

WHITE PAPER  
**2021**

PROMX



Unlocking the secret to success:  
**How to boost your sales  
processes**

# Content

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1. <b>Introduction</b> .....	3
2. <b>What does sales automation mean?</b> .....	4
The key to sales success.....	5
What good sales software does.....	6
Benefits of sales automation.....	6
3. <b>Our recommended solution</b> .....	7
How to turn customer needs into sales opportunities.....	8

## Introduction

How can successful sales teams deliver predictable and scalable results in times of constant change? This is a question you may have asked yourself if you work in the field of sales. You are faced with a wide range of challenges:



Rapid changes  
of buyer  
preferences



Sudden changes in business  
perspectives



Competitors  
develop  
dynamically



What you need now is an effective strategy and a suitable tool to automate and thus optimize your sales processes. In this white paper, we explain what sales automation is and how it will improve your work. We will also introduce you to the solution we recommend, **Microsoft Dynamics 365 Sales**.

## What does sales automation mean?

Sales automation means using software, Artificial Intelligence (AI) and other digital tools to support manual and time-consuming tasks in sales. Sales automation could be the answer to all your selling issues.

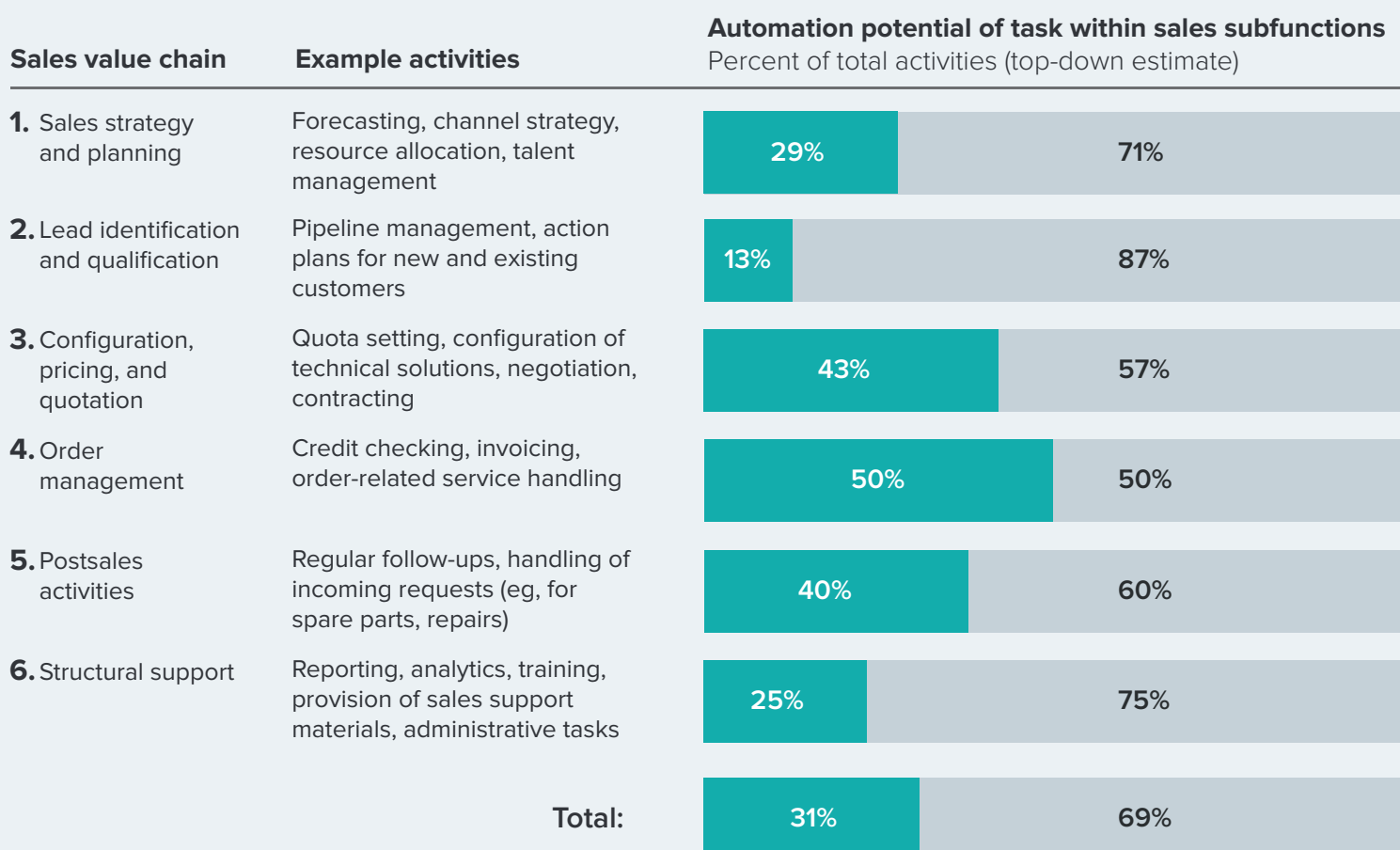
- You lose deals because you forget following up on them?
- You spend precious time adding opportunities or leads to your CRM?
- You have overlooked an important detail in your sales process?
- You waste too much time searching through your files to find a specific document?

