NAVISIONTECH

Supercharge Your Sales:

Unleashing the Power of an AI-Driven CRM

Get started

Microsoft Dynamics 365

Table of Contents

Introduction

Small and medium businesses (SMBs), similar to yours, continue to be the backbone of the global economy, constituting over **90% of global businesses**,[1] and deliver their own unique set of value to their customers through...

Delivering operational excellence

SMBs leverage their size for agility and adaptability, utilizing technology to streamline operations, cut costs, and offer customers affordable solutions.

Offering product leadership

SMBs bring innovative and unique products/solutions to the market by leveraging their agility and nimbleness, utilizing technology to streamline operations, and leveraging their knowledge of their target market to disrupt the status quo and create new markets or expand existing ones.

Customer intimacy

SMBs must have intimate knowledge of their target markets to precisely tailor offerings to match customer demands. By maintaining a close relationship with their customers, agile SMBs can quickly respond to dynamic customer requirements and create a loyal customer base.

> By leveraging AI, companies can gain insights into customer behavior and preferences, which can help them tailor their products and services to meet the unique needs of each customer."[2]
>
> - Forbes
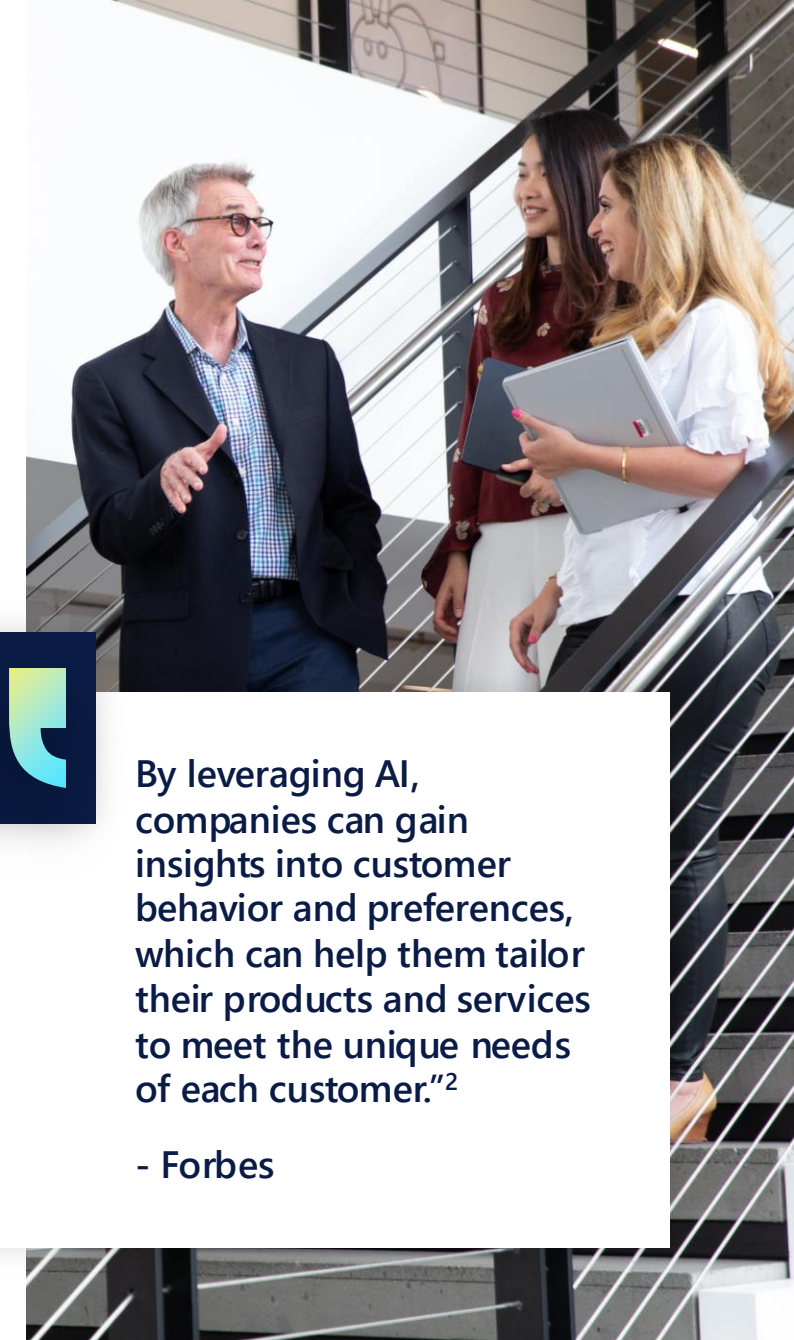
SMB Challenges

