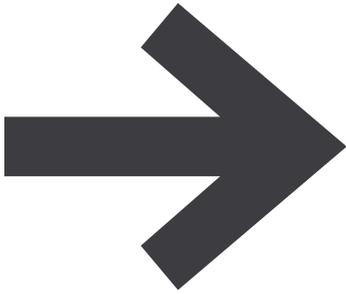


# 6 strategies to boost sales productivity

A guide to modernizing your growing business





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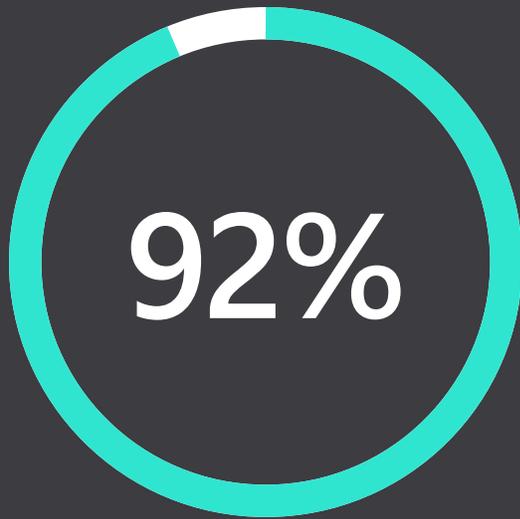
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**Ninety-two percent of sales organizations rank sales engagement platforms as critical to their success.<sup>1</sup>**

<sup>1</sup> Craig Rosenberg, "[Sales Engagement – the Definitive Guide](#)," TOPO, accessed January 15, 2019.

# Leverage the right tools for your sales challenges

For sales organizations of all sizes, there are many hurdles to clear on the way to closing a deal.

Engaging with buyers who follow a nonlinear customer journey or managing a disconnected collection of sales tools can lead to internal silos, a lack of collaboration, and broken sales processes. Not having the right sales engagement solution in place can ultimately lead to lost productivity and revenue.

For small and medium-size businesses (SMBs), these challenges may seem daunting. But with the right tools, they don't have to be.

By implementing a cohesive solution, SMB sales teams can boost productivity and revenue while building stronger customer connections, improving collaboration, streamlining the sales process, personalizing interactions, and optimizing performance.

Review our six strategies for modernizing your sales process, leveraging sales force automation from Microsoft Dynamics 365 for Sales with integrated, familiar productivity tools from Office 365.

Strategy 1 /

# Meet customers at any point in the journey



More than 70 percent of buyers engage with salespeople later in their customer journey, after they've identified their needs.<sup>2</sup>

Buyers expect a sales process that can flex on their terms. They have a wealth of resources that help them decide what they want before ever talking to a sales rep. However, at some point along their nonlinear customer journey, they'll be ready to engage with a sales professional to take the final steps toward a purchase. These savvy buyers won't tolerate sellers who can't provide them with the high-value information they need during the decision-making process.

<sup>2</sup> Tamara Schenk, "[Are Salespeople Relevant to the Modern Buyer?](#)" CSO Insights, June 14, 2018.



### **Be ready to engage on their terms**

To gain and retain buyers' business, sellers must be prepared to jump in anywhere along the customer journey and be fully equipped with context about their preferences and past interactions. The right sales technology can help you quickly understand and respond to buyers' demands, whenever they choose to engage with you.

Proactively close the gaps between customer expectations and what your sellers can deliver with a sales engagement platform that provides a contextual view of customer behavior, including past marketing and service interactions.

"B2B buyers want salespeople who can deliver insights, engage in a fact-based conversation around how their products and services can measurably affect business performance, and pivot the conversation to cover what matters most to them."<sup>3</sup>

<sup>3</sup> Mary Shea and Shanta Samlal-Fadelle, [B2B Buyers Mandate a New Charter for Marketing and Sales](#), Forrester, January 10, 2017.

Strategy 2 /

# Implement seamless solutions



Ninety percent of sales leaders plan to invest in tech to help sellers engage with buyers more effectively.<sup>1</sup>

The more tools that sales reps have to work with, the more effective they'll be, right? Not necessarily.

The truth is that your sales team is likely overwhelmed by how many tools they have to manage. If those tools don't work together seamlessly, sellers will be frustrated and more likely to abandon the technology.

