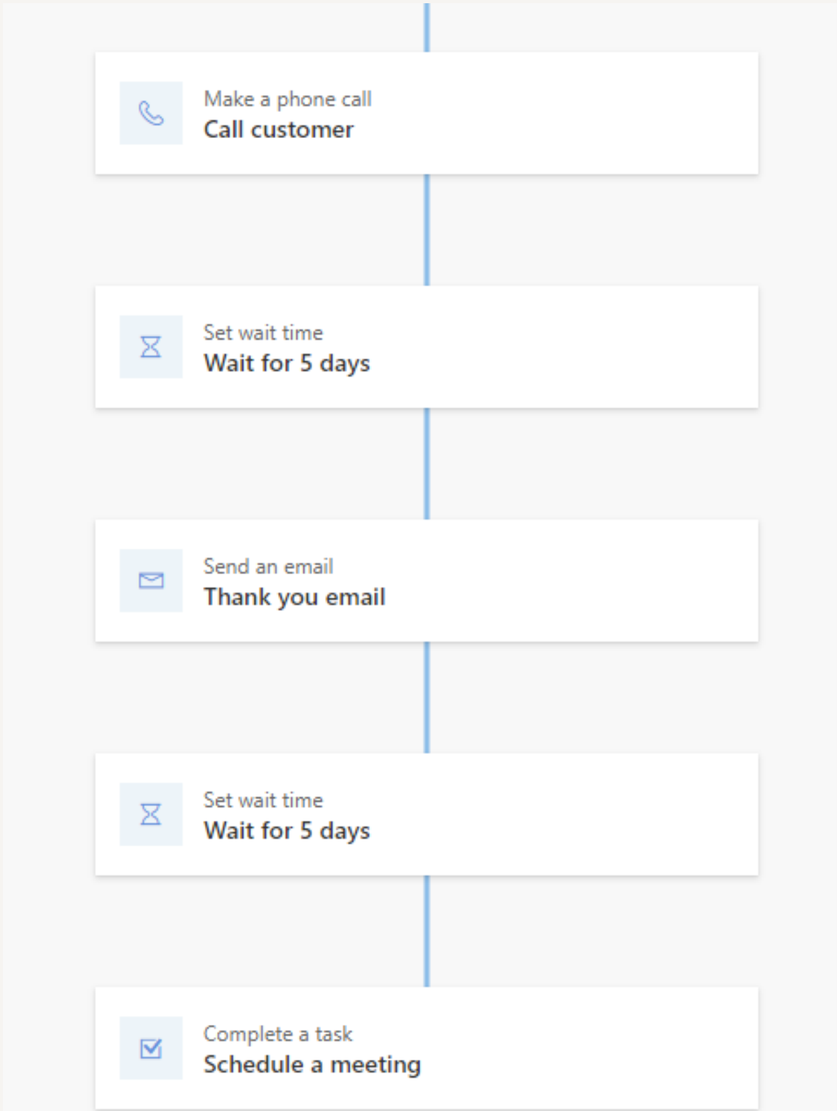

Contoso are expanding and hiring additional sales staff. They have optimised their lead conversion processes with sequences that guide new sales members though the activities.

New leads are automatically assigned by territory, seller attributes and availability.

