Microsoft Dynamics 365

The CRM Buyer's Guide for Today's Business

Who this is for

Business leaders seeking guidance on how to choose a CRM solution that drives significant improvement in customer experience, competitive insights, and internal collaboration.

Estimated reading time:
8 minutes

Contents

Introduction

Adding modern CRM to your operations will strengthen your relationships with customers, sharpen your analysis of the market, and encourage significant growth. Touching key areas of business, it will foster collaboration within your organization and beyond. The right CRM solution will change how you do business—for the better.

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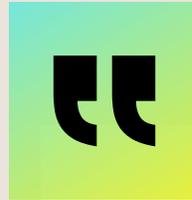
Based on our criteria—across business functionality, IT features, and the strategic and investment profiles of each vendor—we chose Microsoft Dynamics 365."

Gary Tomazevic
Head of IT Strategy, Architecture, and Portfolio
Siemens Smart Infrastructure

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What is CRM?

CRM, or customer relationship management, is a category of integrated, data-driven software solutions that elevate your interactions and relationships with customers. A strong CRM solution is a multifaceted platform that delivers the information you need to develop tailored customer journeys and create lasting relationships. Without a centralized, automated CRM system, you risk losing track of customer interactions and overlooking opportunities.
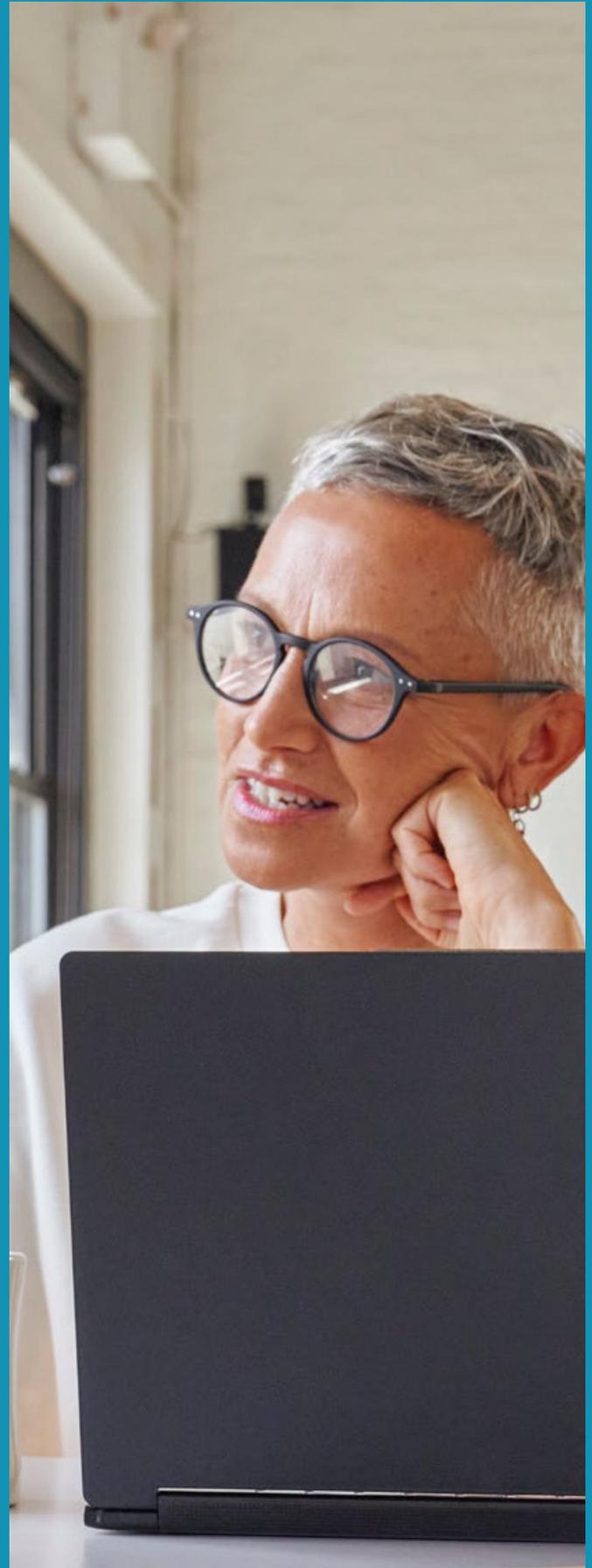
Benefits of CRM

You'll see the results of implementing a successful CRM solution in extended customer lifetime value and increased profitability. CRM automates the personalization of customer experiences and marketing communications to deepen engagement and maximize satisfaction. Proactive and predictive service cuts costs and boosts positive brand sentiment. Expect to source high-value leads and discover actionable insights that drive business development forward.

