Why Choose Microsoft Dynamics 365 CE for Your CRM

How you manage customer relationships is the most vital process for running your business – you "gotta keep 'em happy" and coming back to buy more products and services!

When choosing a customer relationship management solution, it's important to consider your options from multiple perspectives:

- Does the software deliver all the functions your business needs to engage customers effectively?
- Is it easy to learn and use all those functions?
- Is the software simple to manage and support—or will it drain the time of your internal resources?
- Does the software integrate with your other software solutions—so you can easily share information?

One solution that checks all these boxes is **Microsoft Dynamics 365 CE (Customer Engagement)**. It includes all the key functions that sales, marketing and service teams need to transform every single way the company interacts across the prospect and customer lifecycle. This in turn helps close more business, drive more revenue, and strengthen customer loyalty.

You also have the flexibility to activate only the functions you need for your business model: Simply start small and then add functions as your business grows.

Manufacturing · Finance · Supply Chain · Human Resources · Operations · D365 ERP · D365 CE · Marketing · Field Service · Customer Service · Customer Insights · Project Service Automation
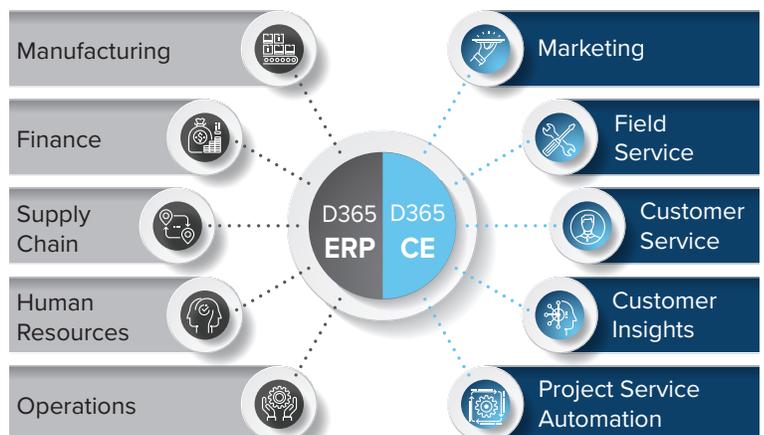
Familiar to End-Users, Easy to Support and Integrate

Since Dynamics 365 CE is a Microsoft solution, it's easy for users to pick up—with the familiar look and feel of other Microsoft applications such as Office, Outlook and Teams. D365 CE also runs in the cloud, which means Microsoft takes care of managing all IT aspects for you. There's no need to worry about security, patch updates, and version upgrades. You can also tap into Microsoft's extensive partner program for any specialized customization, training or support your business needs.

Then there's the tight integration with Office applications—ranging from Excel to Outlook and Teams—

as well as other Dynamics modules, such as ERP, field service, project management, warehouse operations, supply chain, e-commerce, and human resources. You can create automated data flows among all applications and modules so everyone in your business has real-time access to accurate information on what's going on with every customer, every order, every inventory item, and every customer resource—at the office or in the field.

For example, integration between D365 CE and ERP allows the sales team to automate sending orders to the accounting department. This generates invoices faster and speeds up cash flow. And as salespeople use Outlook or Teams on their mobile phones, they can pull in prospect and customer information without opening D365 CE—with just a click or two, contact and other account information appear right in the applications they are using.

The same is true for field service teams. They can keep working within the primary application they use to do their jobs and still get instant authorized access to customer orders. So if they are fulfilling an order or handling a service call, they can take into play other factors about customers that can improve the level of service they provide.

