HCLTech | Supercharging Progress™

Microsoft

The **Dynamics 365** Advantage:

AI-Driven CRM

Table of contents

00

Introduction

01

The Changing Sales Landscape

Increased Competition, Buyer Expectations, and Data Overload

The Challenges of Outdated CRM Systems

02

Introduction to Copilot in Dynamics 365 Sales

Integration and Ease of Use

Benefits of Integration

Important Features

03

A Deeper Dive into how Copilot Enhances Dynamics 365 Sales

AI-powered Personalization

AI-Driven Process Automation

AI-powered Predictive Analytics

04

Conclusion

05

Your Next Step to Understanding How AI Can Transform Your Sales Team

What You'll Receive

Your Path to AI-Driven Sales Transformation

06

Contact Us

Introduction

Finding, tracking and closing deals is the bread and butter of any sales team but doing it quickly and efficiently is swiftly becoming a top challenge as the requirements of the job grow.

Advanced CRM solutions have come to the fore in the past two decades as a way for sales teams to keep up, but today many of those CRM systems are just systems of record, and they are struggling to support the growing complexities of the job.

The emergence of AI as a powerful business tool has given many organizations hope that it holds the answer to their sales-related challenges. And as AI technology has evolved and matured, with responsible stewards like Microsoft working hard to push its ethical and legislation-compliant use, that dream is starting to become reality.

Microsoft Dynamics 365 Sales is an AI-driven CRM solution built on a fully connected and secure data platform. It empowers sales teams to perform the tasks required of them faster and more efficiently thanks to its powerful built-in Copilot AI, an out-of-the box embedded artificial intelligence with automation capabilities.

This eBook will explore the AI-driven capabilities within Microsoft Dynamics 365 Sales as they relate to the sales process, and how it can help sales teams become the powerhouses of efficiency, speed, and innovation they need to be in the modern era.

The **Changing Sales** Landscape

Increased Competition, Buyer Expectations, and Data Overload

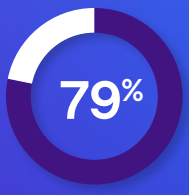
One of the key challenges faced by sellers today is balancing everything they must do to land sales with a range of time-consuming admin duties, all while offering their customers a personalized experience and without dropping any balls.

With so many demands on their time, sellers can struggle to maintain their effectiveness, their job satisfaction can suffer, and their time management skills are constantly under pressure.

To make things even worse, sellers are overwhelmed by data overload and the need to provide a personal touch for new and existing customers.

To highlight this:

79% of sellers in a 2022 survey reported that the expectations of what success looked like increased in the year prior.



79% of sellers surveyed in a 2023 report indicated that they now supported more customers and accounts than they did a year ago.

70% of sellers' time was being spent on administrative and non-selling duties, like researching prospects, manually entering sales data, and preparing for meetings.

While CRM systems are common across sales teams the world over, many sellers are finding that older CRM systems aren't as helpful as they could be. They are burdened by cumbersome workflows and a lack of native AI capabilities to help them complete their tasks, leading to the perception that CRMs are used more for monitoring workers than as tools to benefit them.

Consequently, sales teams without AI-driven CRMs in today's market struggle to compete against those that are making full use of all available technologies.

The Challenges of Outdated CRM Systems

Sales teams using outdated CRM systems face several significant pain points:

- **Cumbersome Workflows:** Outdated systems often have difficult and unintuitive workflows, which can make performing daily tasks take longer.
- **Data Overload:** They don't always offer ways of managing and analyzing large volumes of data which can hamper decision-making and strategic planning.
- **Lack of Integration:** Older CRMs may not integrate well with other tools and platforms, resulting in siloed data and manual data entry.
- **Limited AI Capabilities:** Modern CRMs offer AI-driven features for personalization, predictive analytics, and automation, which outdated systems lack.
- **Poor User Experience:** An outdated interface can be less intuitive and harder to navigate, reducing user adoption and the time it takes to complete tasks.
- **Inadequate Mobile Support:** Older CRMs might not offer robust mobile access, which is critical for sales teams on the go.
- **Data Overload:** Without advanced analytics, sales teams struggle to make sense of large volumes of data, leading to missed opportunities.
- **Security Risks:** Outdated software may not have the latest security features, making it vulnerable to breaches.