Introducing Dynamics 365

Flexible, scalable, cloud-based CRM solutions from Microsoft provide a unified data model enabling insight across your business. Dynamics 365 empowers you to adapt to customer needs and improve collaboration.

You can choose a standalone application or employ several CRM tools as an integrated solution that meets your requirements today—and rest assured that your system can grow with you. Dynamics 365 is extensible using

Power Platform and seamlessly integrates with Microsoft 365 and other common business tools. Using Microsoft Teams, anyone in an organization can view and collaborate on Dynamics 365 records, from within the flow of work.

Define your needs

The first step in selecting the best CRM for your organization is to define your current processes, needs, and future goals.

- Which areas of business have access and actively benefit today?

- What kinds of insights would catalyze business growth most effectively?

- How can you improve your processes to create a clearer picture of your customer?

- Which applications do people use in their day-to-day work, and how will you integrate CRM experiences in those tools?

- What security and compliance considerations apply to customer data in your sector?

Get the basics right

Next, set your expectations for basic CRM requirements. These are capabilities that almost every business needs to maximize the value of customer data.

- Most importantly, your CRM solution should have the ability to unify data sources and business processes to equip every member of your organization with insights and tools for success.

- A software-as-a-service (SaaS) solution delivered through the cloud will alleviate IT maintenance burdens, ensure you have the latest capabilities, and enable higher levels of security.

- With growth in hybrid work, robust mobile apps are increasingly important.

- Seamless integration with your existing tools and processes speeds deployment and adoption.

- Extensibility and scalability allow the solution to grow with your business. A low-code solution enables you to develop apps and automate processes faster and at lower cost.

- Accessible, intuitive visualizations, reporting, and analytics empowers people to get more value from customer data to drive lasting growth.

Finding the right solutions for your teams

Different teams have different needs, yet they all need to work together to achieve common goals. Choosing CRM solutions tailored to specific business functions such as sales, marketing, and field service—but still work together on a unified data store—will provide the best experience for your employees. In the following sections, we'll explore selection criteria for business functions that typically use CRM.

