

DYNAMICS 365: YOUR COMPREHENSIVE GUIDE

DEMYSTIFYING THE PLATFORM SO YOU CAN DISCUSS IT WITH CONFIDENCE



WESTCOAST CLOUD

Gold
Microsoft
Partner



Microsoft

INTRODUCTION

Welcome to the Westcoast Cloud Dynamics Drive interactive guide. You've probably heard of Dynamics before: it's Microsoft's customer engagement and business management platform, a combination of CRM and ERP technologies that sits behind all your business processes. Dynamics helps to integrate and co-ordinate every part of an organisation.

We know Dynamics can seem like a big and complicated beast, but it's easier to deploy and manage than you might think. So our aim with this document is to help you tame it, and get it working for your customers.

We'll go through the capabilities and SKUs of course, but also the ways it can solve different business challenges. Employees from across your customers' businesses will be impacted by Dynamics – from finance, sales and marketing, to call centre and warehouse staff. To get value out of the platform, it's important to understand the impacts and benefits for all of them.

GET IN TOUCH

As always, if we've piqued your interest about Dynamics or you want to speak to our expert team about further training materials, you can get in touch at any time.



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LET'S BUST SOME MYTHS

A lot of the common objections we find with Dynamics are down to a lack of understanding. Some of our partners are worried that they don't have the resources or internal knowledge to run the platform, or can't see the business case to deploy it for clients. Here's the twist though: the more you understand your clients' business processes – how they work day to day, and what their pains and challenges are – the easier it is to establish the business case for Dynamics.

Here are just a few of the key benefits that customers can achieve on the platform:

- Secure, compliant data storage and transfer
- Powerful analytics and reporting for all business functions
- Simple collaboration and integration with other business processes
- Real-time data accessible on any device
- Improved speed and efficiency throughout the business
- A consolidated view of the customer, ensuring consistent experiences at every touchpoint

And with Westcoast Cloud's training, enablement, technical support and long experience of Dynamics, you should be able to deploy and manage the platform for your customers with confidence.

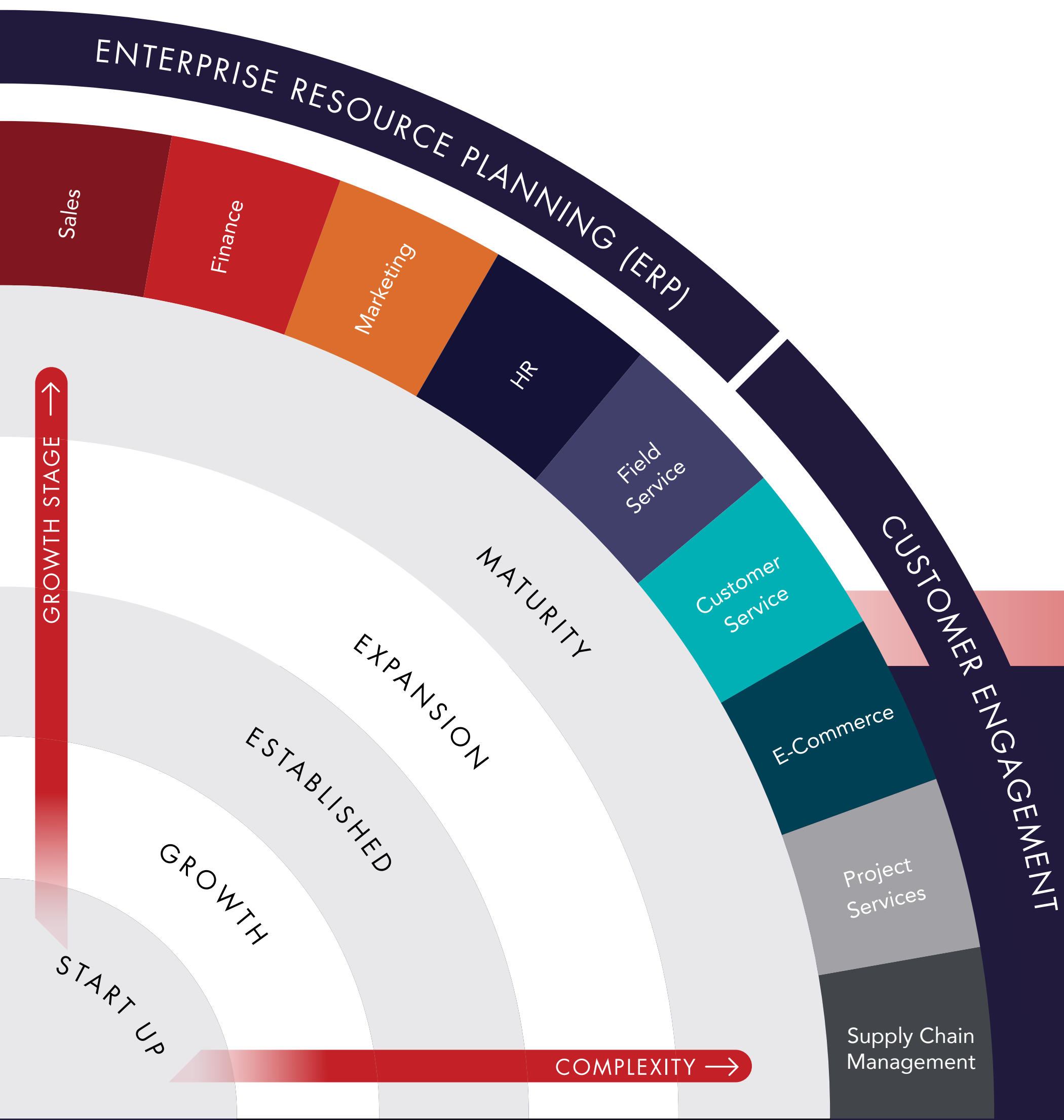
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HOW TO USE THIS TOOL

Here you'll see our radar diagram. You can use this to explore how Dynamics can help businesses of different sizes.

Click into any of the business functions or growth stages to navigate back to them, or you can always click the 'Home' button  which is located bottom right, to come back to the start.

STEP ONE

Click a relevant growth stage on the Radar

STEP TWO

Select a Pain Point from the right-hand column

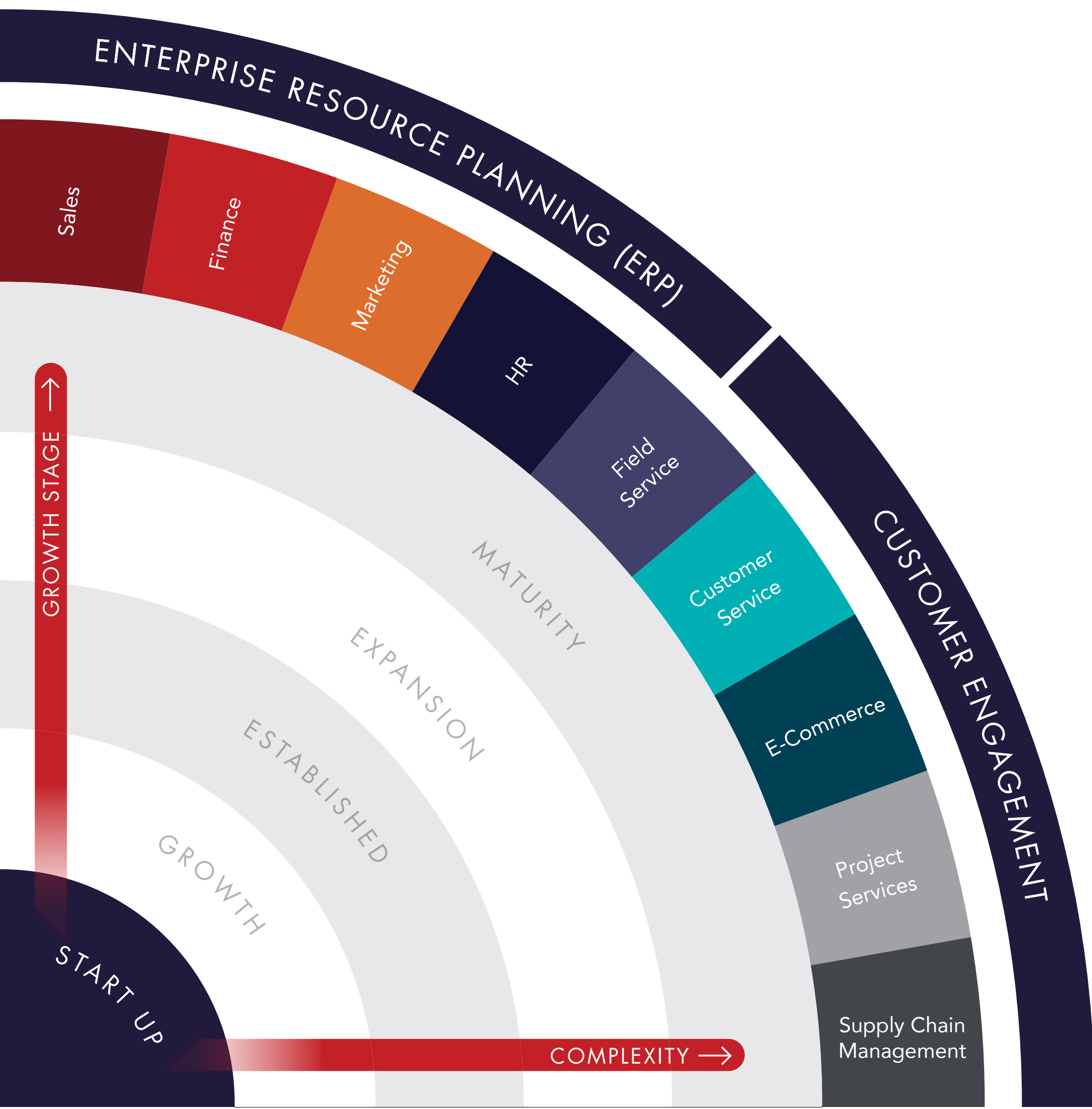
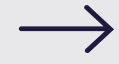
STEP THREE

Pick one of the highlighted business functions on the Radar to read more

First up, we'd suggest viewing this document in either Adobe Acrobat or in Google Chrome. Once you've opened it in one of those viewers, you're good to go.

← [CLICK ON THE DIAGRAM TO BEGIN](#)

Click on a **Pain Point**
to filter the Functions



START UP

Small businesses and new start-ups have fewer employees to deal with all of their business functions. That means a single person may be managing the finances, recruitment, or marketing – and they often need to work on the move or remotely.

Dynamics helps simplify, integrate and digitise these discrete processes, making it easier for employees to be productive and giving them more time to focus on growth and strategy. It also makes real-time data and processes available to remote workers.

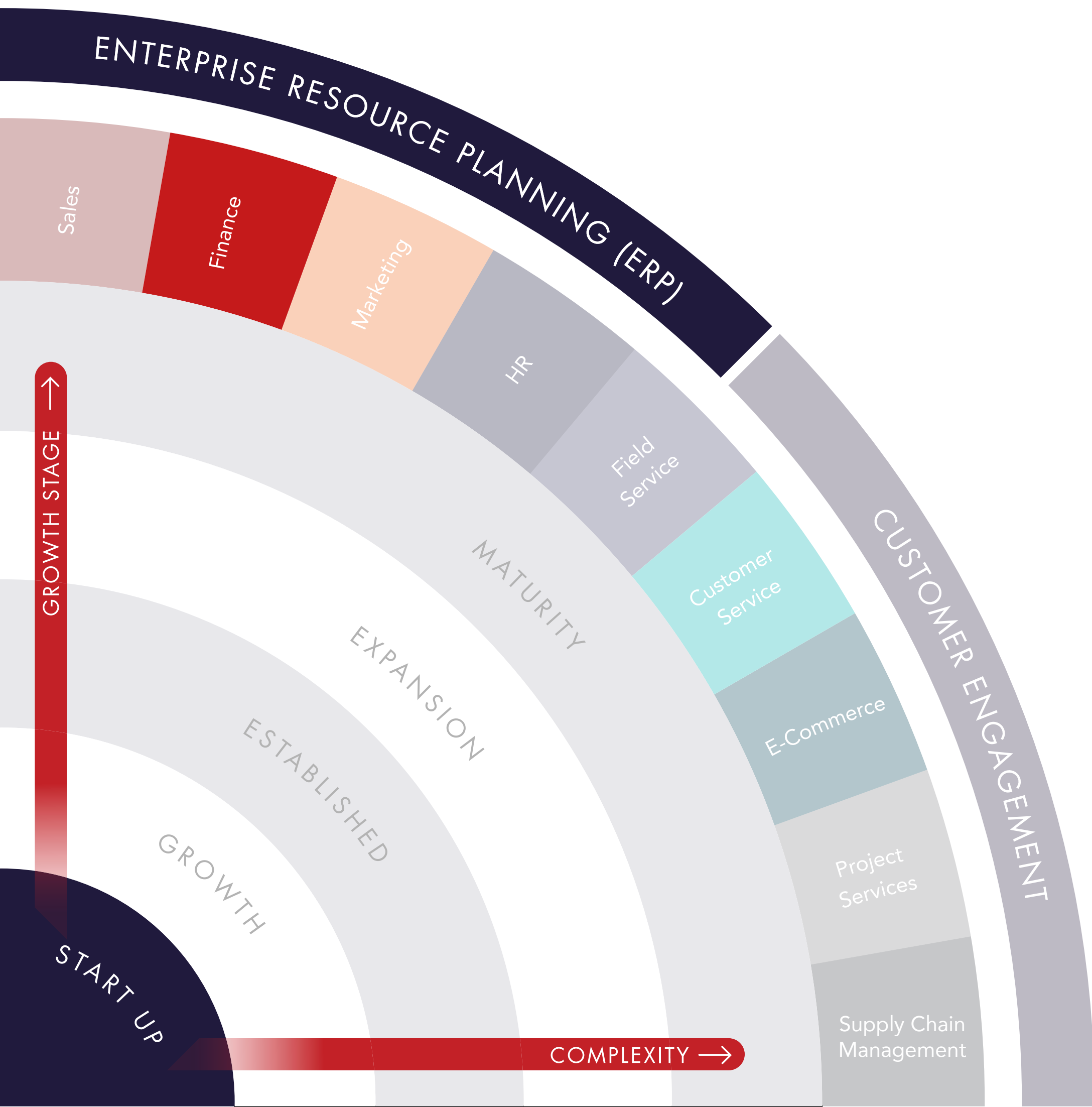
PAIN POINTS

Click on a Pain Point below:

- 1 Finding the resources to manage cashflow and balance sheets
- 2 Understanding how to gain new customers and nurture existing ones
- 3 Growth is restricted because staff can't deliver consistent service to a large customer base
- 4 Managing employees on a range of different contracts
- 5 Balancing business growth with rising costs, at the same time as developing a cohesive business strategy
- 6 Inability to react effectively to changing customer needs and build a reputation in the market
- 7 Getting ahead of day-to-day business to spend more time understanding how to grow



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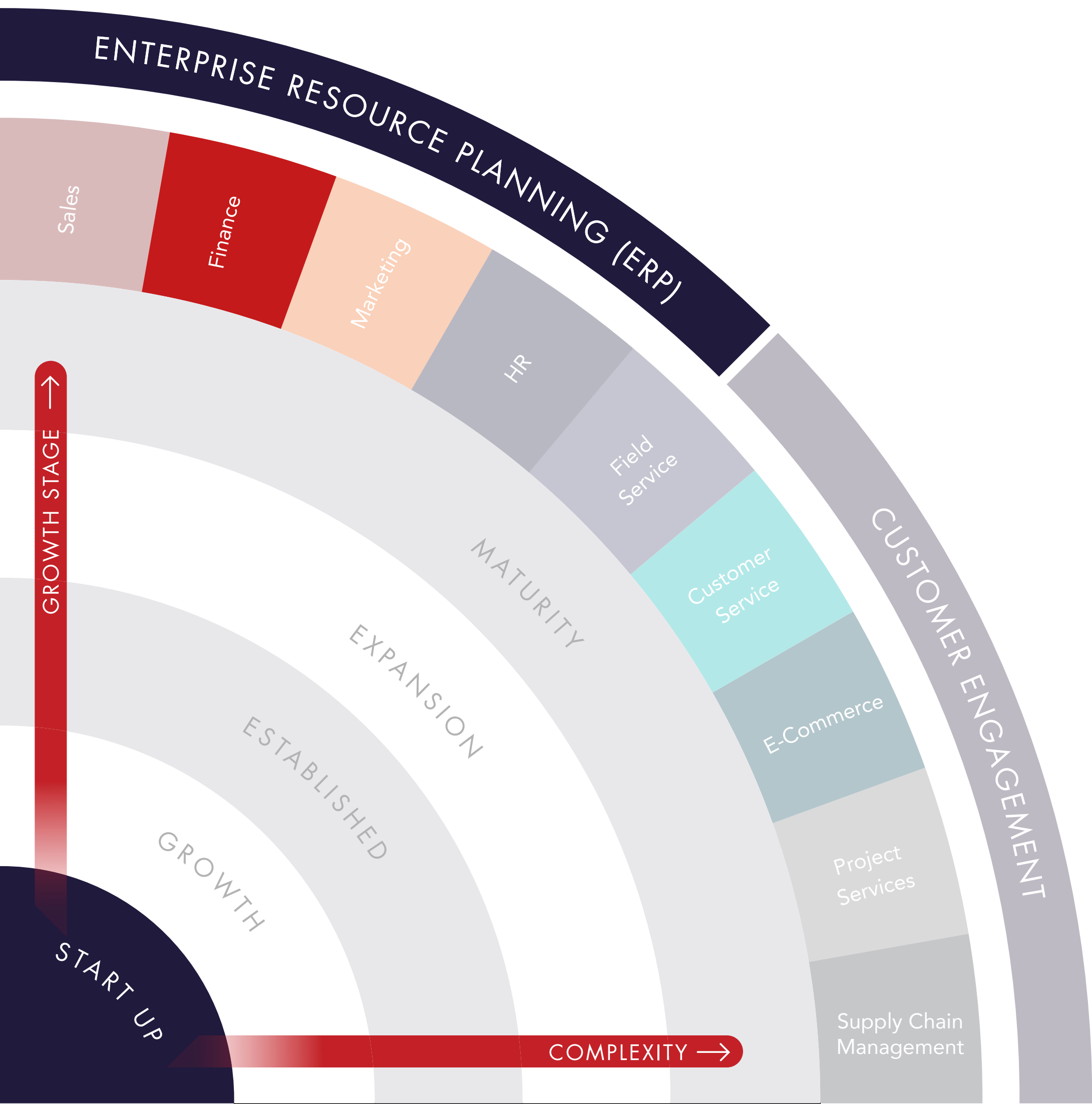
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FINANCE: START UP



PAIN POINTS

- 1

Finance
Finding the resources to manage cashflow and balance sheets
- 5

Finance
Balancing business growth with rising costs, at the same time as developing a cohesive business strategy

CHALLENGES

Many finance teams still struggle with time-consuming tasks, sometimes having to integrate lots of different databases manually – even for basic processes like billing. It’s difficult to share information across departments for order processing, which results in longer lead times. And despite the wealth of financial data available, they might not have the reporting tools to get a look at the bigger picture for the business – which can hamper strategic decision-making.

This can be even harder if your clients offer subscription-based services rather than discrete products; managing subscriptions is a drain on finance teams’ time if they don’t have automation or digital tools at hand.

BENEFITS OF DYNAMICS

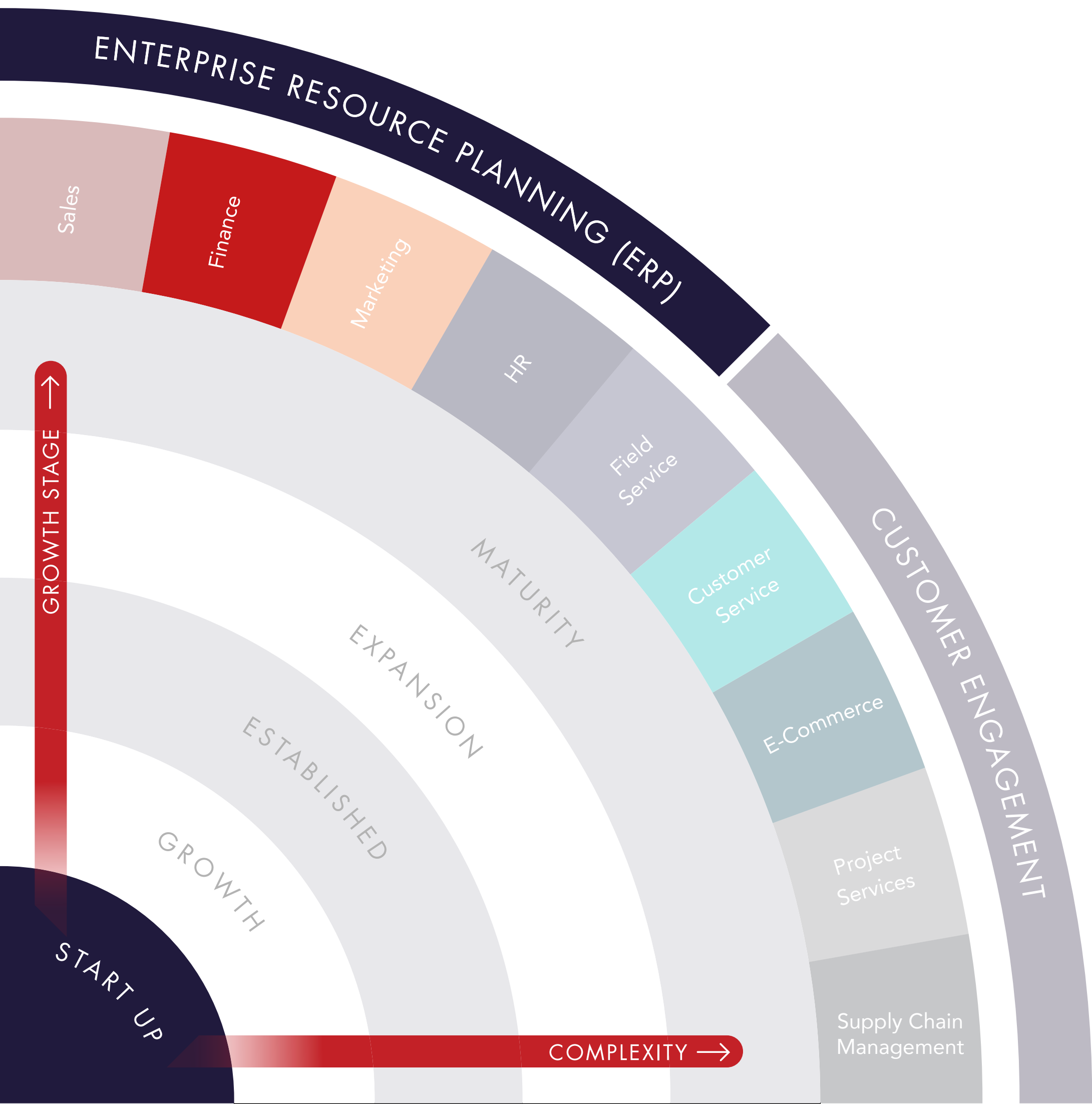
Dynamics can help finance teams maximise their profitability and automate financial operations to make their lives much easier and help them focus on more strategic work. It allows them to monitor performance in real time, predict future outcomes and make decisions to drive business growth.

Intelligent data insights can offer predictive recommendations, to increase profit and cashflow, while Dynamics also makes it easier to cut operational costs with process automation and more efficient financial planning.

And for clients with subscription services, automated recurring billing through Dynamics saves time and effort for the finance team.