For sales teams to perform at their peak, they need a CRM that not only addresses these challenges, but one that is easy to operate and thoughtfully set up to maximize their efficiency.

Introduction to **Copilot in Microsoft Dynamics 365 Sales**

Microsoft Dynamics 365 Sales is more than just a standard CRM solution; it includes the latest in AI and Copilot capabilities that enhance the selling process.

This state-of the art solution gives sellers access to advanced AI-powered functions that help them identify high-potential leads, automate the everyday tasks that have previously slowed them down, and deliver the kinds of personalized experiences their customers expect.

Integration and Ease of Use

Microsoft Dynamics 365 Sales' major strength lies in its seamless integration with Microsoft's productivity and collaboration suite, including Microsoft Office and Teams. This integration with familiar interfaces enhances user adoption, minimizes training time for new recruits, and facilitates smooth communication and collaboration with both customers and colleagues.

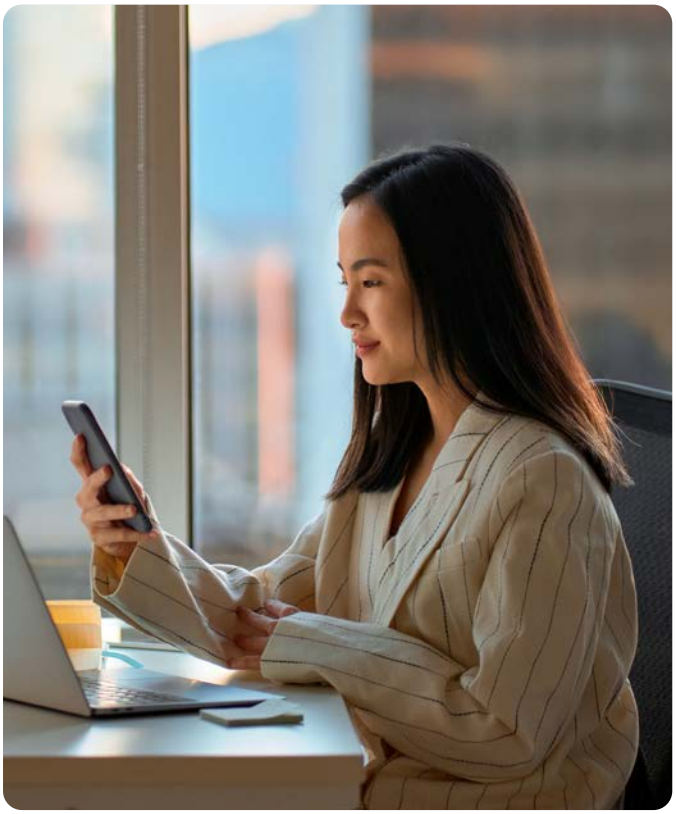
Benefits of Integration:

- **Increased Productivity:** Sales tasks and workflows are far more streamlined with a unified platform, as less time is spent switching between applications.
- **Enhanced Collaboration:** Users can easily share information with Teams, allowing sellers to work together on sales strategies and pitches.
- **Familiar Interface:** Reduces the learning curve and increases adoption.
- **Generated Presentations:** Saves hours of time spent creating slides for sales pitches and other presentations with seamless and collaborative Copilot integration with PowerPoint.