D365 CE also gives you the flexibility to integrate your customer engagement data with non-Microsoft platforms. So, if necessary, you can continue to leverage investments you have already made in your ERP, human resource, or warehouse systems.
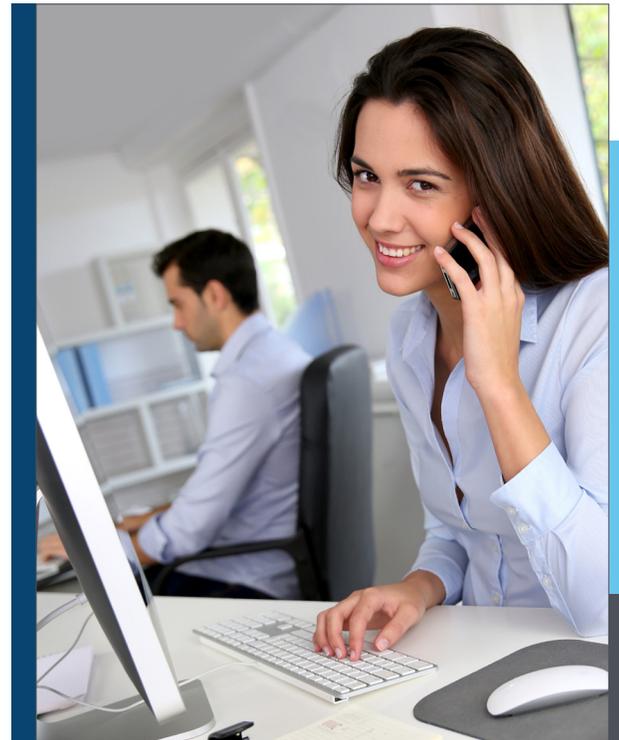
Key Benefits of Dynamics 365 CE

Dynamics 365 CE automates a host of customer engagement functions. These include personalized emails, customer surveys, and tracking website leads and visitor activity. It's also easy to manage customer databases to proactively identify product and service renewals.

Here's a quick rundown of additional capabilities your business gains by deploying D365 CE:

Greater Sales Process Efficiency—reduces manual work for your sales team by automating recurring tasks—such as creating alerts about open client issues and sending e-mails to clients so orders and issues don't fall through the cracks.

Real-time Access to Customer Insights—gives service teams all the information of what's currently going on with customer accounts and historical records; so when interacting with customers, call-center and field personnel can identify opportunities to strengthen relationships and sell new products and services.

Easy Customization—offers standard engagement functions out of the box along with the ability to customize according to the way your sales team operates. You can create client views and forms without needing additional software development.

Real-Time Access to Information—gives sales and marketing teams the lead and order information they need to communicate with clients intelligently while using their preferred application—web browsers, mobile apps, Outlook or Teams.

Targeted Marketing—automates the process to build custom lists so marketing can target specific customer and prospect segments, create and manage campaigns across customers and prospects, and then measure the effectiveness of each campaign.

Simplified Scheduling—provides service managers with a centralized view of all client meeting requests and calendars to make sure the right resources attend each client interaction. Track your cases by skillset and expertise to assign the right requests to the right personnel.

Because D365 CE leverages the Microsoft .NET framework and web services, you also have the flexibility to add more robust functionality. Your internal teams can further customize according to specific needs and integrate with legacy applications. You can also connect to third-party applications to add on niche functionality.

Enabling Customer Service to Create Great Experiences

Dynamics 365 CE changes how businesses interact with the customers by focusing customer service on creating experiences. It's more than a Rolodex to track contact information. It's a solution that changes your business and helps you become more successful and profitable. With a single platform for creating seamless customer experiences, you can reinvent the way your business operates.

Customer service works faster and more efficiently while also giving customers the option to self-service their needs through their own personalized portal when stores and call centers are closed. Customers can log in to access account information, submit a support case, search inventory, purchase new products, and check on the status of cases and orders—thus speeding up the service process.

Essentially, with D365 CE, you can meet your customers wherever they are and how they prefer to interact in their personal buying and service journeys. You also gain several internal capabilities:

- Escalate cases according to the level of urgency and automatically route to the appropriate resource.
- Collect notes on all customer interactions to speed up support-case resolutions.
- Generate automatic notifications of support requests to account stakeholders.
- Enhance customer experiences by providing real-time updates on technician arrival times, job details, pictures from projects, and additional information pertaining to their cases.
- Increase first-time fix rates by giving technicians all the information they need to complete jobs accurately and efficiently.
- Integrate with Microsoft Power BI to pull in additional data from other sources to create real-time graphs to better understand your business and make educated decisions.

Within Dynamics 365 CE, you can also activate Microsoft Power Virtual Agents—chatbots with automated artificial intelligence—to quickly respond to common questions or scenarios as customers interact with your business online. In addition to meeting customer needs more quickly, this frees up your service team to focus on more complex customer activities.