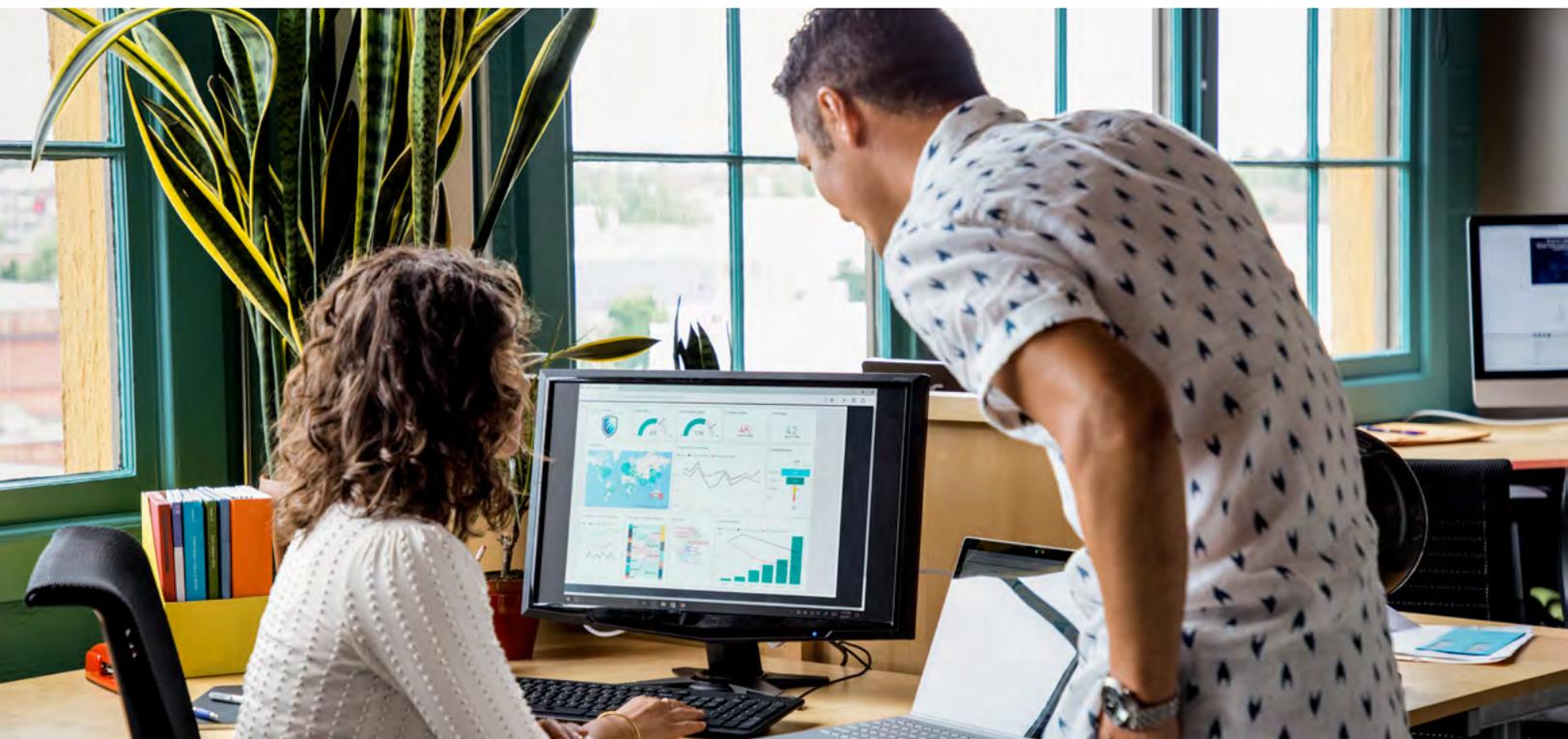
<sup>1</sup> Craig Rosenberg, "[Sales Engagement – the Definitive Guide](#)," TOPO, accessed January 15, 2019.

**Get more done with a seamless, scalable solution**

Give your sales reps everything they need to do their jobs—including lead generation, pipeline management, coauthoring of sales documents, and more—in one place. A cohesive solution that works seamlessly across mobile devices enables them to get more done, even while on the go.

