

Amplify your sales team's productivity

with Dynamics 365, Office 365,
and LinkedIn Sales Navigator

Building relationships is essential in today's sales environment. But sellers fall short when tasked with maintaining so many complex interactions at the same time.

Does today's buyer even want to interact with a sales rep?

The relationship between buyers and sellers grows more complicated each day. Every potential partnership requires finding the right buyer, fully understanding their business, tracking progress through the buying cycle, and engaging them with the right content—when and how they want it. Faced with having to replicate this to meet increasingly divergent buyer needs, most sellers know relationship selling—the art of converting leads through the building of long-term relationships between buyer and seller—is a complex discipline.

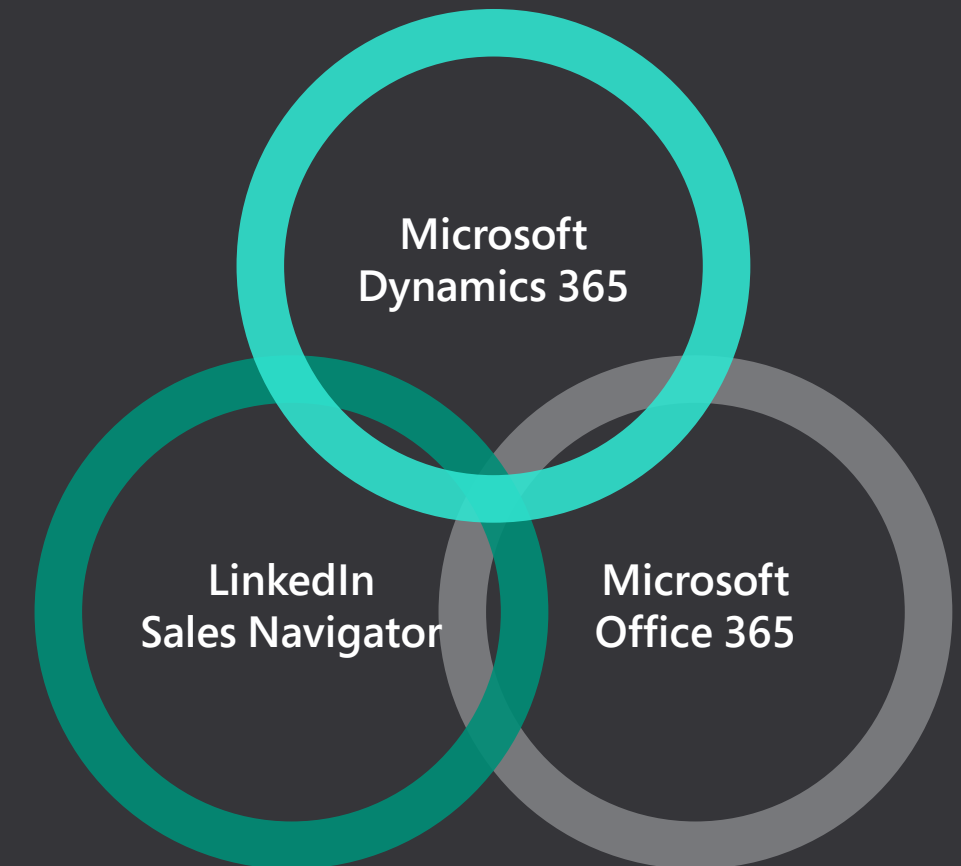
Buyers can sense that complexity. While 36 percent of sellers think they provide an excellent buyer experience during the sales process, just 23 percent of buyers would say that's true.¹

As technology becomes more powerful and ubiquitous, the way buyers make purchasing decisions continues to evolve. Sales teams must urgently employ the right tools to keep pace.

Potential buyers have more information than ever before, and they're using it liberally: Research finds that most buyers are already 57 percent of the way through the buying process before talking to a supplier.² Gartner predicts that by 2020, buyers will manage 85 percent of vendor relationships without talking to anyone.