If you relate to any — or all — of the above, you need **sales automation**.

Automating standard tasks is easy. Research by the McKinsey Global Institute (MGI) revealed that even a third of all sales process tasks can be easily automated with today's technology.

### More than 30% of sales-related activities can be automated.

■ Highly automatable with today's technology





## The key to sales success

The following points are crucial to improve your sales processes. There are also certain requirements for an optimal software solution.



### **Data is the heart of the sales process**

High-performing sales departments need access to consistent data and a common sales tool. Therefore, a sales application needs to support the management and synchronization of lead, account, and opportunity data.

### **Sellers need an accurate overall picture of the processes**

To efficiently develop an action plan and a strategy, it is important to bundle data from different sources. Sales people need to be able to make out patterns and correlations in this data in order to learn how prospects engage with sales content.



### **The right tools enable engagement at scale**

With access to appropriate CRM software, sales teams can engage prospects at scale. A predefined sales process makes it easier to guide leads through the sales funnel.

### **Sales and marketing alignment is essential**

Alignment between sales and marketing is crucial for achieving revenue goals. Exchanging feedback between departments is just as important as sharing reports and insights.



**We also recommend our white paper  
on marketing automation**

## What good sales software does

Sales software supports the tasks in sales controlling, sales management and in the field. A good solution must

- be accessible from mobile devices and provide access to all information from any location.
- let you manage contacts and projects from start to conclusion (e. g., display contact histories and change project status).
- include the option to create newsletters and emails.
- perform data imports and exports.
- be able to generate forecasts and evaluations.

## Benefits of sales automation

Sales automation benefits your business, sales team, and profit in multiple ways. It ...

- increases productivity and performance of your sales representatives.
- enhances your efficiency.
- improves accuracy and accelerates your sales process.
- ensures you not losing any leads.
- enables lead and opportunity scoring to identify potential customers among others and predict the expected revenue potential.
- optimizes the quality of your sales tasks.
- reduces response time which can increase customer satisfaction.
- keeps sales data consistent across your sales organization.
- allows efficient use of otherwise scarce resources (such as a small sales team or budget).



## We recommend Microsoft Dynamics 365 Sales

The most important benefits of Dynamics 365 Sales at a glance:

- Building trusting relationships with AI-supported consulting
- Increased productivity through sales automation
- Increased revenue by analyzing relationships and insights into business transactions
- Decision making based on real-time data and new trends
- Social intelligence to track consumer mood

**The solution includes:**

### Automatic checklists

Artificial intelligence can suggest the best time and interactions to your employees. If an email has been opened, AI can automate customer service tasks and create a checklist for further activities.

### Email engagement

Use email engagement to see when recipients read your message, clicked on a link, opened an attachment, or sent a reply. The system will show you the full interaction history for any message and calculate key performance indicators (KPIs).

### AI assistance

Embedded artificial intelligence supports you in communicating with potential customers. An AI assistant can identify the content of emails asking for feedback and send you a reminder to ensure you send a response to the customer in time.

### Sales Business Process

In Dynamics 365 Sales, a lead must be qualified or disqualified as a sales opportunity. Once a lead meets your requirements, it is ready to be qualified. It can then be transferred into an opportunity, account or contact.

### Lead and opportunity scoring

With transparent and realistic sales activities identify your most relevant leads and opportunities using scoring rules to define their priority.

### Forecasts

Forecasts help you predict how much revenue your sales team will generate in a given time. Use forecasts to track performance against your targets and identify risks that might jeopardize your goals.



Dynamics 365 Sales is an innovative sales management solution that helps categorize and evaluate leads using AI and machine learning. It is suitable for use in different companies and industries and can be customized to fit unique requirements.

## How to turn customer needs into sales opportunities

When your organization is equipped with the required tools to work in customer-centered ways, you can not only build trusting relationships with your customers, but also gain helpful insights to generate revenue from customer relationships.

### Microsoft technology helps you succeed:

#### Centralized, 360-degree view of each customer

The centralized save location of accurate and reliable data within Dynamics 365 Sales helps you identify, prioritize and close opportunities.

#### Foundation for further business transformation

By using Microsoft technologies, you gain useful insights into product features and functions, which you can also use to expand and optimize other business areas. As a result, you will find the best business application for every challenge.

#### Increased focus on customers and potential opportunities

Dynamics 365 Sales makes it possible to easily enter detailed customer data and access it at any time during a customer conversation. This helps you keep the focus.

#### Immediate visibility into unmet customer needs

Always fulfill your customers' needs. For example, using a Power BI dashboard embedded in Dynamics 365, you can effectively identify sales opportunities and plan your next steps.



# We offer a helping hand in your digital transformation

The ideal digital transformation partner is not only an expert in theory and technology but also in its customer's industry. Our consultants are familiar with the processes, priorities and challenges of different sectors. Contact us!

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