NEXT: VIEW CAPABILITIES

< 1/2



FINANCE: START UP



PAIN POINTS

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Finance
Finding the resources to manage cashflow and balance sheets
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Finance
Balancing business growth with rising costs, at the same time as developing a cohesive business strategy

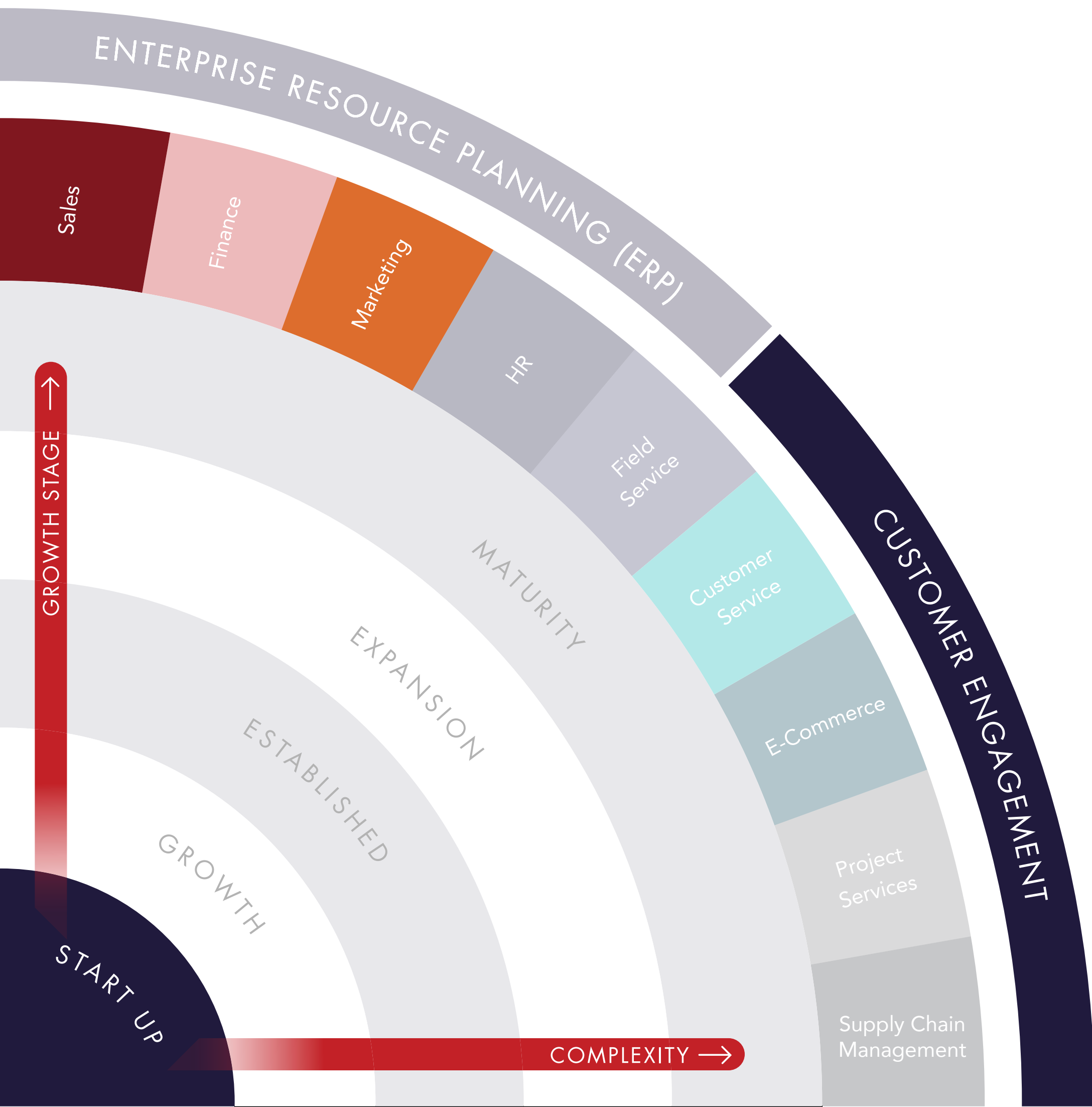
DYNAMICS CAPABILITIES

SKU_s

Budgeting
Accounts receivable
Accounts payable
Treasury
External compliance certification
Risk decisioning dashboard
Fixed assets
Finance management

Dynamics 365 Business Central

Click on the highlighted Functions to learn more ↓



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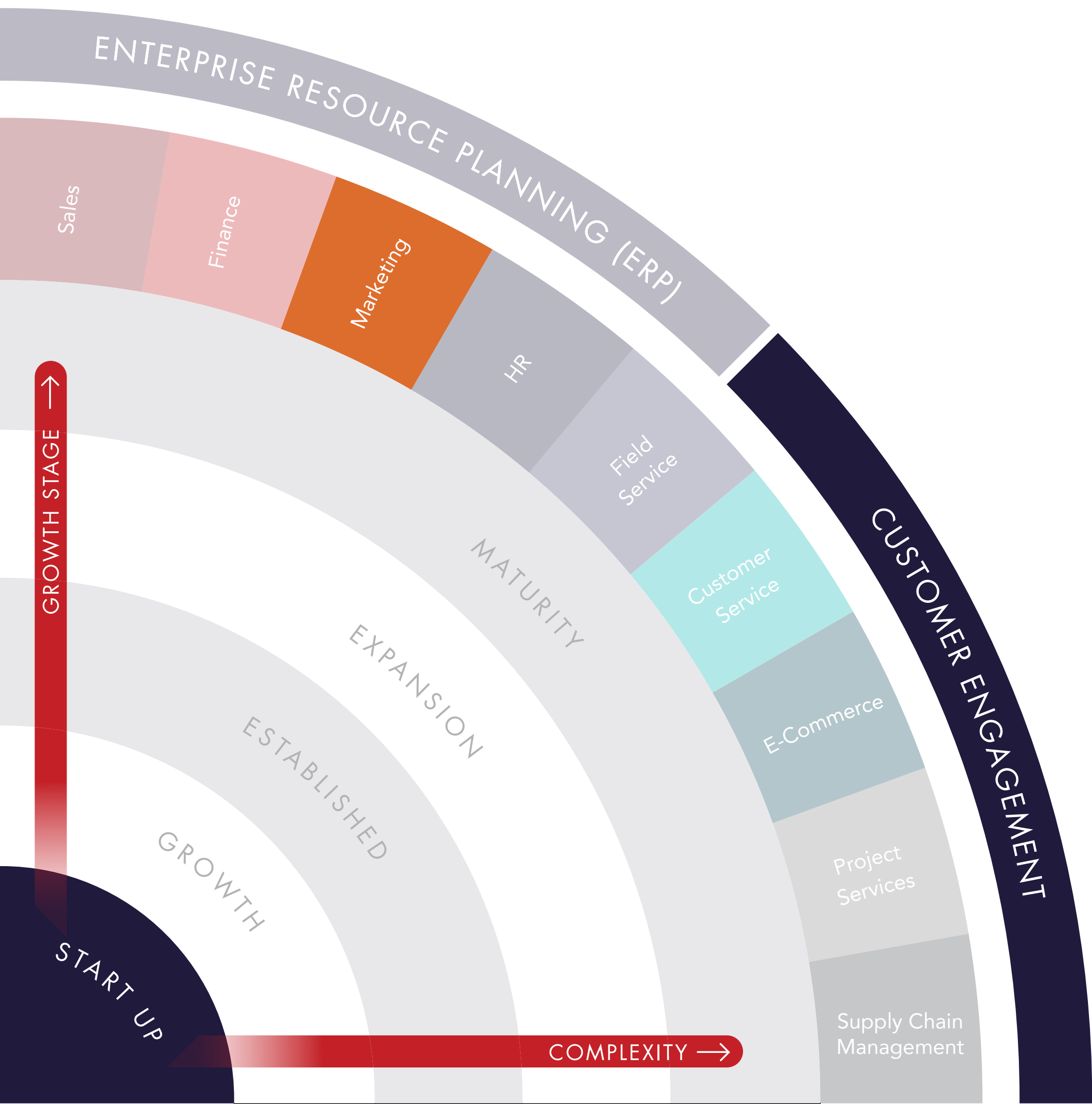
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MARKETING: START UP



PAIN POINTS

- 2 Marketing**
Understanding how to gain new customers and nurture existing ones
- 6 Marketing**
Inability to react effectively to changing customer needs and build a reputation in the market
- 7 Marketing**
Getting ahead of day-to-day business to spend more time understanding how to grow

CHALLENGES

One of the biggest challenges for marketing departments is getting accurate, up-to-date data and making sense of how to use it effectively. They may have a large customer database that doesn't yield any useful insights, or too few staff to consistently communicate with their network.

This makes it difficult to send timely information to the right customers, hampering cross-sell and upsell efforts, and opening the door for competitors. For those customers they do communicate with, marketers without a platform like Dynamics may struggle to monitor email open rates or link customer touchpoints to sales data. It's very hard to track results or understand whether they are adding value.

BENEFITS OF DYNAMICS

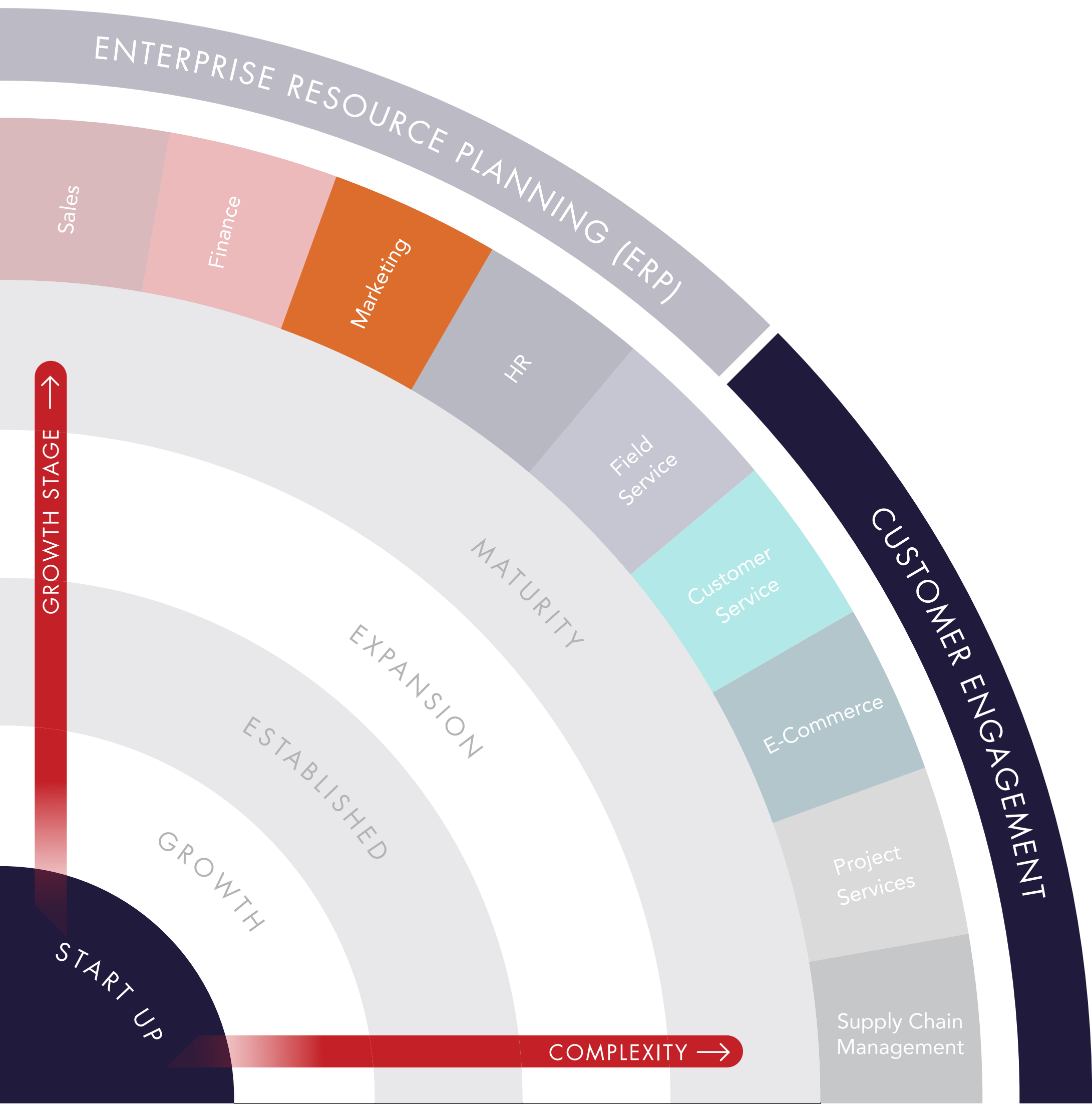
Dynamics for Marketing helps teams plan and deliver campaigns; increase customer demand for their products and services; create, track and nurture leads; and personalise communications for prospects and customers across channels.

It helps marketers align with their sales teams and create a single view of the prospect, delivering a seamless customer experience.

And by targeting the right customers and optimising marketing resources, it can ultimately help marketers improve the ROI of their activities.

NEXT: VIEW CAPABILITIES

< 1/2



MARKETING: START UP



PAIN POINTS

- 2 Marketing**
Understanding how to gain new customers and nurture existing ones
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Getting ahead of day-to-day business to spend more time understanding how to grow

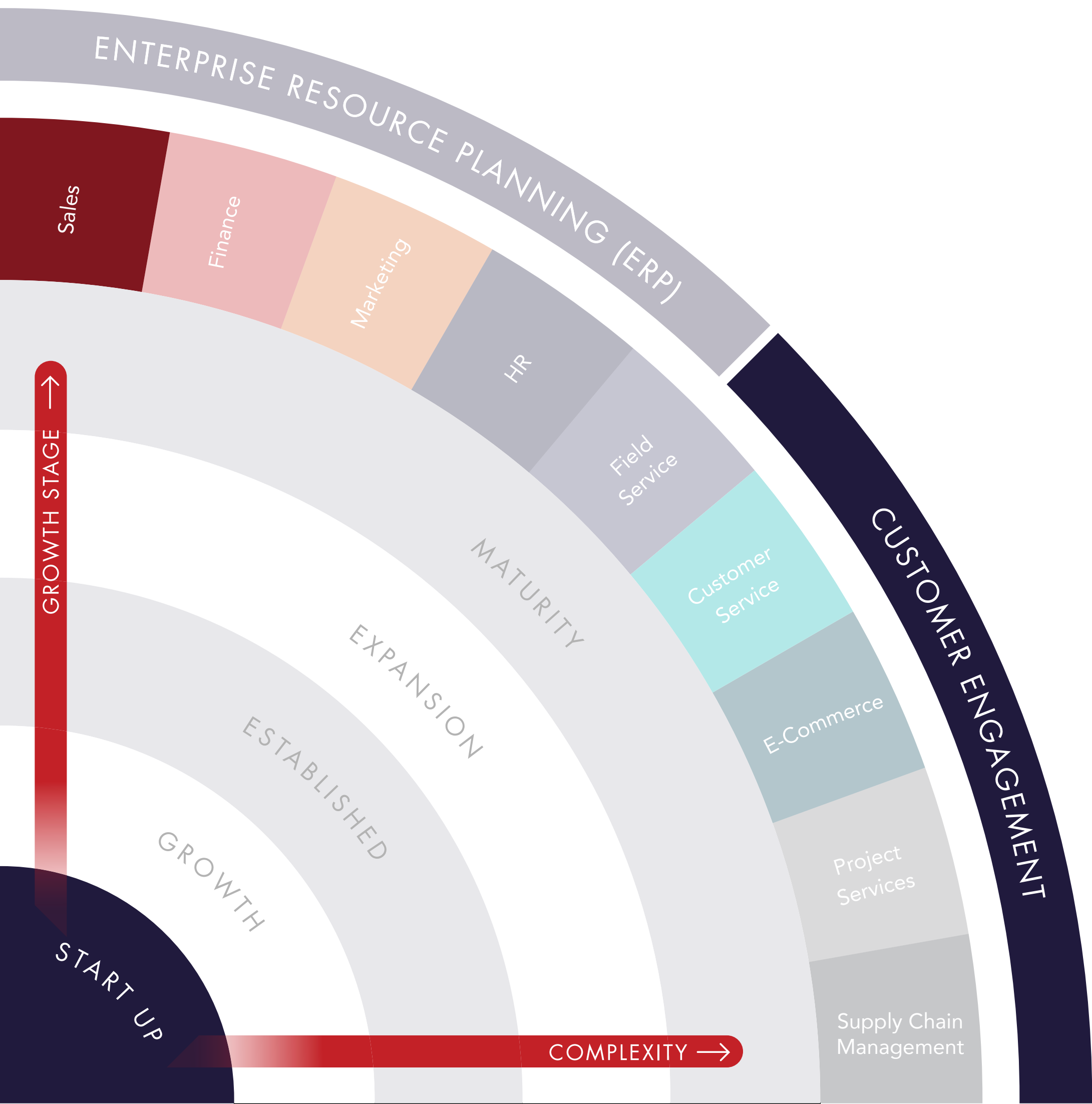
DYNAMICS CAPABILITIES

Email marketing
Lead scoring
Market segmentation
Customer journeys
Event management
Connector for LinkedIn
Lead generation forms

SKU_s

Dynamics 365 Marketing
Dynamics 365 Customer Insight
Power Apps





SALES: START UP



PAIN POINTS

2

Sales

Understanding how to gain new customers and nurture existing ones

7

Sales

Getting ahead of day-to-day business to spend more time understanding how to grow

CHALLENGES

Whether managing a small number of high-value opportunities, or hundreds of smaller leads, salespeople rely on accurate data to succeed. They need to track ongoing opportunities and have a clear overview of all the customers they're currently working with – as well as how those customers are interacting with colleagues in other parts of the business.

Reporting is also vital. Salespeople are sometimes unable to run reports on opportunities and share that information with management. That makes it extremely difficult to collaborate with marketing, and prevents sales teams pursuing opportunities from start to finish. Individual salespeople can also struggle to receive rewards and recognition when they can't prove their work has contributed to business outcomes.

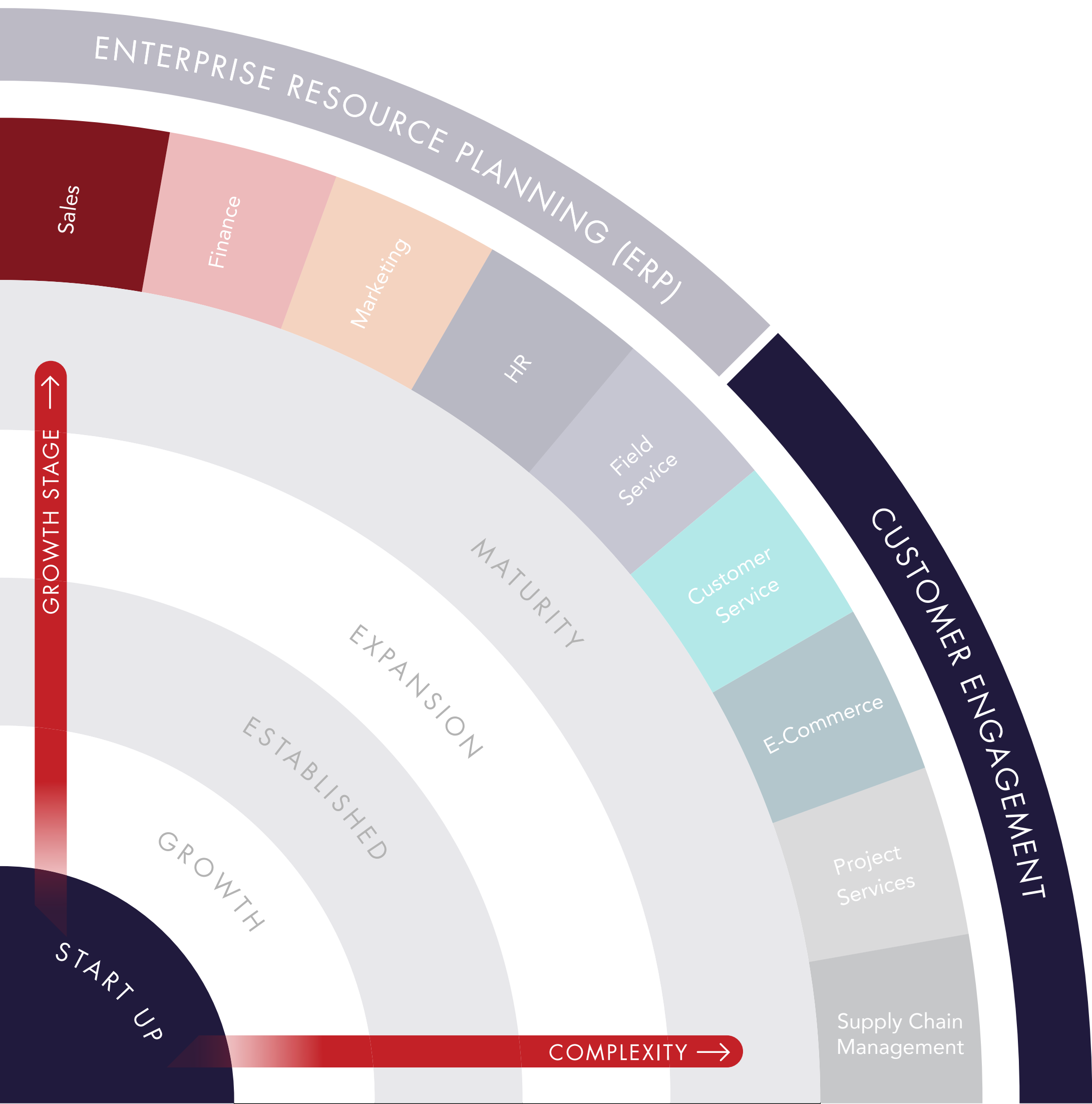
BENEFITS OF DYNAMICS

With its background in CRM, Dynamics is well set up to support sales teams to integrate with marketing and the rest of the business. The comprehensive customer views help salespeople to better understand clients' needs, engage them effectively, and drive more sales revenue.

Dynamics can incorporate information from LinkedIn Sales Navigator, marketing automation platforms, and other sources. It uses intelligent data to bring those customer insights into Office 365 software, making the sales lifecycle simple and familiar. And the underlying AI enables smarter selling, letting salespeople cross-sell and upsell more effectively by targeting the right customers at the right times.

NEXT: VIEW CAPABILITIES

< 1/2



SALES: START UP



PAIN POINTS

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Sales

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Getting ahead of day-to-day business to spend more time understanding how to grow

DYNAMICS CAPABILITIES

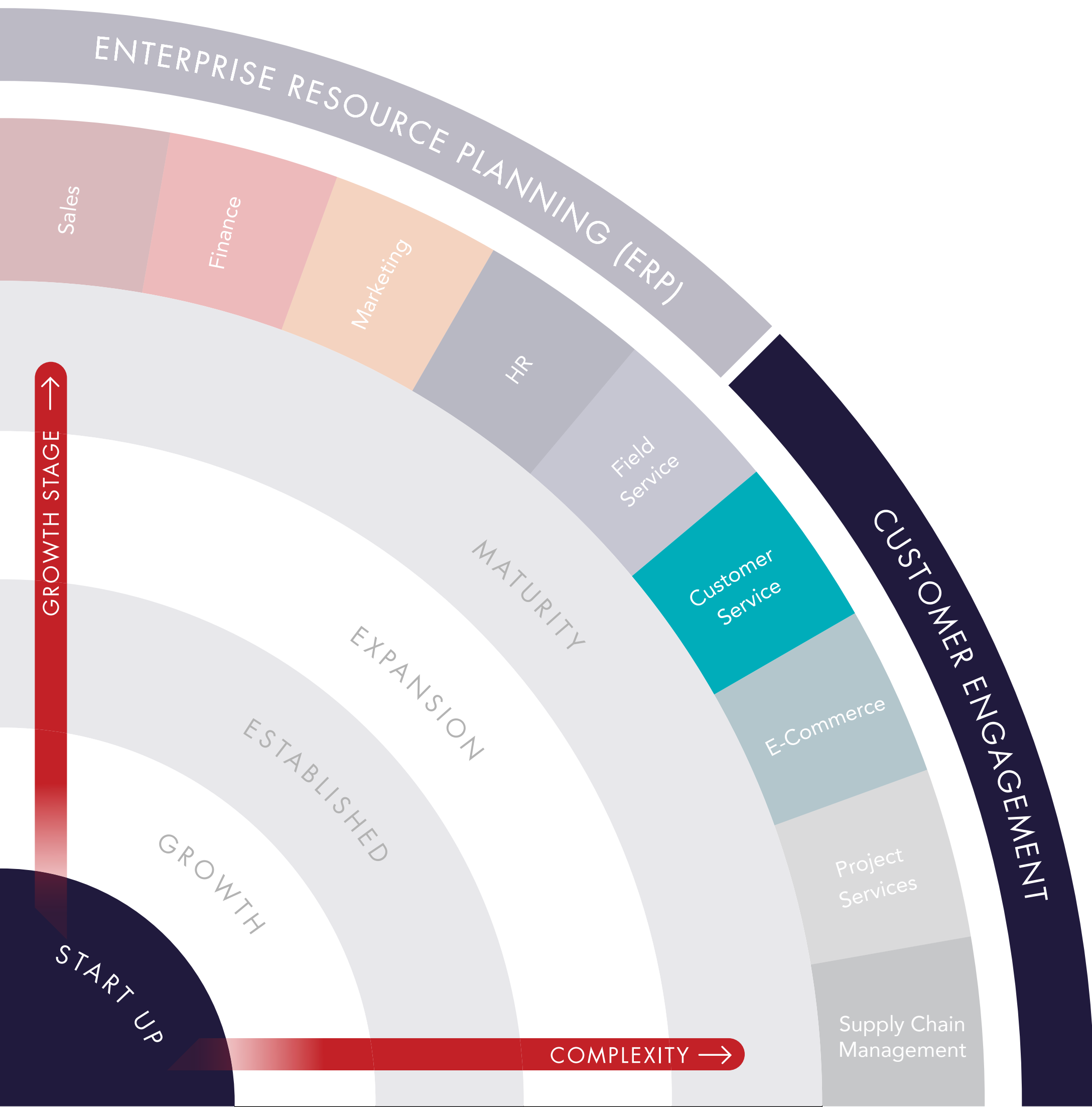
Lead management
Opportunity management
Pipeline forecasting
Sales automation
Quote management
Marketing lists
Email marketing

SKU_s

Dynamics 365 Sales Professional
Dynamics 365 Sales Insight
Power BI



Click on the highlighted Functions to learn more ↓



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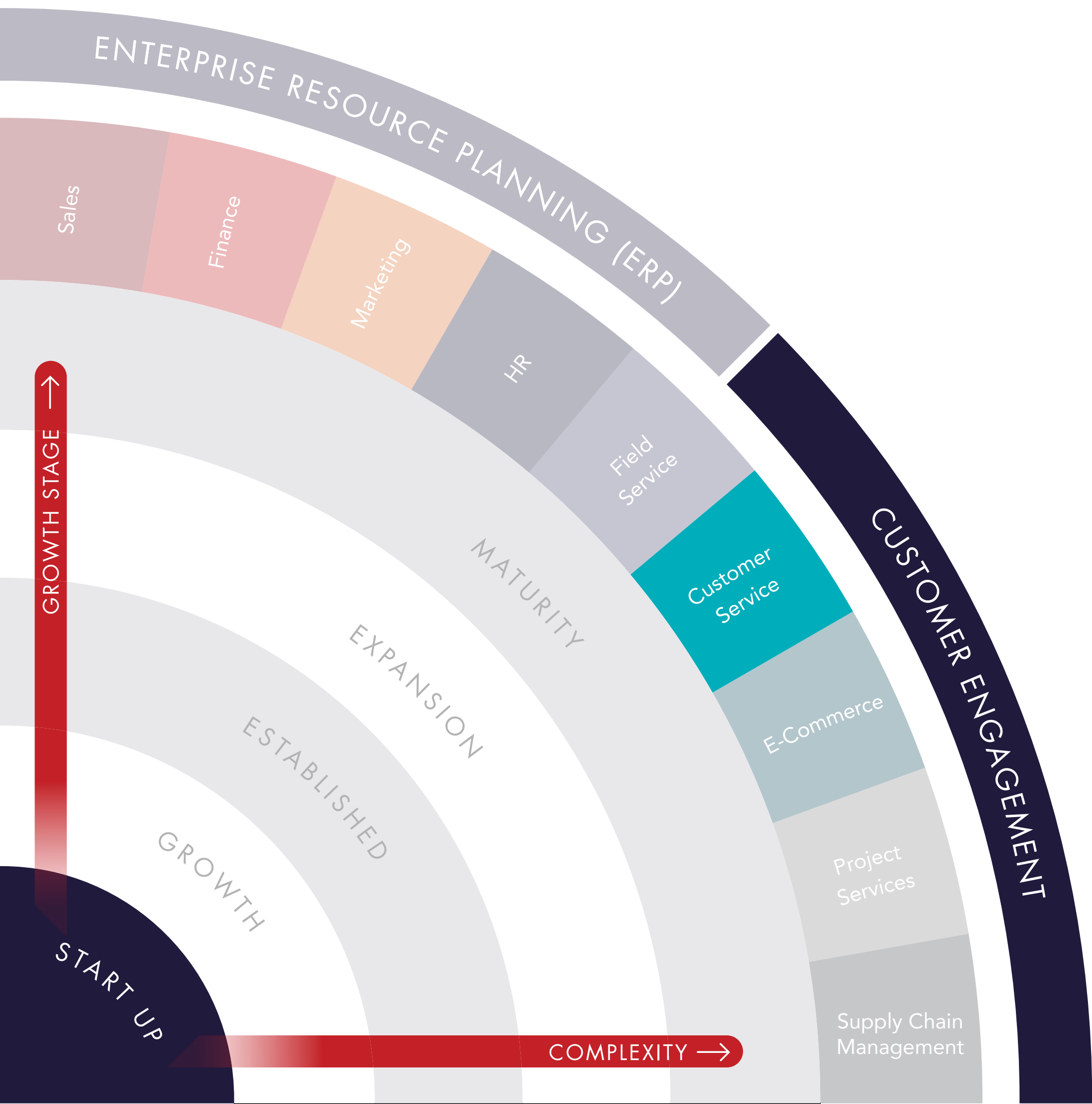
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CUSTOMER SERVICE: START UP



PAIN POINTS

3

Customer Service
Growth is restricted because staff can't deliver consistent service to a large customer base

6

Customer Service
Inability to react effectively to changing customer needs and build a reputation in the market

CHALLENGES

To meet high customer expectations, businesses are now under pressure to deliver omnichannel customer service. But for many, it's impossible to track when a customer has previously interacted with the company, even if they spoke to a different agent just minutes before.