These shifting dynamics underscore the artistry of modern selling: When the time is right, buyers still want personal attention from sellers. More than two-thirds of all buyers say sales rep engagement is important to them.² What this tells us is that buyers are typically motivated to engage with sales reps only when it adds value for them. Adding to the complexity is that buyers are also used to technology that's both increasingly simple to use and interconnected. As a result, they have high expectations for every buying experience. A seller's job then becomes twofold: Provide useful interactions and seamless transactions.

This combination of effectiveness and efficiency is precisely what the Microsoft Relationship Sales solution is designed to provide. Combining the power of the Microsoft Dynamics 365 for Sales application with LinkedIn Sales Navigator, the Relationship Sales solution also integrates with Microsoft Office 365 to improve seller efficiency by giving them an end-to-end view of sales activities and relationship data. Better yet, it empowers sellers to turn relationships into revenue.



¹ TOPO research

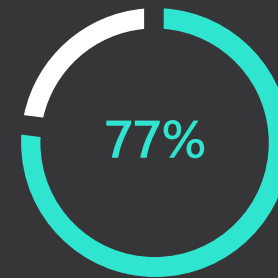
² TOPO research, *The New Rules of Engagement*



Still not convinced that improved relationship selling is key to an organization's success? **Consider this data.**

2x

Sales teams that emphasize engagement are more than twice as likely to hit their quotas⁴

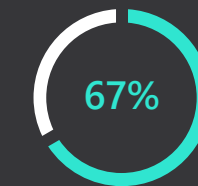


of customers want sellers to teach them something new⁶

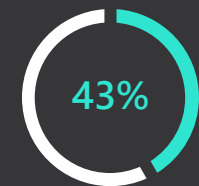


of customers say that sellers provided an excellent experience³

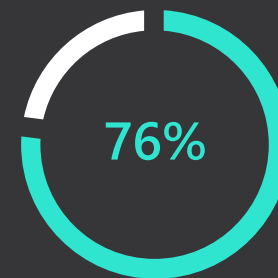
Percentage of sellers spend their day on customer engagement



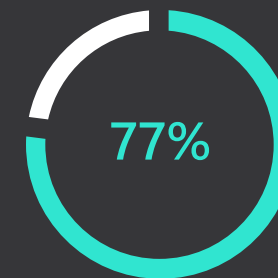
or more at high-growth organizations



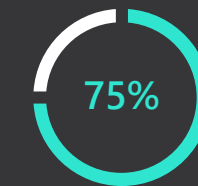
at low-growth organizations⁵



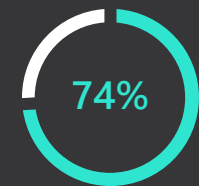
of customers want sellers to build a relationship as a trusted adviser⁶



of customers want personalized sales content⁶



of customers want to see how a product affects their business specifically⁶



of customers want their interest to be a seller's focus⁶

³ TOPO research

⁴ "A New Hybrid Sales Model: Empowering Sellers to Drive Customer Engagement at Scale". Blog post by David Held, October 25, 2017.

⁵ TOPO research: Sales Benchmark Report; Senior Product Manager, Microsoft

⁶ TOPO research, The New Rules of Engagement

How can sellers build personal relationships through technology?

Rapidly evolving innovations can help facilitate stronger buyer relationships across a sales team's three most valuable tools: CRM, productivity applications, and social networks. While most organizations have these basic capabilities in place, the minimum isn't enough to grow a sales operation.

CRM tools can drive more meaningful interactions with buyers, suggest relevant content, and ensure sellers are meeting buyers at any point in the sales journey.

Productivity tools should free up time to invest in relationships and make it easy for buyers to communicate and provide feedback.

Social networks should surface insights to enable buyer conversations based on what matters most to them. The end goal? Each tool should help sellers build better relationships and boost overall sales.

Core tools for sales reps

CRM

Most sales organizations have systems for tracking and managing interactions with potential buyers. Some simply rely on spreadsheets or collaboration platforms. But low-tech solutions that don't scale risk putting them at a competitive disadvantage.

Our solution: Microsoft Dynamics 365 automates key sales features, ensuring reps have more time to tailor their approach for each unique buyer relationship.

