


Transforming Sales With Dynamics 365

Driving efficiency and
customer insights with
Microsoft CRM technology

Getting More From Your Sales Teams:

The Value Of CRM Technology



Success in sales is key to business growth. But it comes with challenges.

Customer Relationship Management (CRM) technology is an indispensable asset for sales teams aiming to stay on top of rising demand and existing customer requirements.

When choosing a CRM system, future-focussed business owners are looking for CRM systems that offer much more than the storage of data and tracking of customer interactions. They want systems that can scale alongside their growth and development.

Dynamics 365 Sales is a cloud-based sales CRM software that provides the tools needed to help convert more of leads into business.

It allows sales teams to manage customer and new business enquiries at scale to ensure no opportunities are missed. And with advanced tracking and reporting capabilities, processes can be optimised for the best results.

We outline more about how best to use Microsoft's sales management platform, and how it can simplify time management, promote growth and improve customer trust.

Fully Connected Systems

The benefits of choosing Microsoft 365 as your CRM provider

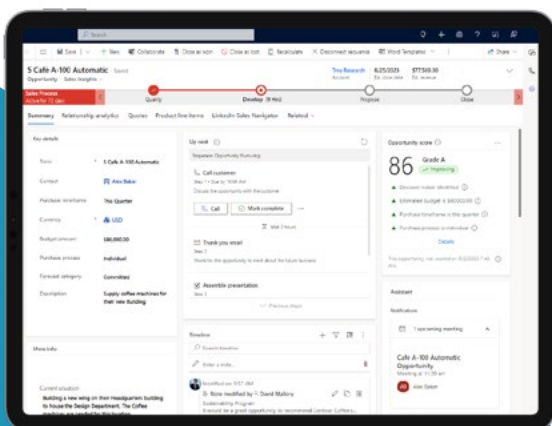
The function of a CRM system is to keep track of contacts, leads, and opportunities, as well as to securely store customer data in an easily accessible area.

Dynamics 365 Sales is a customisable system using streamlined processes to integrate seamlessly with the software solutions already in use at your organisation. It also offers advanced mobility to support both remote working and working on the go to ensure your leads always feel like a top priority.

Increasingly, Microsoft Outlook and Teams are go-to solutions for business communications. Along with applications such as SharePoint and the Power Platform, Microsoft has created a web of systems that gain functionality when used in conjunction. Dynamics 365 therefore not only assists with improving sales but also enables organisations to integrate existing programs under one roof for better reporting and easier communication.

Many organisations are still working across disconnected systems because they believe that change will be too disruptive to their operations. However, a lack of innovation causes far bigger issues down the line when disparate systems struggle to keep up with the organisation's developments. Older systems can also eventually go end-of-life which means all updates and support will no longer be available.

Updating your systems and adopting Dynamics 365 Sales also doesn't need to be a stressful or disruptive process. We carry out development work independently so as not to disturb your operations. Additionally, any migration requirements can be completed outside of your working hours meaning your users won't even notice the shift until the new system is ready to use.



Streamlining Productivity for Modern Workplaces

Driving efficiency with business systems

Fast-paced, high-pressured working environments call for effective time management and efficiency across all departments.

Organisations face a constant challenge to optimise workflows and reduce time wastage in order to stay competitive in their respective markets. Organisations must be able to adapt to rapidly changing requirements, leveraging innovative strategies and tools to streamline processes and enhance productivity.

Dynamics 365 Sales increases the productivity of teams through intelligent automation of everyday workflows, including prompts for users. This ensures they follow the right processes, helps to achieve informational consistency and prevents time from being wasted on calls to IT support. And, with many employees still working from home, easy-to-use interfaces across desktop and mobile devices are more important than ever.

The Dynamics 365 mobile app enables users to be more efficient than ever, providing ultimate flexibility to make time management simpler and easier. By giving teams access to sales tools and data on the go, organisations can enhance their overall operational efficiency, boost employee productivity and success, and deliver a superior customer experience.



Driving Growth

Choosing A Technology Stack For Sustained Success

Recent years have taught us anything, it's that we never know what's around the corner.

Whether you're selling ice cream or are running a multi-million-pound marketing agency, we all need a CRM system that can scale alongside our growth and development.

From forecasting and performance analysis to personalised dashboards and easy implementation, Dynamics 365 Sales has the power to match your growth ambitions.

As your organisation evolves and changes, you'll want to spend less time on routine, repetitive tasks and more on segmentation and analysis to grow your sales. With different plans and licenses available, you can start with what you need and add to Dynamics 365 Sales as your requirements change.

And beyond sales, Microsoft offers Dynamics 365 modules to support a range of other business functions including customer service, marketing and finance. So you can drive efficiency - and growth - across your whole company.



Building Trust & Reputation

Establish Your Credibility With Dynamics 365

Whatever stage your prospect is at, you'll want to make sure that the representative picking up the trail has all the information they need to close the sale. They need a comprehensive knowledge of the deal to be able to speak with confidence and conviction, and that knowledge comes from an easy-to-navigate storage system of client data.

Teams are not static and staff will come and go meaning there needs to be a constant in place to keep continuity throughout your organisation. The systems you've put in place and the valuable contact data you've built up over the years need to remain unaffected and your customer service needs to appear seamless.

Dynamics 365 Sales centralises prospect data and interactions in an easily accessible interface to facilitate seamless knowledge retrieval and transfer. This ensures that all salespeople have instant access to the full history and context of each relationship, even if they haven't personally interacted with them previously.

Intelligent analytics tools further enhance this capability by providing actionable insights and recommendations based on the data collected. This means that representatives can personalise their interactions based on previous engagements, preferences, and needs, demonstrating a deep understanding and commitment to each contact.

Advancing Digital Transformation

Gaining a competitive edge with Microsoft's AI

The CRM functionality of Dynamics 365 offers a framework for sales management that will advance many teams. But business leaders can also deliver an extra productivity booster.

Copilot for Sales is available as an add-on to Dynamics 365 Sales to further enhance processes, reduce admin and improve customer insights. Copilot acts as a personal assistant within Dynamics 365, automating many manual processes and offering prompts to users based on previous engagements, Outlook emails, Teams messages and other contact data that's been collected.

Sales teams spend as much as two-thirds of their time checking and responding to emails and engaging in other admin-based tasks. With Copilot this time can be significantly reduced thanks to AI-generated email response suggestions, automated meeting notes taken from video conferences and even calendar follow up suggestions.



Next Steps

Ready to embrace more efficient sales management today? Discover how Dynamics 365 Sales can transform your business with guidance from Akita's experts.

Get in touch now to learn how Microsoft's cutting-edge CRM technology can streamline your sales processes, enhance customer insights, and drive growth:

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