Streamlined Marketing Processes Help Pinpoint Qualified Leads

Dynamics 365 CE makes it easy for your marketing team to design email campaigns and landing pages with templates they can quickly customize and tailor. Marketing can then streamline the prospect management processes—with lead scoring to know where to focus follow-up efforts. D365 CE also integrates with LinkedIn to identify target audiences for specific products and services.

In addition, marketing can automatically capture *every prospect and customer engagement* through web forms, events, webinars, and other communication channels. From there, they can assign targets to a specific nurture campaign or sales representative.

For event management, D365 CE makes it easy to track registration and attendance to measure just how well your messaging attracts potential attendees and—more importantly—if the messaging is strong enough to convince registered prospects to actually attend the event. Online events and webcasts can be conducted via Teams, and you can coordinate the logistics and manage venues for in-person events. You can also track sponsorships of your events over time to see which event partners help you attract the largest audiences consisting of qualified leads.

An additional benefit for marketing with D365 CE is prospect segmentation. Track journeys based on how prospect attributes and behaviors map to the pain points that each of your products and services solves. As you produce campaign messaging, you can define the right audience and make sure you reach them at the right time.

When tracking customer journeys and building nurture campaigns with D365 CE, you can analyze email interactions, responses to campaigns, and the effectiveness of marketing tactics. This lets you then tailor activity flows based on the actions taken by each prospect and customer.

Helping Sales Close More Opportunities and Build Stronger Relationships

Your sales team can leverage Dynamics 365 CE for real-time insights into customer activities to prioritize which customers to target first with follow-up information. And as customers respond positively to outreach, sales reps and managers can forecast sales opportunities to see how strong the pipeline is and make adjustments when necessary. Reps can also easily manage opportunities in the office or on their mobile devices to increase the likelihood of closing on proposals.

Just as importantly, sales can quickly communicate with customers directly in Teams. During these sessions, integration to data in Dynamics 365 CE makes it possible to know the status of customer accounts and orders—without ever leaving the Teams session.

Additional key sales capabilities:

- Track all customer email and online communications automatically so everyone has visibility into customer status and relationships.
- Streamline sales cycles through suggested next actions—focusing on the highest-priority activity with the best propensity to close.
- Receive notifications about stalled deals and assist sales reps in increasing closure rates.
- Identify at-risk relationships so management can intervene before it's too late.
- Analyze individual and collective pipelines for accurate forecasts through automated insights.
- Predict revenue fluctuations and highlight areas of focus down through the entire sales funnel.
- Reduce time spent on reporting by surfacing exceptions with out-of-the-box reports.

Another key tool for the sales team within D365 CE is the sales accelerator. Real-time, AI-driven insights and recommendations—based on customer events and needs—let sales teams know when to offer customer guidance. The accelerator also helps sales work smarter by providing a prioritized list of the next best lead or opportunity. Sales team members also know each customer's preferred communication channel—and with built-in integrations, they can quickly send an email or place a phone call.

The Power of Leveraging Microsoft Solutions

A key capability of Dynamics 365 CE to consider is how it integrates with Microsoft Power BI. Embedded analytical tools in D365 CE can pull data reports from Power BI to help managers across all departments make decisions in real time while they have a complete view of any client, campaign, resource or project.

It's also important to consider Microsoft's strong position within the IT industry for the past 40+ years. It's a company that will be around forever to support and continue enhancing your customer engagement application. Microsoft is a company you can trust to secure and protect the data you store in the cloud. You will own your data and have confidence in the security behind Microsoft's cloud.

In addition, Microsoft maintains a reasonable software license cost structure. As your monthly subscription service comes up for renewal, there will be no sudden, surprise spikes in the cost. And with the large Microsoft partner network, it's easy to find assistance. You lower your risk if a change in partners is needed down the road.

D365 CE is a powerful customer relationship management tool that will help you drive sales productivity, improve the effectiveness of your marketing campaigns, and provide service with insights into what's going on across all your customer accounts.

Discover how your business can better serve your customers with Dynamics 365 Customer Engagement.

CONTACT US TODAY!