The Dynamic Sales Team
Transforming the way organizations sell
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Successful sales organizations have always strived to outpace their competition, improve efficiencies and continuously improve sales tactics to increase performance. Today, the “always on” generation in the workforce, along with more highly connected and empowered consumers, is creating an almost moment-to-moment shift in the way people and communities engage with one another.

To compete and win in this constantly changing environment, successful sales leaders and their sales teams are doing more than simply adapting sales tactics—they are transforming the way they sell in order to create compelling customer engagements.

This white paper reflects Microsoft’s vision for enabling this transformation and helping the successful organizations of the future equip and inspire their people for greater success.
Until recently, getting to a closed sale started with a cold call: meeting a customer who may or may not be happy with the product or service they own, and guiding them through the process of purchasing new or upgrading to something better—all of this based on tried and true methods of providing information to bring the customer to the logical conclusion that they want to purchase. Today, a telesales rep has less than a 9 percent chance of even getting a prospect on the phone, much less converting them to an opportunity. Sending a cold email message with an offer averages less than a 1 percent response rate.1

This traditional sales approach is undergoing a massive evolution. Regardless of industry, whether it is business to customer (B2C) or business to business (B2B), and regardless of the type of selling, whether it is relationship selling, transactional selling, or consultative selling, it is clear there has never been a time when salespeople have been under so much pressure to transform so quickly. There are a lot of reasons for this, but by far the biggest driver of this change is the fact that customers have never been so empowered. They have access to more information, they have greater choice, and their expectations are higher. Prospects are getting a majority of their information from sources other than your salespeople—they are getting it online, from web sites, search, and their social networks. Alarmingly, a recent CEB study found that on average, customers are 57 percent of the way through the purchase process before ever contacting a supplier.2

1 2012 Response Rate Trend Report, Direct Marketing Association
So if the average engagement with a customer begins 57 percent of the way into the sales cycle, how can companies and their sales teams be first up, look their best, and win the sale over their competition? Today’s digital-driven marketplace ensures that information is readily available. By the time a prospect initiates a conversation with a vendor, they’ve already spent a significant amount of time on research. This means that the importance and influence of marketing departments is increasing.

Marketing has always had “early access” to this audience, but the duration and opportunities for impressions are increasing. Successful sales organizations will need a two-pronged approach.

**The two-pronged approach**

1. Make marketing an integral part of the sales process.

2. Provide sales professionals with the right information and tools to engage with the customer once they are ready.

This new model for customer engagement will force organizations to look across marketing, sales, and service departments to ensure that they are able to consistently maintain a compelling relationship with the customer.
In addition to empowered customers, other notable trends are rapidly becoming commonplace practices—with customer relationship management (CRM) technology driving the speed at which these trends evolve.

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Cloud

Cloud computing has been a key trend in CRM for the last several years, but it is now truly reaching mainstream because of the benefits it provides both business leaders and IT departments.

Cloud computing has been providing significant advantages in terms of cost, speed and agility—from rapid setup and deployment, to predictable pay-as-you-go pricing, and instant on, anywhere access. This trend also means sales organizations and other departments are less dependent on traditional IT purchasing processes.

Social and digital

Social media is transforming communications and communities both inside and outside sales organizations. Prospects are using social networks to learn about products and to help navigate their purchase choices. Increasingly, social tools provide a big opportunity for organizations to improve internal collaboration as well as differentiate external customer interactions.

In contrast to the 1 percent response rate a cold email message gets, an InMail sent from LinkedIn with a second-degree connection has a 67 percent response rate. Many recipients view InMails as originating from a trusted source. Consider the savvy salesperson who takes advantage of connections on LinkedIn in ways that traditional marketing and sales techniques can’t begin to approach. The best salesperson knows how to make that connection without the recipient knowing that they are being sold to.

Microsoft’s view is that social tools, such as LinkedIn, provide a huge opportunity for competitive advantage, but only if they are implemented in a way that is tied carefully to sales, marketing, and customer care processes. See The Connected Enterprise white paper to learn more about Microsoft’s vision.
Mobility
In this hyper-fast and competitive environment, salespeople and other field-based workers require instant access to information and insights from wherever they are and from whatever device they choose. In order to stay relevant and ahead of the competition, sales reps cannot afford to wait until they are in the office to be productive and capitalize on new opportunities. Having access to the information they need on their mobile device can mean the difference between winning and losing the deal.