Customer sales advisors may not have access to real-time, accurate information, or have collaboration tools in place to get quick answers from other departments.

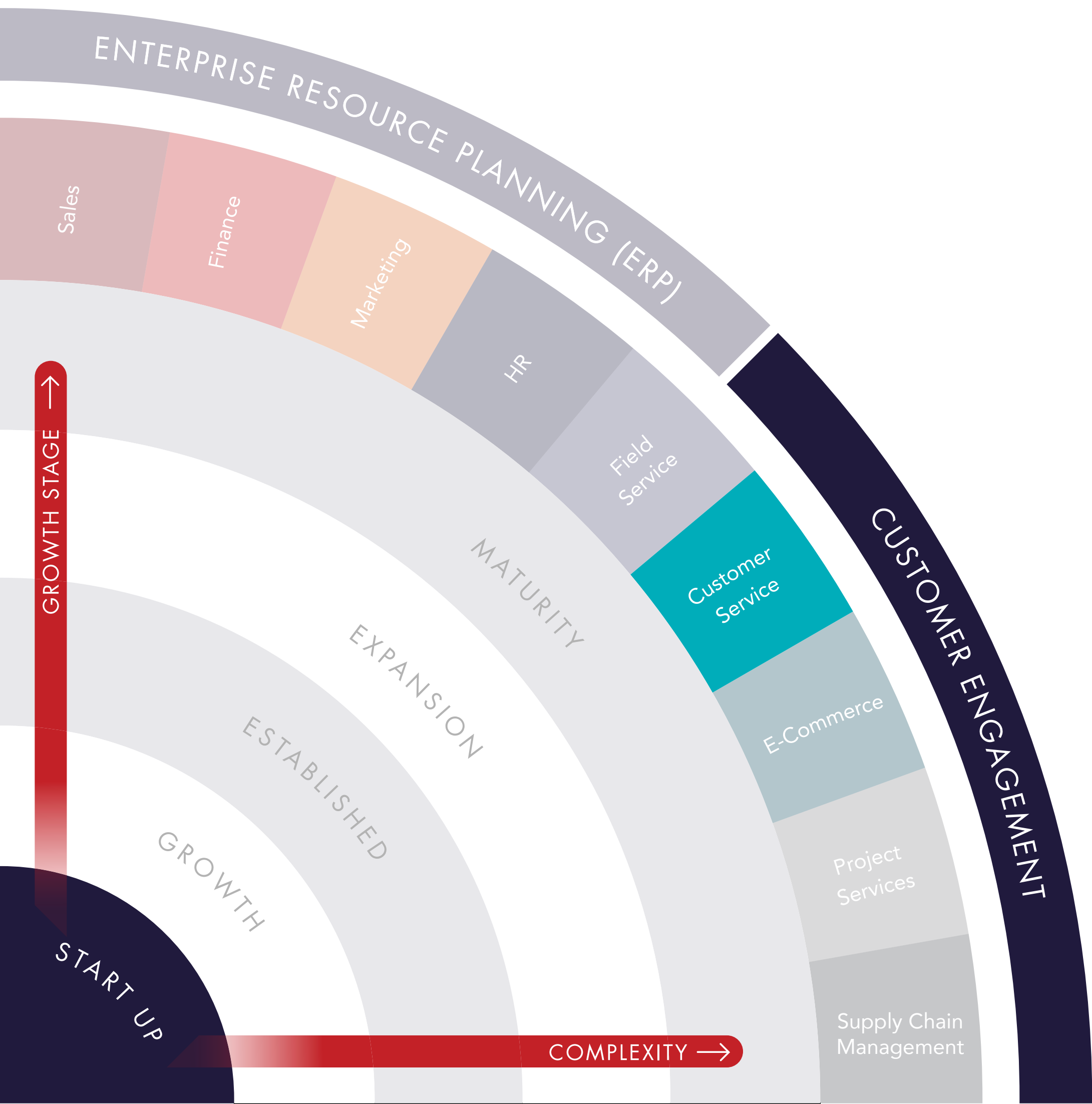
And when customer calls surge, they sometimes lack the call handling insight to resource their teams properly, or have no way to route customers through an interactive voice response (IVR).

BENEFITS OF DYNAMICS

The CRM capabilities within Dynamics, underpinned by AI, are an ideal platform to help customer service teams deliver seamless, personalised experiences. Dynamics brings all customer touchpoints into one comprehensive view, so agents are empowered to solve problems with a full picture of the situation.

NEXT: VIEW CAPABILITIES

< 1/2



CUSTOMER SERVICE: START UP



PAIN POINTS

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Growth is restricted because staff can't deliver consistent service to a large customer base

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Customer Service
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DYNAMICS CAPABILITIES

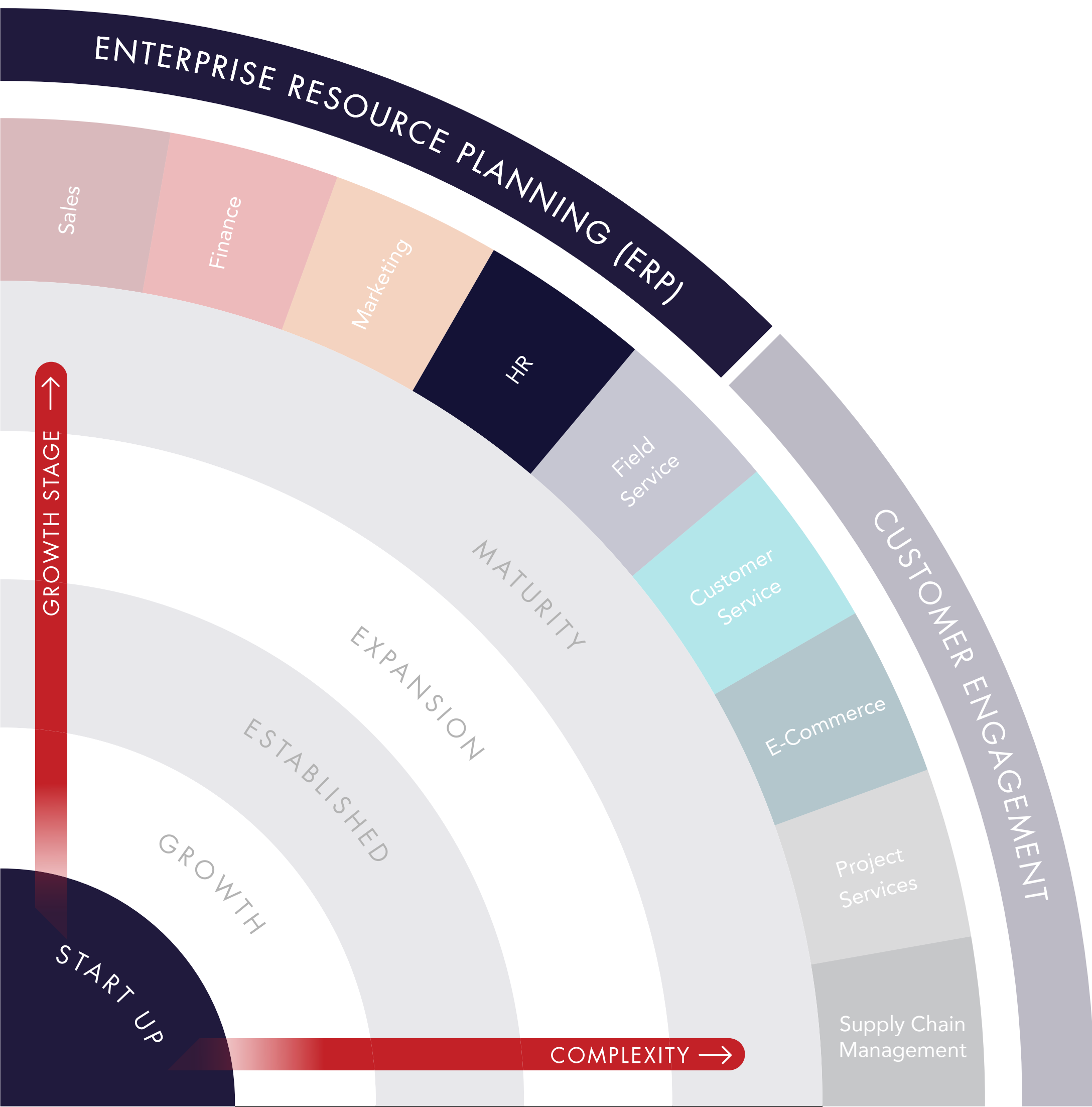
Case management
SLA support
Account management
Service automation
Customer web portals
Contract management
Service analytics

SKUs

Dynamics 365 Customer Service Enterprise
Power Apps
Power BI
Dynamics 365 Unified Service Desk



Click on the highlighted Functions to learn more ↓



START UP

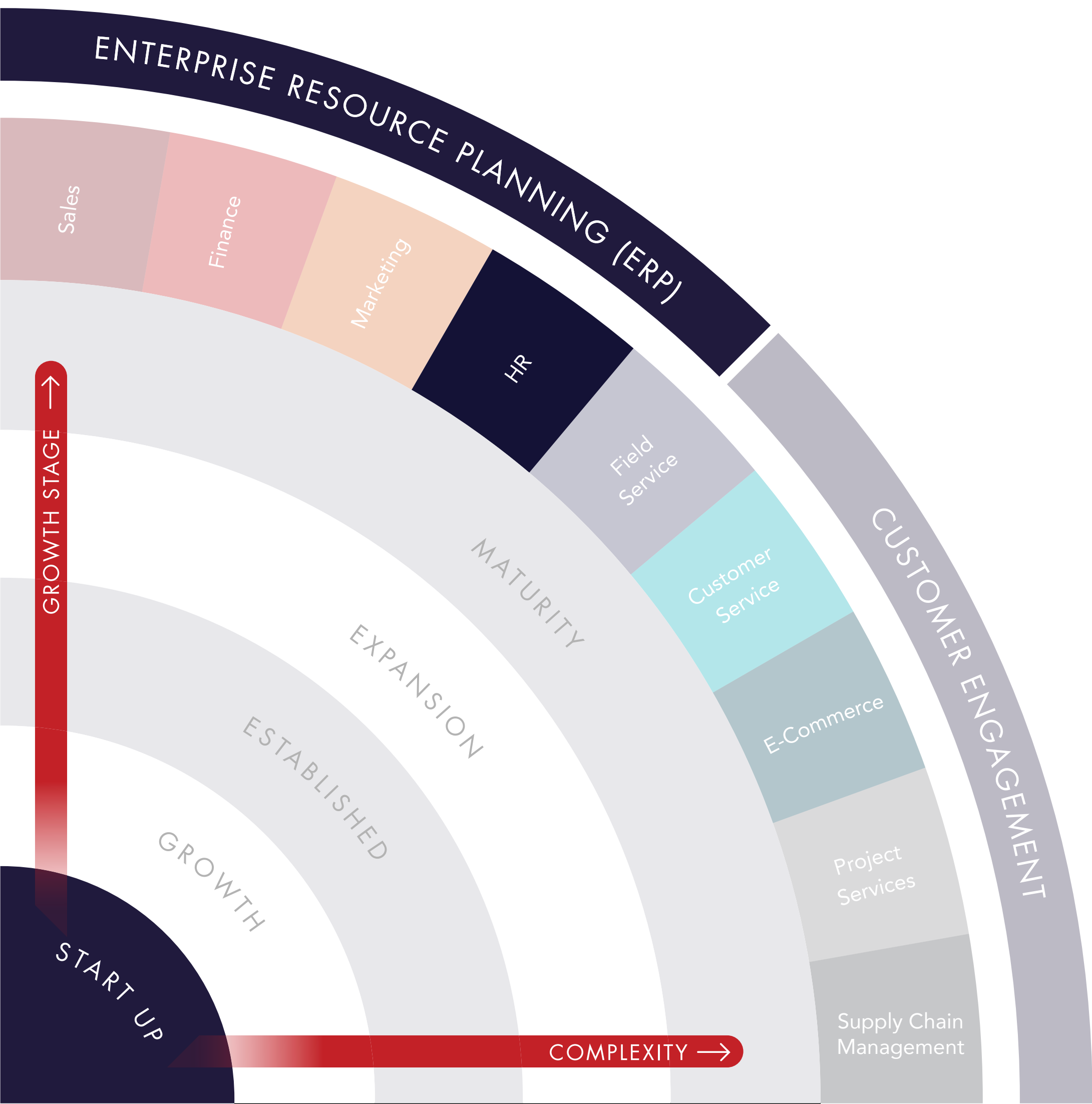
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HR: START UP



PAIN POINTS

- 4 HR
Managing employees on a range of different contracts

CHALLENGES

As a business grows, its HR processes and systems become increasingly complex. HR managers need to report on employees' wellbeing, learning and development, absences, annual leave, and much more.

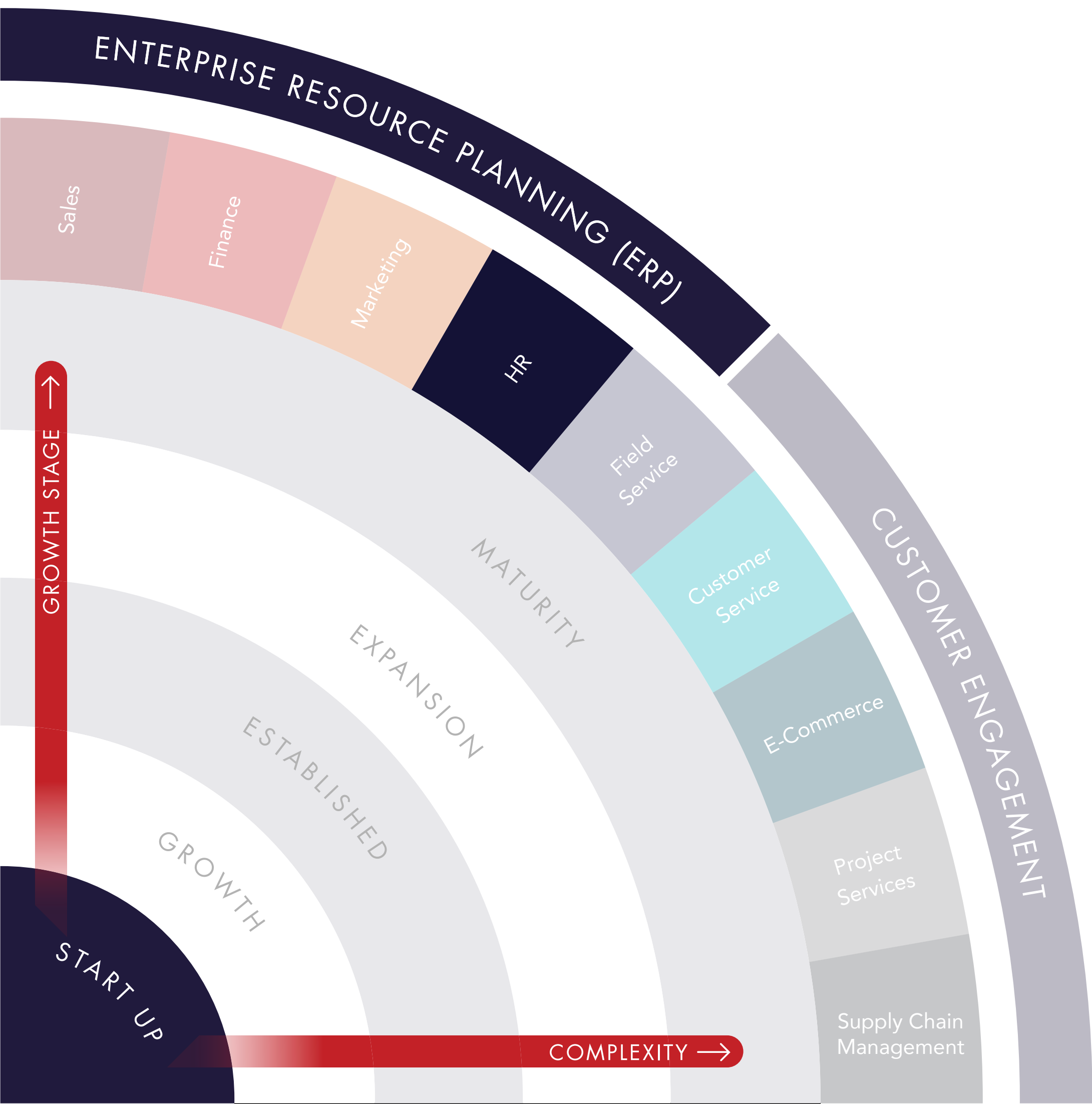
That's on top of trying to make recruitment and onboarding more efficient, centralising core HR processes, and giving managers the tools and training they need to manage their team members.

BENEFITS OF DYNAMICS

Dynamics helps deliver an HR solution that takes better care of your people, so they in turn can take better care of your business. It enables HR self-service for employees, provides a platform for training and certification, ensures security, privacy and compliance, and empowers managers to address concerns effectively.

At the same time, Dynamics can support HR teams to simplify reporting with rich dashboards, helping leaders make informed decisions. By identifying and engaging the right candidates, businesses can feel confident that they're bringing in the right people to support future growth.

NEXT: VIEW CAPABILITIES



HR: START UP



PAIN POINTS

- 4 HR
Managing employees on a range of different contracts

DYNAMICS CAPABILITIES

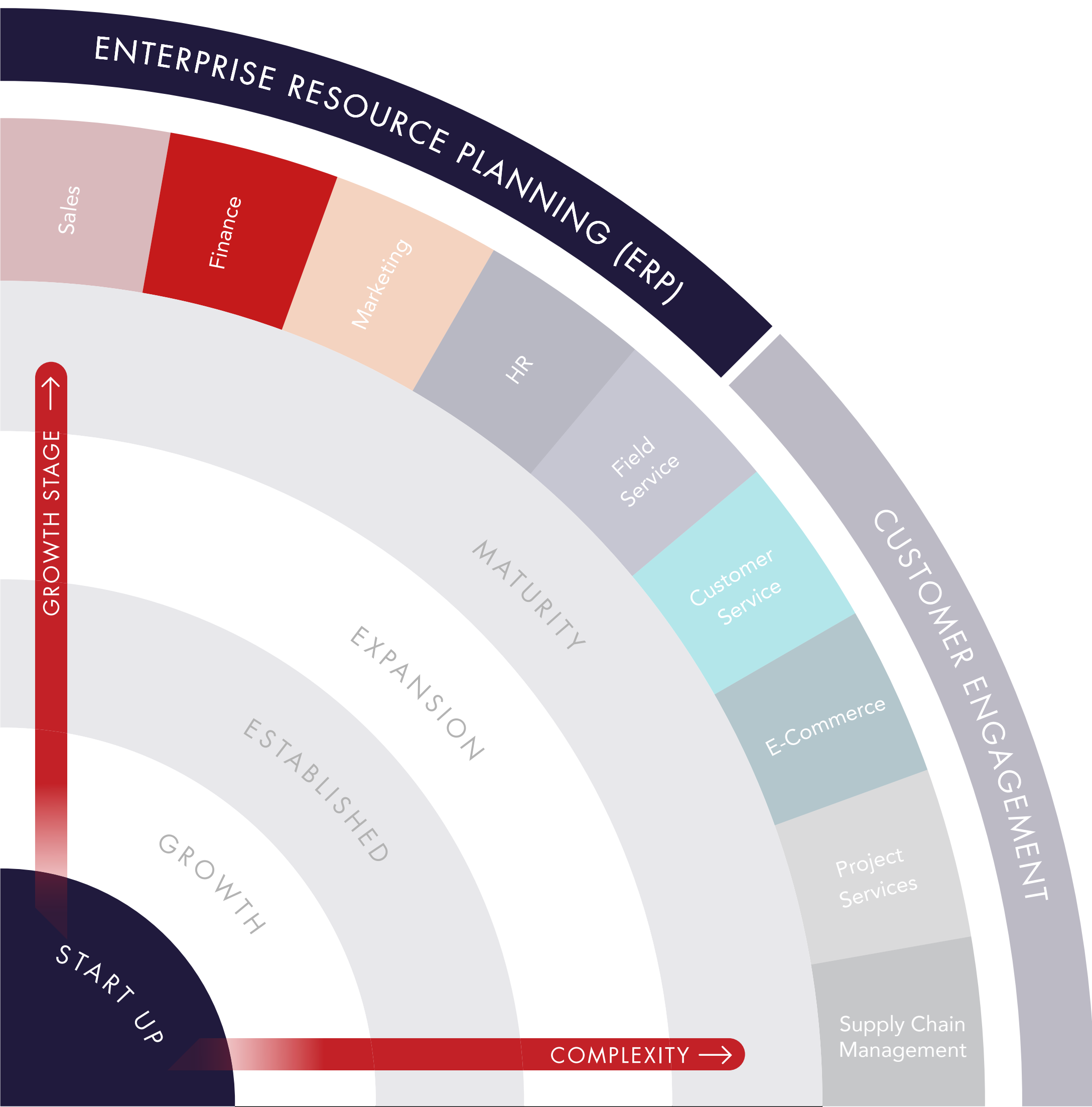
- People management
- Compensation management
- Compliance
- Leave and absence
- Benefits
- Learning and development
- Employee development
- Employee self-service
- Hiring and offer management

SKUs

Dynamics 365 Human Resources



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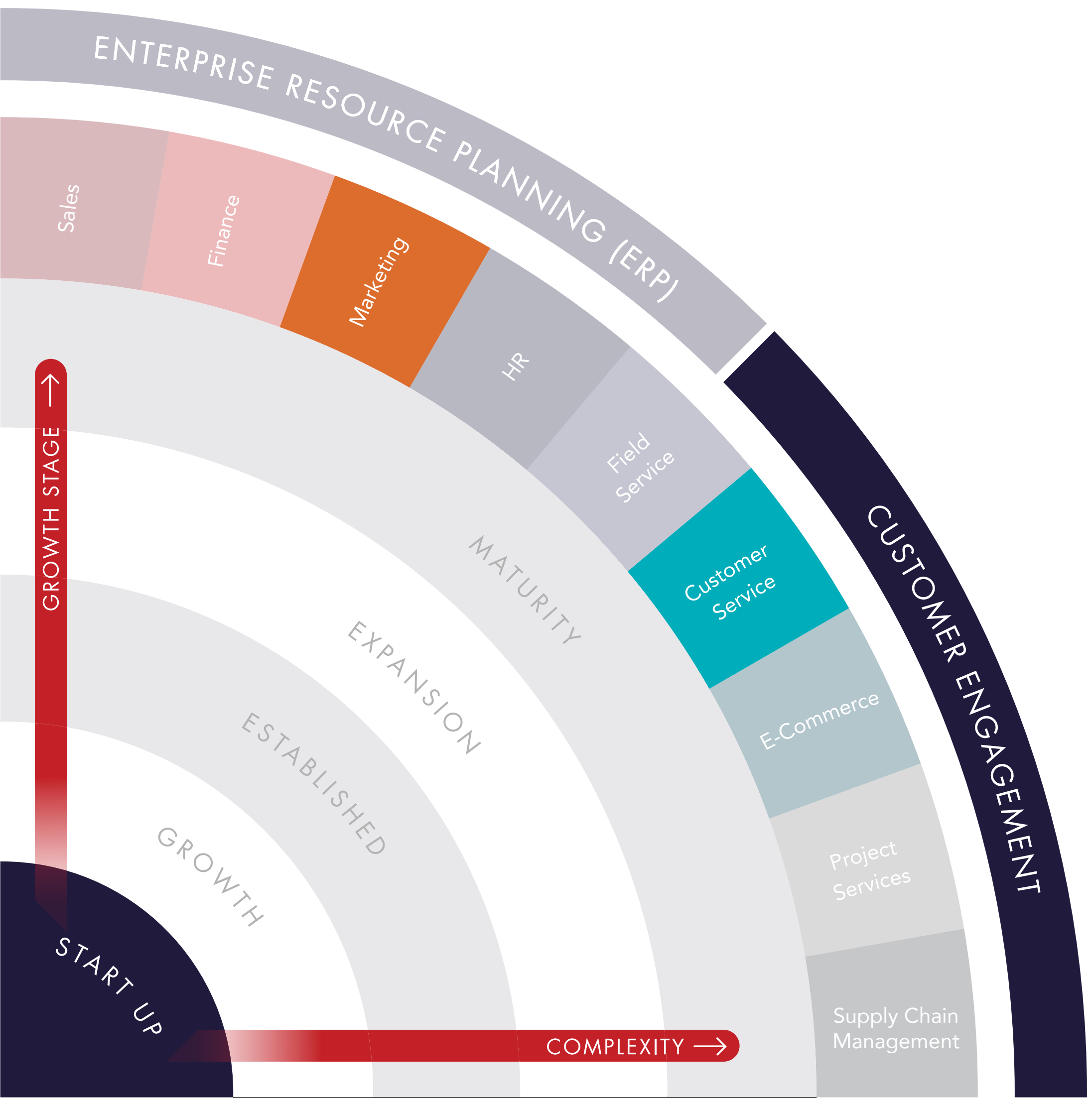
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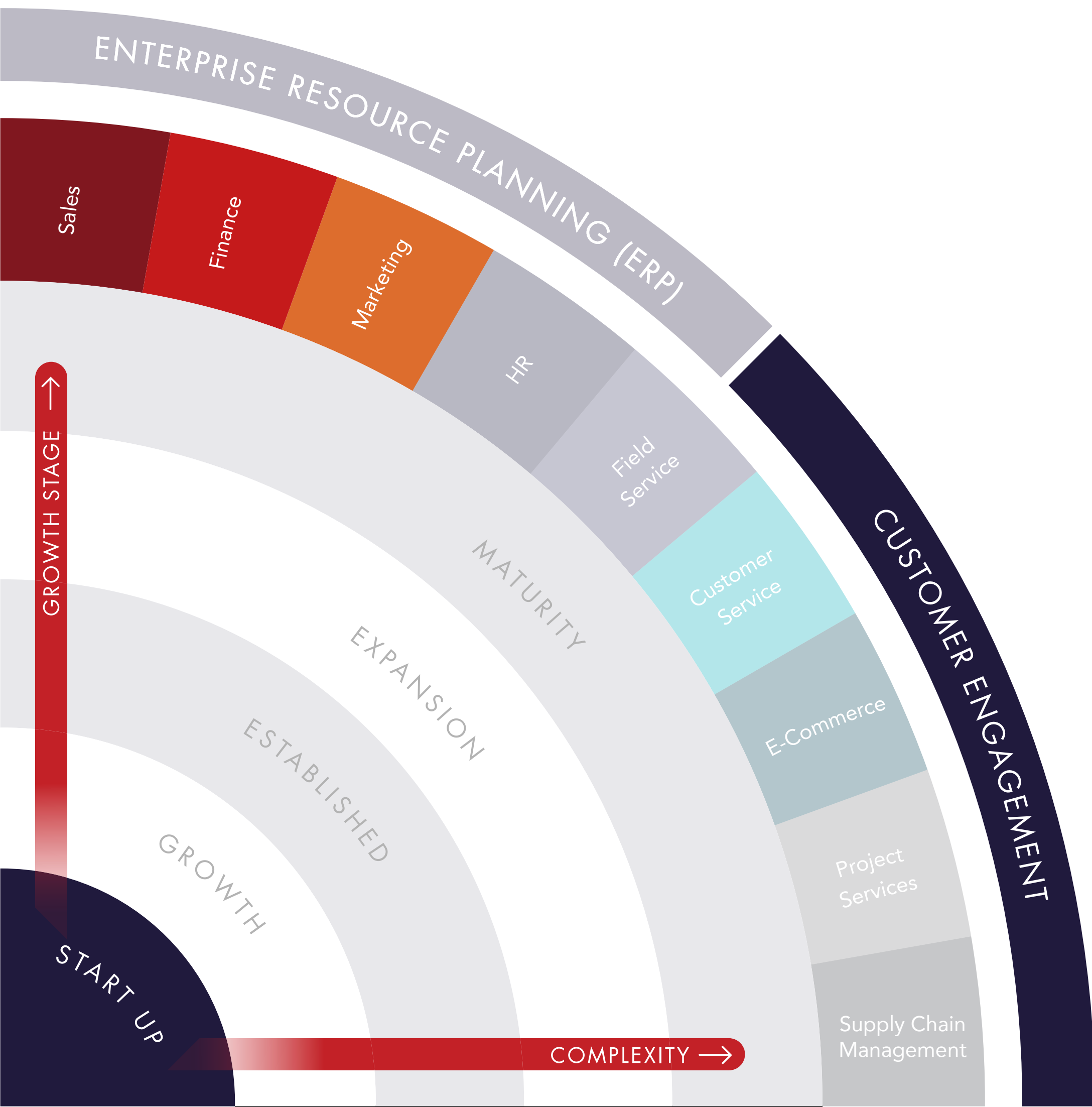
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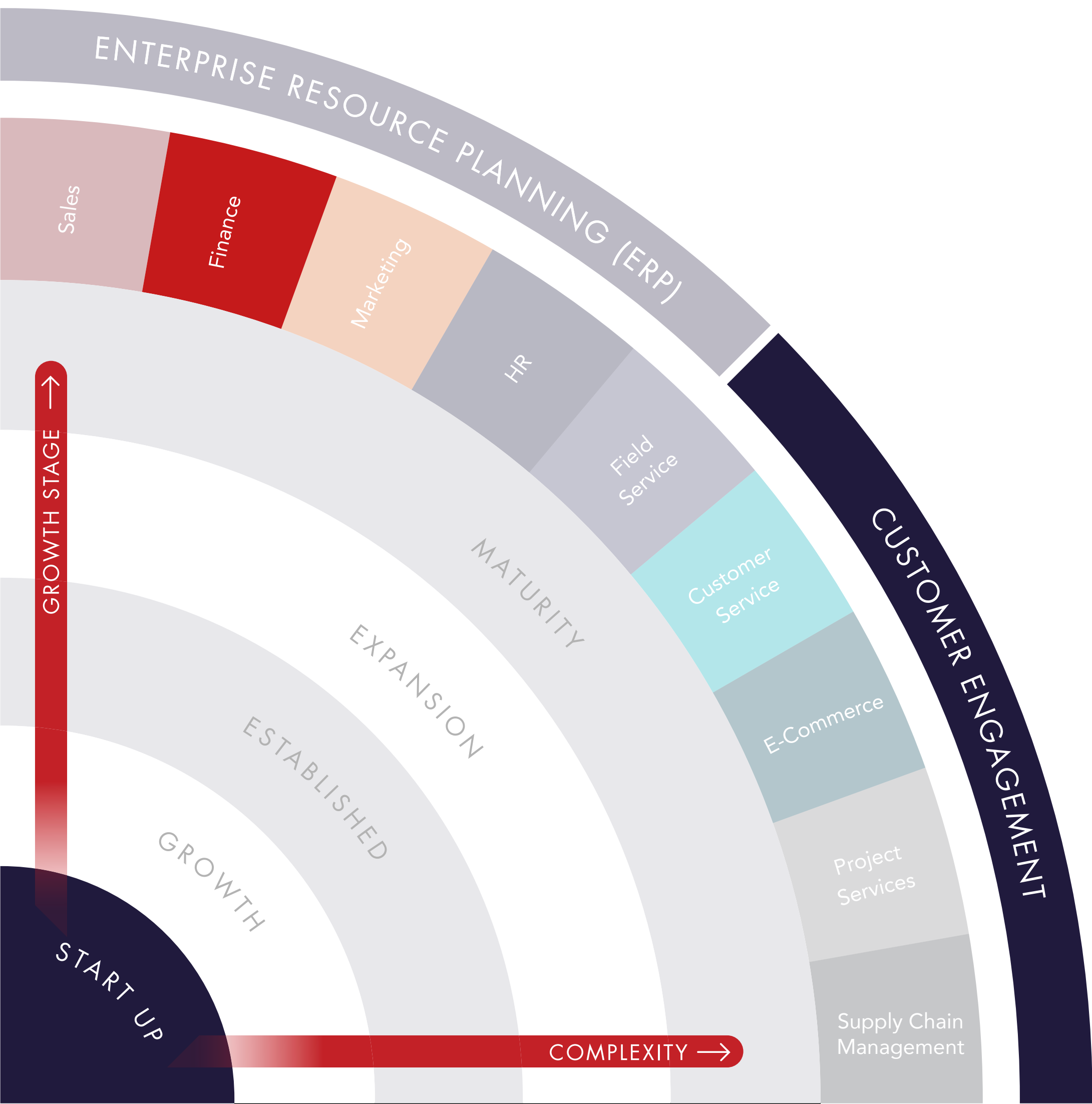
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FINANCE: START UP