We understand the margin pressures and priorities to resolve burn business issues often limits the available resources to implement technology solutions with:

sellers spending only **20 – 30%** of their time on sales activity3

40% of SMBs do not have any full-time IT staff[4]

of those that do have in-house IT, **63%** have between 2-4 IT staffers.[5]

But there is a need to establish and maintain intimate relationships with your customers and prospects.

This is the value AI delivers to SMB.

Chapter 1:

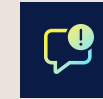# Understanding the value of AI enhances sales for small to medium businesses

While the subject of AI is everywhere in today's media, sellers within small to medium business (SMB) organizations, are eager to embrace AI with 65% of SMB sellers confident in using AI, or about the prospect of using it, in customer-facing functions.[6]

Sales, salespeople, and sales operations for small and medium-sized businesses are looking to AI to have a significant and immediate impact on their business, delivering benefits such as:
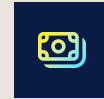
Improved lead quality:
AI **analyzes** large amounts of data identifying the most promising leads based on prospects' behavior, demographics, and previous interactions.

Reduced costs:
AI enables businesses to **save money** by eliminating the need to hire more sales staff or train existing staff on new technologies.

Improved sales data analysis:
AI uses predictive analytics to gain insights into customer **behavior and preferences**, enabling sales teams to make **informed decisions** for each interaction.

Better customer insights:
AI provides **insights** into customer behavior, assisting sales teams to increase sales.

Automated administrative tasks:
AI **automates** tasks such as lead generation and customer data management, giving salespeople more time to focus on selling.

Better sales training:
AI improves sales training by analyzing data on sales performance and providing **customized** training based on individual needs enabling sales leadership to focus on mentoring and value-added coaching.

Ultimately, AI helps you **streamline the sales process, improve customer relationships**, and **enable data-driven decisions**, all on a secure, proven platform.

Introducing Microsoft Dynamics 365 Sales, a CRM for SMB

Microsoft Dynamics 365 Sales is a cloud-based Customer Relationship Management (CRM) and Sales Management (SM) solution assists SMBs to improve their sales processes and customer intimacy. With built-in AI and Microsoft's Copilot capabilities, you get the full benefit of AI, on a proven, reliable platform.

Designed with small-to-medium businesses in mind.

Grow as you grow.

Built on Microsoft Azure cloud platform for low maintenance.

Microsoft Teams integration allows collaboration at no additional cost.

Microsoft Teams helps put collaboration in context and provides actionable next steps using AI-driven insights, allowing sellers to be more productive and build stronger customer relationships.

14 data security and compliance certifications

Fourteen data security and compliances certifications for Azure, including: 1SO 27001, ISO 27018, SOC 1, SOC 2, SOC 3, FedRAMP, HITRUST, MTCS, IRAP, ENS, GDPR, HIPAA, HITRUST, and FERPA.[7]

The merging of AI capabilities with your CRM empowers you to **streamline the sales process, improve customer relationships, and enable data-driven decisions.**

AI driven CRM/Sales automation enables

Streamlined sales processes.

74% of seller expect AI process automation to deliver value.[8]

Sales Automation and CRM systems provide SMBs with a **scalable** and **flexible** platform that **automates** routine tasks such as lead management, sales forecasting, and reporting, streamlining sales processes, reducing administrative overhead, and allowing sales teams to **focus on revenue-generating activities**.

Improved customer relationship.

Just 4.2 hours of the workweek are spent on meaningful customer interactions.[9]

By **centralizing** customer information, Sales Automation, and CRM systems enable SMBs to **personalize** interactions with customers, **respond** to their needs more effectively, and **build stronger relationships** with them, facilitating the modernization of the SMBs' brand and building on prior experience with customers.

Enabled data-driven decisions.

