

A Quick-Start **Guide to Accelerate Digital Selling**



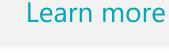
Over the last five years, brands have been making it easier for customers to shop and buy their products from anywhere and at any time. However, during times of rapid change, the difficulties organizations continue to face when it comes to digital selling come to the forefront.

This checklist targets common challenges that sales organizations face, with tips and tactics that can help. You won't find a lengthy list of to-dos—our goal is to provide you with a short set of concrete actions that will deliver the most impact, so your teams can sell seamlessly, wherever they are.

Choose your challenge Click on the arrows to learn how to tackle each challenge.



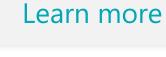
We don't know what our customers need or how best to engage with them and move them through the sales funnel.

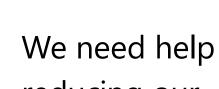






My team struggles to guide and collaborate with customers remotely.





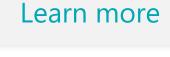
reducing our sales and marketing costs.



Learn more



My teams need help working from remote locations.





To understand your customers' needs and move them down the sales funnel...



the health of client relationships and where new opportunities may lie, take actions based on those insights, close new opportunities faster, and win more deals.

Build a comprehensive view of each customer

relationship so you can engage with confidence.

Check off the tasks as you complete them

- Predict near-term changes in demand and markets.
- Use survey and web forms to gather feedback and sentiment directly from customers and act quickly when you detect that a relationship is at risk.
- in real time.

Track keywords to detect competitive shifts

collaborate with customers remotely...

To guide and



Equip your salesforce with video conferencing tools so they can communicate with customers and

Check off the tasks as you complete them

colleagues face-to-face, regardless of location. Manage timely communications and relevant

customer journeys by having aligned sales and

marketing platforms and integrated customer data to derive insights. Give salespeople the skills they need to

be successful with remote and interactive

Track customer relationship health to improve long-term relationships today and in the future.

coaching and training.

with the right message.

Check off the tasks as you complete them

Eliminate functional silos by unifying sales and

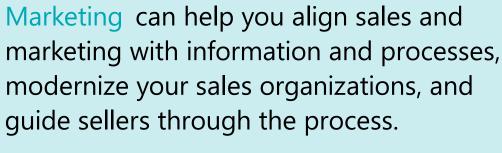
Stay informed and on-track with your customer's

life event changes to reach out at the right time

and reduce costs...

To optimize sales and

marketing processes



To help teams

work remotely...

Take a self-guided tour to see how

Microsoft Dynamics 365 Sales and

marketing data with connected business processes to manage leads across the customer journey.

Jointly plan complex buyer/customer journeys to effectively target accounts and prospects.

Automate routine tasks to free up seller time and

Maintain responsiveness by automatically routing and escalating customer requests.

increase customer purchase volume.



with Dynamics 365.

regardless of their location.

Learn how to accelerate digital selling

shareable sales collateral and knowledge articles.

Check off the tasks as you complete them

Keep customers informed with timely communications.

Create campaign content with customizable templates

for target segments, customer journey emails, and

- Keep the lines of communication open with your sales team by collecting continuous feedback. Identify and onboard sales resources to handle surges in demand, and re-skill and up-skill teams with online,
 - Gain real-time visibility into sales performance and provide insight-driven coaching.

interactive learning content.

automated approvals and digital signatures. Give customers real-time inventory visibility to

ensure fast and reliable order fulfillment while

reducing out-of-stock or overstocked items.

Provide real-time digital buying experiences with

Enable seamless, remote sales

Customers can shop and buy your products from

wherever life takes them. It's time that your sales team

can do the same. By fully embracing digital selling, you

can empower your sales organization to effectively sell

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Microsoft Azure

If you need help addressing your remote selling challenges

or checking off the boxes on this list, our sales advisors are

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happy to help.