CRM is not just for salespeople

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There was a time when Customer Relationship Management, or CRM, was the exclusive domain of the sales team. Salespeople were the liaison between the customer and the business. Those days have come to an end—to meet customers' expectations today requires input from across the company.

Today's customer expects to have a deeper relationship with your small and medium business (SMB). They are more educated about your products when they engage and want to be empowered to find answers for themselves. No matter the size of your business, you can leverage data and technology to make every customer experience with your business easier.

Put customers first and increase productivity across the company with Microsoft Dynamics CRM Online

To build those deeper relationships, customers must be at the center of your business. Every interaction—with both current and potential customers—should become part of the company's corporate memory, shared across the organization.

Every size business today is collecting more and more data. When that data is organized and focused to serve the customer, it also improves productivity. Employees go one place to find the answers they need—no matter where their work takes them.

In this white paper, we'll show you how a business solution from Microsoft puts the power of data in your employees hands to build customer relationships. With familiar tools, integrated communication and connected resources, you can also make a leap in productivity that will drive profits. Let's get started.

Note: As of November 1, 2016, Microsoft Dynamics CRM Online is part of Microsoft Dynamics 365 Enterprise Edition.

Contents

1. Build customer value with cross-sell and upsell

Every business owner knows that it's more cost effective to extend relationships with current customers than to attract new ones. But when customer information is stuck in departmental silos, selling more to your customers isn't as easy as it should be.

Use data to educate customers

Putting data to work will help you build the lifetime value of customers. By combining all the information about each customer in Microsoft Dynamics CRM, you can identify untapped potential. With complete data, you can automatically and regularly deliver personalized information about the other products and services that your business can supply.

50% of all businesses say their success depends on their ability to be highly responsive to customers' specific needs.

In addition, through Microsoft Dynamics CRM Online, you can put customer information in the hands of sales and service workers to:

- Build on established relationships with other departments to cross-sell
- Identify upsell opportunities with product catalogs at their fingertips
- Empower employees in the field to sell additional services

*WW, Techaisle 2015 Global SMB Technology Adoption Study

Financial services cross-sell

Different departments of an investment management firm handled personal retirement planning and employer-sponsored 401K programs. No crossover of data meant that neither department was able to build on relationships of the other.

With Microsoft Dynamics CRM, the firm was able to analyze the data to identify those personal retirement planning clients who were also business owners. Through a targeted marketing campaign, the financial services firm has launched a newsletter to educate those clients on 401K programs.

2. Bridge disconnected applications

When employees—from service call agents to shipping clerks—have to check three different applications to answer a question, customers get impatient.

Empower employees with a single source of information

With Microsoft Dynamics CRM Online, you can provide intuitive access to the right information, resources and complete customer context through a single view. Access to every source of information they need across diverse environments, means employees can provide an efficient, personalized customer experience. Empower customers and employees with unified knowledge to provide a single source of truth.

59% of global consumers have higher expectations than just one year ago.*

Using Microsoft Dynamics Online as the central user interface for customer information enables:

- A single source which includes even the most recent interactions with customers.
- Faster response—from your desktop or mobile—enabling your employees to deliver memorable customer experiences.
- A deeper data pool to identify trends and underlying cause and effect relationships.

*Microsoft Global Customer Service Report

Better experience for happy campers

Managing membership renewals for a private recreational facility, was just the tip of the iceberg. In addition to scheduling their members' visits, the park offered a variety of activities during their stay.

Tracking the fees, reservations, product sales and special requests was previously managed through ten different forms and manual processing. Errors were common and members were losing patience.

With Microsoft Dynamics CRM, the park now tracks everything related to each member in one place. Groundskeepers can even note camp spots, license plates and maintenance issues right through their mobile device.

Your business is a unique combination of resources—from the people who deliver services to the physical tools they use. Tracking those resources and the relationships between them, can get complicated fast.

Equipment used to deliver to off-site locations, assets that are rented out, service vehicles and tools are just a few examples of assets that you may need to track across time and location.

Track relationships of things

Microsoft Dynamics CRM Online simplifies the task of relating assets to people, places and times. With Microsoft CRM, you can keep track of all the assets that drive the value of your business. From scheduling rentals to assigning specialized

"Technology leaders"—businesses who stay ahead of their peers when it comes to technology adoption—achieve 15% faster revenue growth.*

equipment to tracking service vehicles, employees can have access to all the information about an asset anywhere, anytime through mobile devices. And because it's Microsoft, you can build on familiar tools, so keeping control of your assets doesn't mean a huge amount of additional training and costs.

*Boston Consulting Group, "Ahead of the Curve" study.

Transportation control

A full-service transportation provider offering convention shuttles, charter services, event transportation and support staff was using an outdated, manual process to manage their transportation portfolio.