Big data and sales intelligence
“Big data” relates to taking advantage of increased computing power and business intelligence capabilities to bring together large amounts of data both from within your company and across the public Internet as a way to glean important insights. In the context of sales, a good example of this is the ability to provide sales reps with up-to-date real-time information about their contacts and accounts—combining information from your CRM system together with information from social profiles and third-party data services—and then surfacing that information in the context of where the sales rep is in the sales cycle. This is what is referred to as sales intelligence.
Where sales intelligence is focused on providing sales professionals with information that will help them sell better, analytics is more about collecting data across multiple time horizons and using this data to improve sales efficiency. One example is identifying who your top sales performers are versus low performers, and then using analytics to understand what actions your top performers are doing differently at each stage of the sales cycle in order to make changes to your sales methodology and/or coach your lower performers up.

These changes, along with other macro-economic trends, are forcing organizations to re-think the role of sales, and to look for opportunities to harness these new capabilities for competitive advantage. The leading sales organizations (and leading CRM vendors as well) are evolving their focus from being primarily about internal sales and process efficiency towards using proactive insights and more consumer-centric approaches to drive more effective customer interactions and ultimately more profitable customer relationships.
As organizations continue to evolve, it’s important to keep in mind that at the heart of all successful businesses are the people who make things happen. The most successful sales organizations have impassioned and inspired individuals who are equipped to win. So whether you are implementing a full sales transformation program or just deploying a departmental sales force automation solution, it is important to keep in mind what your key people and roles need to be successful.

**At the heart of all successful businesses are the people who make things happen.**

### Sales executives
- True business insight and visibility
- Ability to spot new opportunities
- Empowered to transform into a customer-centric organization

### Sales managers
- Tools to plan and manage against key KPIs
- Insights to outsmart the competition
- Productive sales reps who win as a team
- High conversion and win rates

### Sales professionals
- Qualified leads
- Insights to close more deals faster
- Holistic 360-degree view of customers
- More time selling, less busy work
- Access to CRM anywhere
The best sales organizations empower their sales executives with true business insight and visibility. This insight and visibility helps them set the stage to drive the appropriate culture change that results in a customer-centric organization, by aligning processes and incentives to actions and outcomes.

The best sales managers are armed with insights to outsmart and outpace the competition. These insights help them provide coaching, guided selling, and navigation across the sales process: prospecting, qualifying, solution, closing, and follow-up. The best sales managers have reps that are productive, with high morale and retention, and the ability to consistently win as a team.

The most empowered sales professionals are equipped with qualified (warm) leads and the necessary insights to prepare for and close deals faster—supported by powerful and easy-to-use social, mobile, and collaboration tools. They have a holistic 360-degree view of their customers, wherever they are, including a history of communications and all interactions. The best sales professionals have what they need to nurture relationships, win deals, gain recognition, and exceed quota.
At Microsoft, we believe there’s an opportunity for the best sales organizations to use these new trends for competitive advantage, to focus on empowering their people and transforming the way they sell. The results will be the ability to outsmart and outpace the competition, to learn to win as a team, to create compelling and differentiated customer interactions, and ultimately to close more deals faster.

To be the winners in this new era of empowered customers, sales organizations and sales professionals will need to be:

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Four characteristics of a dynamic sales team

1 Prepared and insightful

It is not good enough anymore to show up to a prospect conversation without already having a lot of real-time information about that company and that person. Sales professionals need to take information that is publically available via online search and social networks, along with what they know from their CRM system, and use that as a bridge to a first conversation. This is the way to establish rapport and build a better relationship, because they already understand a good portion of that person’s problems.

There are a number of different technologies, such as social media and big data, which can be used to differentiate an organization in this way.

With Microsoft Dynamics CRM business software, customers are able to integrate social media with their sales process. Salespeople can easily view related LinkedIn profiles for a specific lead, or combine information about an account in Microsoft Dynamics CRM with publicly available sources on the web. Microsoft Dynamics CRM integrates with third-party services such as InsideView to deliver the latest market buzz and news, as well as corporate data. This sales intelligence is presented within the CRM application to help sales professionals have more targeted and relevant sales conversations. Getting this information up-to-date in real time can make the difference between being ahead or behind the competition—and it is the only way to stay relevant and in front of empowered customers who expect you to be on your game.

Microsoft Dynamics CRM helps sales managers focus on the right information by providing powerful dashboards with real-time visualizations. The visualizations are not only in context and available right from within the CRM application but they are also real-time and actionable—meaning sales managers can interact with the charts to pinpoint just the insights they are looking for to determine the next right action.
Customer success story: CSX Transportation

CSX Transportation, a leading North American rail-based transportation company, had customer information that was spread across many different systems. They lacked a complete view into their customer relationships. As Vicki Burton, Director of CRM for CSX Transportation, noted, “We needed a way to bring all our information together and enable people to collaborate on our accounts in a more strategic and efficient manner so that we could continue to grow our business.”