68% of seller expect AI to provide impactful business insights.[10]

Sales Automation and CRM systems empower SMBs to **accelerate sales** by utilizing customer, marketing, and sales data to identify **ideal customer targets**, provide sales guidance, and collaborate with peers, enabling data-driven decision-making, **optimized sales strategies**, and **improved overall business performance**.

We will modernize our brand."

– Brand Marketing

We will deliver more personalized and timely communications to prospects and customers."

– Sales

We will use one system that centralizes all our data, automates key processes, and provides a single, unified view of our customers."

– Sales and Marketing Operations

Dynamics 365 Sales automates sales tasks

Microsoft Sales Copilot uses AI to reduce the time your sales team spends on mundane tasks, allowing them to focus on connecting with customers. In fact, it is estimated that 30% of sales tasks can be easily automated.[11]

Unlock sales productivity

Email assistance:

Get AI assistance to write emails and propose meetings utilizing data from Dynamics 365 Sales and Microsoft 365 Graph

Automated summaries:

Get AI-generated email and meeting summaries with follow-up tasks

Intelligent transcriptions:

Free sellers from manual notetaking with meeting transcriptions and recordings with competitor mentions and action items

Personalize customer interactions

Call insights:

View real-time tips, related information, and suggested answers to customer questions during Microsoft Teams calls

Meeting preparation:

Get AI assistance to prepare for meetings with summaries of relevant customer and opportunity details and past activities

Conversation intelligence:

View customer sentiment analysis and KPIs like talk-to-listen ratio, talking speed, and conversation switches during calls in Microsoft Teams

Stay in the flow of work

Customer record syncing:

Get AI assistance to add and edit customer details directly in Microsoft Teams and Outlook and sync to Dynamics 365 Sales

Customer cards:

Easily surface and share contact, opportunity, and account information from Dynamics 365 Sales in Microsoft Teams and Outlook

Collaboration spaces:

Create collaboration spaces in Microsoft Teams with pre-built templates like deal room and integrated access to Dynamics 365 Sales data

Realizing the full value of AI enabled CRM through partners

In order to realize the full benefits of AI, your data must be good, and the system configured for your specific business requirements. An experienced partner, with the expertise to implement Dynamics 365 Sales enables you to quickly realize the full potential of AI and Copilot in your sales activities. Partners are certified to assist you with:

Data Configuration and Migration:

- Configuring and migrating data from legacy systems or other CRM platforms to Dynamics 365 Sales.
- Ensuring data integrity, mapping data fields, and performing data validation.

Digital Transformation:

- Adapting existing sales processes and workflows to align with Dynamics 365 Sales and AI capabilities.
- Identifying areas where AI and Copilot can enhance sales efficiency and effectiveness.

User Adoption and Training:

- Ensuring that employees are trained on how to effectively use Dynamics 365 Sales and leverage AI and Copilot features.
- Encouraging user adoption and addressing any resistance to change.

Customization and Configuration:

- Tailoring Dynamics 365 Sales to meet the specific needs of your business, including creating custom entities, fields, workflows, and reports.

Integration with Other Systems:

- Integrate to the Microsoft Dynamics 365 suite of solutions including Microsoft 365, Dynamics 365 Finance and Operations, Dynamics 365 Customer Engagement, Dynamics 365 Marketing, Dynamics 365 Customer Services.
- Integrating Dynamics 365 Sales with other business systems, such as third-party ERP systems, marketing automation platforms, or customer support tools, to ensure seamless data flow and process automation.

Ongoing Support and Maintenance:

- Providing ongoing support and maintenance services to address any issues, updates, or enhancements required for Dynamics 365 Sales and AI features.

Navisiontech, a Microsoft partner, is committed to your success

MS Dynamics 365 Sales implementation partners with AI and Copilot capabilities, must meet and maintain certain requirements while undergoing specific training.

Microsoft continuously measure and recognize experts at delivering solutions with Dynamics 365 and Power Platform

- Microsoft measure and recognize Microsoft Solution Partners who proven high broad technical capabilities and demonstrated success delivering technology solution.

- Partners need to demonstrate expertise in selling and implementing Microsoft Dynamics 365 solutions, including Dynamics 365 Sales with AI and Copilot capabilities.