With Microsoft Dynamics CRM Online, the company has increased visibility across operations, managing the fleet, including maintenance and scheduling in one place. Dashboards provide a central source of information, supporting improved forecasting, vehicle utilization and customer satisfaction.

4. Coordinate care for patients and social service clients

Today, healthcare and social service organizations of all sizes need to improve patient safety and satisfaction while containing costs. Meeting those goals requires modern technology that connects disparate systems to provide a single view of patient information and streamline processes.

A better patient experience

With Microsoft Dynamics CRM Online, centralizing patient and social service client related information allows health care providers and employees to provide a professional and caring experience for every person. You can improve patient experiences across the entire journey with:
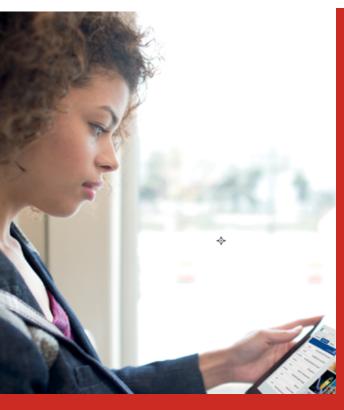
- Coordinated health services across multiple care settings or agencies.

67% of consumers use web self service to find answers to their questions.*

- Automated tools that personalize outreach and follow-up with patients over multiple communication channels.
- Online health portals that provide a single point of self-service access.

With Microsoft Dynamics CRM, you can provide patient-centered communications and processes to increase satisfaction—all while lowering costs.

*Microsoft Global Customer Service Report

Special needs workforce support

A social services organization whose mission is to integrate special needs adults into the workforce uses Microsoft Dynamics CRM to track client skills, placements and history. For staff members on the road, access to information through mobile devices allows them to address any client issues with complete background—instantly. In addition, Microsoft Dynamics CRM helps the organization fulfill the specialized reporting the government requires for the grants that fund operations.

5. Improve coordination across departments

None of the departments in your business works in a vacuum, yet coordination is often a huge challenge. A business solution from Microsoft break down the silos to simplify operations and increase productivity. By combining Office 365 with Microsoft Dynamics CRM Online, businesses connect across departmental boundaries to provide better end-to end customer experiences.

Providing your teams with common tools and collective data through Microsoft Dynamics CRM Online, supports smooth handoffs of orders, service delivery, project management and production. You achieve greater control over business processes and keep your company data safe, centralized and protected.

One platform for productivity

With Microsoft Dynamics CRM Online, you can connect your people and processes on a single secure platform to support activities like:

- Craft professional documents such as quotes and sales orders using Word templates in CRM.
- Stay connected and collaborate with colleagues and customers using Skype for Business.
- Connect and collaborate with partners and customers on open external networks.
- Deliver seamless customer experiences with automated workflows from order entry through delivery.

Streamlined production

A fencing manufacturer and installer was challenged by the disconnect between sales and the production department. Production wasn't being notified in a timely manner when jobs were won and sales was constantly calling for updates on job progress.

With Microsoft Dynamics CRM Online, a Production Job is now automatically created when a sale is finalized. The status of the Production Job is tracked through the same system. Now, the production team has timely notification of new jobs coming down the pipe and sales knows the status of orders at all times.

6. Automate processes to increase productivity

Automated workflows support efficient processes that coordinate activities across sales, service, marketing and other teams. By replacing manual processes with workflow, employees can reduce administrative tasks, minimize paperwork, errors, delays and wasted time to build the efficiency and effectiveness of staff.

Streamline processes

With Microsoft Dynamics CRM Online, employees don't have to use a different document management solution to find what they need or work collaboratively. Workflow connects employees and drives actions through the tools you use every day, like Office and Outlook to send emails, schedule activities, request approvals and automate a variety of other processes.

*Cloud-based applications deliver 7% total increase in user productivity.**

Automated workflows can drive processes like:

- Notify sales people when customer contracts are due for renewal.
- Send personalized emails to avoid manually composing individual messages.
- Send a confirmation email to a customer when a support case is opened or closed.
- Assign accounts to the correct sales team based on the account territory.

*IDC. The Business Value of Cloud-Based Customer Relationship Management

Keeping up with regulations

A financial institution providing services to economically distressed communities and underserved people was unable to keep up with internal and federal compliance regulations, resulting in numerous failed audit procedures. Missed tax filing deadlines and overlooked documentation were putting the organization at risk.

Using Microsoft Dynamics CRM, the company now monitors and sends alerts to support the documentation submission and loan compliance requirements. The team is now able to work more productively and is fully prepared for audits.