Leverage intuitive productivity apps and take advantage of automated tasks to give your sellers more time for building buyer relationships. Real-time dashboards increase usability and productivity by helping your sales team turn data into actionable insights.

Ready-to-deploy packaged applications help your sales team get up and running quickly with just the tools they need right now. Look for a solution that can scale with your business growth and your buyers' and sellers' evolving needs.





### **A productivity surge at Gallup**

Polling powerhouse [Gallup](#) needed a unified, user-friendly way for its sales team to track leads and serve customers faster. With the familiar front-end functionality of Dynamics 365 for Sales and Office 365, Gallup’s sales team got the comprehensive insights needed to enhance effectiveness with customers and boost lead generation—and, in turn, grow the team by 30 percent.

“We’re able to leverage the content that we create to drive leads and capitalize on that, and then we can see the ROI of all our activities, all the way through.”

—Brandon Schulte, Technical Project Administrator, Gallup<sup>4</sup>

<sup>4</sup> Microsoft, “[Polling and Data Analytics Giant Gallup Helps Salespeople Find and Serve Customers Faster with Microsoft Dynamics 365](#),” February 17, 2017.

Strategy 3 /

# Enable sharing and collaboration



Forty-five percent of global B2B services decision makers are working to improve collaboration between internal organizational silos to drive digital sales transformation.<sup>5</sup>

Serving your customers and resolving their problems quickly requires sellers to communicate and act cohesively. Like any modern business, your sales organization relies on healthy collaboration—what makes teamwork tick—to promote efficiencies and drive growth through shared ideas and information. When your teams are geographically dispersed and your sales enablement technology doesn't include familiar and intuitive productivity tools for email, document creation, or data collection, your team has to work a lot harder to work together.

<sup>5</sup> Mary Shea and Meredith Cain, [B2B Digital Sales Transformation: Three Global Leaders Share Best Practices](#), Forrester, August 14, 2018.

### **Work better together with a hub for productivity**

Your busy sales team doesn't have time to learn how to use productivity tools. That's why it's essential to choose a CRM system that seamlessly integrates with tools that fit the way they work.

Document sharing and coauthoring tools, along with powerful email and chat apps, will empower your team to quickly connect with internal and external collaborators to create stronger, more meaningful—and productive—team and customer interactions.



**Strategy 4 /**

# Streamline engagement



Today's purchase decisions (in a B2B buying group) involve an average of 10 people.<sup>6</sup>

When sellers manage multiple accounts at once, they may not be able to deliver the level of personalized engagement their stakeholders expect. And when your sales team's data passes through many disparate channels, it's harder to track information and, ultimately, close deals.

<sup>6</sup> Gartner, *Eliminating B2B Buying Complexity On and Offline*, July 6, 2018.



### **Manage multiple relationships at scale**

In a multichannel world, it's important to take a unified route to stakeholder engagement that enables sellers to connect with prospects in personalized, scalable ways.

A sales tool embedded with user-friendly productivity tools allows teams to follow up with stakeholders faster and manage relationships with greater efficiency. Email integration can show you the most recent customer interactions, while social selling tools give insights about contacts, accounts, and opportunities, enabling you and your team to be more proactive and responsive.

A sales force automation solution with prebuilt and embedded insights that are quick to deploy and easy to act upon improves stakeholder engagement and seller decision making. This solution can reveal insights your sales team needs to build trust, take relevant and impactful actions with the best prospects, and manage stakeholder relationships at scale.

Strategy 5 /

# Ease onboarding and alignment



Sixty percent of companies lack a well-designed sales process.<sup>7</sup>

While the steps to close a deal will vary from account to account, your team may miss out on opportunities to close if they aren't up and running from day one. Hiring rapidly and using a sales process that can be learned without extensive training become critical. Furthermore, if your sellers aren't working from a tool with a single user interface (UI), they may not follow or be aware of the steps required to close a deal at your business. Toggling between multiple tools and disconnected apps can further exacerbate your team's workflow headaches.

<sup>7</sup> Craig Rosenberg, "[Sales Process: How to Design and Manage a Process That Will Scale](#)," TOPO, accessed January 15, 2019.

