



Selling more with Dynamics 365 Sales

The complete guide



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Automated, intelligent selling with Dynamics 365

Growing your business and managing your customers, whoever they may be, is a critical activity for any business. Having the ability to effectively and productively build relationships, manage leads and opportunities and support your customers will all drive better outcomes for your organisation and help you grow.

This is where a great CRM system comes in. Helping your sales team, better understand your prospects, communicate and manage opportunities better and save time on administrative tasks all leads to more time selling.

Dynamics 365 Sales is Microsoft's class leading CRM solution for your sales team. It offers unparalleled integration with the tools your team use every day. It has a customised experience for different roles and offers a great experience for office and field sales teams.

This guide covers

- › Sales themes and challenges of today
- › An overview to Dynamics 365 Sales
- › Dynamics 365 Sales features
- › Additional capability within Dynamics 365
- › Dynamics 365 Sales licensing
- › 5 tips when implementing Dynamics 365 Sales



Sales themes and challenges of today

When thinking about a new Sales CRM solution, there are normally some key drivers for needing a new system these include improving:

Sales productivity – 64% of seller time is now spent on non-sales activity. The ability to reduce this and keep your sellers selling will inevitably lead to a rise in sales and happier salespeople.

Digital Selling – 80% of enterprises expect a sustained shift to digital buying/selling where sellers guide and collaborate with customers remotely. This is a significant shift and ensuring your sellers have all the collaboration tools they need, with the right data to deliver for your customers, is a new challenge.

Sales Forecasting – Less than 50% of forecasted business ends up being closed. For sales and operation leaders this causes massive issues, in forecasting cashflow, scheduling work and board reporting. Gaining a greater understanding of where your opportunities are in their pipeline is critical and will drive better decision making and scheduling throughout your business.

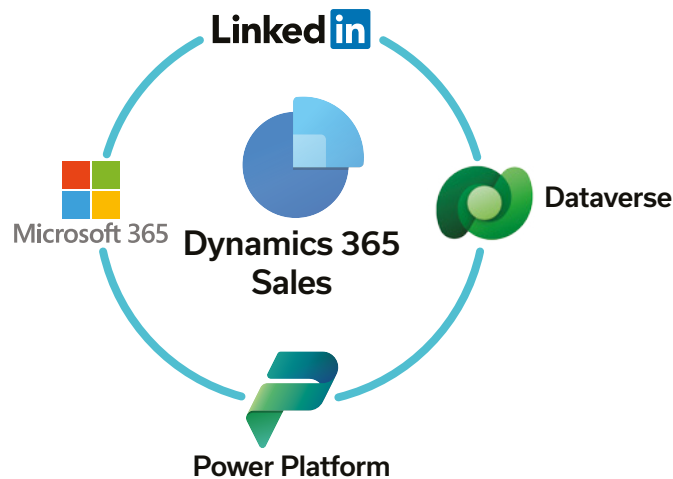
Sales + Marketing integration – the better sales and marketing work together the better value an organisation will create, the more opportunities converted, better data and more cohesion in your business.





Overview of Dynamics 365 Sales

Dynamics 365 is Microsoft's Sales CRM. It is a business application that offers a wide range of functionality to help you sell more and sell better. Manage leads, opportunities, quotes, products and activities all within Dynamics 365.



Dynamics 365 Sales offers a great range of features that automate and improve the process of your sellers. The solution can be tailored to suit your sales processes and offers a full range of integration options to fully embed within your organisation.

Dynamics 365, being a Microsoft product, offers best in class Microsoft 365 integration for SharePoint, Teams and Outlook. LinkedIn Sales Navigator is a key tool for any seller and Dynamics 365 Sales offers full integration, bringing in LinkedIn data into your CRM solution.

It is built on the Microsoft Power Platform and Dataverse offering the ability to easily build reports in Power BI, extend the capability with Power Apps, automate workflows Power Automate and integrate data via Dataverse.

Dynamics 365 Sales is recognised as an industry leader offering best in class capability and value. Forrester have carried out several exercises to measure the value organisations gain from Dynamics 365 Sales:

215%
ROI over 3 years

7
months to pay back

15%
increase in seller efficiency
when collaborating with
team members



Dynamics 365 Sales features

Dynamics 365 Sales is an extremely powerful Sales CRM solution that has a great range of functionality including:

Lead management

Leads are the first step of any sales process. Leads represent early-stage potential customers and opportunities. By using Dynamics 365 you can manage your leads and work to convert them into opportunities.