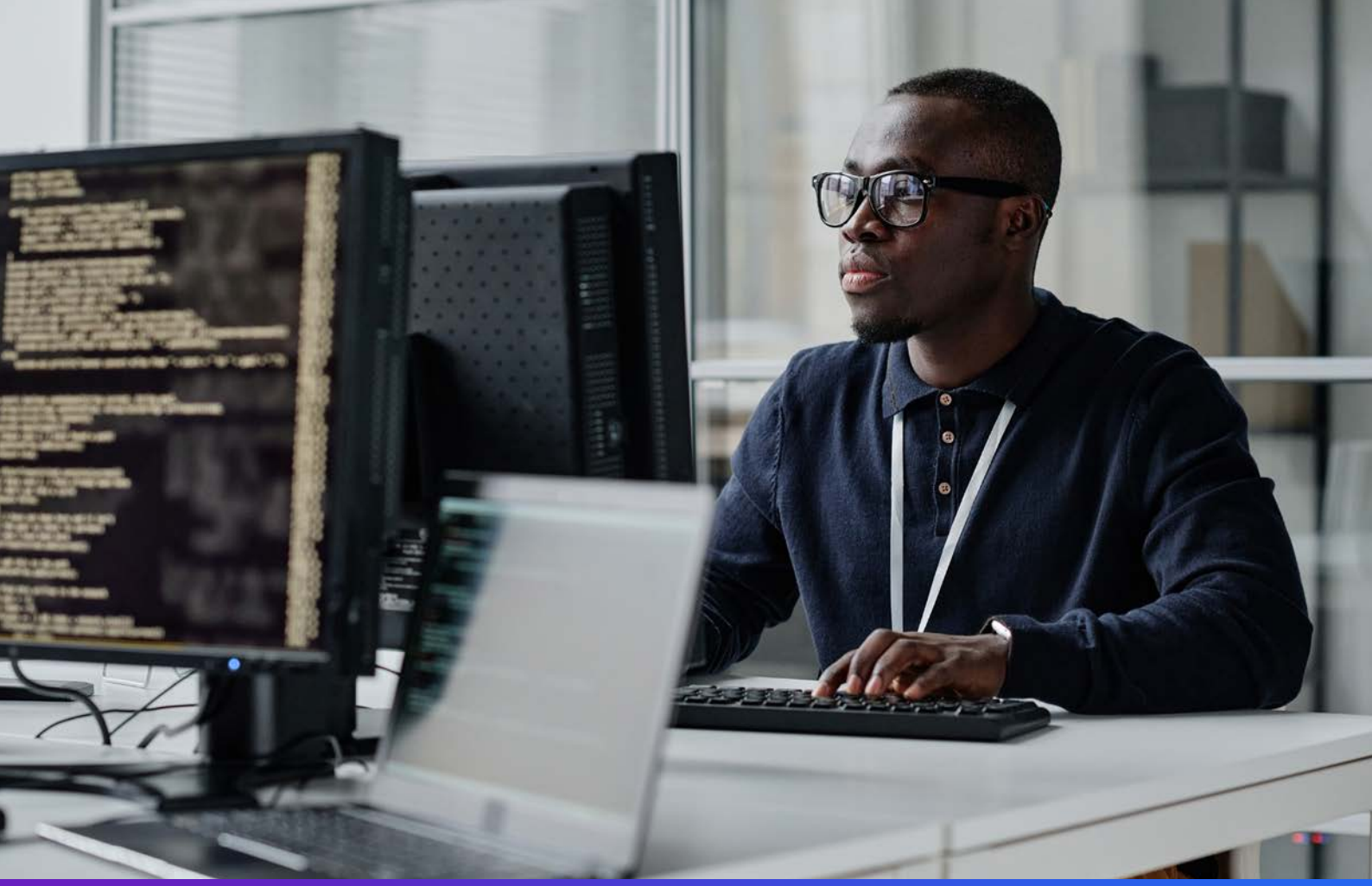
Important Features

Microsoft Dynamics 365 Sales comes packed with AI-supported features that can transform your sales operations:

- **AI-powered Personalization:** Customer interactions can be customized using prospect data.
- **Process Automation:** Tasks and workflows can be automated to save time.
- **Predictive Analytics:** Sales data can be analyzed and used to find sales opportunities, highlight deal risks, and prevent customer churn.
- Give sellers access to the visualization of their live sales data, presented via interactive packed dashboards and reports which can be tailored or integrated with other analytics tools such as Microsoft Power BI.



A Deeper Dive into how AI Empowers Sales Teams



AI-powered Personalization

Smart Prospecting

Microsoft Dynamics 365 Sales can help users identify high-potential leads and personalize communications to prospects. Leading sales teams understand the value of having a solution that can assist with streamlining communications, so they can focus on advancing their most promising opportunities.