- Partners need to stay up-to-date with the latest product releases and enhancements to maintain their certifications.

Return on investment (ROI) for AI enabled CRM

The use of generative AI specifically for sales is still relatively new. As a result, a definitive impact of AI specifically for sales is still to be determined; however, for marketing efforts, leading to sales, SMB have realized positive ROI:

66% of marketers using generative AI have witnessed positive ROI, with many seeing a 3x ROI with cost efficiencies improving over time.[12]

While SMB workers estimate AI to save them:[13]

21% of their time listening to voicemails

23% of their time coaching or training other team members

23% of time in meetings to recap customer interactions

27% of time building reports analyzing customer data

25% of time transcribing and writing notes

28% of time manually transferring or inputting data

This is all time that your sellers can now spend on selling!

The experience of your value-added partner enables you to realize the full value and potential of your Dynamics 365 Sales with AI and copilot implementation.*

* It is important to note that the effectiveness and time-saving benefits of generative AI may vary depending on the specific implementation and usage within an organization. Proper training and adoption of the feature by sales representatives will also play a role in maximizing the time redirected to direct customers' and sales activities.

What do customers say: Streamlining sales and lead generation

All companies are looking to technology to streamline sales and lead generation:

59% Reported improved sales quota achievement:[14]

While the effectiveness and time-saving benefits of generative AI may vary depending on the specific implementation and usage within an organization, proper training, and adoption of the feature plays a role in maximizing the time redirected to direct customers and sales activities.

> The impact of the solution has been immediate since it has gone live, with a 20 percent increase in sales meetings, orders up by 15 percent, and sales boosted by 10 percent.[15]"
>
> – **Thomas Johansson**
> CEO, *iQ Fuel*
> *retailer, small (1-49 employees)*

75% of respondents said their cost per conversion decreased when they implemented CRMs:[16]

Dynamics 365 Sales automates sales processes for SMBs, boosting productivity, saving time, and allowing sales teams to focus on closing deals. The platform integrates with other applications commonly used by businesses, covering every aspect of their business cycle, increasing sales and marketing returns, and cutting down on costs.

> The CRM system now offers back-end automation that helps reduce the workload for sales personnel. "The solution's Excel upload capabilities save each sales representative two to three hours weekly by uploading customer data automatically into the system— meaning a total of 130 to 195 hours per week saved," says Schmitt. Dextra's new CRM also offers better lead management through automation—it analyzes multiple sales inquiries to identify leads with higher potential while marking those that may require additional follow-up. [17]"
>
> – **Matthew Paul Schmitt**
>   Group ITS Manager, *Dextra*
>   *manufacturing, medium (50 – 999 employees)*

What do customers say:
Enhancing customer relationships

Centralized view of your customers:

Dynamics 365 Sales provides SMBs with a centralized customer data platform, offering a 360-degree view of customer interactions, improving communication and coordination across sales and service teams, and leading to improved customer satisfaction, NPS scores, and retention.

Dynamics 365 Sales functionality—including account and opportunity management—provides enhanced visibility across all stages of the account management process. The solution features a business process flow among its opportunity management capabilities, guiding users and providing the team with the ability to track and report during each stage of the sales process.

Thanks to Dynamics 365, there is greater transparency across the whole sales process, enabling our employees to make better, more informed decisions.[18]"