Productivity

Collaboration with your sales team is essential, but becomes more of a challenge if you and your colleagues are constantly on the go and don't work from one location.

Our solution: Office 365 offers tools that enable simultaneous collaboration with your team across multiple scenarios including RFPs and pitch decks in SharePoint, seamless Outlook integration, exporting to Excel, or group chats via Microsoft Teams. These are critical for decentralized sales efforts.

Social networks

Smart sellers increasingly rely on social media tools to understand more about their target buyers. Discovering buyer connections and organizational nuances can often prove decisive in propelling deals forward.

Our solution: LinkedIn Sales Navigator tool can help reps better identify target companies and their decision makers—all from within Microsoft Dynamics 365.



The problem with disconnected tools

Many companies keep these sales tools separate.

But tools in silos cost your company time and money. Disconnected business apps mean disconnected data and processes, which, in turn, create inefficiencies and missed opportunities. A seller's output decreases when they have to change between apps just to enter data. Research shows that workers lose 40 percent of their productivity when they have to switch tasks.⁷

Sellers also don't have a single view of their relationships when they have to cull data and interactions from different applications. An incomplete picture of a buyer relationship risks an inaccurate understanding of that relationship's health. For example, if a CRM doesn't automatically pull buyer engagement history from email or LinkedIn, sellers won't have the most up-to-date information to effectively reach leads or close deals.

⁷ Microsoft's Sell in the Now – How to make your sales team more productive

When considering integrated sales tools, focus on these three tangible benefits:

Better opportunity targeting

Cutting through a crowded marketplace to find qualified buyers can be complicated. Modern sales tool should enable sellers to efficiently hone in on the right contacts- and source networks from them- to build the most efficient sales process possible.

The Microsoft Relationship Sales solution uses predictive lead scoring, via artificial intelligence, to help sellers find and nurture the right leads. It also gives deep insight into a contact's social network, helping teams to identify additional stakeholders and coordinate a sales strategy across a target organization.

Actionable insights

Advanced sales tools have sophisticated capabilities to pull insights from a diverse set of data sources. Integrated technology helps sellers understand their buyers' needs better, provide relevant content recommendations, and identify at-risk relationships.

The Microsoft Relationship Sales solution uses AI to analyze data from sales, Office 365, LinkedIn, and information gleaned from CRM to provide a single relationship health score. Sellers also receive content recommendations built from a target's social behaviors or press mentions, which takes the guess work out of choosing topics for the next interaction.

Engaging at scale

Research shows that organizations would like their sales reps to be spending 20 percent more time each week directly engaging with customers or prospects. By automating and integrating tasks and business processes, managers can reduce the time sellers spend on administrative tasks like filling out forms and aggregating data into a central location.

The Microsoft Relationship Sales solution's flexible and configurable interface seamlessly links up small tasks to recognize significant gains. Accessing Sales Navigator information through Dynamics 365, for example, prevents sellers from having to flip back and forth between platforms for routine work.

The smarter solution: Microsoft Relationship Sales

The combination of Dynamics 365 for Sales, LinkedIn Sales Navigator, and Office 365 provides the kind of capability integration that can change the way your sales team does business—making disconnected tools a problem of the past.

- **Microsoft Dynamics 365** provides the collaborative relationship management tools that help sellers increase revenue, stay focused in a fast-paced environment, and close deals faster—all while reducing acquisition costs.
- **LinkedIn Sales Navigator** streamlines access to millions of potential buyers, offering both profile and behavioral information that can help sellers identify and connect with high-value targets at scale.
- **Microsoft Office 365** consolidates all of a seller's productivity tools into one software experience by combining the email and calendar functionality of Microsoft Outlook with the versatility of Excel, Word, and PowerPoint.