7. Ensure compliance with consistent processes

Driving consistent processes across the company can be challenging—and in today's regulated world, consistency is critical to compliance. Working with check lists and paper documents doesn't provide the guidance or audit trail that supports stringent regulations.

Tracking assurance

Through Microsoft Dynamics CRM, you can help ensure that people enter data consistently and follow the same steps every time they perform a function or task. Using automated workflows, dashboards, and analytical tools, you can simplify and streamline key tasks to:

- Track due dates of certifications, training, licenses, requests and approvals

33% of midsized business owners faced fines for noncompliance with government regulations in 2014.*

- Assign inspections to service technicians.
- Track maintenance or testing of machines based on usage, lifetime or service calls.
- Support complex processes, building up multiple layers of logic to accommodate business requirements.

*ADP Research 2014 midsized business owners study "The Struggle for Confidence Between Main Street & Wall Street"

Keeping certifications up-to-date

An international leader in mechanical engineering and standards uses Microsoft Dynamics CRM to track the life cycle and issuance of codes and standards certificates (known as "stamps") for over 600 critical applications, including nuclear power plants, elevators, pressure technologies such as steam boilers and performance testing. During inspections, technicians have access to full information on the equipment specifications, code requirements and history. Inspection notes entered directly into CRM are available to support reporting and audits.

8. Provide unparalleled customer service

In the customer-driven economy, only the companies that can deliver great experiences are likely to survive. To meet customer expectations, your organization needs to provide personalized and consistent engagement across all channels.

Increase brand loyalty

Microsoft Dynamics CRM is designed to easily adapt to changing demands, leveraging customer and company data to deliver intent driven outcomes with:

Self-service: Make it easy for customers to solve issue on their own with a branded online support portal.

Agent enablement: Empower agents with a single, unified experience to deliver fast, amazing customer service from desktop or mobile device.

Multi-channel support can improve customer satisfaction by 36%.

Field service: Deliver world class, intelligent customer experiences in the field while maximizing efficiency and minimizing costs.

Knowledge: Easily connect the right person with the right knowledge at the right time to answer service needs.

Service intelligence: Identify trends, anticipate opportunities and gain powerful insights into customer behavior and agent productivity. .

*Microsoft Global Customer Service Report

Inventory on the go

For a real estate investment company, inventory goes directly from the supplier to the field without ever making a stop in their own warehouse. Keeping track of when that inventory was received and available at the job site was nearly impossible in the past.

With Microsoft Dynamics CRM Online tracking the inventory, everyone who needs to know—from employees to contractors to customers—have access to the status. The company can coordinate services to hit the tight schedules their fast-paced customers expect.

9. Deliver highly personalized customer experiences

To deliver highly personalized experiences, companies today need to use data from every source available to better understand and respond to their customers.

Targeted, relevant messages

With Microsoft Dynamics CRM, you can deliver targeted, relevant messages at the right time through the right channel. You can enable more engaging, personal interactions by:

- Finding and combining data from internal and external sources to build a more complete picture of your customers.

- Anticipating your customers' needs—even before they contact you—based on their purchase history.

97% of global consumers say customer service is important to their choice of and loyalty to brand.*

- Ensuring your entire team has the latest on customer interactions including buying, service and communications history.

Customized engagement means understanding customer segments, demographics and behavior to educate and sell proactively with the most relevant content across the customer's channel of choice—whether it's digital, social or traditional.

*Microsoft Global Customer Service Report

Finding the perfect candidate

A recruiting firm uses Microsoft Dynamics CRM Online to track the resumé details of their candidates and the specific needs of their corporate clients.

Using analytics to match skillsets, locations, salary ranges and other factors, the recruiting firm not only finds candidates for open requisitions, but also suggests candidates that could be a good fit for the organization.

With a deep understanding of their client's requirements and thorough collection of data on their candidates, the recruiting firm adds extra value to their services.

10. Coordinate project teams

Keeping everyone on the same page through the course of a project can be a challenge. With so many moving parts it's hard to know whether you are on schedule and within budget. Specialized project management solutions can be complex and unwieldy.

A single source of project data

With Microsoft Dynamics CRM Online, you can provide a single place to track all the pieces of your project. With centralized data, you can automate the communication to employees, customers and vendors throughout the project to keep everyone in step.

Reports and dashboards help you monitor the status and profitability of each project. Alerts notify the project manager when a milestone

Excessive data growth is the #2 top IT challenge for mid-market businesses after budget constraints.*

is missed or costs exceed the budget. Improve project coordination and collaboration with:

- Attached meeting notes and customer interaction information using OneNote.
- Document management through one SharePoint location with links to CRM.
- Face-to-face calls with project members using Skype for Business.

*Techaisle 2015 Global SMB Technology Adoption Study

Nonprofit project coordination

A nonprofit organization assigns teams of experts to help other nonprofits improve program management. Throughout the course of a project, the team must coordinate deliverables, meetings and tasks all while monitoring costs to assure the project stays within budget.