PAIN POINTS

7

Finance

Getting ahead of day-to-day business to spend more time understanding how to grow

CHALLENGES

Many finance teams still struggle with time-consuming tasks, sometimes having to integrate lots of different databases manually – even for basic processes like billing. It’s difficult to share information across departments for order processing, which results in longer lead times. And despite the wealth of financial data available, they might not have the reporting tools to get a look at the bigger picture for the business – which can hamper strategic decision-making.

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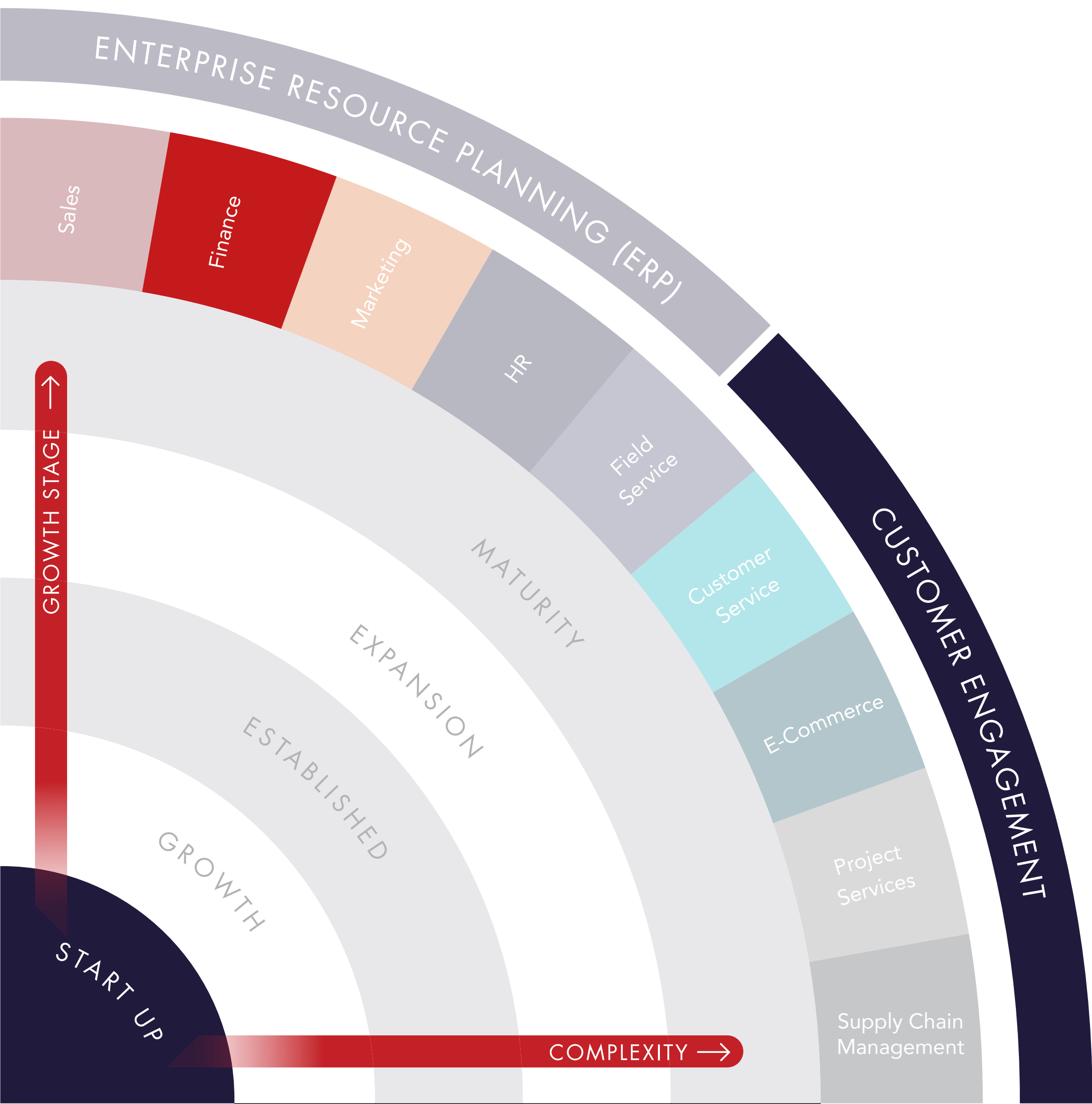
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NEXT: VIEW CAPABILITIES

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FINANCE: START UP



PAIN POINTS

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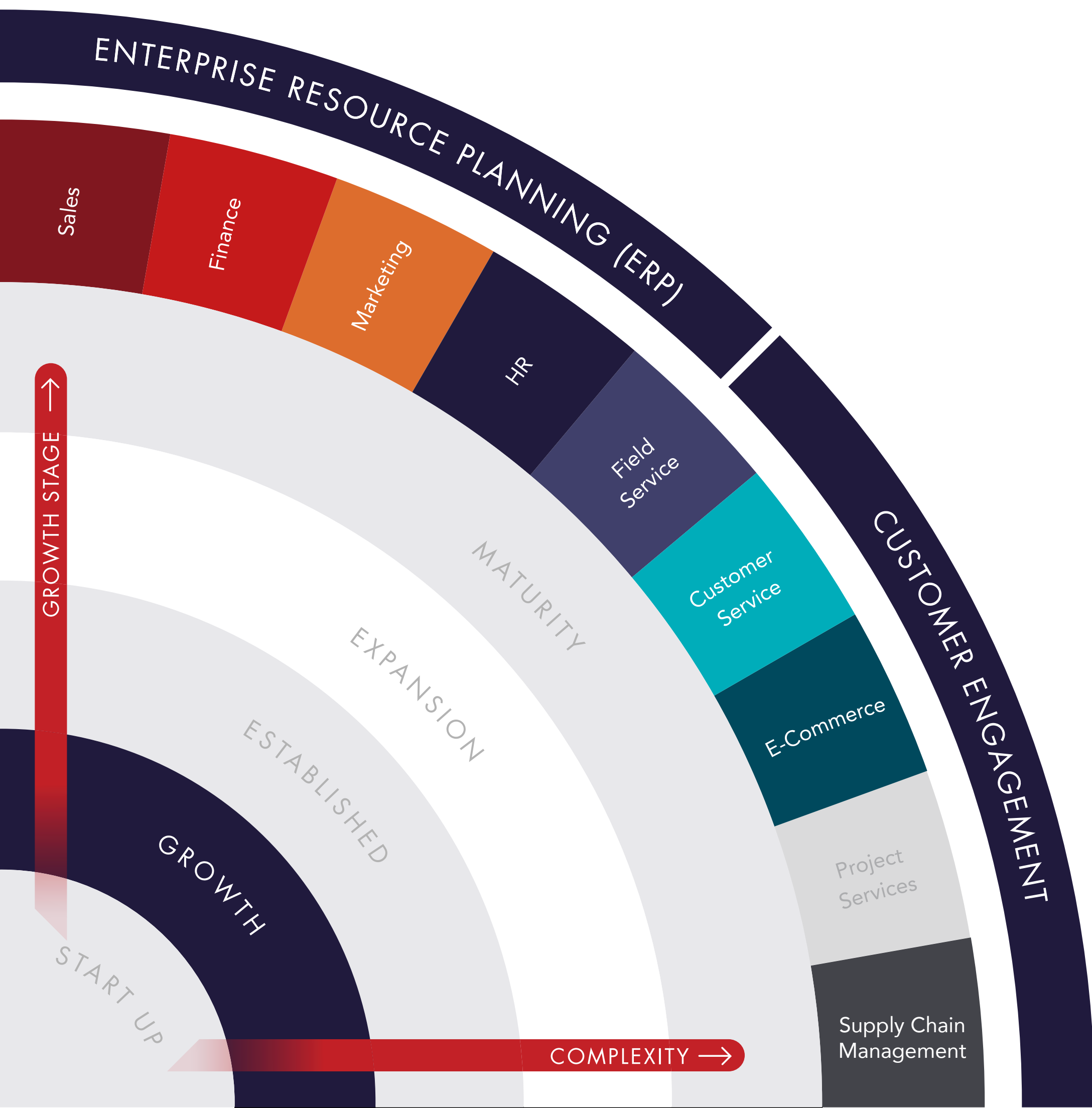
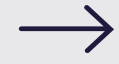
DYNAMICS CAPABILITIES

SKU_s

- Budgeting
- Accounts receivable
- Accounts payable
- Treasury
- External compliance certification
- Risk decisioning dashboard
- Fixed assets
- Finance management

Dynamics 365 Business Central

Click on a **Pain Point**
to filter the Functions



GROWTH

As businesses grow, their software suite becomes more complex. The last thing they want are bespoke processes and systems that don't play together nicely. It's about setting up platforms that can work for ten employees or 200.

Dynamics offers the scalability and integration capabilities that are essential for an organisation to flourish. It knits together business functions, helping to avoid silos and ultimately, satisfy the customer.

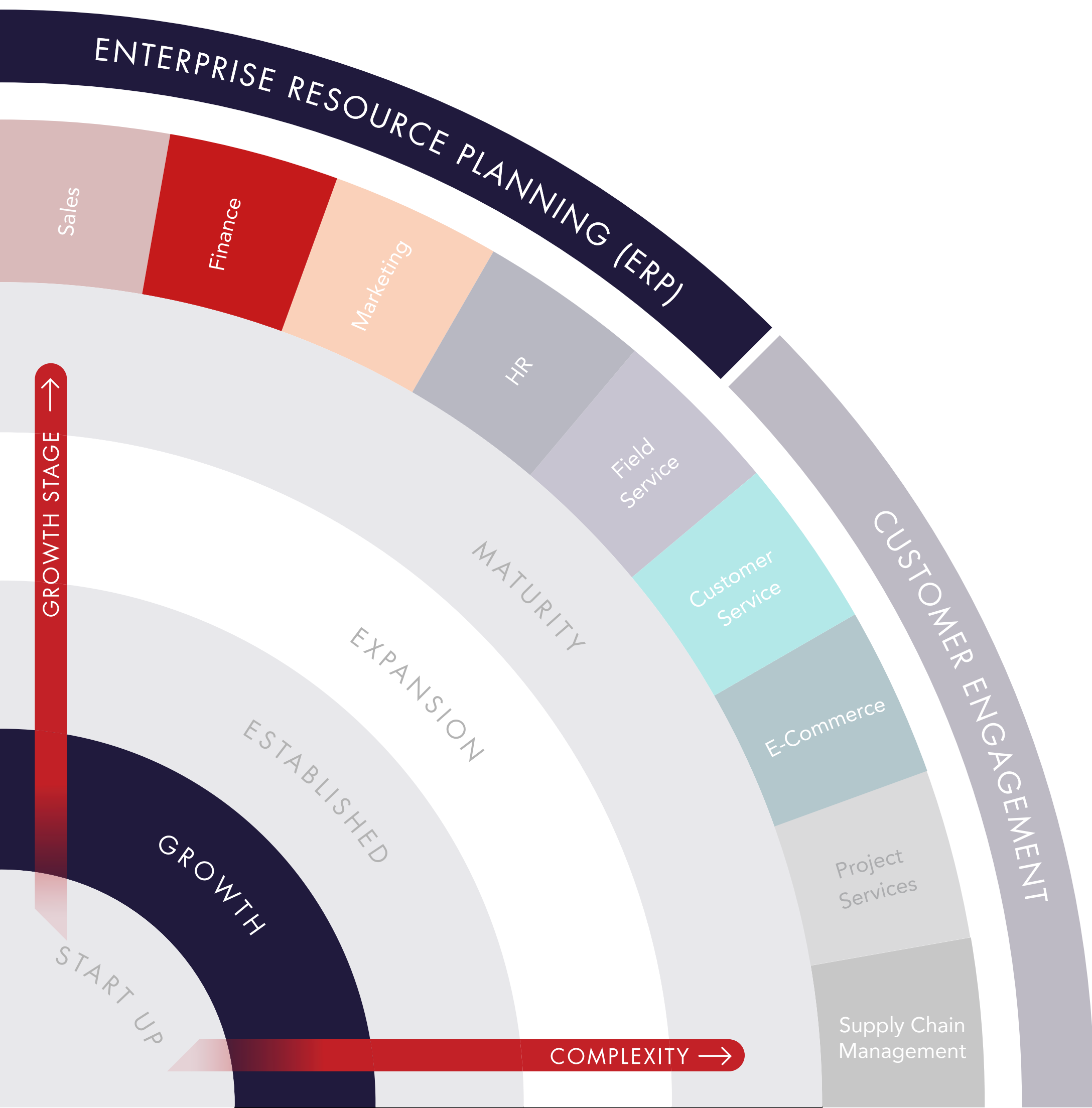
PAIN POINTS

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- 1 Expanding business operations are putting a strain on cashflow
- 2 Sales and marketing don't have the capacity or tools to tackle a larger database of customers and prospects
- 3 Inability to forecast demand to sustain business growth
- 4 Customer touchpoints are not joined up, leading to a backlog of complaints
- 5 Managing the right stock, fulfilling and tracking orders through digital shops
- 6 Finding the right people to grow with the business



Click on the highlighted
Functions to learn more



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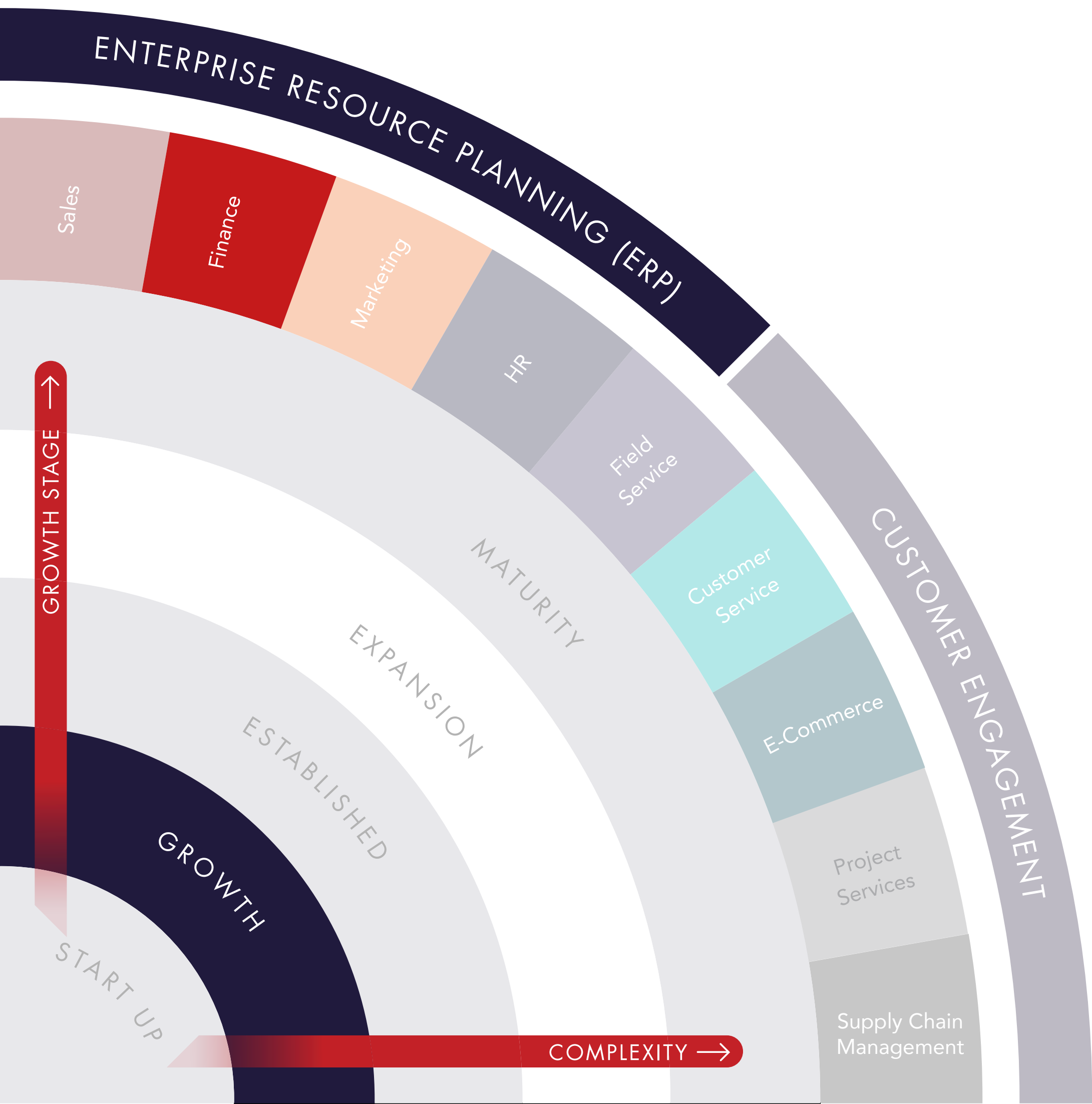
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FINANCE: GROWTH



PAIN POINTS

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Expanding business operations are putting a strain on cashflow

CHALLENGES

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This can be even harder if your clients offer subscription-based services rather than discrete products; managing subscriptions is a drain on finance teams’ time if they don’t have automation or digital tools at hand.

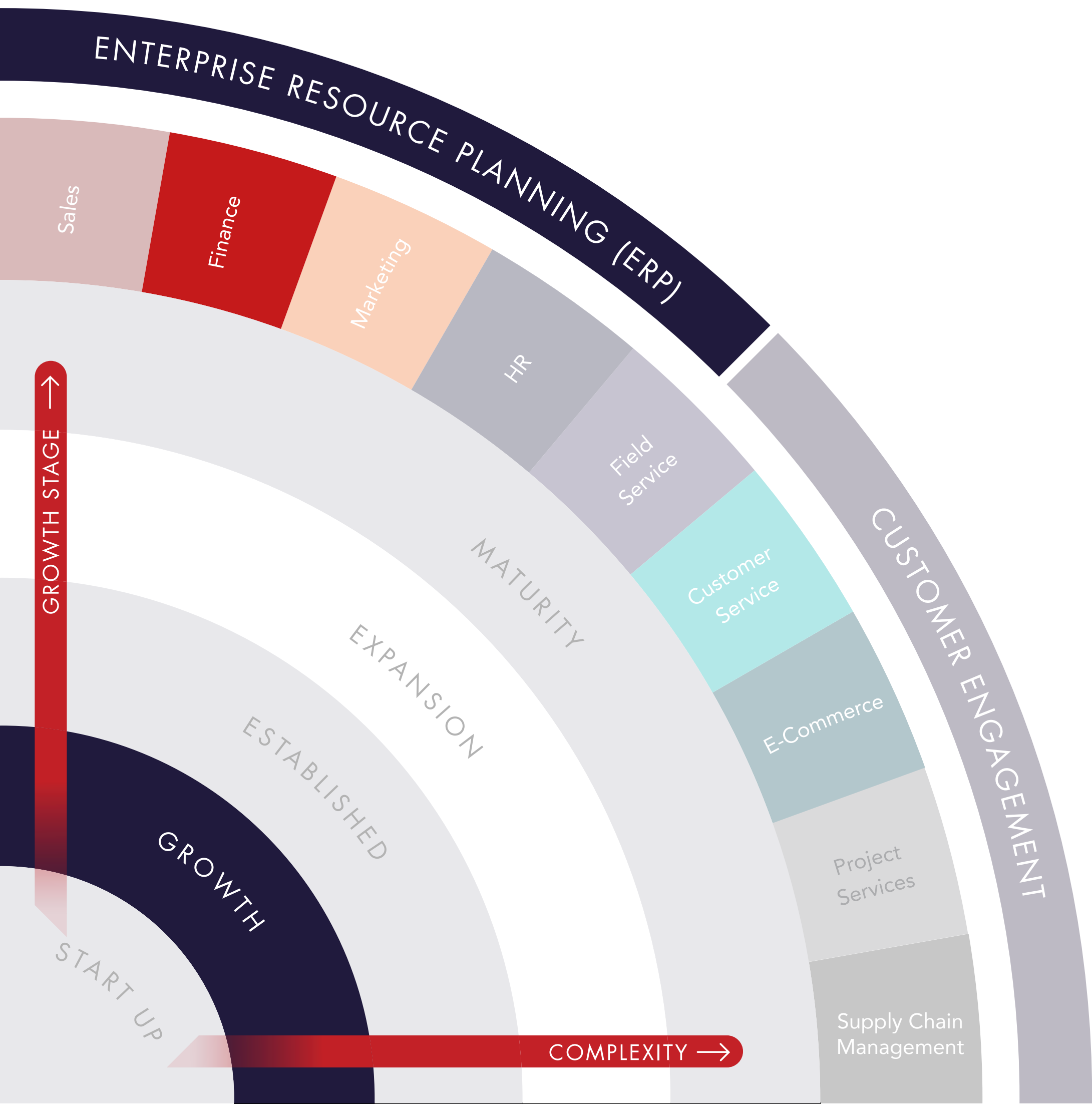
BENEFITS OF DYNAMICS

Dynamics can help finance teams maximise their profitability and automate financial operations to make their lives much easier and help them focus on more strategic work. It allows them to monitor performance in real time, predict future outcomes and make decisions to drive business growth.

Intelligent data insights can offer predictive recommendations, to increase profit and cashflow, while Dynamics also makes it easier to cut operational costs with process automation and more efficient financial planning.

And for clients with subscription services, automated recurring billing through Dynamics saves time and effort for the finance team.