Capabilities:

- Combine and analyze data streams from all three tools through AI and machine learning
- Easily access and edit Microsoft Office 365 documents—including Excel pivot tables—from within Dynamics 365
- In the Outlook email pane, view suggestions for discussion topics based on recipient's social activity
- Map the buying community and uncover new relationship opportunities by sourcing LinkedIn connections within Dynamics 365
- Maintains key processes from all three tools in one platform, eliminating the need to switch tasks and dashboards
- Highly configurable interfaces allow visual prioritization of data streams

Microsoft
Dynamics 365

LinkedIn
Sales Navigator

Microsoft
Office 365

Benefits:

- Generate relationship health scores and predictive lead scoring to help your sellers focus on the best opportunities
- Start smarter, more relevant conversations by reaching out to new and existing leads with customized content sourced from target's behavior
- Decrease onboarding time and maximize use adoption with contextual, in-platform help options
- Boost day-to-day productivity for sellers by streamlining their crucial tasks into one interface
- Increase win rates by following data-based recommended actions, like when to send an email to make sure it's seen and opened

How Microsoft Relationship Sales can meet all your selling needs

What's uniquely powerful about the combination of these three tools is the **unification of data**. Sellers can now access critical data points from disparate platforms in a central location—and, more importantly, obtain crucial insights extrapolated from aggregated data. Sellers and managers can assess pipeline health and lead scoring compiled by AI processes, resulting in sales team productivity boosts of up to 15 percent.⁸

Such gains come from a platform-wide integration of data. Key LinkedIn Sales Navigator information isn't simply housed in a widget within Dynamics 365—it's utilized throughout the platform to provide relevant and contextual analysis on a buyer's behavior. This data stretches beyond just accounts and contacts; it reaches into recommended seller actions, including when to move toward a potential closed deal.

Leading competitors rely on partnerships to provide LinkedIn Sales Navigator combined with the capabilities of productivity tools. Microsoft doesn't. Since Dynamics 365, LinkedIn Sales Navigator, and Office 365 are all Microsoft assets, you get one seamless experience.

⁸ Nucleus Research: *Microsoft Lays Out LinkedIn CRM Strategy*, July 2017

Claims based on a 2017 study by Nucleus Research that analyzed more than 50 ROI case studies on CRM deployments from 2015 to 2017. Companies ranged in size from small and medium-sized businesses to large multinational enterprises. Results will vary based on your CRM strategy and deployment.

Microsoft versus leading competitors

Microsoft Relationship Sales solution

- Fully integrated with Office 365, combining new experiences (like integrated Outlook and Dynamics 365 for Sales) with all the apps sellers live in (Excel, PowerPoint, and Word), to allow sellers to more efficiently engage with buyers at scale
- LinkedIn Sales Navigator data (like a contact's social behavior) is utilized throughout the Dynamics 365 platform, delivering smarter, more actionable insights for sellers to use in assessing their leads
- The new AI for Sales app empowers sales teams with dashboards, embedded insights, and predictive lead scoring that help them make better decisions and sell smarter. [Learn more about AI for Sales](#)
- Interface is configured and flexible, allowing sales teams to create immersive environments best suited to their needs

Leading competitors

- Lower-fidelity Office integration with no full Outlook app and no immersive Excel, OneNote, or Yammer integrations
- Sales Navigator data exists in an isolated widget, limiting the platform's ability to combine data streams for rich insights
- Lacks relationship assistant; automated data entry and predictive analytics sold as separate product

Microsoft’s Relationship Sales tool provides a comprehensive environment for sellers to contact, nurture, and close leads—all from within a central platform. [Here’s how it works:](#)



Increase seller productivity

The challenge:

Even the most talented sales reps are only as valuable as the time they spend selling. But as much as 67 percent of a rep's time is spent on non-selling activities. Too much time doing administrative chores and switching between tasks risks leaving reps with zero time to build lasting relationships. They need a platform capable of automating unnecessary tedium out of the workday while delivering integrated tools, innovation, and efficiencies across the sales cycle.

The solution:

Dynamics 365 can reduce administrative time by 15 to 20 percent, which means each seller would gain an average of 53 minutes each day.⁹ With tools that guide sellers to the next best action to take with buyers, rather than simply offering data-entry technology, teams can prioritize what matters most and minimize administrative tasks.