Dynamic Email

Dynamics 365 Sales provides sellers and sales managers with valuable insights into how customers interact with their emails. By tracking and analyzing email engagement, Dynamics 365 Sales helps build stronger customer relationships, enabling more personalized and effective communication strategies.

Automated Content Generation

AI-driven content generation can create targeted and relevant content based on prospect data which can be tailored with each seller's style. This not only saves time but also helps sales messaging resonate with the intended audience, enhancing engagement and increasing the likelihood of positive responses.

Email Integration

Seamless email integration with Microsoft 365 allows sellers to automatically save incoming emails directly into Dynamics 365 Opportunities and Accounts, so that communications are captured and easily accessible within the sales process.

AI-Driven Process Automation

Streamlining Processes

Copilot in Dynamics 365 Sales can automate repetitive tasks that take a lot of time, like manual data entry and reading and sending emails. This frees up your sales team to focus on more meaningful tasks.

Meeting Preparation

For example, by seamlessly integrating with Microsoft Outlook and Teams, Dynamics 365 Sales empowers salespeople to stay ahead of their tasks. With Copilot, they can effortlessly prepare for meetings, catch up on important emails, and manage their workload more efficiently. This integration means that sales teams are ready and equipped to respond quickly and effectively.

AI-powered Predictive Analytics

Sales Opportunity Scoring

Microsoft Dynamics 365 Sales can identify the most promising leads using its AI-powered insights. Various data points are analyzed to give each opportunity a score, allowing your team to focus their efforts on the prospects that are statistically more likely to respond positively.

Sales Lead Scoring

AI is used to analyze customer interactions and behaviors, assigning scores to leads based on their potential value. Organizations can customize these scoring models to fit their specific needs, and scores are updated in real-time. This system integrates with automated workflows, helping sales teams focus on high-priority leads.

Deal Risk Prediction

Potential roadblocks in the sales pipeline are proactively assessed with AI-driven risk predictions. Armed with this foreknowledge, your team can take the necessary preventive actions and make sure that deals move smoothly towards closure.

Conclusion

Sales teams are under a lot of pressure to perform.

Their everyday task lists are filled with minutiae that take time away from the far more important task of selling. Compounding matters, the definition of 'success' changes every year.

The advent of AI-powered CRM is revolutionizing the sales process for sellers and their customers. Microsoft's powerful AI capabilities, integrated into Microsoft Dynamics 365 Sales, and with seamless integrations into the rest of the Microsoft productivity suite, address key challenges faced by sales teams and unlock more selling potential. Tedious tasks are replaced by automated workflows, prospects are identified faster than ever, and the most relevant sales information is right at each seller's fingertips.

At HCLTech, we are a global technology leader with over 227,000 passionate professionals across 60 countries, delivering industry-leading capabilities centered around digital, engineering, cloud, AI, and software.

Powered by a broad portfolio of technology services and products, we serve clients across major industries, including Financial Services, Manufacturing, Life Sciences, Healthcare, Technology, Telecom, Media, Retail, CPG, and Public Services.

Our mission is to be the world's number one Microsoft Business Applications Provider by delivering solutions that help organizations increase productivity, streamline business processes, and build stronger relationships.

Our partnership with Microsoft is built on HCLTech's world-class digital innovation capabilities. Together with Microsoft's market-leading enterprise technology, we enable enterprise customers to embrace disruptive innovation by migrating to and building cloud-native services that align with their unique business goals.

At HCLTech, we are committed to innovation and delivering superior AI-powered solutions. This dedication to our clients' experiences has been recognized with the 2024 Microsoft Partner of the Year Award, cementing our position as a leader in the Microsoft Services marketplace.

Our dedicated team leverages Microsoft Business Applications, Copilot Studio, and Azure OpenAI Service to create custom solutions that enhance productivity, streamline processes, and build stronger relationships.

HCLTech has also been certified by the Top Employers Institute as a Top Employer in 26 countries, with a No. 1 ranking in 15 countries across Asia Pacific, North America, and Europe.

Your Next Step to Understanding How AI Can **Transform Your Sales Team**

In the rapidly evolving technology and business landscapes, there is an urgent need to help enterprises avoid AI tech debt, reduce the dilemma surrounding AI implementation choices, and adopt AI with trust and reliability.