NEXT: VIEW CAPABILITIES



FINANCE: GROWTH



PAIN POINTS

- 1 Finance**
Expanding business operations are putting a strain on cashflow

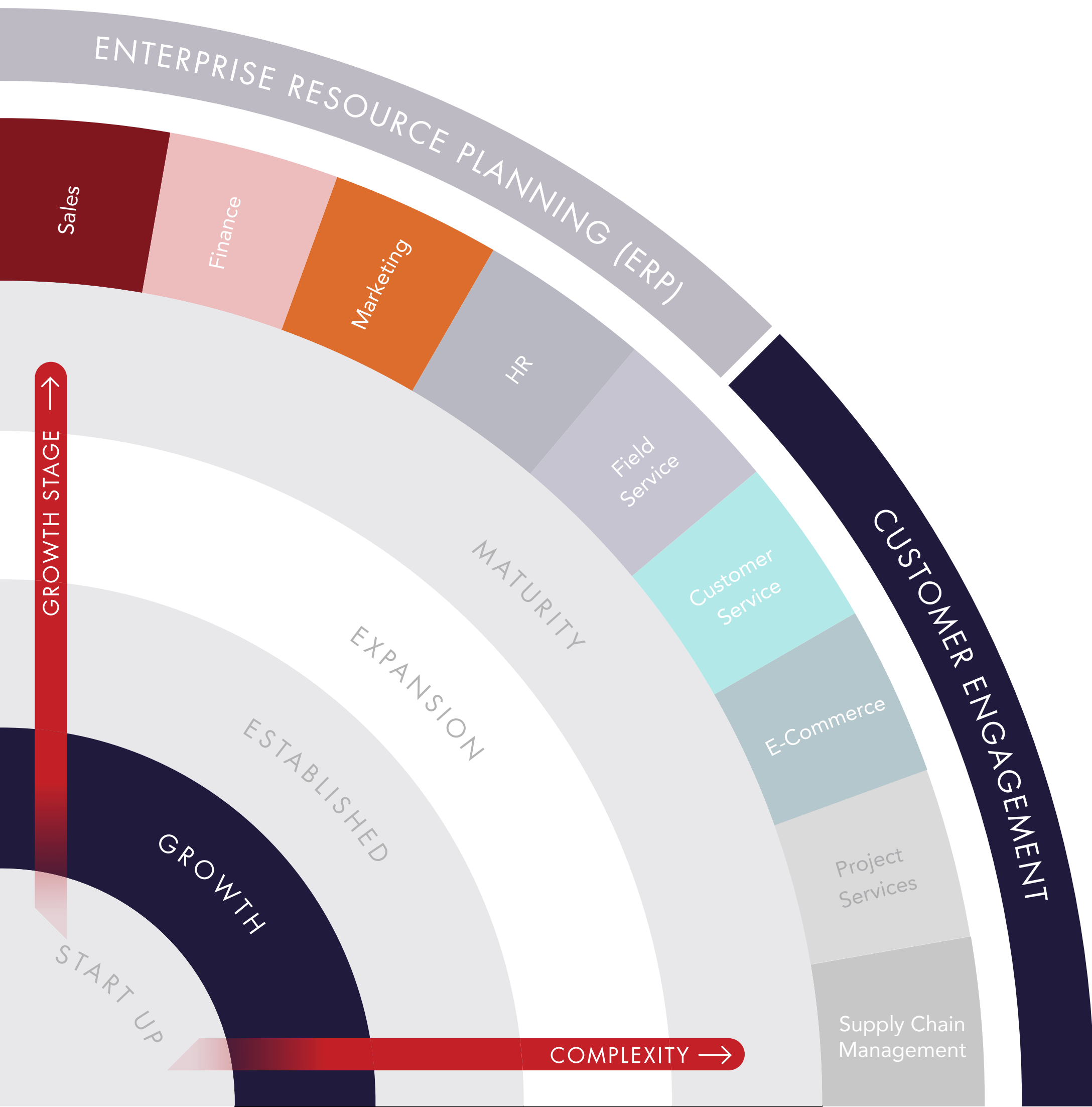
DYNAMICS CAPABILITIES

Budgeting
Accounts receivable
Accounts payable
Treasury
External compliance certification
Risk decisioning dashboard
Fixed assets
Finance management

SKU_s

Dynamics 365 for Finance

Click on the highlighted Functions to learn more



GROWTH

As businesses grow, their software suite becomes more complex. The last thing they want are bespoke processes and systems that don't play together nicely. It's about setting up platforms that can work for ten employees or 200.

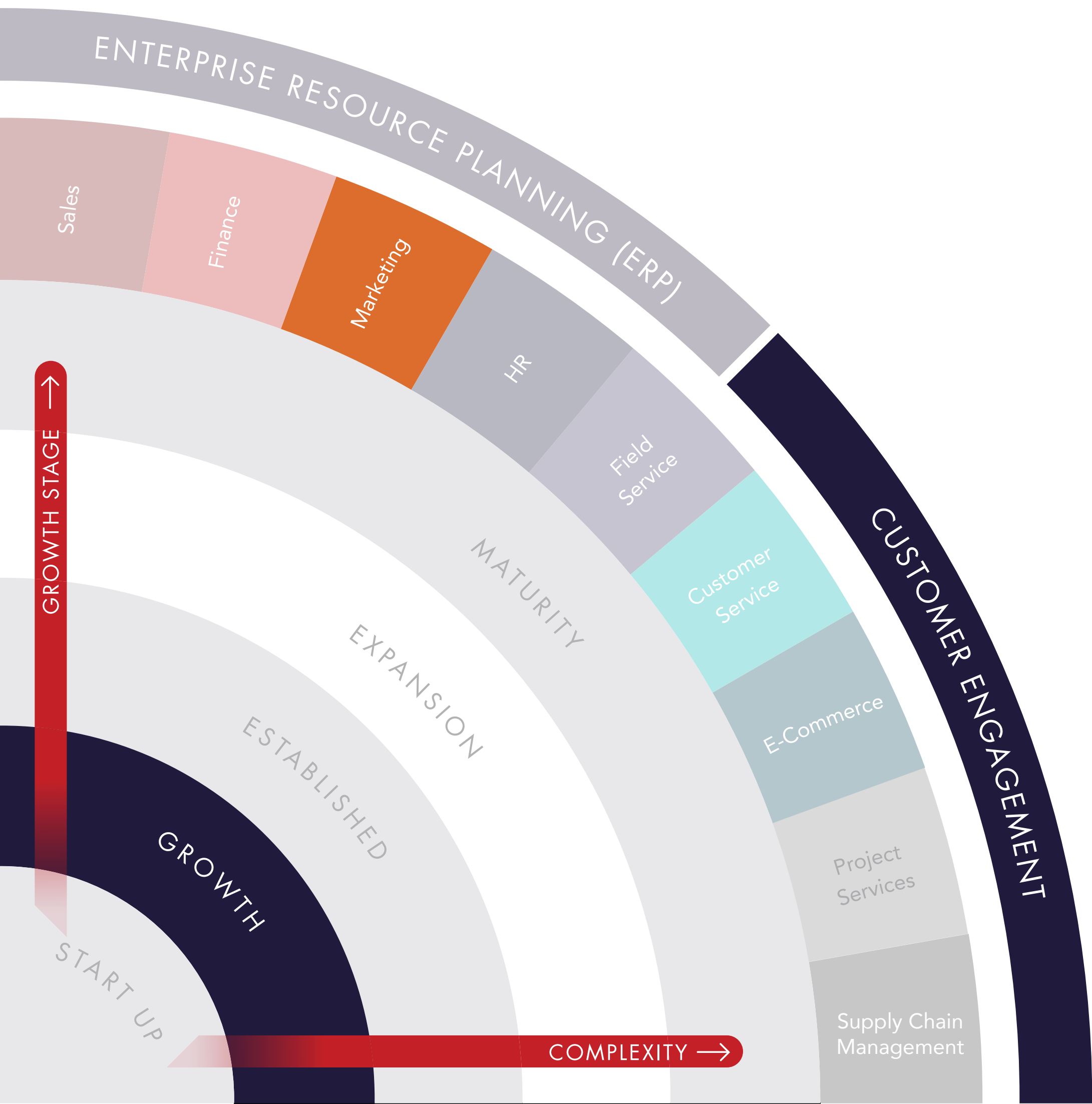
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PAIN POINTS

Click on a Pain Point below:

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- 2 Sales and marketing don't have the capacity or tools to tackle a larger database of customers and prospects
- 3 Inability to forecast demand to sustain business growth
- 4 Customer touchpoints are not joined up, leading to a backlog of complaints
- 5 Managing the right stock, fulfilling and tracking orders through digital shops
- 6 Finding the right people to grow with the business





MARKETING: GROWTH



PAIN POINTS

2

Marketing
Sales and marketing don't have the capacity or tools to tackle a larger database of customers and prospects

4

Marketing
Customer touchpoints are not joined up, leading to a backlog of complaints

CHALLENGES

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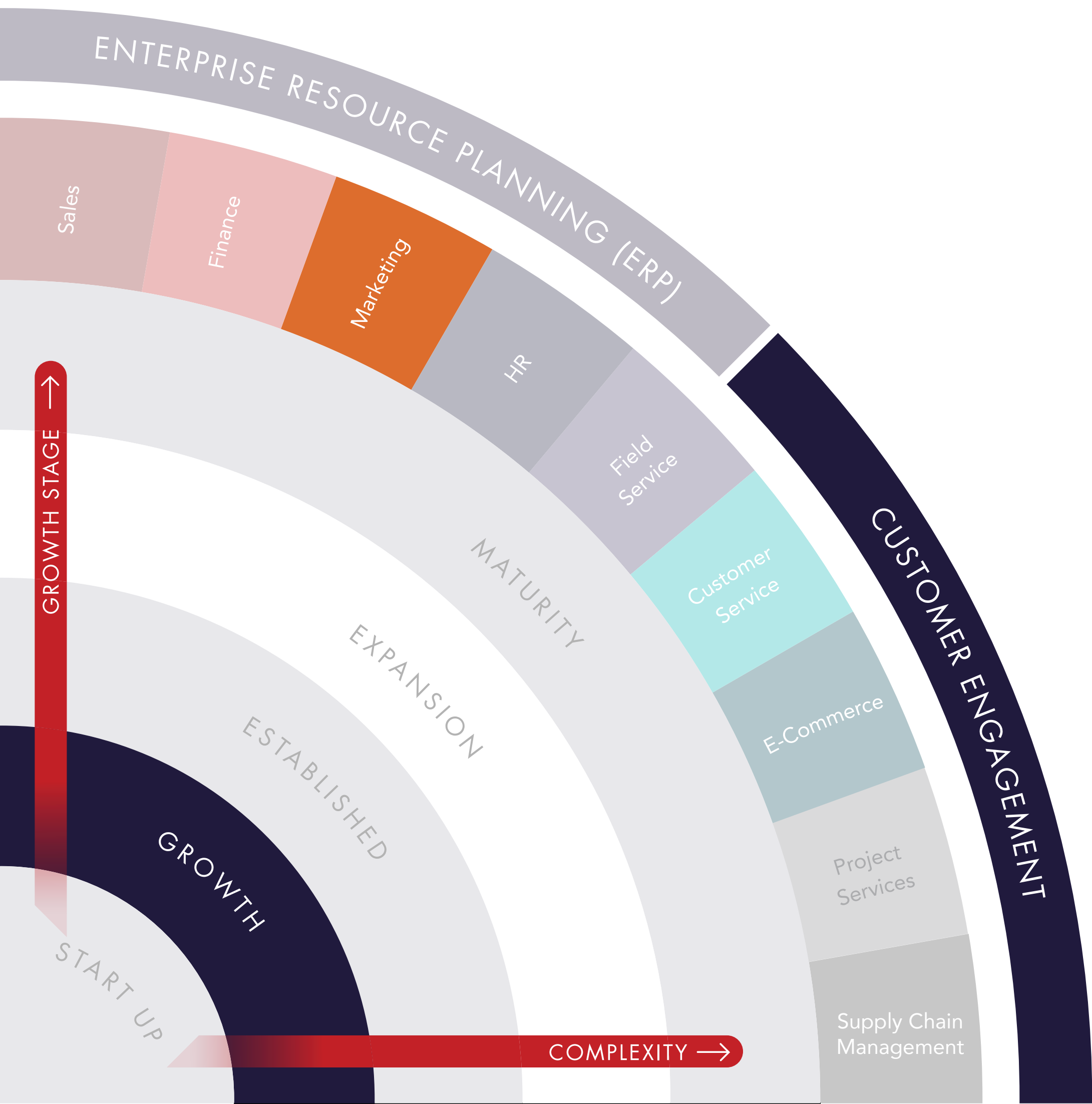
This makes it difficult to send timely information to the right customers, hampering cross-sell and upsell efforts, and opening the door for competitors. For those customers they do communicate with, marketers without a platform like Dynamics may struggle to monitor email open rates or link customer touchpoints to sales data. It's very hard to track results or understand whether they are adding value.

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And by targeting the right customers and optimising marketing resources, it can ultimately help marketers improve the ROI of their activities.



MARKETING: GROWTH



PAIN POINTS

- 2

Marketing
Sales and marketing don't have the capacity or tools to tackle a larger database of customers and prospects
- 4

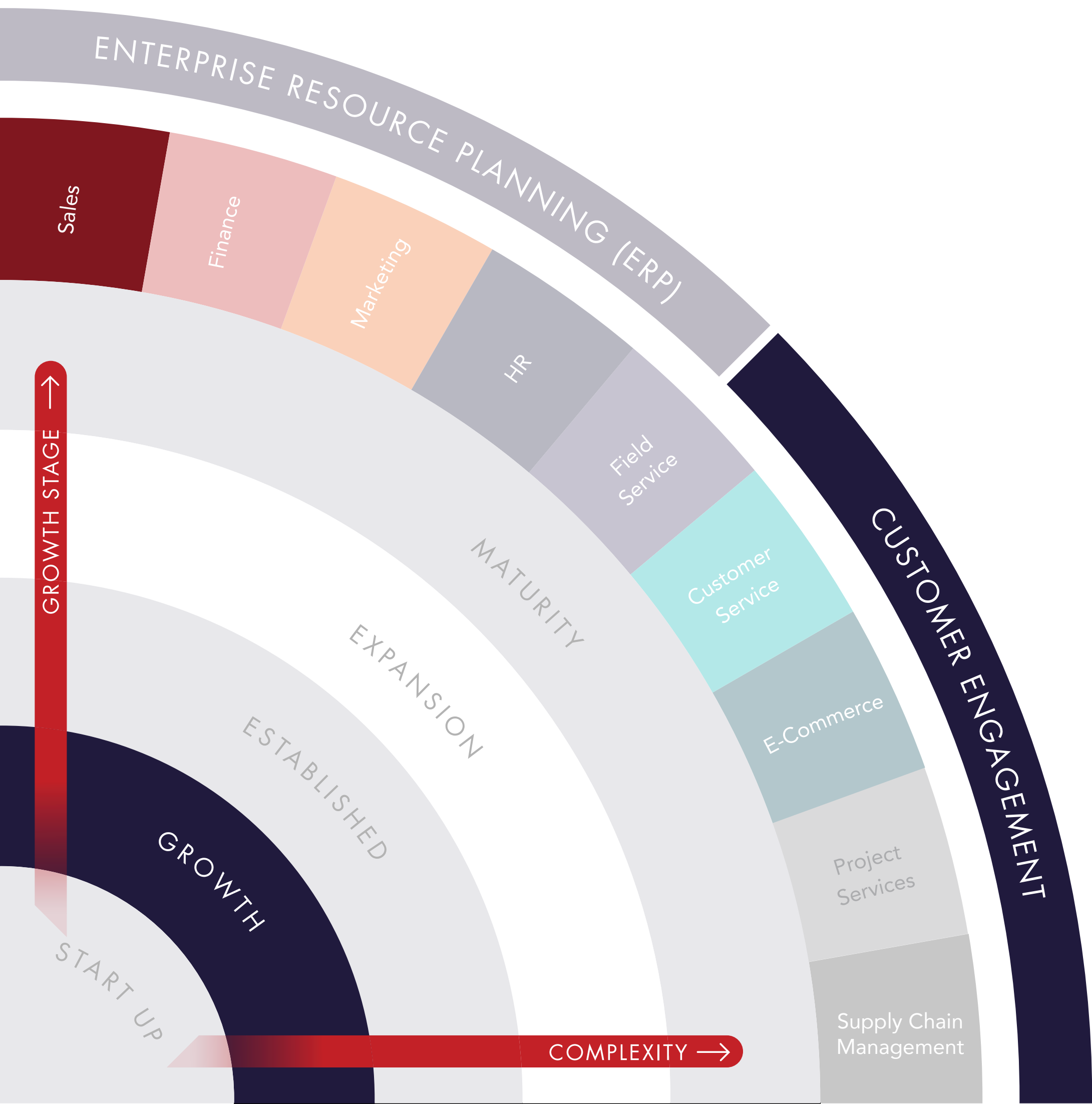
Marketing
Customer touchpoints are not joined up, leading to a backlog of complaints

DYNAMICS CAPABILITIES

Email marketing
Lead scoring
Market segmentation
Customer journeys
Event management
Connector for LinkedIn
Lead generation forms

SKUs

Dynamics 365 Marketing
Dynamics 365 Customer Insight
Power Apps



SALES: GROWTH



PAIN POINTS

- 2

Sales

Sales and marketing don't have the capacity or tools to tackle a larger database of customers and prospects
- 4

Sales

Customer touchpoints are not joined up, leading to a backlog of complaints

CHALLENGES

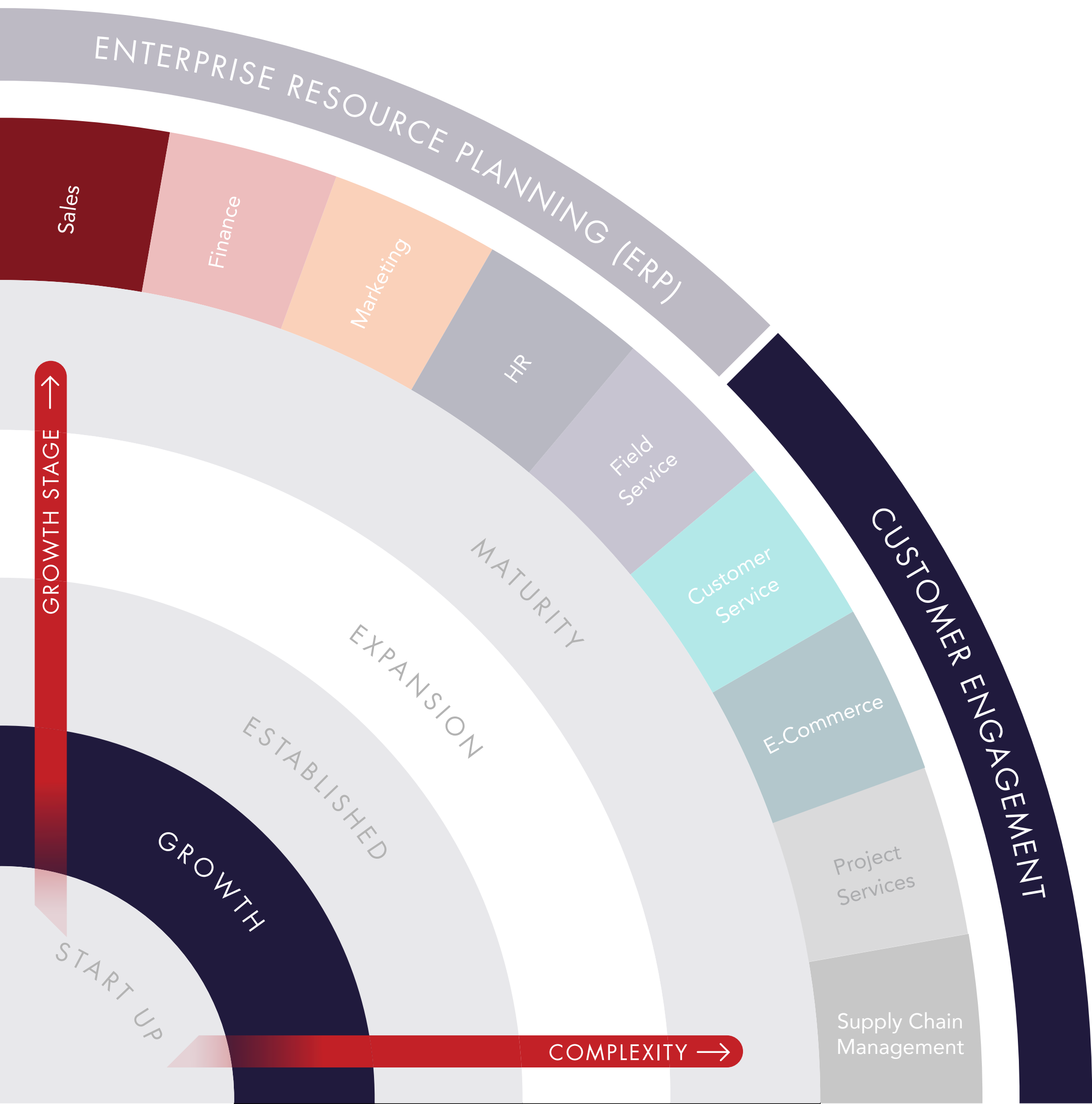
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SALES: GROWTH



PAIN POINTS

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DYNAMICS CAPABILITIES

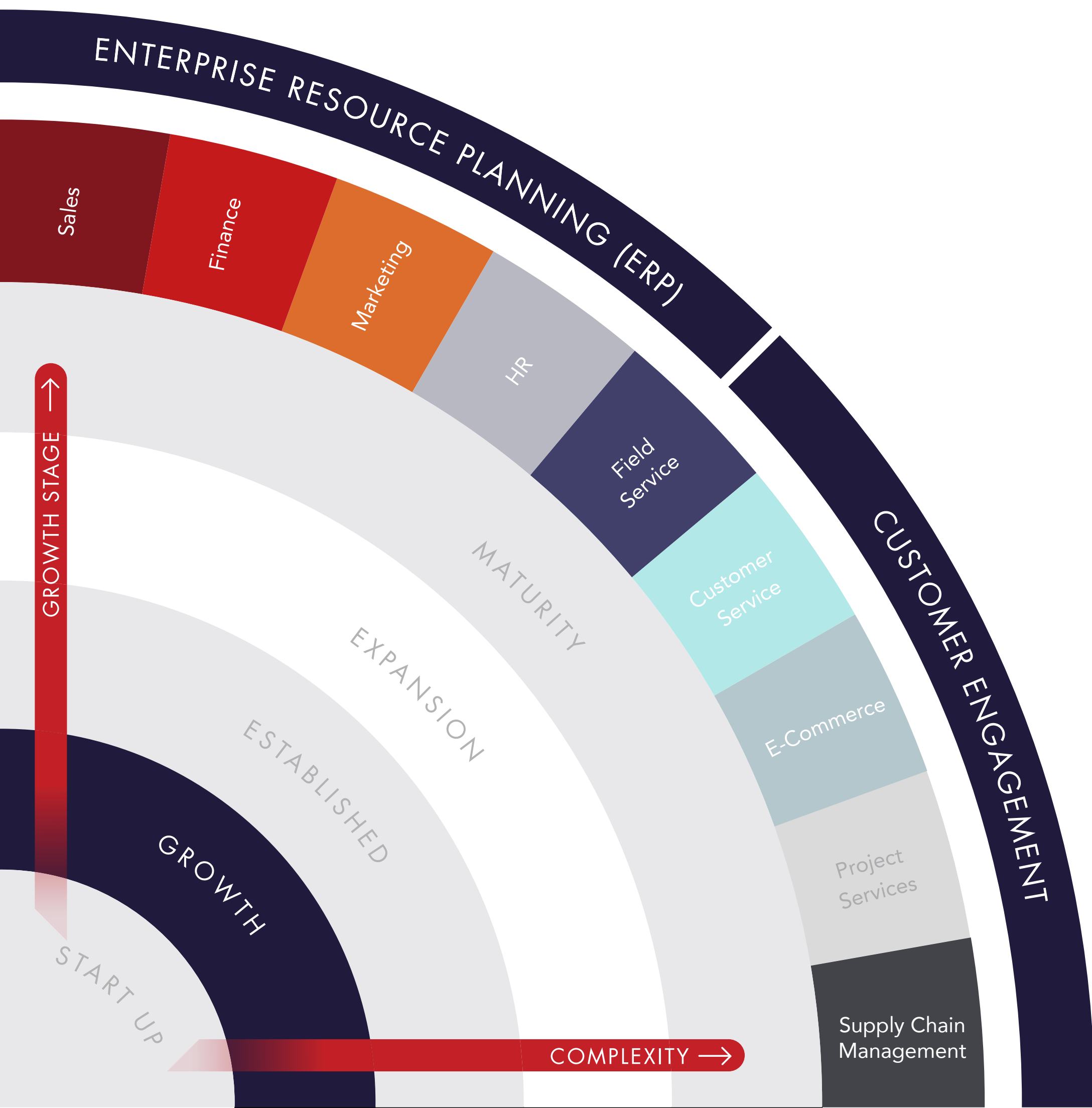
SKUs

Lead management
Opportunity management
Pipeline forecasting
Sales automation
Quote management
Marketing lists
Email marketing

Dynamics 365 Sales Professional
Dynamics 365 Sales Insight
Power BI



Click on the highlighted
Functions to learn more



GROWTH

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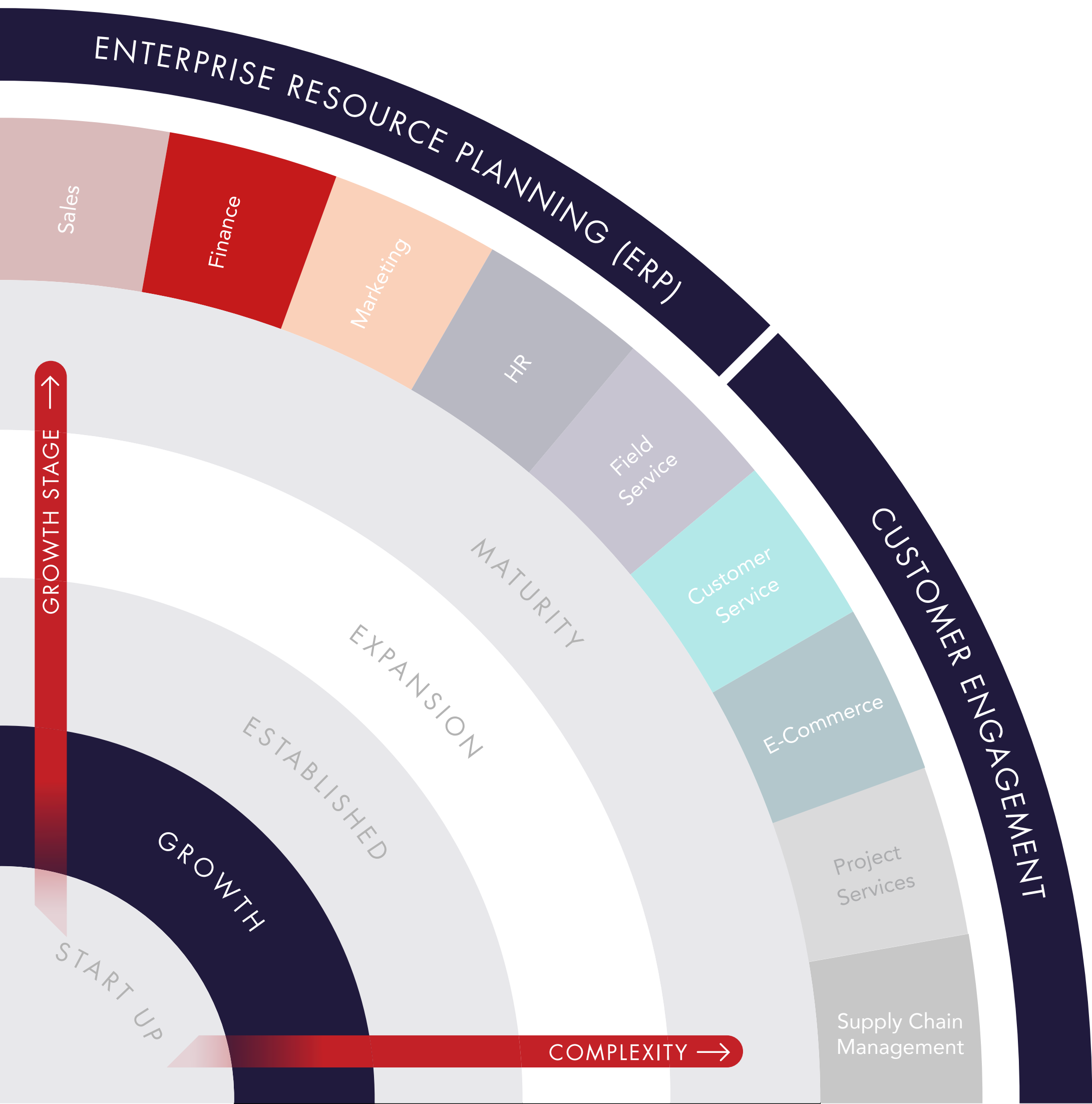
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FINANCE: GROWTH