Through Microsoft Dynamics CRM Online, the organization aligns tasks with project milestones and tracks other key data points. Dashboards are set up to monitor everything from budget variance to milestone achievement.

11. Win over your clients...over and over

Engaging with your customers today can't be one-size-fits-all. You need to understand your customer, their interests and needs. Intelligent customer engagement enables your business to build customer trust and loyalty while enabling your sales, service and marketing professionals to be as productive as possible.

Know your customers

With Microsoft Dynamics CRM Online, you can better serve your current customers—and win new ones—with a complete view of your customers' history and expectations of what they may need next. By combining data from both internal and external source, like social sites, you can build deeper insights into your customers' needs and recommend additional purchases.

75% of companies now view customer service as a competitive differentiator (up 18% in two years).*

Microsoft Dynamics CRM Online makes it easier to follow through with customers with Microsoft Office 365 and Yammer. Employees can go to one place for all of their tasks, like viewing customer history, researching companies, finding social connections, communicating with prospects, reviewing sales insights and creating sales proposals.

*Dimension Data Global Contact Centre Benchmarking Report

Understanding the client's needs

An award-winning nonprofit organization helps companies get involved in the social and economic regeneration of inner cities. Each client company has unique schedules and specific resources that they can donate to projects.

With Microsoft Dynamics CRM, the nonprofit tracks the interests of clients and proposed projects. From planting trees to painting schools, the nonprofit selectively recommends the projects that fit the timelines and profiles of client companies. With a deep understanding of their client's needs, the nonprofit is making a huge impact on the community.

12. Engage experts when needed

In most cases, salespeople no longer operate individually. Since buyers expect solutions to bridge sales, operations and service, salespeople depend on the entire organization for their success. They need the experts of the organization to provide the full story to customers.

Connect across the business

Sales organizations need the right collaboration and communication tools to stay connected with the rest of the business. Through Microsoft Dynamics CRM communication and collaboration is a snap, including through mobile devices.

With Skype for Business, salespeople have a simple way to interact with colleagues, partners

1/2 of business decision makers worldwide say the cloud lets them be more agile in their business operations

and contacts—right through CRM. Salespeople can quickly find subject matter experts or decision-makers and include them in meetings to answer questions and get deals closed. Users see presence icons within Microsoft Dynamics CRM and can initiate an interaction in a single click. Salespeople can also use Yammer to connect to experts right from within CRM.

*Techaisle 2015 SMB Cloud Adoption Trends Study

Supporting the complex sale

An aerospace company uses Microsoft Dynamics CRM to track the project experience and skillsets of engineers and scientists. The sales process for the company is long and complex, requiring specific expertise brought in at different times.

With Skype for Business, salespeople can identify the specialists they need and set up face-to-face meetings with people in different parts of the world. Facilitating in-depth discussions with interactive presentations, sometimes right on the production floor, is critical to the success of the company.

Microsoft Dynamics CRM Online works across your business

Microsoft Dynamics CRM Online provides secure, reliable access to detailed account information, streamlined business processes, rich collaboration tools, and more, all within an affordable, easy-to-use cloud solution designed to meet the needs of small and medium businesses. With CRM capabilities in the Microsoft Cloud, your business has secure, anywhere access ensuring your sales, marketing, and customer care teams deliver personal experiences across every interaction.

A business solution from Microsoft uniquely brings together business applications, data, documents, and devices—offering one unified user experience that gives you greater control over your finances, inventory and operations, while delivering the insight you need to build and maintain customer relationships. Only Microsoft offers a complete, flexible, and trusted platform that works across your business and your entire IT ecosystem, from server to cloud, and desktop to mobile devices.

Let's Get Started!

Learn how Dynamics CRM can put your customers first and may increase your productivity company wide.

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About Magenium Solutions

Magenium Solutions is dedicated to delivering technology solutions that solve problems and move business forward.

Solutions designed for your business.

Our team will help you envision how Dynamics CRM can help you communicate in new ways to build deeper insights into your customers' needs and expectations using data you capture with CRM, resulting in reduced costs and increased sales.

We know Microsoft Dynamics CRM.

At Magenium, we have a deep knowledge of Microsoft Dynamics CRM. We can take our knowledge and experience to help you get productive with the vast functionality the software offers and help you get the great ROI you need.

Focused on Your Success.

Companies rely on our expertise in a variety of technology delivery areas. We deliver that expertise by bringing our greatest asset to the table on every project–our people. Our clients receive world-class technology solutions from seasoned Microsoft certified professionals who will ensure your Dynamics CRM implementation integrates seamlessly with all of your business operations.

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