You can define the lead assignment rules, qualification experience, duplicate detection rules, lead scoring rules, and so on. These settings help your sales team to follow a streamlined process for managing leads.

One of the best features of Dynamics 365 Sales is the predictive lead scoring capability to help you prioritise and focus on your best leads.

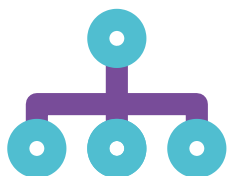
When a lead is qualified you can easily convert it to an opportunity.

Opportunity management

Once you have qualified your leads using whatever qualification criteria you like, for example BANT qualified they become opportunities. The point of breaking the process into two stages is that leads allow you track your potential future opportunities and opportunities allow you to ensure you properly manage your sales process once the opportunity is ready. With rising sales cycle times, the ability to do this is critical.

Opportunity management in Dynamics 365 Sales is based on your sales process. You can create different stages that mirror your own process and make sure that your sellers capture the right activity and information at each stage of the process. All of the information and documents can all be completely tailored to give a simple and intuitive process for your team to follow.





Contacts/Accounts

Underlying your opportunity and lead processes is ultimately your prospect and customer database. This is split into contacts and accounts.

With the ability to tag contacts as part of companies and vice versa. You can tailor the views on these screens and customise the information you are capturing for each of these to meet your requirements. You can assign owners, attach documents and correspondence, assign opportunities too and keep track of your contacts and accounts easily with Dynamics 365 Sales.

You can also create a richer view of your customers by creating organisation charts, this a greatly enhanced area of capability where you can use a drag and drop editor to build up a picture of the organisation and show the relationships and hierarchy. You can also tag contacts as decision makers, influencers blockers and more. The organisation equivalent lets you mark organisations as part of a group and show the relationship between them.

You can easily import and export everything with Dynamics 365 and can also integrate with other systems. For example, your marketing solutions, say a prospect sends a message via your website you can automatically create a contact and account in Dynamics 365 and assign this to the relevant seller and migrate across all of the relevant information

Activities

Activities in Dynamics 365 have 2 very useful purposes. Firstly, they help you keep track of all of the actions, follow ups and activities your sellers need to be doing to convert your opportunities. You can schedule activities such as meetings, phone calls, tasks and appointments. Then you get a dashboard showing your scheduled activity for today, this week and so on. This is great for keeping on track of everything and never forgetting to chase or follow up an opportunity.

The second reason this is a great feature is that it creates an audit trail of all of the activity that has happened within an opportunity, contact or account. You can easily see the last time they were contacted and by who, or the status of an opportunity and the tasks that the seller is working on for it. This allows sales leaders to better stay on top of their team, supports changing salespeople assigned to opportunities or when a salesperson leaves all the valuable information is captured within the system.



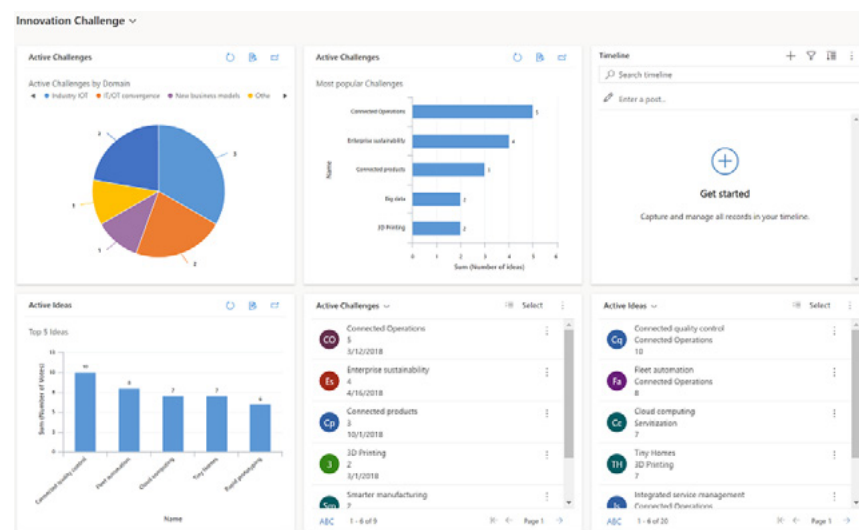
Dashboards and reporting

One of the strongest areas of Dynamics 365 Sales is the built-in dashboards and native reporting capability. Using inbuilt Power BI visualisations to give each of your users exactly what info they need at a glance.