The advantage:

- Send InMail messages or emails directly from Dynamics 365. View LinkedIn profile data for leads—where they work, what they do, where they went to school—directly in your Outlook inbox, calendar, or contacts. Send LinkedIn invites directly from Outlook, all without leaving the workflow.
- With immersive Excel Online integration, users can edit CRM data in Excel. Reps can also stop alt-tabbing to other applications with the single-pane application provided by unified service desk.
- Create contracts or RFPs right in the CRM and start conference calls with the Skype for Business integration. Sellers can even use Power BI dashboards in Dynamics 365 to view buyer data in the CRM, saving valuable time finding relevant content and products to upsell or cross-sell.
- The AI for Sales app easily connects data with prebuilt connectors, giving you valuable insights immediately.

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⁹ Microsoft Research

Manage sales teams

The challenge:

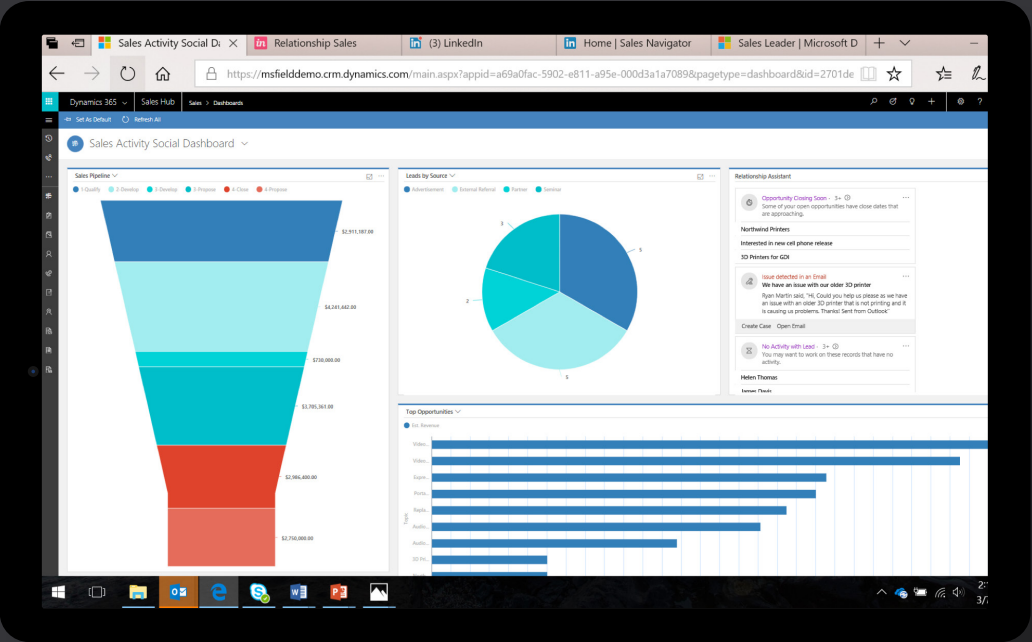
If reps are challenged to gauge the health of multiple complex relationships, a manager’s challenge is multiplied by the need to get a top-level view of those relationships across many sellers. Managers need a way to get an accurate view of team activity to ensure sellers are reaching their potential, craft an effective onboarding process, provide tools that guide consistent sales process workflows, and—most importantly—help sellers reach their potential.

The solution:

The Microsoft Relationship Sales solution automatically captures team activities in Dynamics 365 from integrated business apps and generates customized reports and dashboards to give leaders the information they need. Guided sales process flows drive consistency across opportunities and executions. And gamification makes it simple to onboard new reps while also ensuring they are motivated and engaged.

The advantage:

- With integrated advanced analytics/visualization, managers get a clear picture of business functions and performance.
- Use PowerBI within Office365 to create sales forecast reports, understand sales trends, build performance dashboards, and track sales pipelines in real time across all Dynamics 365 data. Sellers can customize reports to address specific needs and make data-driven decisions.
- Establish a consistent approach to opportunities with guided sales process flows. Sellers can solidify data and execution coherence across their sales processes and run additional workflows on entry or exit of a stage.
- Train new reps quickly and easily with embedded Learning Path so they can close sales faster. Customizable in-app support services and step-by-step instructions help users learn your company’s specific processes.
- Learning Path can also be adjusted for different users depending on their role in your company. Motivate sellers with fun and dynamic competitions.