PAIN POINTS

3

Finance
Inability to forecast demand to sustain business growth

CHALLENGES

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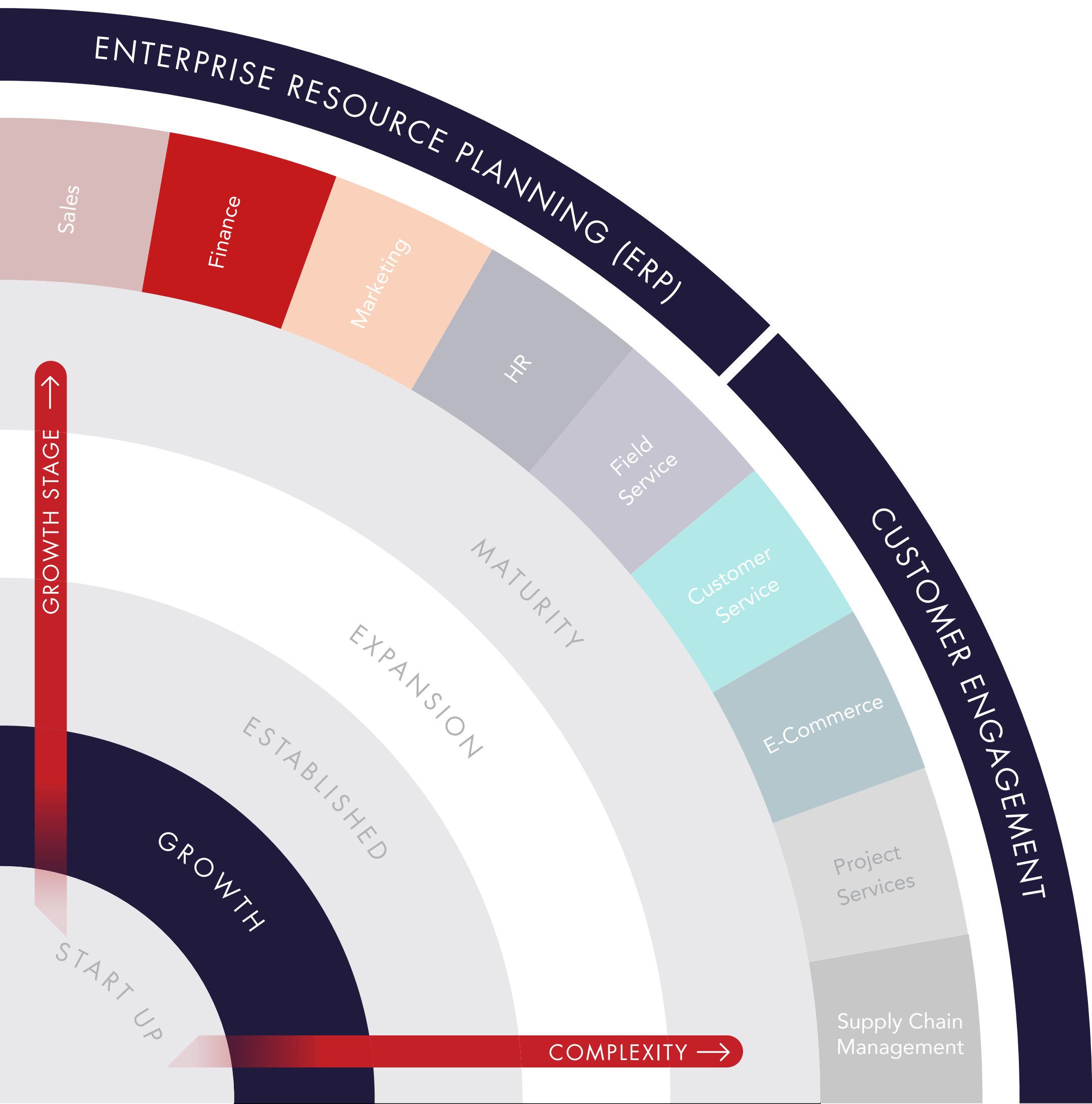
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NEXT: VIEW CAPABILITIES

< 1/2



FINANCE: GROWTH



PAIN POINTS

3

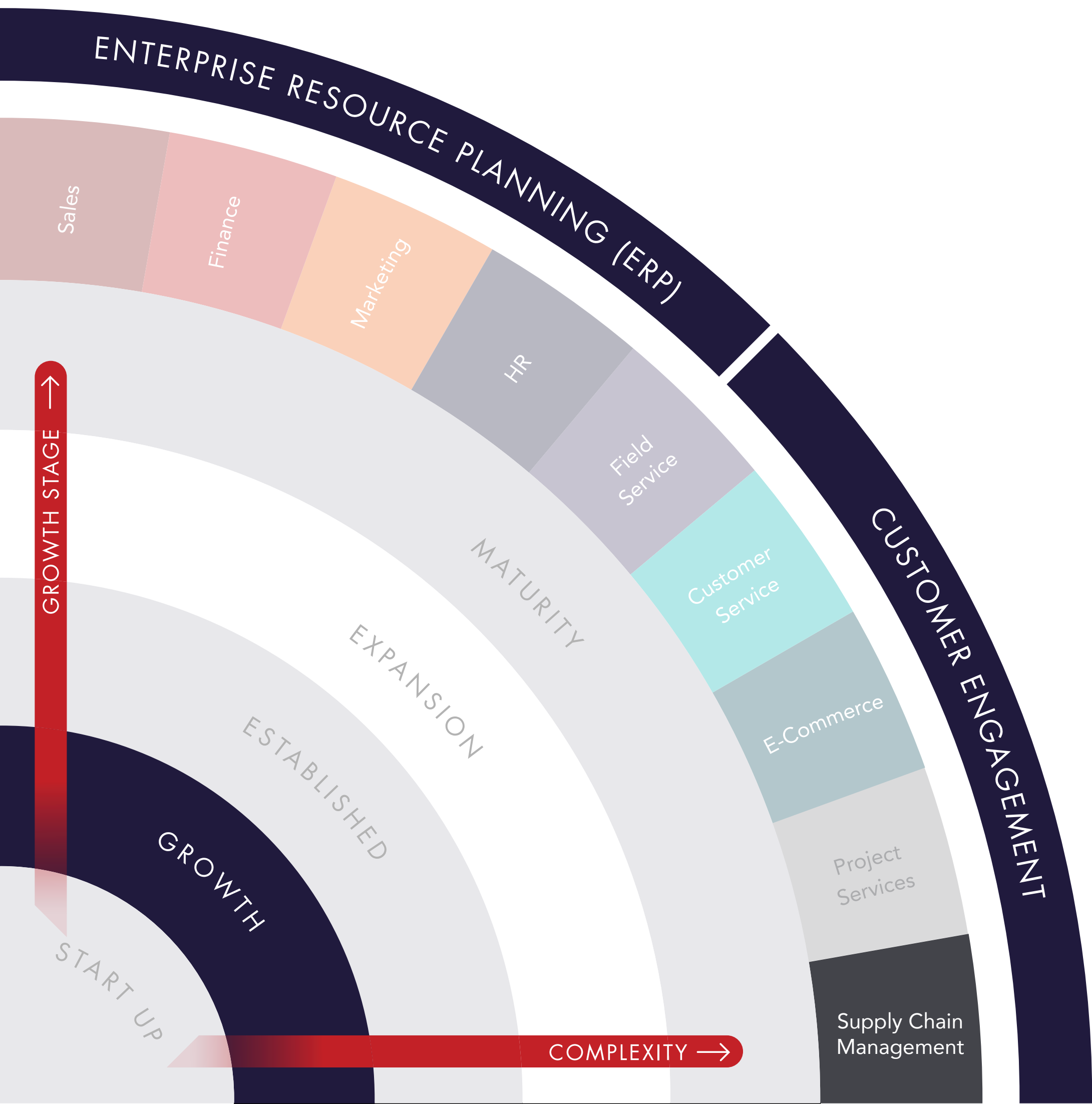
Finance
Inability to forecast demand to sustain business growth

DYNAMICS CAPABILITIES

SKUs

Budgeting
Accounts receivable
Accounts payable
Treasury
External compliance certification
Risk decisioning dashboard
Fixed assets
Finance management

Dynamics 365 for Finance



SUPPLY CHAIN MANAGEMENT: GROWTH



PAIN POINTS

3

Supply Chain Management

Inability to forecast demand to sustain business growth

CHALLENGES

Without real-time information, it's difficult to efficiently manage logistics and supply chain operations. Maintenance ends up being reactive rather than proactive, stock levels have to be recorded manually (an error-prone process), and customers end up being given inaccurate delivery times. Without end-to-end visibility of the supply chain and warehousing operations, improvements can only be based on intuition.

Many businesses also have disparate or disconnected procurement systems, particularly as they grow across territories. This makes it difficult to spot cost inefficiencies.

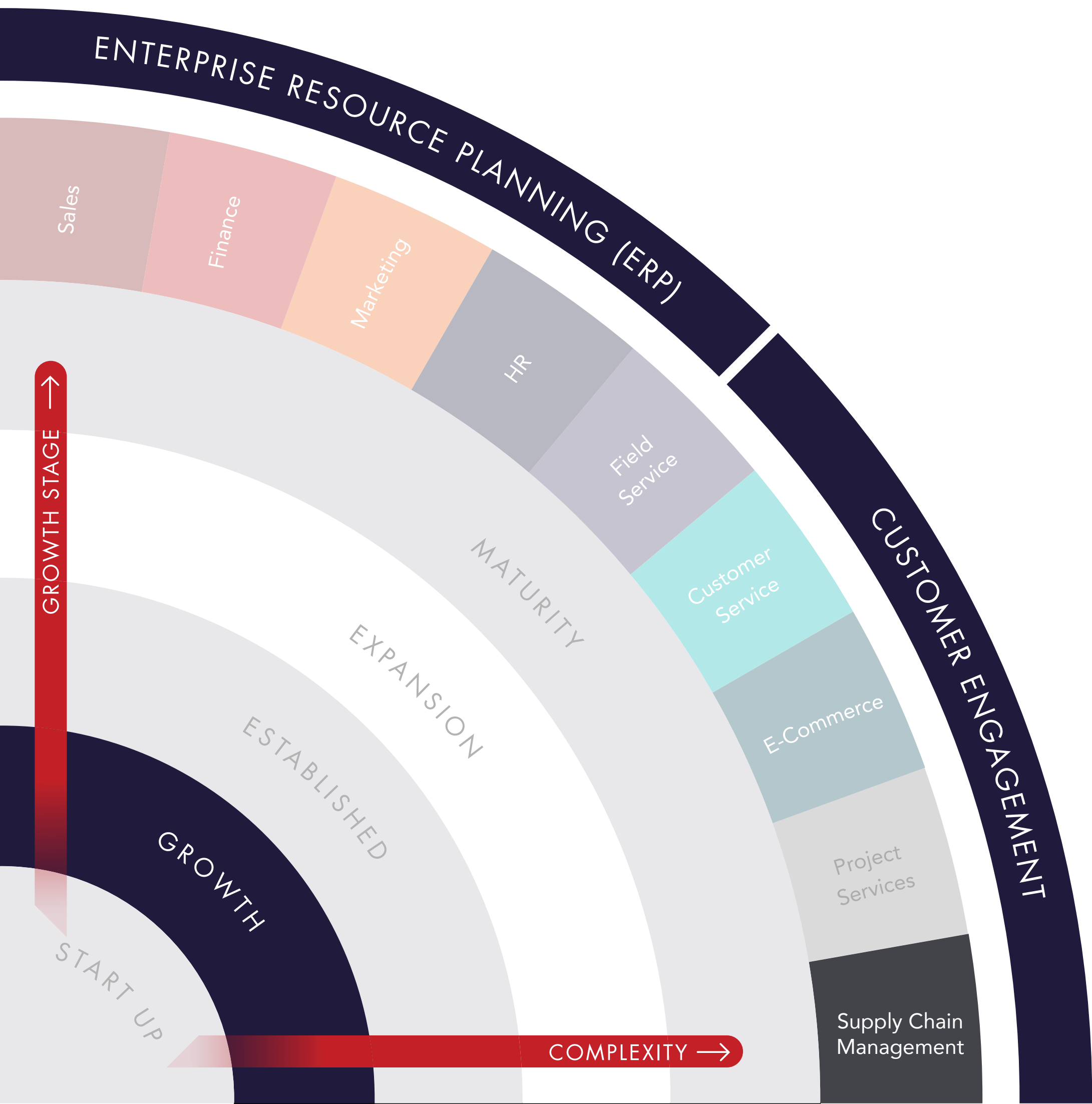
CHALLENGES

With machine-learning-enhanced warehouse management through Dynamics, your clients can accurately report and forecast stock levels, helping them to move from a reactive to proactive supply chain operation. Dynamics also integrates IoT devices, so they can fix issues in advance to prevent downtime and extend the life of equipment.

And with powerful automation and analytics tools, the platform can also optimise planning and improve the fulfilment, material sourcing, and logistics of supply chains.

NEXT: VIEW CAPABILITIES

< 1/2



SUPPLY CHAIN MANAGEMENT: GROWTH



PAIN POINTS

3

Supply Chain Management
Inability to forecast demand to sustain business growth

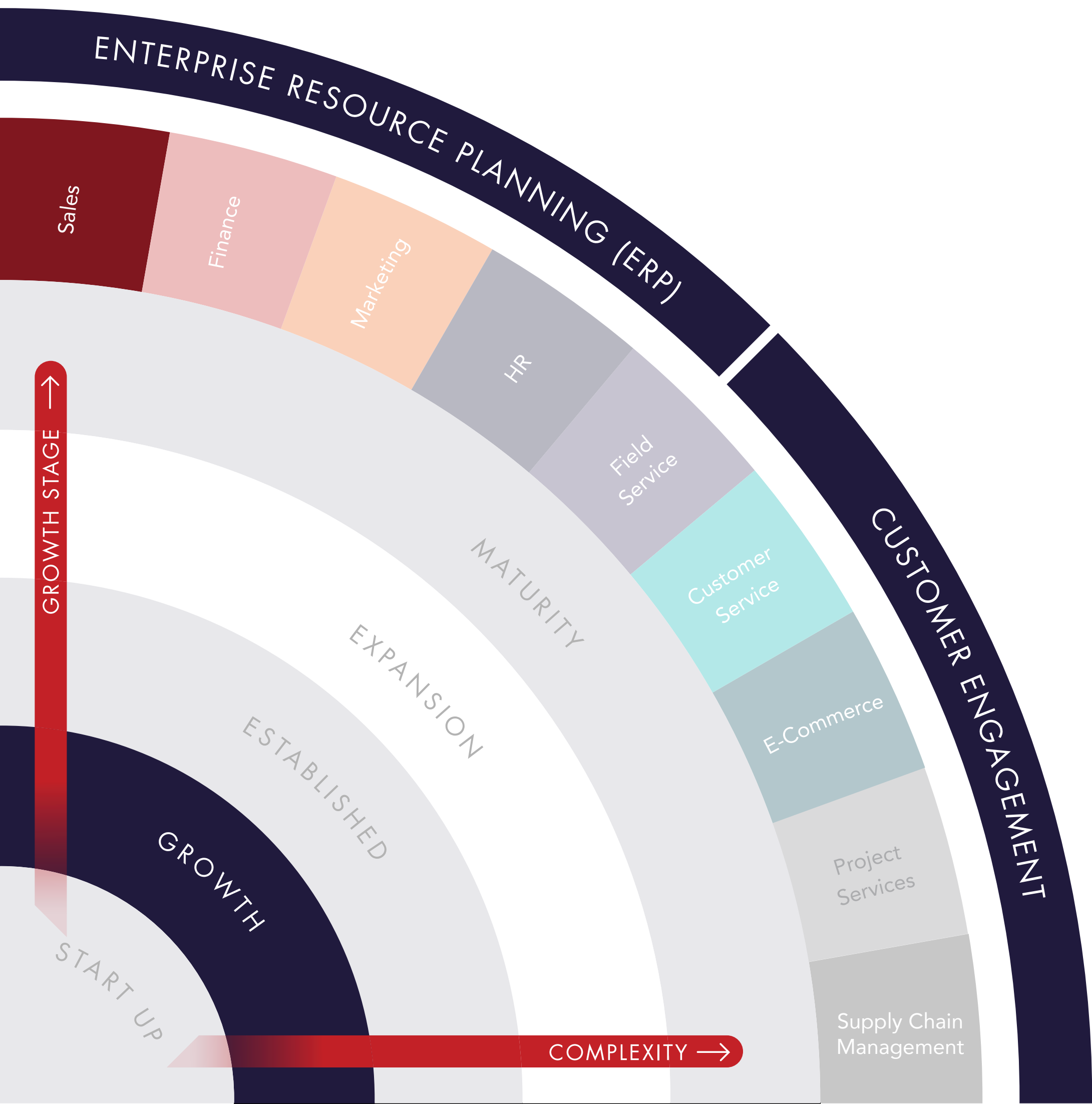
CAPABILITIES

Asset management
Inventory management
Production central
Procurement and sourcing
Transportation
Warehouse management
Fleet management

SKU_s

Dynamics 365 Supply Chain Management





SALES: GROWTH



PAIN POINTS

3

Sales

Inability to forecast demand to sustain business growth

CHALLENGES

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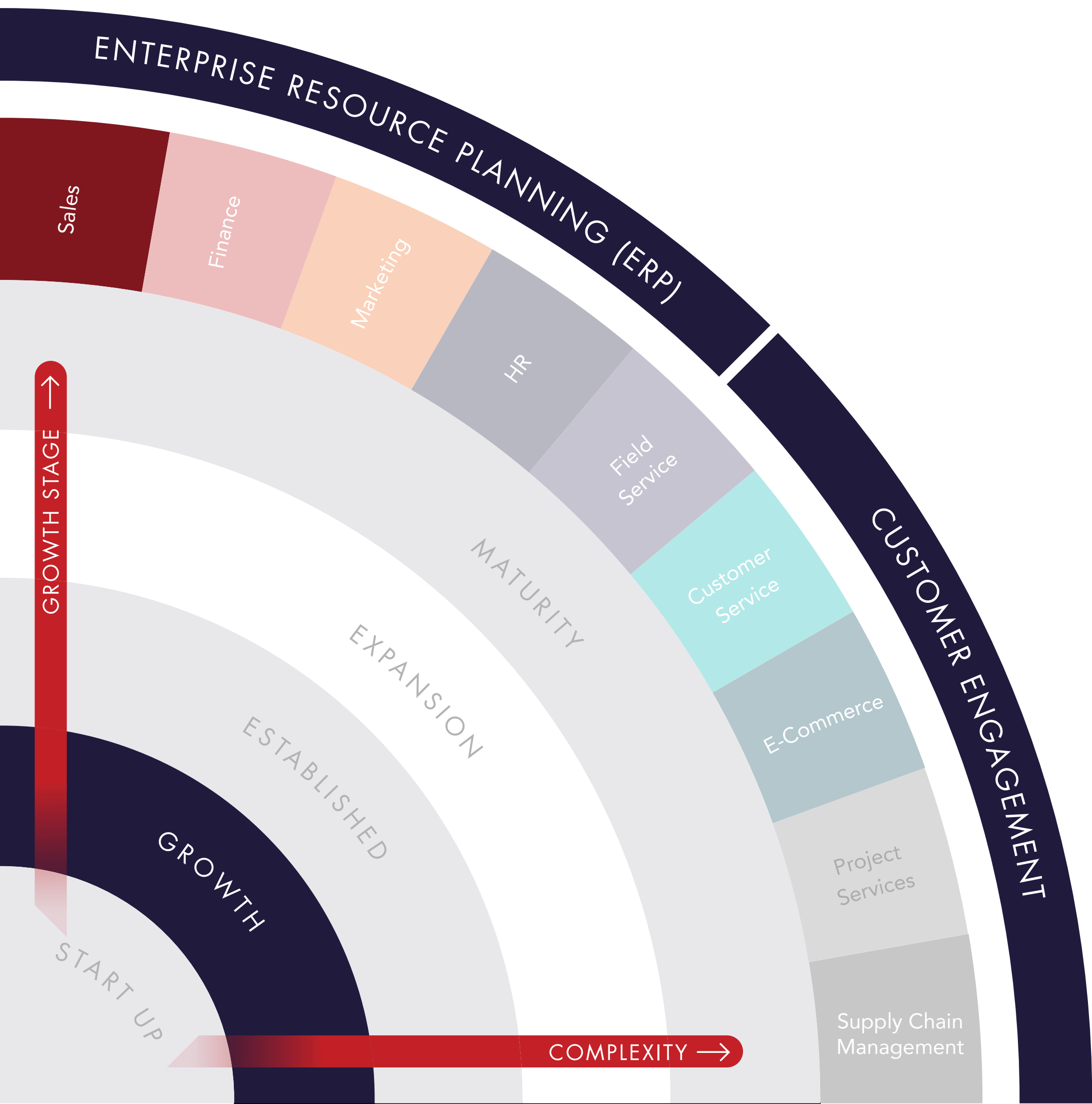
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SALES: GROWTH



PAIN POINTS

3

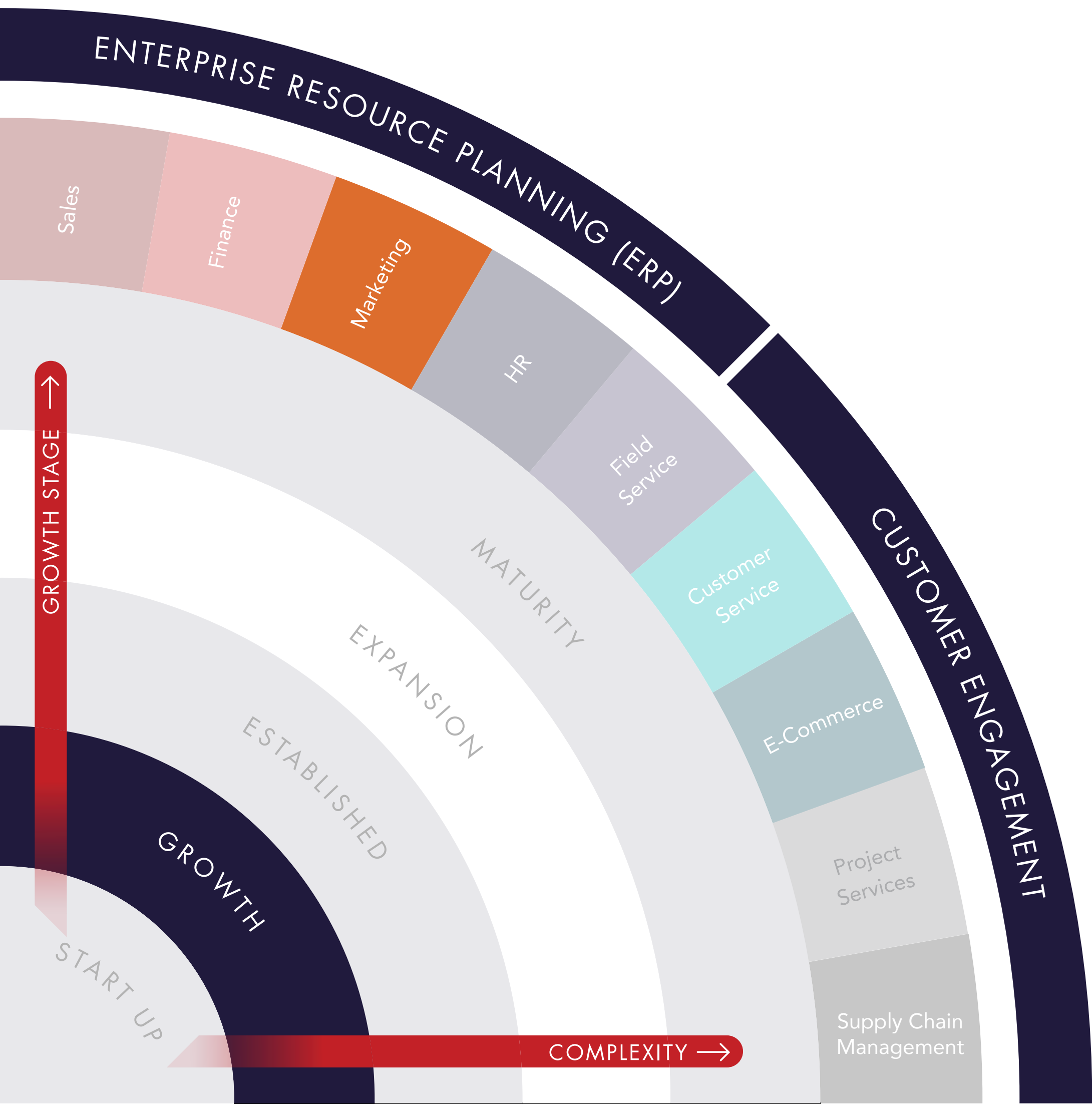
Sales
Inability to forecast demand to sustain business growth

DYNAMICS CAPABILITIES

Lead management
Opportunity management
Pipeline forecasting
Sales automation
Quote management
Marketing lists
Email marketing

SKU_s

Dynamics 365 Sales Professional
Dynamics 365 Sales Insight
Power BI



MARKETING: GROWTH



PAIN POINTS

3

Marketing
Inability to forecast demand to sustain business growth

CHALLENGES

One of the biggest challenges for marketing departments is getting accurate, up-to-date data and making sense of how to use it effectively. They may have a large customer database that doesn't yield any useful insights from, or too few staff to consistently communicate with their network.