At HCLTech, we have been building and deploying enterprise AI solutions for almost a decade. Generative AI plays a crucial role in enhancing productivity and supporting sales professionals in all aspects of their role.

Thanks to Copilot's seamless integration with the Microsoft 365 Platform, sales teams are able to create effortless sales pitches and presentations with the help of PowerPoint, saving crucial time for sales teams empowering them to reimagine customer engagements, innovate new services, and even pioneer novel sales models.

Our Customer Engagement Vision and Value Workshop is your key to unlocking a future of groundbreaking sales strategies. It empowers your teams to personalize conversations, automate tasks, and leverage data-driven insights for superior performance while taking collaboration to new levels.

During this unique two-week engagement for your organization, we'll help you envision revolutionary solutions to your biggest challenges by asking and exploring thought-provoking questions like "What if..." and "Imagine if..."

What you'll receive:

- **A prescriptive Needs Assessment for CRM migration to Dynamics 365 Sales:** We'll provide a Gap analysis and uncover desired business outcomes, measures of success, and solution priorities. We'll also challenge the status quo and spark innovation to revolutionize the way your teams sell and serve.
- **Envisioning Session—The Art of the Possible:** We'll create a vision for your AI-powered sales transformation and showcase the value of migrating to Dynamics 365 Sales.
- **A Project Plan:** We'll create a standard business value analysis and proposal for your CRM migration, providing you with a project blueprint and boardroom-ready business case.

Your Path to AI-Driven Sales Transformation

We recognize that migrating from a legacy CRM to Dynamics 365 Sales can be complex and time-consuming. HCLTech's XitForce bridges this gap. It is a migration solution that accelerates the transition from Salesforce (SFDC) to Dynamics 365 Sales.

Agility and comprehensive customer insights are key to staying ahead in the market. Switching from SFDC to Dynamics 365 Sales offers unparalleled integration with existing Microsoft products, advanced AI capabilities, and a flexible, user-friendly interface that empowers teams to achieve more.

XitForce isn't limited to standard migrations. Its solution framework, built on Microsoft Dynamics, is developed for complex migrations ensuring sensitive data is not lost. XitForce can be utilized to rapidly migrate desired functionality from your legacy SFDC environment to your new Dynamics 365 environment, allowing you to focus on gaps and spend less development time on fits.

Key Features of XitForce:

Automated Solution Creation: XitForce swiftly sets up a new D365 environment, auto-generating solutions and schema directly from SFDC outputs with a click-friendly interface.

Rapid Functionality Migration: Eliminate manual configuration with XitForce's quick transfer of SFDC functions to D365, streamlining your focus on enhancement knowing like-for-like functionality is created correctly.

Rapid Customization Migration: Eliminate manual coding with XitForce's quick transfer of SFDC functions to D365, powered by Azure Gen AI, streamlining your focus on enhancement rather than setup.

Optimized Project Timing: XitForce's rapid schema build allows early integration efforts in the development cycle and cuts down SFDC to D365 migration time, facilitating a seamless user transition.

Data Migration: XitForce's integrated pipeline allows for ADF creation of data maps for immediate data migration capability.

Connect with us to find out more

Enterprises achieve their business goals by utilizing HCLTech's top-notch digital innovation capabilities in combination with Microsoft's industry-leading enterprise technology.

Dynamics 365 Sales does more than enhance operational efficiency. It also provides a seamless experience that adapts to your unique business needs, ensuring that every customer interaction counts. Make the switch to Dynamics 365 Sales and transform your customer relationships with a platform that grows with you.

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Microsoft Dynamics 365

HCLTech is a global technology company, home to more than 219,000 people across 60 countries, delivering industry-leading capabilities centered around digital, engineering, cloud and AI, powered by a broad portfolio of technology services and products. We work with clients across all major verticals, providing industry solutions for Financial Services, Manufacturing, Life Sciences and Healthcare, Technology and Services, Telecom and Media, Retail and CPG, and Public Services. Consolidated revenues as of 12 months ending June 2024 totaled $13.4 billion. To learn how we can supercharge progress for you, visit hcltech.com.

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