– **Pat Stack**
Client Director, SalesSense
International Ltd., professional services, medium (50 – 999 employees)
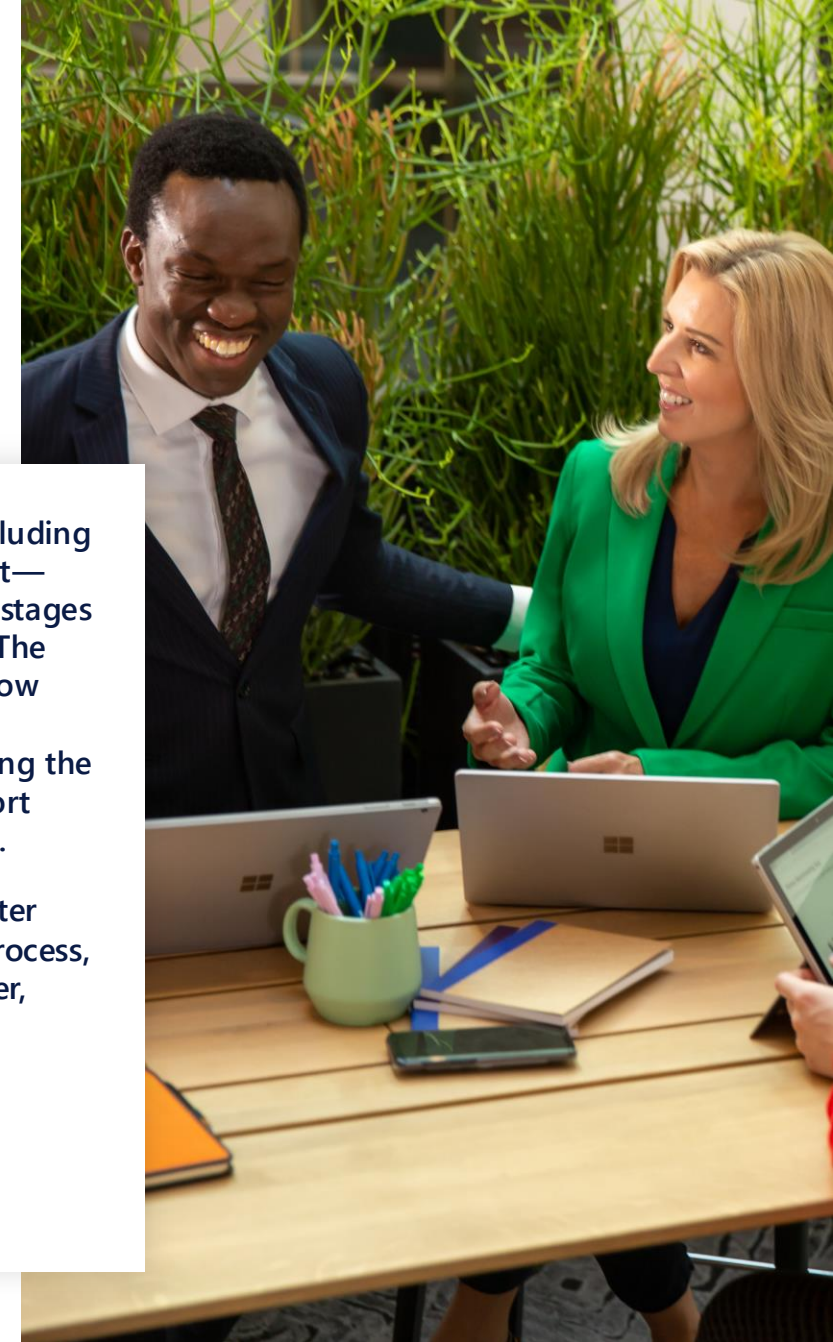
The large majority of B2B buyers (82%) want personalized communications from all brands or brands they give permission to:[19]

Dynamics 365 Sales enables SMBs to segment customers to tailor their marketing and messaging, delivering more personalized and timely communications and a better overall experience to prospects and customers.

> Not only do sales team members have the context to deliver personalized conversations, but they also know the right time to engage. Knowing when to reach out to a client is especially helpful because it allows the sales team to seize the moment when clients are most receptive, which is especially important since decision-making is often based on emotions rather than hard facts and figures.[20]"
>
> – **Daniel Ziriakus**
>   President & COO, *Northrop & Johnson*
>   *retailers, medium (50 – 999 employees)*

What do customers say: Data-driven decision making

Dynamics 365 Sales harnesses the power of data analytics, enabling SMBs to make informed decisions and gain valuable insights into sales performance, customer behavior, and market trends.

With Dynamics 365 Sales, organizations can address common challenges such as:

Missing out on revenue opportunities due to a lack of data and insights;

Dynamics 365 Sales provides valuable insights into sales performance, customer behavior, and market trends, enabling businesses to make data-driven decisions, prioritize leads, manage prospects effectively, and serve as a single source of truth, optimizing sales processes and driving growth

Accurately measuring the impact of marketing and advertising campaigns;

Dynamics 365 Sales measures the impact of marketing campaigns by tracking customer responses and costs, providing analytics and KPIs based on customer reactions, and offering features like in-app marketing and predictive scoring for targeted campaigns and improved sales performance.