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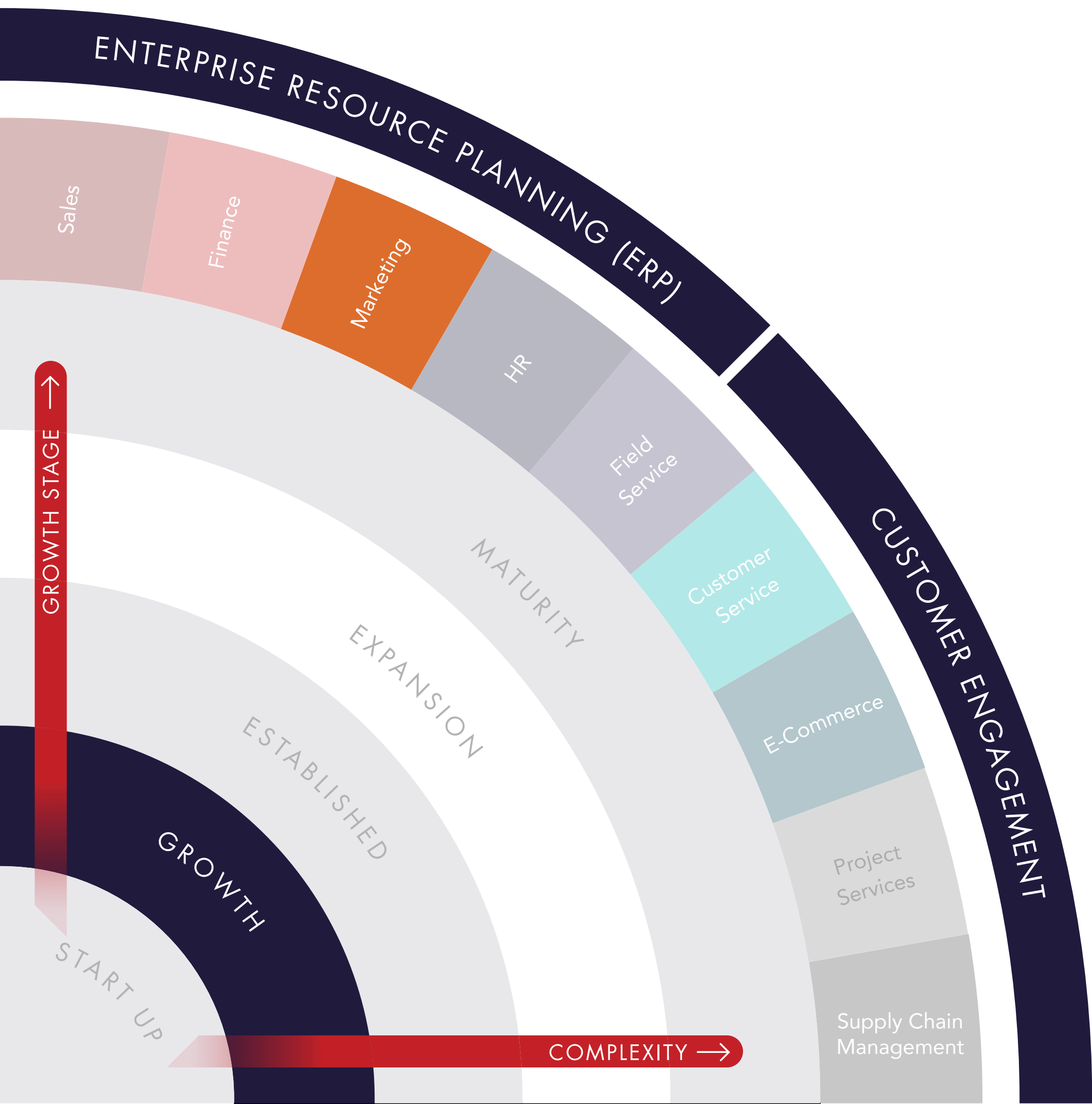
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< 1/2



MARKETING: GROWTH



PAIN POINTS

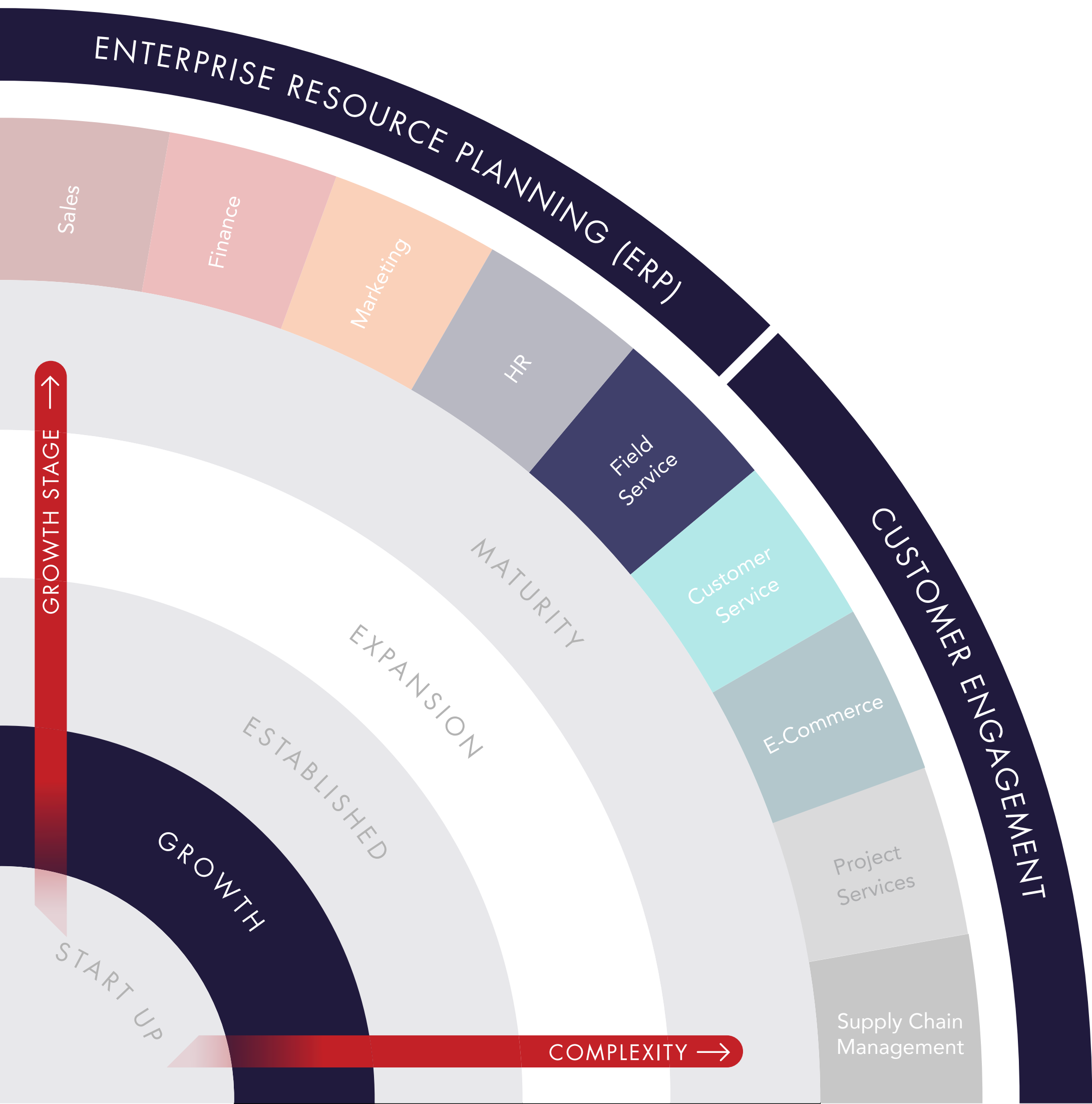
- 3 Marketing
Inability to forecast demand to sustain business growth

DYNAMICS CAPABILITIES

- Email marketing
- Lead scoring
- Market segmentation
- Customer journeys
- Event management
- Connector for LinkedIn
- Lead generation forms

SKUs

- Dynamics 365 Marketing
- Dynamics 365 Customer Insight
- Power Apps



FIELD SERVICE: GROWTH



PAIN POINTS

3

Field Service

Inability to forecast demand to sustain business growth

CHALLENGES

When you're out solving customer issues in the field, you need the information and the flexibility to come up with solutions on the fly. Many teams don't have access to the right tools to support technicians, or effective customer insight collection systems, and that makes it very difficult to prioritise faults or offer a triage service. Agents are forced to be reactive, rather than proactively finding fixes in advance.

Without accurate, real-time data, co-ordinators can also struggle to schedule field agents with the right skillsets at the right times, and customers don't always receive appropriate levels of communication throughout the process. All of this can have a negative impact on customer experiences.

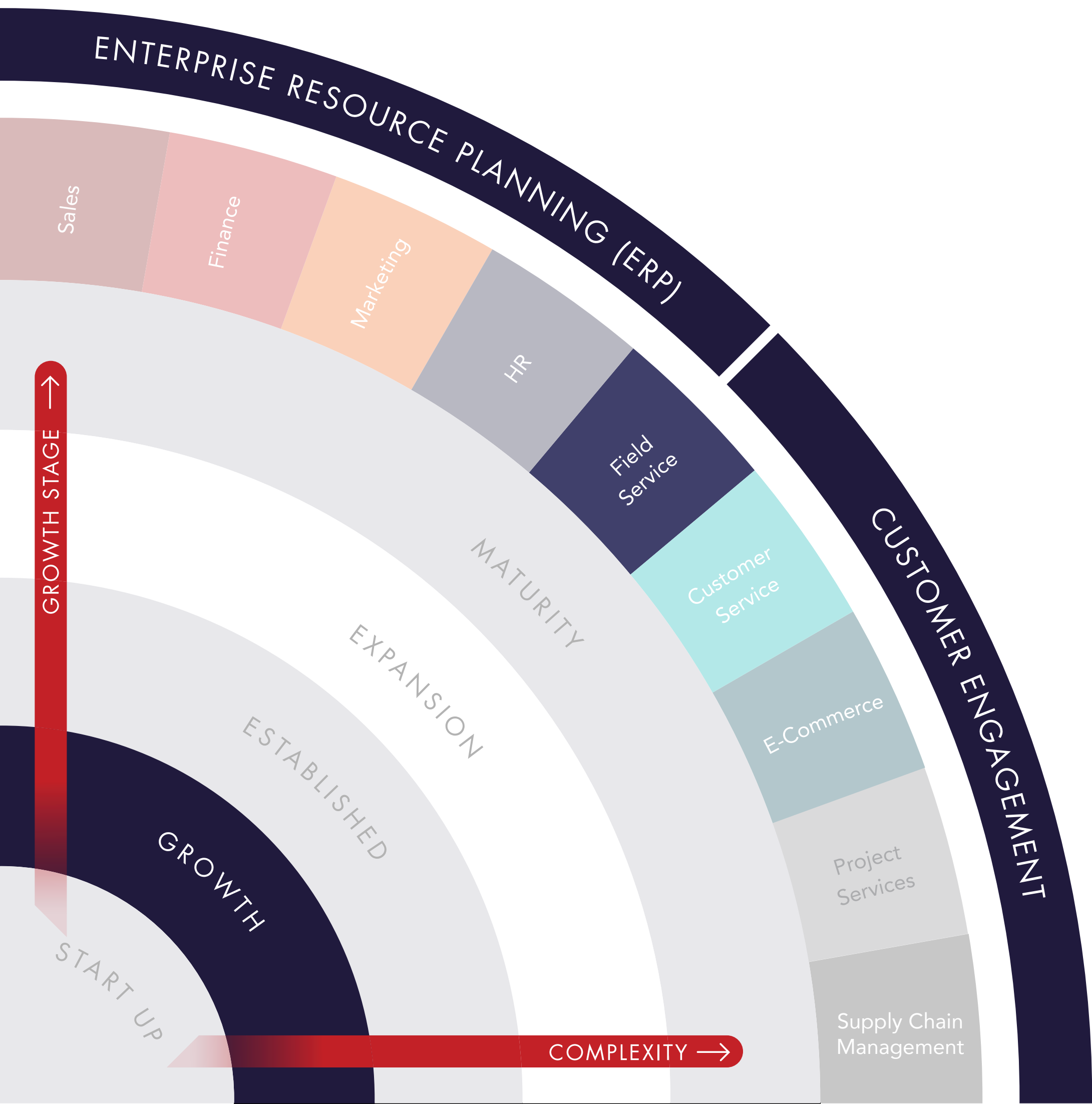
BENEFITS OF DYNAMICS

With effective information management through Dynamics, field service teams can get the right person to the right place at the right time with the right skills and equipment. That's thanks to effective scheduling processes and powerful analytics, making it easier to predict, detect and resolve issues in advance.

Rather than finger-in-the-air prioritisation, it's much easier for technicians and coordinators to prioritise and be proactive, so that customer issues are fixed first time. Which all leads to happier customers and more efficient operations.

NEXT: VIEW CAPABILITIES

< 1/2



FIELD SERVICE: GROWTH



PAIN POINTS

3

Field Service
Inability to forecast demand to sustain business growth

DYNAMICS CAPABILITIES

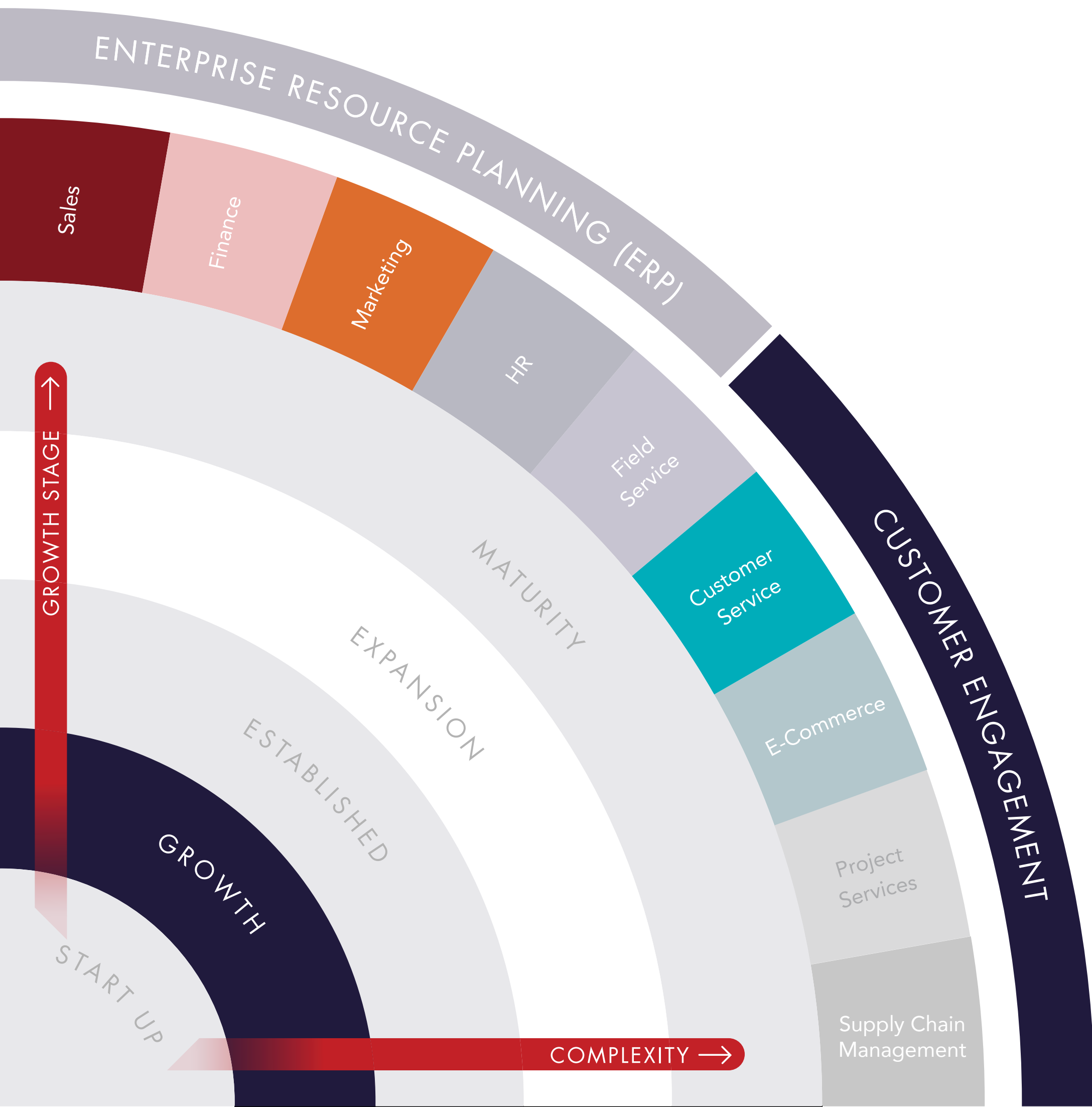
Work orders
Service agreements
Schedule and dispatch
Schedule board
Inventory management
Mobile productivity
Connected devices

SKU_s

Dynamics 365 Field Service
Dynamics 365 Remote Assistant
Power Apps



Click on the highlighted Functions to learn more ↓



GROWTH

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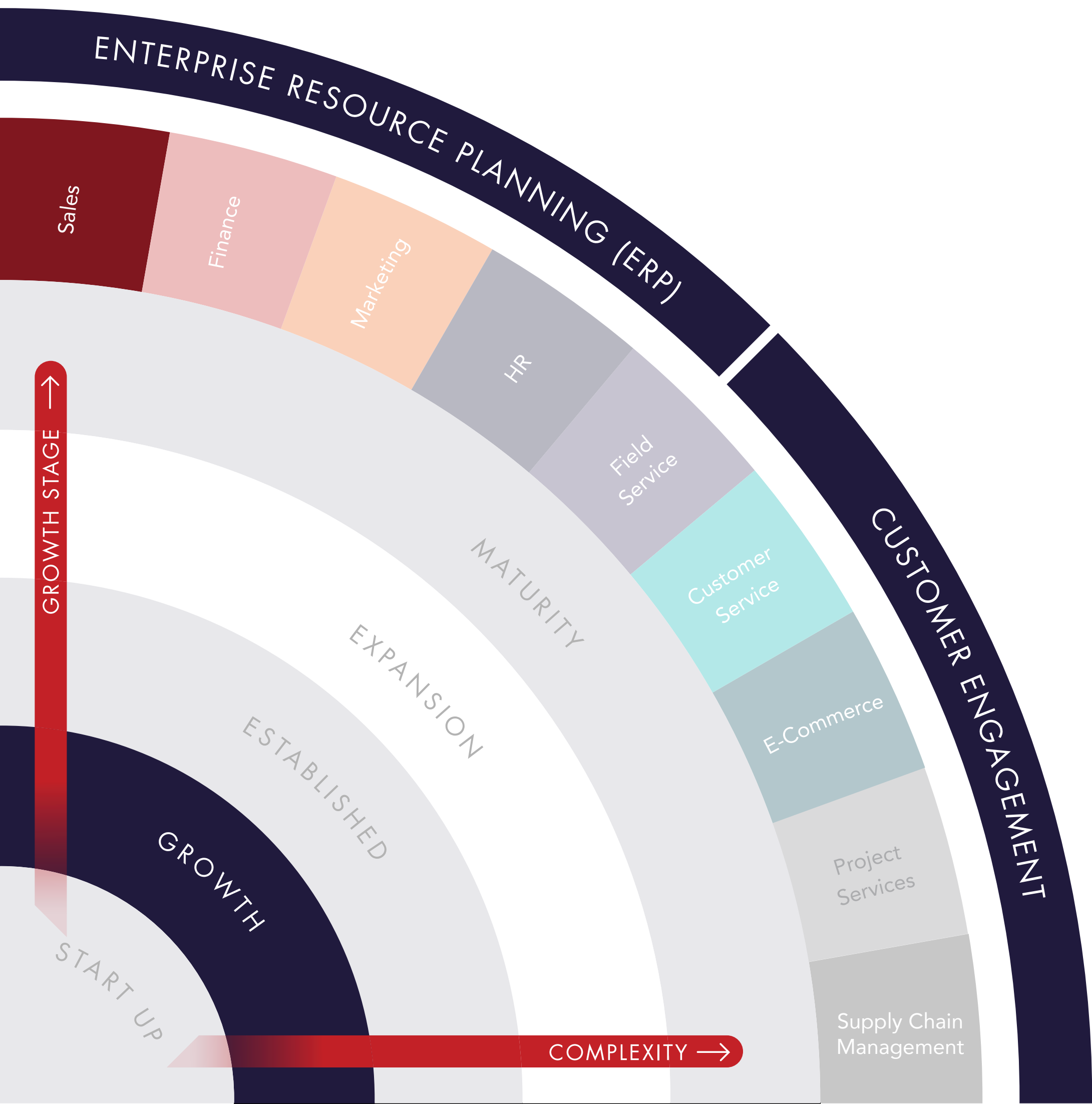
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SALES: GROWTH



PAIN POINTS

- 4 Sales
Customer touchpoints are not joined up, leading to a backlog of complaints

CHALLENGES

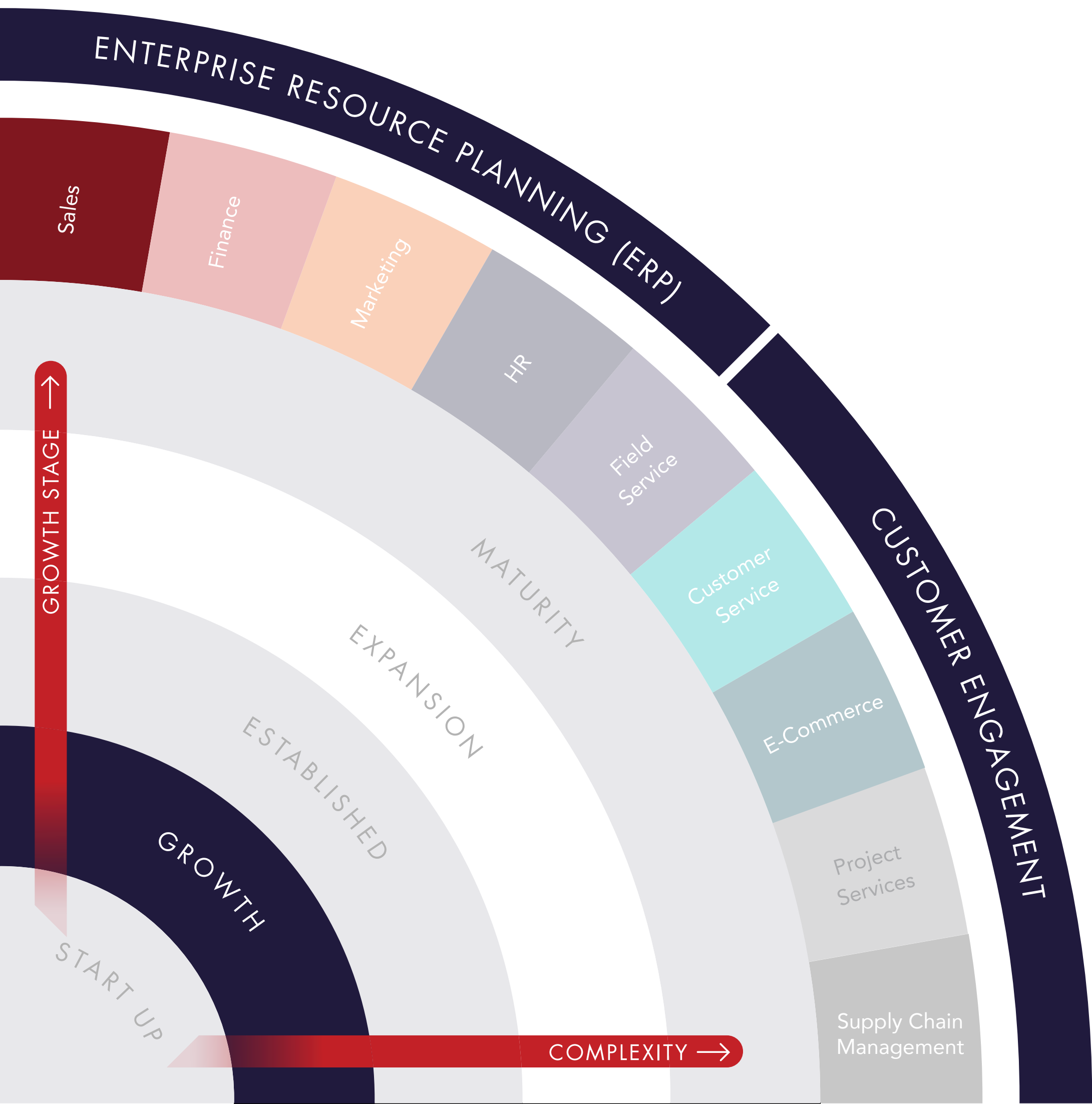
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SALES: GROWTH



PAIN POINTS

4

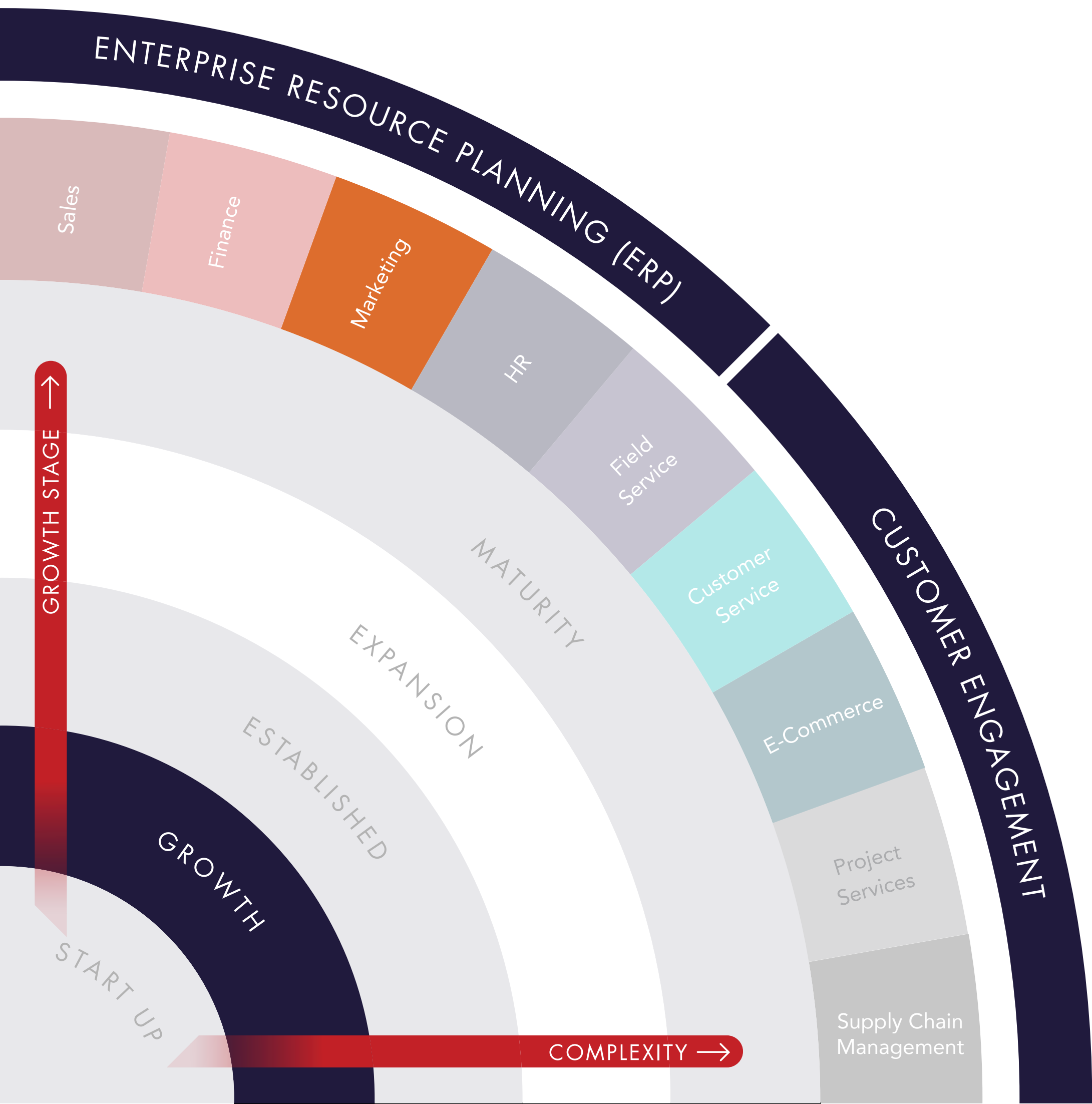
Sales
Customer touchpoints
are not joined up,
leading to a backlog
of complaints