By using Microsoft Dynamics CRM, CSX salespeople manage their customer portfolios on a day-to-day basis and frequently reference the information to ready themselves for sales calls. At the same time, CSX marketing groups focused on specific markets, such as lumber, fertilizer, or steel, can draw on this central source of customer information, identifying trends to help the sales staff devise new strategies for driving new business.

“Through our customer profiles in Microsoft Dynamics CRM, we were able to uncover new business opportunities that we wouldn’t have known about otherwise—and we’re working on those right now.”

—Vicki Burton, Director of CRM, CSX Transportation
Collaborative and connected

The days of the individual salesperson as hunter, slaying the big whale deals, are fewer and fewer. Increasingly, it’s more about how people are able to work together via virtual teams. For example, organizations can include customers as part of the journey across sales, operations, service, and marketing to come up with solutions that will create significant value for them. Salespeople need to work as a team and explore the opportunities offered by new technologies, like integrated web conferencing, instant messaging, and social collaboration.

In order to be a connected selling organization, teams need the right collaboration and communication tools. Two great examples of this are Microsoft Lync and Skype. They both provide a powerful and simple way to interact with colleagues, partners, and contacts. Whether it is email, phone, instant messaging, or web conferencing, sales teams have an easy way to work together and stay connected. Lync and Skype capabilities are embedded in the Microsoft Dynamics CRM experience, allowing users to see presence icons and initiate an interaction with just one click.

Managing documents and managing information is a big part of selling, and Microsoft’s goal is to make creating and sharing that information as easy as possible. That way, it is much easier to facilitate collaborative team selling—salespeople working and winning together as a team.

Rather than forcing teams to use a different document management solution, Microsoft SharePoint works directly within Microsoft Dynamics CRM, ensuring that any team member working on a sales document, such as a presentation, proposal, or RFP, will be able to utilize the powerful check-in, check-out, and version control capabilities. There is no need for sales professionals to leave the CRM application—instead they stay right where their customer information is.

Social media is becoming an important tool for external customer interactions, but equally important to sales teams is the need for internal collaboration. In Microsoft Dynamics CRM, team members can use Yammer and activity feeds to stay connected. They provide instant notifications and facilitate quick and easy sharing of relevant information. Rather than being generic chatter that clutters up your work space, conversations are organized to surface in the context of the contacts, accounts, and other records you care about. They provide a way to stay connected and on top of the situation, like Twitter or Facebook, but they also provide automated updates, alerts, and notifications tied to workflow. For example, when a deal closes or a new opportunity is created, you know about it. Microsoft believes social is about driving productivity, not about being more social. Empowered sales organizations will use social for a competitive advantage both within and outside their organization.

2

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Customer success story: ISS Belgium

ISS Belgium provides cleaning, catering, property services, and office support for over 12,000 customers.

Employees lacked visibility into each other’s actions, causing salespeople to step on each other’s toes. It happened so frequently that managers coined a new metric called “friendly-fire” incident. The price of friendly fire was high, resulting in a reduction of contract renewals. **The inability for business units to collaborate on cross-sales efforts kept sales and closure rates below the level managers knew salespeople were capable of.**

ISS Belgium established Microsoft Dynamics CRM as the sales tool across the enterprise. They use the marketing and sales modules to support operations from the initial contact with a prospect through the purchase and renewal of services. **Since implementing Microsoft Dynamics CRM, ISS Belgium has seen sales conversions increase by 6 percent and friendly-fire incidents are down by 90 percent.**

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Four characteristics of a dynamic sales team

3 Quick and mobile

It’s not good enough to say, “Hey, I’ll wait until I get back to the office,” to get or share the latest information. CRM applications on mobile devices are becoming indispensable selling tools. Five minutes before going into an appointment, sales reps need real-time information about what’s happening with prospects. They need to know what conversations are going on about those prospects and they need additional market data and news feeds. Did the prospect recently go through an acquisition? Is there an existing service issue with this customer that they might not know about?

Mobile solutions for Microsoft Dynamics CRM give salespeople several options to ensure that they have the best tool for the job. Sales teams need to stay ahead of their competition, they need to turn on a dime and act on the spot. With Microsoft Dynamics CRM, sales professionals stay productive and agile wherever they are. They can get real-time information on the mobile device of their choice, through a lightweight HTML client or rich application optimized for smartphones and tablets. By receiving activity feed notifications on their phone, salespeople know what’s happening, right as it happens. Mobile solutions for Microsoft Dynamics CRM give salespeople several options to ensure that they have the best tools for the job.
Customer success story:
Insphere Insurance Solutions

Insphere Insurance Solutions, an insurance products distribution group, needed to streamline their sales agent experience to support goals of doubling the size of its sales field over the next few years. Insphere sought a technology solution that provided the tools essential for managing key business processes, worked on major smartphone operating systems, and provided a consistently productive, efficient working experience for all sales agents.