The dashboards are made up of a collection of easy-to-read charts and graphs that provide visual representation of filtered app data. These dashboards are tailored based on your view and can be customised to show exactly what you need to support different employees using the system.

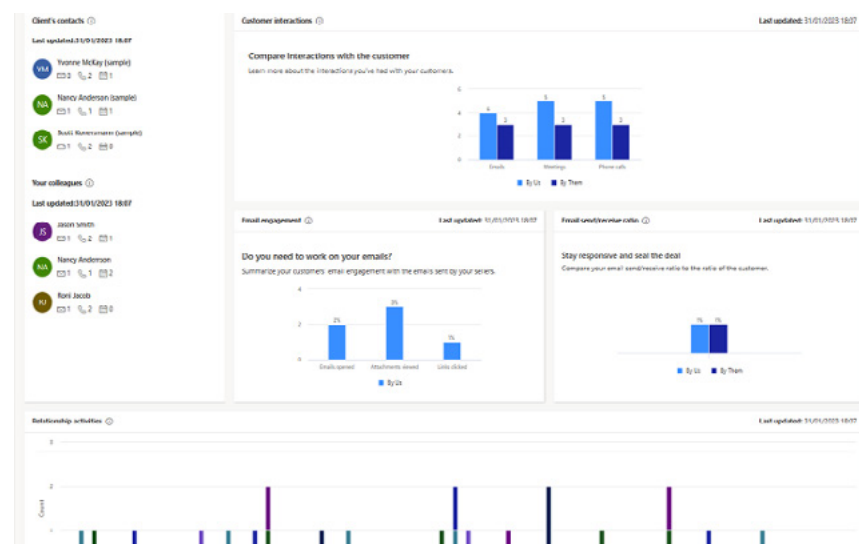
On top of the dashboard, you also have the ability to run custom reports. There is a wide range of presets, these include: Win reports, lose reports, accounts by sales, sales pipeline, sales history and more.

With Dynamics 365 Sales being built on Dataverse and the Power Platform, there is easy connectivity to Power BI with a Power BI connector already available. This allows you to extract data from Sales and build custom reports and dashboards within Power BI.



Relationship Analytics

Relationship analytics uses the activity history of a seller with a contact or account and calculates KPIs based on their interactions. The KPIs are available at various levels such as, contact, account, opportunity, and lead. The graphical display of the KPIs help you quickly identify relationships that need to be nurtured and the KPIs to be improved for the same.





Quotes, Orders and Invoices

In Dynamics 365 Sales, a sale typically starts with a draft quote. A quote undergoes several revisions between the salesperson and customer before it is accepted. After the quote is accepted, an order is generated from the quote. The order is used to fulfill the agreement of goods or services that were offered in the quote. Finally, after the order for the goods or services is shipped, an invoice is generated.

In Dynamics 365 Sales, quotes, orders, and invoices are considered to be the same item, but in different states of transition.

You can start a sales transaction, such as a quote or invoice, from within the opportunity record. The advantage of starting sales transactions in this manner is that much of the information is automatically entered based on the opportunity data. You can auto generate the quotes as pdfs making your sales team more efficient. You can also view any sales transaction records from within the opportunity record to track the overall sales process and expected revenue.

Products and easy quotes

Dynamics 365 Sales offers organisations the ability to create product suites within the solution. These allow you to easily create quotes and pricing for your sales.

Products are the backbone of your business. They can be physical products or services—whatever your organisation sells. Your sales reps use the products you create in Dynamics 365 Sales to generate sales quotes, marketing campaigns, orders, and invoices. Your customer service reps might also use them when they create customer service cases. Product capability includes:

- › Define a product and set a price for each item
- › Create product families
- › Create discount lists for certain customers and for certain quantities





Additional capability with Dynamics 365

We have covered the core functionality available within the system but now we are going to cover some of the great additional capability you get with Dynamics 365 Sales.



Microsoft 365 integration

Dynamics 365 being a Microsoft cloud product offers market leading integration with the wider Microsoft 365 suite. Below are some of the ways this works.



Outlook

You can easily integrate Outlook and Dynamics 365. There is a Dynamics 365 add-on for Outlook that makes this seamless. This allows you to easily access your CRM information within Outlook, letting you see any active opportunities, last contacted date and any relevant information you might need when emailing a prospect.

Secondly you can capture emails sent and received in Outlook with Dynamics 365 so when you check a record/opportunity you will see the email chains within Dynamics 365.