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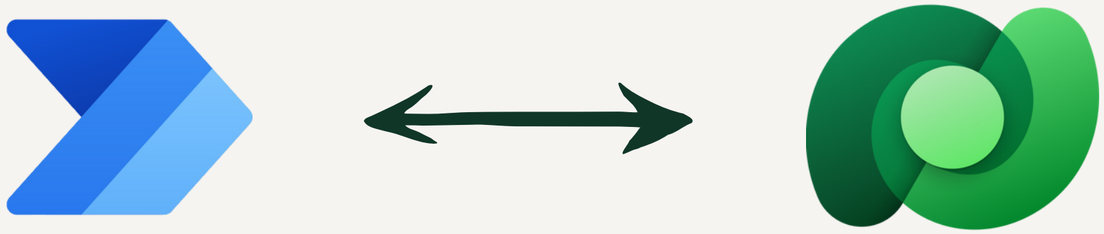
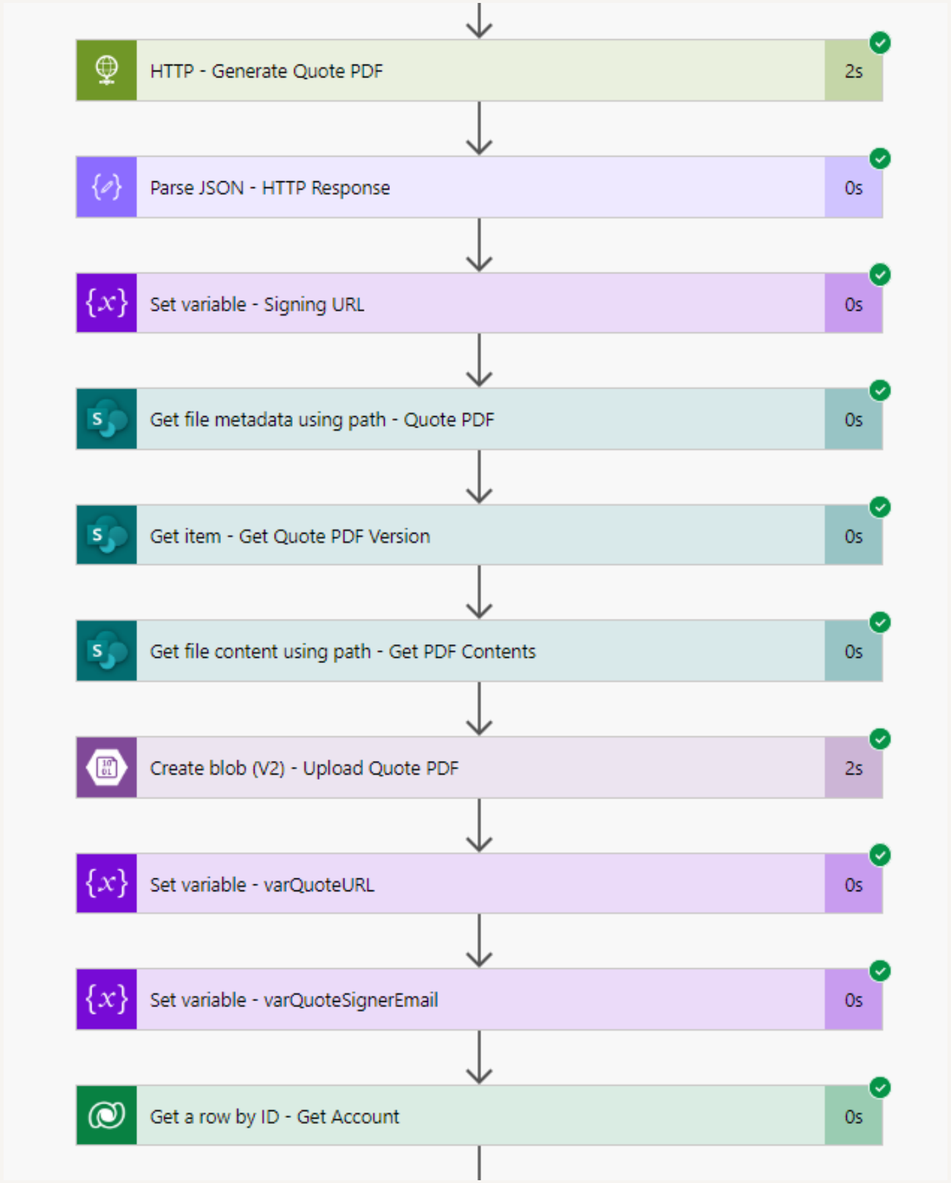
For commercial buyers, when a quote is ready to send, automatically upload the quote to an e-signing platform and draft a templated email based on the products in the quote, attach any data sheets and the specific finance and safety requirements based on the customers state.





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