Line of business considerations

CRM fulfills specific line-of-business needs while helping break down the silos in an organization that hinder collaboration. With a centralized CRM system, all areas of a business benefit from insights and progress made across the organization. A successfully implemented CRM solution will meet individual needs while encouraging team members to work together.
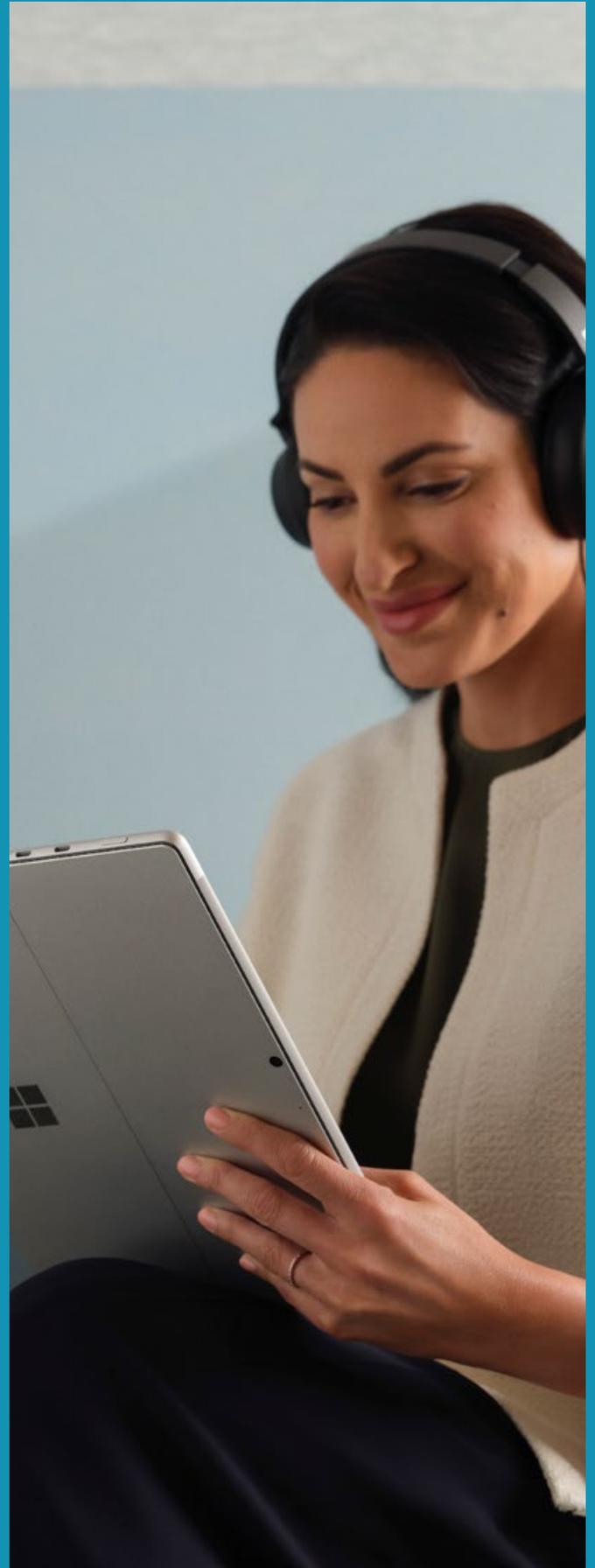
Sales

CRM supports the full sales cycle. Sales teams, field sellers, inside sales, and sales managers use it to bring clarity to the entire customer journey. CRM offers in-the-moment insights about customer emotions and competitive market sentiment. Guided selling is enabled by prepping sales teams with priorities in phone calls. Empowered by recommended actions and insights, sales teams can source and develop relationships with the customers that will generate the most sales long term.

To maximize the sales impact of CRM, your chosen solution should help your sellers:

- **Personalize sales through deep customer understanding**
  Unlock the next best opportunity with insights from customer interactions and marketing and sales data to create new opportunities.

- **Collaborate effectively with built-in tools**
  Fulfill customers' requirements for digital-first buying experiences through a virtual dashboard for collaborative remote selling.

- **Drive revenue with AI**
  Grow revenue by closing sales faster, and by expanding deal size through stronger customer relationships.

- **Work efficiently**
  Adapt and innovate with the applications that support operational excellence and scale to meet growing customer needs.

Dynamics 365 Sales

With Dynamics 365 Sales, you can achieve individualized selling at scale. Help your team close more deals by equipping them with insights and connecting them to high-value customers through the channel those customers prefer. Improve customer calls with feedback and use AI to predict and manage your sales pipeline and accelerate revenue.

> **We've created and captured more than 14,000 individual sales opportunities in the first 6 months, and we've increased the quality of data on potential sales opportunities by 89%."**

Jennifer Stocco
Director of CRM
C.H. Robinson

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Marketing

Marketers capitalize on CRM to source and nurture the higher-quality leads that boost sales success. They can manage the full marketing process, including content management and personalized customer journeys. Guided by data, marketers can design, predict, and deliver content at opportune times through effective channels to provide a complete customer experience. CRM marketing tools abide by compliance requirements and protect customer data.

The right CRM solution can empower your marketing team to:

- **Own your customer relationships**
  Directly connect with your customers on your own terms with full ownership of data. Bring together transactional, behavioral, and demographics data to build a 360-degree view of the customers.

- **Create raving fans**
  Predict customer intent to deliver the right content at the right channel and in the right moment. Rich out-of-the-box AI and insights can help you discover new segments and predict lifetime value, churn, and other key metrics.