**“The benefit of Dynamics 365 lies in its ability to be quickly configured to align forms to unique business processes. I was able to use CRM’s workflows and business rules to create a tool for our sales team that adds value by making it easier for them to do their job.”**

**Tom Faillace**

*Senior IT Generalist, Luck Companies<sup>8</sup>*

**Rally your team around best practices**

An intelligent, event-driven sales process can demystify expectations and keep everyone focused on optimal outcomes. Set new hires and existing team members up for success immediately with interactive, context-sensitive onboarding guides that minimize training time. Break down organizational silos and provide a clear view of each step toward closing a deal with built-in sales force automation workflows that make sense for your business and your team.

<sup>8</sup> Microsoft, [“Stone Products Producer Improves Sales Productivity and Effectiveness with CRM,”](#) March 20, 2017.

Strategy 6 /

# Get holistic performance insights



Seventy-three percent of businesses recognize the value of data and aim to be data driven.<sup>9</sup>



Just 29 percent are actually acting on that data.<sup>9</sup>

As your business grows, it can become hard to keep track of sales and sales rep performance. Competing priorities arise, and sometimes your team isn't on the same page. Sales reps and leaders need to see how they're performing against business goals in order to set objectives, make decisions, and maintain accountability. If your sales tools can't measure and report on which types of customer interactions consistently convert to revenue or how to turn metrics into actionable insights that improve the sales cycle, your team could be missing the mark.

<sup>9</sup> Allison Snow, "[Predictive Marketing Analytics and the Link to Customer Engagement Action](#)," Forrester, September 26, 2016.

### **Optimize your team's outcomes**

Get more value out of your sales engagement tools with a platform that can help evaluate your performance and sales cycle length for optimal outcomes. Greater visibility and insight into sales performance help you set and adjust goals to ensure your team hits their numbers. Creating these clear objectives helps prioritize metrics such as deal-cycle length and customer churn rate, allowing data-driven decisions to be made and creating accountability where and when it matters.

Real-time dashboards that display data and results ensure the entire sales team is working toward common goals and following a proven process. All-access visibility means you can track and measure performance, provide timely feedback and coaching, and take corrective actions for any deviations from your sales plan.



# Modernize your sales process

Does your sales team have the sales engagement solution needed to improve productivity and drive growth for your business? Review our six strategies to see how you can plan your next move by implementing Dynamics 365 for Sales with Office 365.

## **1. Meet customers at any point in the journey**

Stay informed about buyer trends and habits. Dynamics 365 for Sales provides sales teams with an enriched view of accounts, contacts, and leads.

## **2. Implement seamless solutions**

Dynamics 365 for Sales with Office 365 helps your sales team get more done quickly through a modern hub for productivity that includes familiar tools like Outlook, Word, Excel, and OneNote and can be accessed across any mobile device, even while on the go.

## **3. Enable sharing and collaboration**

Dynamics 365 for Sales eliminates internal silos and increases communication and connection with a single, centralized interface.

#### **4. Streamline engagement**

Dynamics 365 for Sales integrates with Office 365 to give you holistic customer data from email and social channels to simplify sales execution and reveal the best prospects, so your team can easily manage stakeholder relationships at scale.

#### **5. Ease onboarding and alignment**

Dynamics 365 for Sales offers step-by-step processes that are configured to fit business needs, so new sellers see the specific steps needed to move deals forward. Align your team on best practices through interactive guides and reduce training time with rich, context-sensitive help and an intelligent, event-driven sales process that guides sellers to optimal outcomes.

#### **6. Get holistic performance insights**

In addition to its powerful measurement and reporting features, Dynamics 365 for Sales helps your team stay on track by setting goals, monitoring results, and providing timely feedback. You can investigate deviations from plan and take corrective action using real-time analytics dashboards that turn data into actionable insights.

# Get a solution that scales with your business



Dynamics 365 for Sales integrates seamlessly with Office 365 and allows sellers to work from anywhere, boosting their productivity with familiar tools. With powerful insights and solutions built to evolve and scale with your goals and your customers' demands, you'll know how and where to innovate—and close deals faster and smarter.

**QGate** is an established consultancy who focus on helping SMEs to implement Microsoft Dynamics 365 and business automation solutions.

We work collaboratively with our clients to deliver digital transformation that exceeds initial goals and expectations. We provide our clients with technology that is easy to manage and that delivers immediate business results, helping to minimise risk and ensure employee adoption and buy-in.

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