Insphere implemented Microsoft Dynamics CRM and integrated the solution with a custom, cross-platform mobile solution. Agents are able to view all of their business information and manage all related activities and tasks from their mobile device. Lead notification helps agents stay up to date, even when they are away from the office.

Steve Jensen, Vice President of IT, notes, “Of all the positive feedback we have received, one sales agent went so far as to say that having access to Microsoft Dynamics CRM on their mobile phone was the best application in the insurance-selling space.” By making functionality from Microsoft Dynamics CRM available via mobile phones, Insphere has also seen a dramatic boost in user adoption.

“Just four weeks after providing functionality from Microsoft Dynamics CRM in our mobile applications, user adoption increased by 40 percent.”

—Steve Jensen, Vice President of IT, Insphere Insurance Solutions
Four characteristics of a dynamic sales team

4 Highly productive

Salespeople and sales organizations need to optimize every moment in terms of reducing the time salespeople spend doing administrative work. Any time spent not delivering value to the company or their customers is time wasted. For example, CRM systems often fail to help because they are not adopted well by sales professionals, or they are too cumbersome to use. Sales leaders need to provide their teams with easy-to-use tools, along with information and content that’s relevant to where they are in the sales cycle. When those tools are simple and familiar, they can help keep reps from getting lost in busywork.

Job number one of any successful sales application is that it needs to empower people, not make it feel like extra work. Whether it is qualifying leads, meeting with customers, or closing deals, time always matters to a salesperson. With Microsoft Dynamics CRM, salespeople can access prospect and customer data directly within the Microsoft Outlook messaging and collaboration client. This helps them focus their time on selling, rather than hunting for information and doing busy work. In Outlook, email messages from prospects can be converted into opportunities and added to the sales pipeline. Every communication is automatically tracked. If your customer places an order, Microsoft Dynamics CRM schedules the follow-up meetings, updates the deal phase, and shares the success with the team. Because the solution works in Outlook and looks and feels just like Microsoft Office, the ramp-up time is fast, training costs are low, and adoption is high. And because the solution runs in the cloud and offline, you have it wherever you go; no time wasted searching for information.
Customer success story: Specialists On Call

Specialists On Call (SOC) is the largest provider of emergency telemedicine consultations to U.S. hospitals, giving them immediate access to highly trained neurologists over the Internet.

To grow its business, SOC created a full-featured sales and patient management system by using Microsoft Dynamics CRM Online. The project took just 90 days, cost US $200,000 less than other solutions, and gave SOC a single system for managing sales, hospitals, and patient cases.

Today, SOC salespeople use Microsoft Dynamics CRM Online to manage thousands of leads. When a hospital becomes a customer, account managers take advantage of all the contacts and information that the salespeople gathered during the sales process to help maintain the company’s relationship with the hospital. In an ROI case study conducted by Nucleus Research, it was found that the Microsoft Dynamics CRM deployment enabled SOC to increase productivity and improve the sales team’s service knowledge. The case study found a reduction in acquisition costs due to the increased visibility that sales now has into overall operations. This helps salespeople speak more knowledgably about the business when speaking with prospects.

“Because we now have automated processes for all aspects of our business, we can handle more growth without adding more staff.”

—Robert Ritchie, Operations Vice President, Specialists On Call
The world of sales as we know it is undergoing significant change. Organizations are being forced to reevaluate the way they sell. Empowered customers and trends such as mobile, cloud, social, and big data are the major change agents here, but transformation for a sales organization starts with their people. To succeed, these individuals must be impassioned and inspired. From sales executives to sales managers and sales professionals, they must be equipped with the right tools to win. The tools must provide organizations with efficiencies for internal processes and help advance initial relationships into profitable customer accounts and strategic partnerships.

Microsoft Dynamics CRM is the tool to help sales teams become prepared and insightful, collaborative and connected, quick and mobile, and highly productive. The organizations that are able to make the transformation will ultimately position themselves to outsmart and outpace the competition, to learn to win as a team, to create compelling and differentiated customer interactions, and ultimately to close more deals faster. At Microsoft, we are committed to helping organizations transform so sellers sell more effectively and managers manage more intelligently.

To learn more about Microsoft Dynamics CRM, visit http://crm.dynamics.com.