Help sellers identify and reach better leads

The challenge:

Finding and building relationships with the right leads is key to a seller’s success. It’s not just a numbers game: Sellers want to sell to people who will actually buy their product. But many sellers struggle with identifying buyers who are likely to convert. Reps need tools to generate leads, rank them, and make it simple to start the conversation.

The solution:

With Dynamics 365, you can see LinkedIn account and buyer profiles to get lead recommendations, while viewing people within your company who are connected to your prospect with LinkedIn Sales Navigator.

The Relationship Sales tool can also show sellers people similar to those they’ve been targeting to grow their list of prospects. Combining LinkedIn Sales Navigator and Dynamics 365, the Microsoft Relationship Sales solution lets sellers leverage LinkedIn’s network of 575+ million professionals to find and target high quality leads.

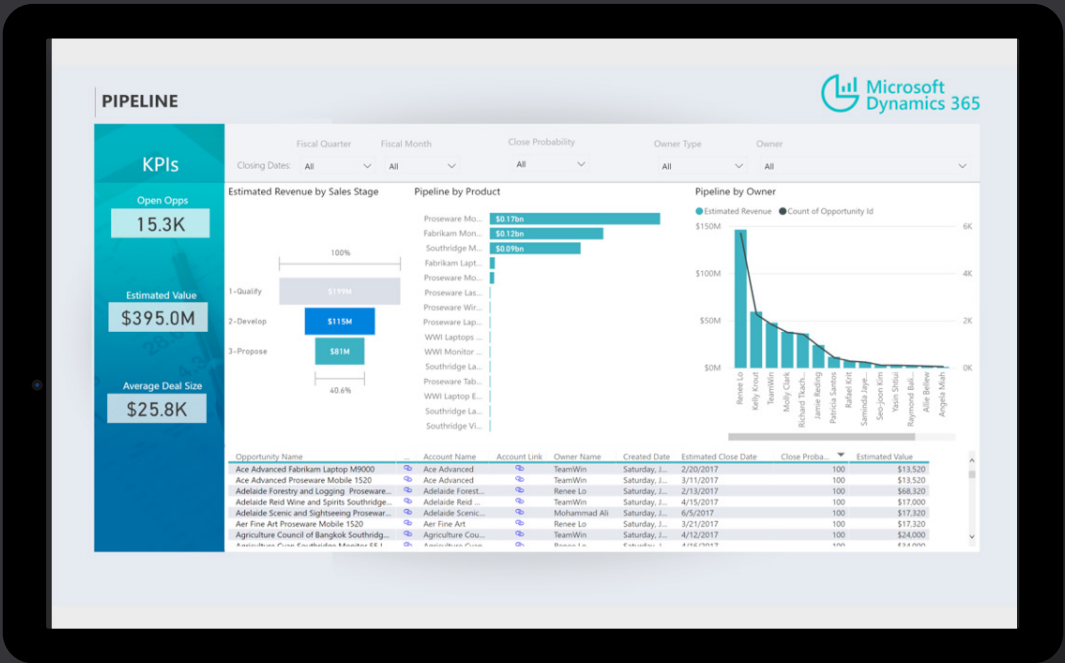
The advantage:

- LinkedIn Sales Navigator reveals both first-degree connections who know the lead, and indirect connections. Sellers can reach out to those people and ask for a warm introduction, improving the likelihood of lead engagement.
- When sellers combine LinkedIn Sales Navigator and Dynamics 365, their leads, contacts, and accounts data are synchronized, allowing them to discover and follow leads and accounts in Sales Navigator and receive lead recommendations and insights. The system notifies them when a colleague can introduce them to a buyer, when your contact leaves a company, or when a prospect has interacted with an email they sent.
- Increase conversions and win rates by finding and prioritizing prospects with the highest likelihood to buy based on a broader set of signals.