- **Engage beyond ads**
  Deliver connected experiences across every customer touchpoint with AI-orchestrated journeys. Acquire and retain high-value prospects based on their interactions across advertising, email, mobile, social media, custom channels, and in-person touchpoints.

Dynamics 365 Marketing

Transform your business with Dynamics 365 Marketing. Employ AI to orchestrate personalized, real-time journeys across all touchpoints to strengthen relationships and earn loyalty. Then, analyze the entire customer lifecycle to win new business.

> **With customer-led journey orchestration in Dynamics 365 Marketing, our agents can gain a real-time, 360-degree view of each customer and their support experience."**

Brian Johnston
Business Architect
HP

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Customer service

CRM personalizes customer service by creating a comprehensive view of each customer. Sales representatives engage with customers across multiple channels while building a history of interactions. Virtual agents and knowledge base portals can automate self-service while AI-powered tools streamline case resolution.

Choosing a capable CRM service enables your customer service teams to:

- **Focus on customer needs**

  With self-service support including virtual agents and rich knowledge base portals, customers can solve more issues on their own, giving agents more time to focus on more challenging cases.

- **Increase effectiveness**

  AI helps give agents the right information at the right time so they can resolve cases faster and with higher customer satisfaction.

- **Optimize operations**

  Managers can use AI-powered insights and analytics to improve staffing and training while lowering costs.

Dynamics 365 Customer Service

Build long-lasting customer relationships with Dynamics 365 Customer Service. Guided by AI and IoT, representatives can provide elevated, proactive service that delights customers and increases loyalty. Its native integration with Microsoft Power Platform allows you to streamline work by combining AI with automated workflows and processes to create more time for teams to focus on delivering better customer experiences. As each interaction becomes more effective, it helps improve the overall customer journey. Deploy self-service for quick, dependable access that saves you time and money.

"The amount of traffic we would have received through phone lines and email would have been a challenge for our staff to handle. With Power Virtual Agents, we've taken a lot of the manual work out of customer service and empowered ourselves to provide amazing experiences for the people coming here."

Maxwell Stiss
Director, Delivery, Information Technology
Miami Dolphins and Hard Rock Stadium

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Field service

CRM tools ensure frontline service employees are prepared for dispatches by equipping them with relevant work-order data. IoT and AI-powered tools can provide actionable insights, critical data, and real-time remote support from technical experts. This level of service builds trust and loyalty by delivering empathetic, connected service experiences that adapt to your customers' evolving needs.

Field service teams can enhance customer service using CRM that helps them:

- **Tailor customer engagements**

  With the right data at their fingertips, service professionals can build trust and loyalty by being more responsive and knowledgeable about customer needs.

- **Elevate employee effectiveness**

  Automated, efficient work order management means employees will have the right tools and information to deliver top-quality service.

- **Optimize service operations**

  Insights and analytics about service outcomes, along with the ability to access experts using augmented reality, helps increase first-time fix rates.

Dynamics 365 Field Service

Maximize field service effectiveness and customer experiences by deploying Dynamics 365 Field Service. Your frontline workers will deliver differentiated, tailored services using data insights and connected experiences. Optimize scheduling and experience a boost in first-time fix rates.

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Selecting a platform like Microsoft Dynamics 365 Field Service is a long-term commitment and migrating 12,000 users isn't something we'd undo in two years. We wanted a partner that would ensure continuous innovation—a must in an agile and changing world."

Sébastien Bey
CIO
Siemens Smart Infrastructure

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Generate more powerful customer insights