SharePoint

Dynamics 365 offers full integration with SharePoint Online. You can easily store all files and documents within SharePoint. This helps with storage usage, as there are limits within Dynamics 365 and allows your users to manage and collaborate with documents the way they normally do.



Microsoft Teams

Microsoft Teams is now the predominant collaboration and communication platform for businesses.

Dynamics 365 Sales offers a range of integration options with Microsoft Teams including:

- › Teams chat within Dynamics 365 – You can bring Teams chat into Dynamics 365 Sales. Allowing sellers to collaborate and chat from within the application while viewing the information they need.
- › Teams meeting from Dynamics 365 – when enabled, you can easily add the ability to make any meeting within Dynamics 365 a Teams meeting.
- › Microsoft Teams dialler – This allows you to use Teams Phone from directly within Dynamics 365. A great feature for following up on prospects and customers with all of their information right in front of you. You also have the ability to turn on automatic transcript and insights through conversation intelligence.
- › Dynamics 365 app for Teams – You can now add a Dynamics 365 app to your Teams channels and meetings, where you can access and update records from within Teams.



Copilot

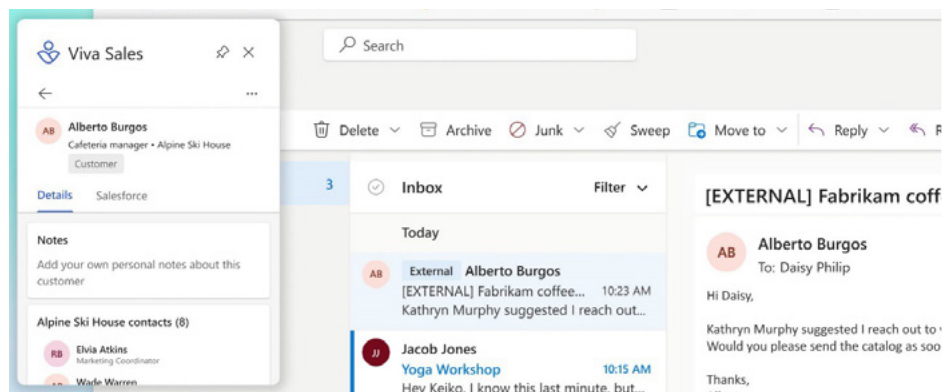
Copilot in Microsoft Dynamics 365 Sales and Viva Sales helps sellers dramatically reduce the time they spend on clerical tasks. AI helps write email responses to customers and can even create an email summary of a Teams meeting in Outlook.

The meeting summary pulls in details from the seller's CRM such as product and pricing information, as well as insights from the recorded Teams call. With sellers spending as much as 66% of their day checking and responding to emails, this presents a significant business upside to give the seller more time with their customers.

Microsoft Viva Sales

Microsoft Viva Sales is a seller experience application that uses Microsoft 365 and Microsoft Teams to automatically capture, access, and register data into Dynamics 365 Sales. Viva sales is part of the wider Microsoft Viva product family, a collection of intelligent applications within the Microsoft 365 suite.

It eliminates manual data entry and gives sellers more time to focus on selling. By enriching the data set with customer engagement data from Microsoft 365 and the power of AI, Viva Sales empowers sellers with sales intelligence that helps them deeply understand their customers for faster deal closure. Viva Sales is designed to help sellers boost productivity, lighten workloads, save time, and help salespeople sell more.



Dynamics 365 Sales mobile app

Mobile apps help sellers build great customer relationships, stay up to date with important information, and respond to their customers faster. The new Microsoft Dynamics 365 Sales mobile app is optimised for core field seller scenarios to help sellers make use of the time that they spend on the road while traveling to meet customers. It helps sellers with the right data anywhere, anytime, and lets them log and share information quickly.



LinkedIn integration

As a seller, you can use the LinkedIn network, which contains millions of users and offers a unique depth and quality of information that can help you research and connect with your customers. This functionality allows you to use LinkedIn Sales Navigator in your sequence to recommend the next best action.