The Infosys story:

Take this example: By enabling relationship selling with Dynamics 365 and LinkedIn, Infosys was able to achieve 30 percent higher win rates. Thirty-one percent of deals closed were sourced from relationship selling. The company also condensed its sales cycle by three months. In terms of revenue, Infosys saw a year-over-year sales increase of 87 percent and a £\$7.7 million revenue increase each year using customer insights.¹⁰

Infosys saw a year-over-year sales increase of **87%**



Help sellers build stronger relationships

The challenge:

Relationship selling requires navigating the complex desires of buyers. It also involves knowing what information would be useful, and when and how that information would have the most impact. Sales reps need tools that provide them with a deep understanding of a buyer’s business and pain points, guide interactions, and evaluate the strength of each relationship—all at a glance.

The solution:

The Microsoft Relationship Sales solution provides sellers with tools to easily keep up with multiple complex relationships and insights to guide next actions. Artificial intelligence and machine learning add unique value by analyzing the health of each relationship based on integrated data sources and providing recommendations to make the most impact.

The advantage:

- Up-to-the-moment data and insights from the integration of Office 365, LinkedIn Sales Navigator, and Dynamics 365 help sellers strengthen relationships and stay relevant. The Relationship assistant provides them with a single view to stay on top of what’s important and see actionable intelligence.
- AI for Sales analyzes data across multiple apps to provide relationship health scores, so sellers know if a prospect is at risk or close to a sale. The app analyzes LinkedIn, social networks, customer sentiment, email and more to recommend next-best actions giving sellers the opportunity for smarter selling.
- Track when and where buyers open emails to optimize responses, get recommended templates, and suggest the best times to send emails based on performance. Receive recommendations of content to share along with smart upselling and cross-selling opportunities, based on a buyer’s needs and where they are in the buying cycle.
- The Microsoft Relationship Sales solution allows sellers to engage at scale by synchronizing relationship data across systems. When you connect Sales Navigator and Dynamics 365, sales data is synchronized between the apps, allowing sellers to locate and track leads and accounts in either application and get lead suggestions and feedback.



The screenshot shows the Microsoft Dynamics 365 Sales Hub interface. The top navigation bar includes 'Dynamics 365', 'Sales Hub', and 'Sales > Leads'. Below the navigation bar, there are tabs for 'Show Chart', 'New', 'Refresh', 'Delete', 'Email a Link', 'Excel Templates', 'Export to Excel', 'Import from Excel', and 'Open Dashboards'. The main content area is titled 'All Leads' and displays a table of leads.

✓	Name	Lead Score	Topic	Owner	Status Reason
	K Martin	99	3d printer lead test 1	Isalah Langer	Qualified
	Helen Thomas	98	Remember to call	Jeff Hay	New
	William Thompson	96	Need to send the quotation	Jeff Hay	New
	James Davis	95	Got this through a good lead	Jeff Hay	New
	Nancy Thomas	92	Remember to call	Jeff Hay	Qualified
	Mary Williams	90	Got this through a good lead	Jeff Hay	Qualified
	Donna Miller	70	Need to send the quotation	Jeff Hay	New
	John Jackson	68	Got this through a good lead	Jeff Hay	New
	Sharon Wilson	62	Got this through a good lead	Jeff Hay	New
	Mihae Ahn	28	3D Printer	Jeff Hay	New
	Carol Brown	26	Unable to contact	Jeff Hay	New

At the bottom of the table, there is a row of letters from A to T, with 'All' selected under the 'A' column.

Better together

Relationship selling is the key to driving revenue in today’s complex sales environment. Customers expect personalized touch points along their purchasing journey, and sellers need to effectively engage customers at scale. Microsoft Relationship Sales integrates Microsoft Dynamics 365, LinkedIn Sales Navigator, and Office 365 to do just that.

Combining data and processes across apps adds value that can’t be found with the applications individually—or with any other sales force automation tool on the market. Improved productivity, facilitated lead pipeline, tighter relationship building, and more effective sales management drive seller success by focusing sales activities, shortening sales cycles, and growing business.

Find out how to improve your relationship selling by contacting a Relationship Sales expert today.

Ready to watch the Microsoft Relationship Sales solution in action?

Request a demo

For more information, visit the Relationship Sales solution website at <https://www.microsoft.com/relationship-sales>.

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