Optimizing marketing, sales, and customer service processes.

Dynamics 365 Sales optimizes marketing, sales, and customer service by providing valuable insights into sales performance and customer behavior, lead management and opportunity tracking features, collaboration tools, and Microsoft Teams integration to enhance teamwork and customer engagement

Dynamics 365 Sales empowers businesses to gain a competitive edge by unlocking the potential of their data, enabling data-driven decision-making, optimizing marketing strategies, improving sales performance, and delivering exceptional customer experiences.

Supercharge your sales team!

Small and medium businesses (SMBs) continue to be the backbone of the global economy, representing over 90% of all businesses, but need solutions designed specifically for their needs.

Dynamics 365 Sales, with AI and copilot, helps SMBs manage and track leads, opportunities, and sales pipelines. With reduced manual work and automated tasks, SMBs save time and can focus on closing deals.

Now with Dynamics 365 Sales platform, combined with the implementation and experience of your value-added partner, AI assisted sales technology enables you to optimize your sales efforts through intelligent reporting, data-driven decision-making and a guided sales approach.

Now is the time to prepare for the future, get ahead of the competition, and empower your sales team with next-generation AI-assisted sales.

To get started, contact Navisiontech, Inc
sales@navisiontech.com, (941) 914 9144

www.navisiontech.com
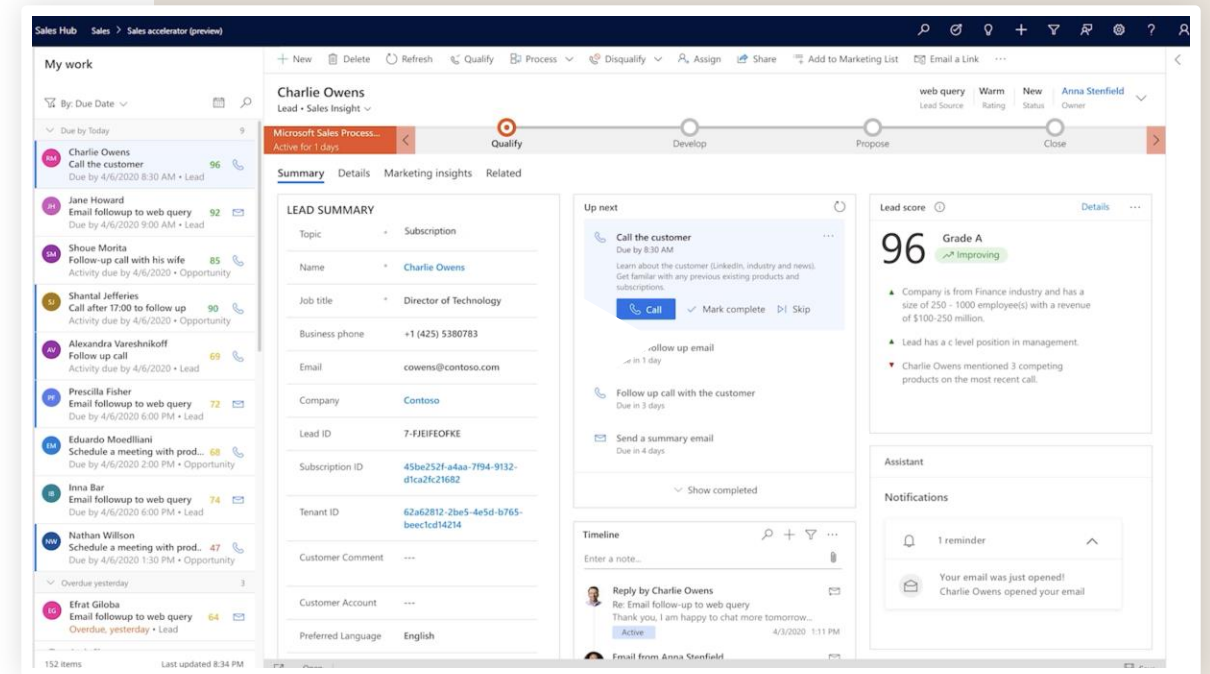
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