Fully understanding your customer provides a key competitive advantage. A strong knowledge base will help your business align with customers more successfully than companies without this resource. Personalization makes your business stand out. A customer insights platform elevates the power of your CRM, unifying customer data and third-party sources and applying AI to deliver game-changing knowledge about customer needs.
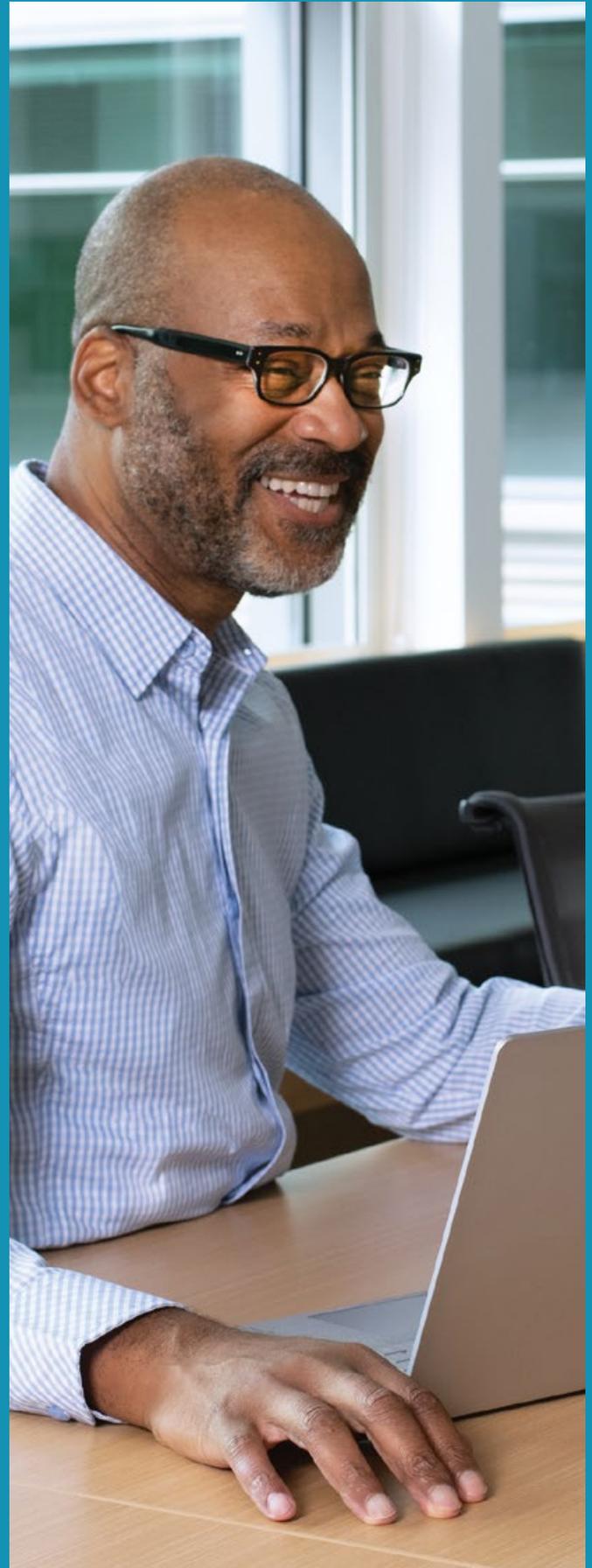
When looking for a customer insights solution, consider whether it will help you:

- Gain a 360-degree view of your customers combining transactional, behavioral, and demographic data.

- Create a single view of the customer that helps you predict customer needs, drive meaningful action, and build trust.

- Stay attuned to changing patterns and insights by tracking cross-channel customer behavior on your website and mobile app.

- Use out-of-the-box and custom interactive reports to bring insights to everyone who needs them across your business.

Dynamics 365 Customer Insights

Used across all areas of business engaged with CRM, Dynamics 365 Customer Insights allows you to cultivate customer relationships proactively. Audience and engagement insights, powered by thorough, granular detail, help you reach your customer relationship milestones faster. Guided by world class AI and analytics, your team will deliver unmatched customer experiences.

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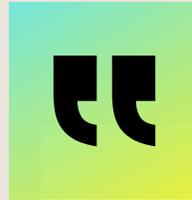
Customer Insights is a best-in-class product for a company seeking speed to market in its customer initiatives."

Sashi Kommineni
Director of Enterprise Analytics
Chipotle Mexican Grill

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Win and keep customers with insights across your business

Choosing a CRM solution that matches your goals and has the intelligence, ease of use, and data connectivity you need helps your entire organization. It connects true customer learning to personalized marketing, intuitive sales outreach, and superior service.

Microsoft Dynamics 365 provides several business applications with CRM functionality that can be used alone or together to achieve your goals and are available to try free.

Learn more about Dynamics 365 >

Start a free trial

Microsoft Dynamics 365