When a sequence contains steps that are related to LinkedIn activities, you can perform the following actions to interact with customers:

- › Research customers to learn more about their preferences. More information: Research activity
- › Get introduced to a customer. More information: Get introduced activity
- › Send personal messages to connect with a customer. More information: Connect activity
- › Send an InMail to a customer. More information: Send InMail activity

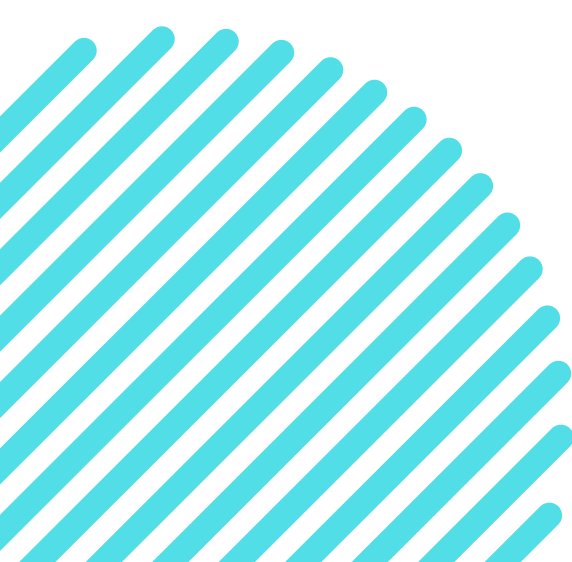


Dynamics 365 Sales licensing

The application offers the following license options:

- › **Professional** – This is the lower tier license for the Sales application that provides a core set of CRM capabilities and is suited for organisations with less complex requirements.
- › **Enterprise** – A mid-tier license which offers more than the standard CRM capabilities you get with the Professional license. The main addition here is you get customisation, extensibility, embedded intelligence, and manual forecasting.
- › **Premium** – Premium gives you everything you would receive with the Enterprise license, combined with an additional application called Sales Insights which offers impressive, embedded intelligence for a supercharged CRM solution with highly advanced analytical functionality.
- › **Relationship Sales** – This license gives you Dynamics 365 Enterprise and LinkedIn Sales Navigator combined into one discounted license for optimal prospecting and opportunity nurturing. 10 users are required at minimum to qualify for this license.
- › **Viva Sales** – This seller experience application lets sellers use Microsoft 365 and Microsoft Teams to automatically capture data into any CRM system, eliminating manual data entry and giving more time to focus on selling. **Worth noting that Viva Sales is included in Sales Enterprise, Sales Premium and Relationship Sales at no extra cost.**

Base licenses	Cost user/month
Dynamics 365 Sales Professional	£53.40
Dynamics 365 Sales Enterprise	£78.10
Dynamics 365 Sales Premium	£111
Dynamics 365 Microsoft Relationship Sales	£108.34
Microsoft Viva Sales	£32.90





5 tips when implementing Dynamics 365 Sales

Many organisations go wrong when implementing Dynamics 365 Sales, and here are our top 5 tips to help you successfully implement your new CRM solution

- 1. Clean Data** – when setting up your new CRM solution it is important to clean your data before uploading it into the system. What data do you actually need, how up to date is this data? All of this needs to be worked through to give you a fresh start and an accurate sales system.
- 2. Adapt processes to Dynamics 365** – One of the things many organisations get caught up in is trying to customise systems to perfectly match their existing processes. Like with data, a new CRM solution is a perfect time to rethink your sales process and to follow the Microsoft recommended steps. The great thing about Dynamics 365 is it is easily configured but the closer you match the default approach the cheaper and easier your implementation will be.
- 3. People** – For any big technology project people are the key to success. For Dynamics 365 Sales, ensuring you understand your users, the culture and openness of these users is critical. Then keeping your sales leaders and teams involved in the design and testing phases will ensure you have a system that delivers for them. Thirdly is spend time on training with your teams, building knowledge and capability throughout every user group, with an investment in the creation of super users being a key step.
- 4. Focus on the integrations** – A new business application is a new opportunity to create productivity and productivity within your sales teams, which means more selling time and more sales. The range of integrations available with Dynamics 365 Sales is a key way of you maximising this. Integrations with Outlook, Teams, SharePoint and more should all be fully setup up from the get-go to drive those savings.
- 5. Reporting** – Sales is a critical business activity, understanding what your pipeline looks like, what deals you are winning and losing, who your best customers are, who are the best performers in your team, how to develop commission structures and more. These are all key metrics that are easy to track and follow via the different dashboards and the integration with Power BI allows easy to set up custom reports. These reports will drive better analysis and decision making and help you win more opportunities.



What's next?

Dynamics 365 Sales – 2-hour briefing

We offer a free 2 hour briefing session with one of our Microsoft certified consultants. During this session we will discuss your requirements and how Dynamics 365 Sales might be able to help.

[FIND OUT MORE ›](#)

*Please note all prices listed in this guide are correct at the time of writing. Prices are subject to change by Microsoft.

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