DYNAMICS CAPABILITIES

Lead management
Opportunity management
Pipeline forecasting
Sales automation
Quote management
Marketing lists
Email marketing

SKU_s

Dynamics 365 Sales Professional
Dynamics 365 Sales Insight
Power BI



MARKETING: GROWTH



PAIN POINTS

4

Marketing

Customer touchpoints are not joined up, leading to a backlog of complaints

CHALLENGES

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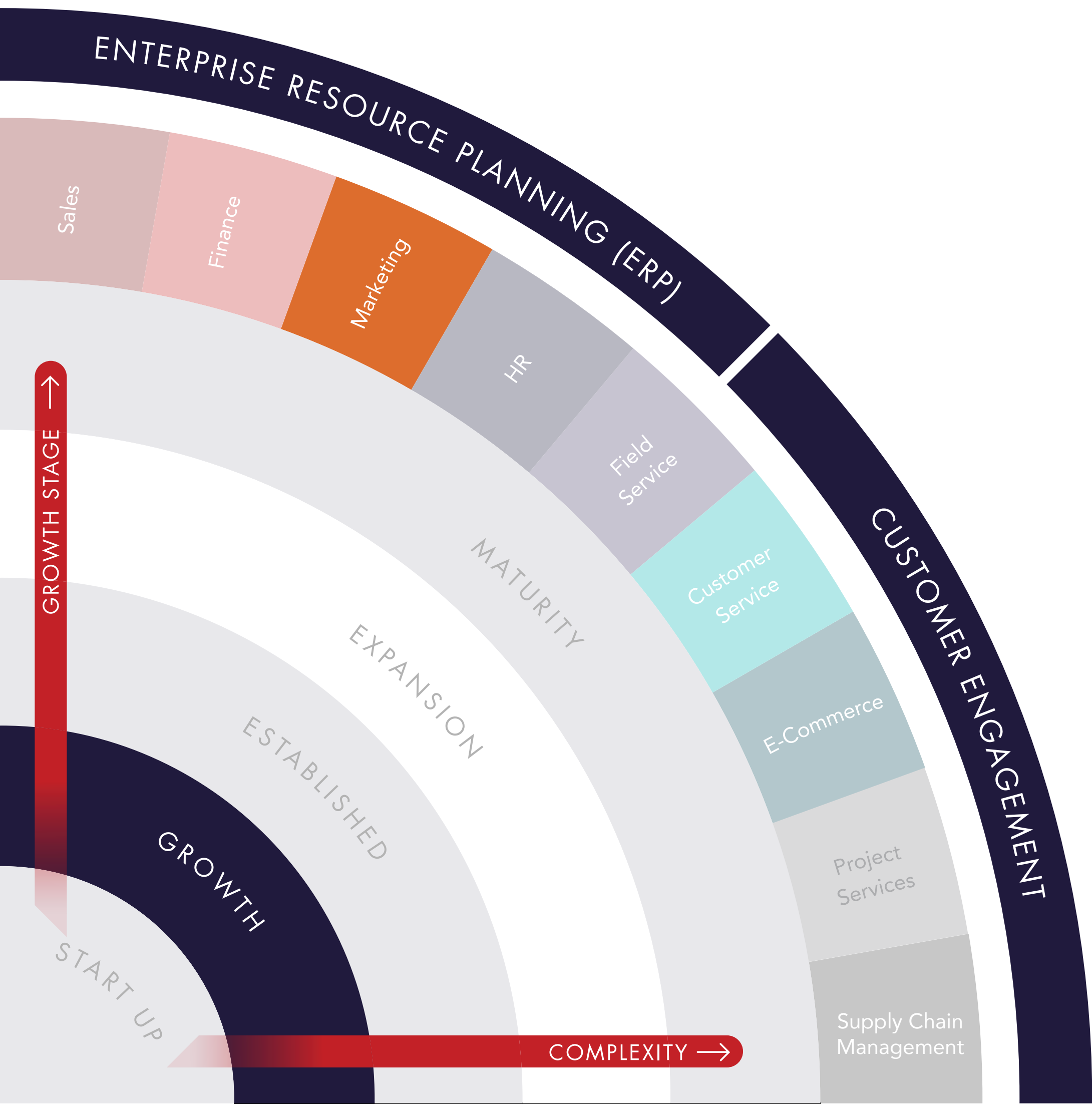
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NEXT: VIEW CAPABILITIES

< 1/2



MARKETING: GROWTH



PAIN POINTS

4

Marketing
Customer touchpoints
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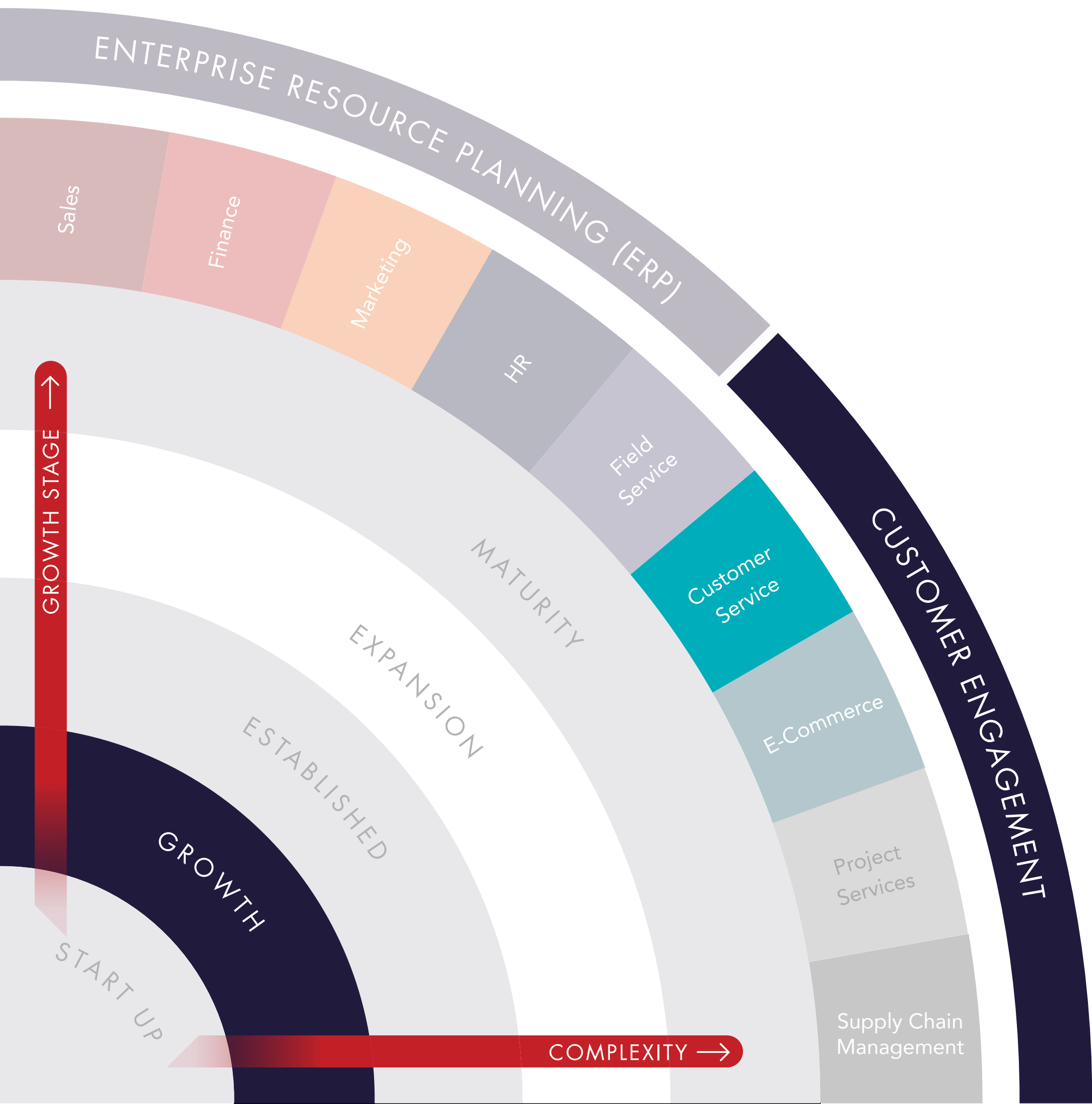
CAPABILITIES

Email marketing
Lead scoring
Market segmentation
Customer journeys
Event management
Connector for LinkedIn
Lead generation forms

SKUs

Dynamics 365 Sales
Dynamics 365 Sales Insight
Dynamics 365 Product Visualise
Power BI





CUSTOMER SERVICE: GROWTH



PAIN POINTS

4

Customer Service
Customer touchpoints
are not joined up,
leading to a backlog
of complaints

CHALLENGES

To meet high customer expectations, businesses are now under pressure to deliver omnichannel customer service. But for many, it's impossible to track when a customer has previously interacted with the company, even if they spoke to a different agent just minutes before.

Customer sales advisors may not have access to real-time, accurate information, or have collaboration tools in place to get quick answers from other departments.

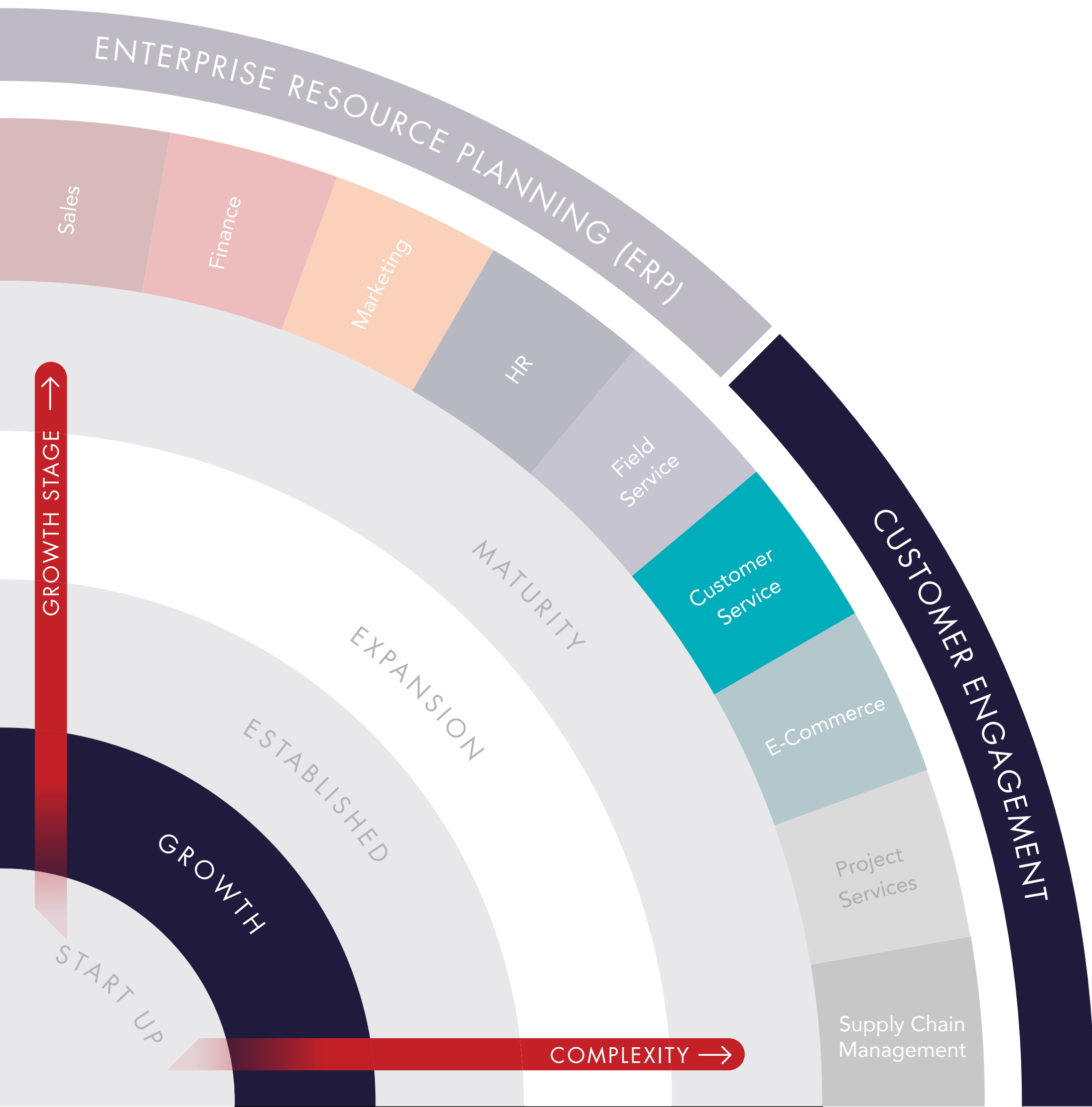
And when customer calls surge, they sometimes lack the call handling insight to resource their teams properly, or have no way to route customers through an interactive voice response (IVR).

BENEFITS OF DYNAMICS

The CRM capabilities within Dynamics, underpinned by AI, are an ideal platform to help customer service teams deliver seamless, personalised experiences. Dynamics brings all customer touchpoints into one comprehensive view, so agents are empowered to solve problems with a full picture of the situation.

NEXT: VIEW CAPABILITIES

< 1/2



CUSTOMER SERVICE: GROWTH



PAIN POINTS

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Customer Service
Customer touchpoints
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DYNAMICS CAPABILITIES

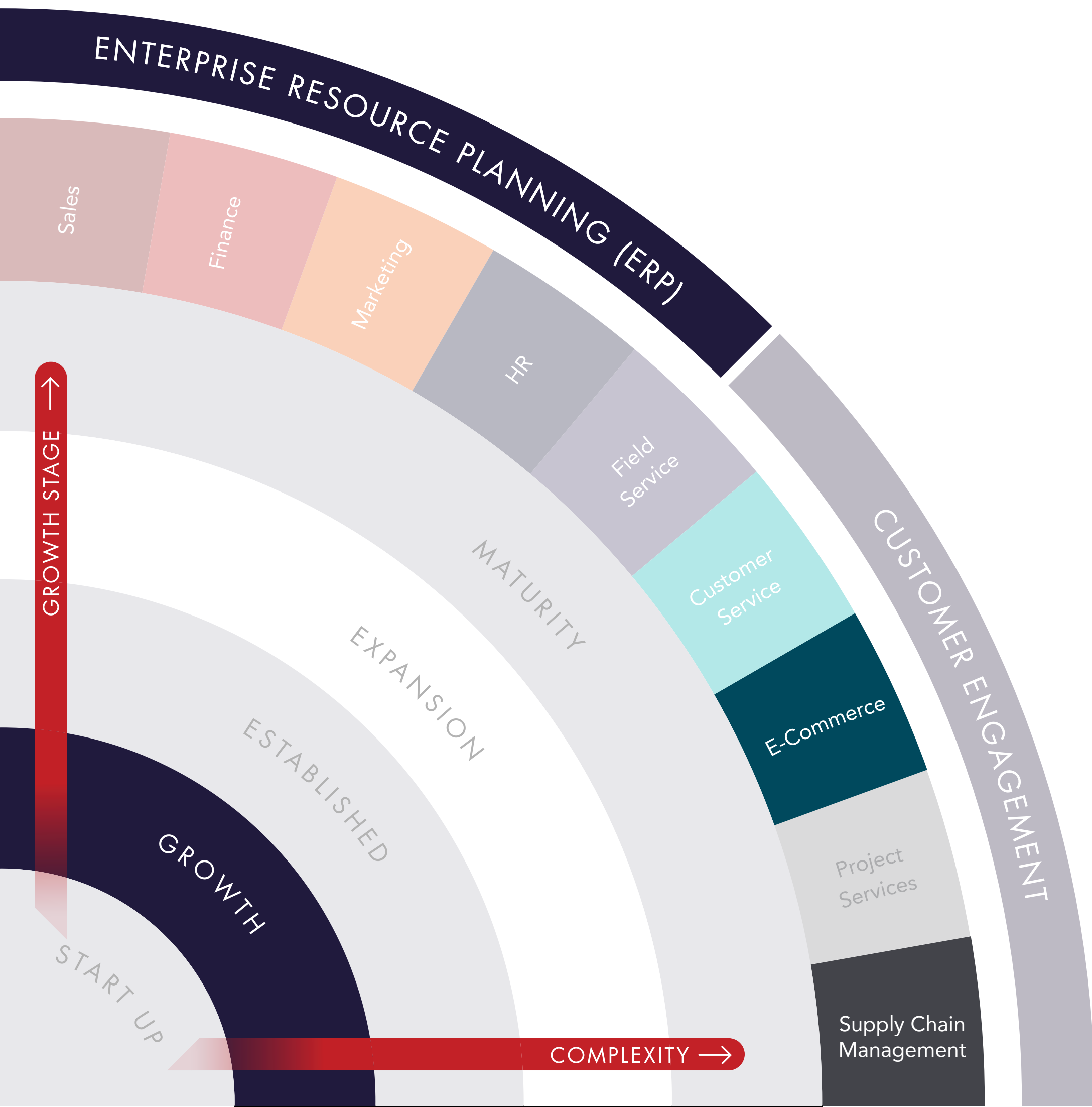
Case management
SLA support
Account management
Service automation
Customer web portals
Contract management
Service analytics

SKU_s

Dynamics 365 Customer
Service Enterprise
Power Apps
Power BI
Dynamics 365 Unified Service Desk



Click on the highlighted Functions to learn more



GROWTH

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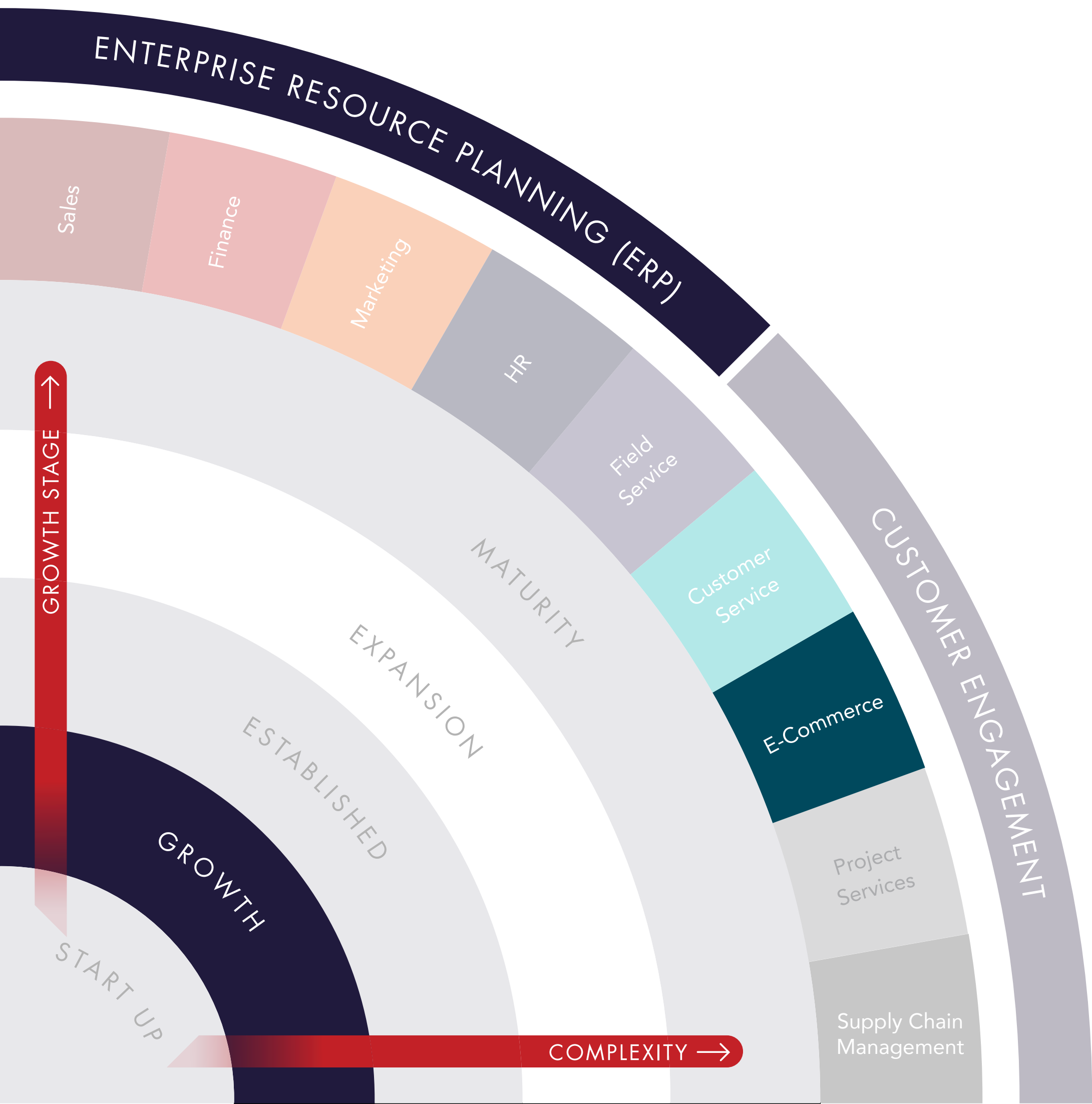
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E-COMMERCE: GROWTH



PAIN POINTS

- 5 E-Commerce
Managing the right stock, fulfilling and tracking orders through digital shops

CHALLENGES

E-commerce is a business of fine margins – every click counts. Customers need to see the same content and promotions across different channels, for example, which is hard without a single, integrated platform. Equally, it's a challenge to fulfil orders efficiently online, and to offer flexible delivery models (particularly for smaller organisations).

Businesses also struggle with data: they need to predict customer demand and report on real-time stock levels, as well as needing accurate customer data so they can personalise offers.

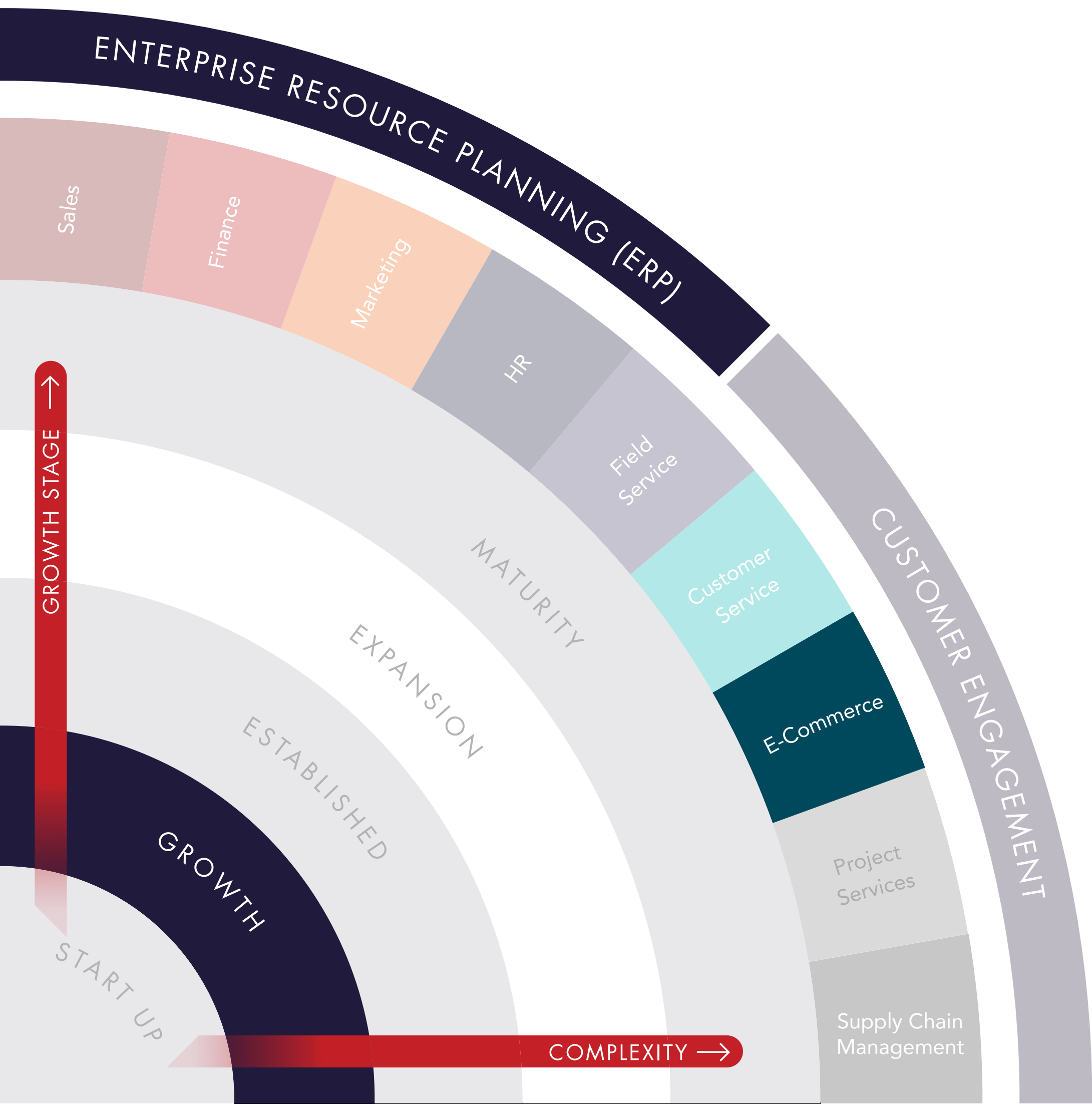
BENEFITS OF DYNAMICS

E-commerce teams can use Dynamics to create exceptional shopping experiences. The platform's built-in AI and machine learning can help to integrate and optimise back-office processes, streamlining your retail operations. It is also extremely scalable, lending itself to growing businesses or those expanding into new territories and markets.

The single view of the customer that Dynamics facilitates gives businesses the option to serve customers when, how, and where they want – on any device. E-commerce teams can view each customer on a unified platform, which brings all customer touchpoints together.

NEXT: VIEW CAPABILITIES

< 1/2



E-COMMERCE: GROWTH



PAIN POINTS

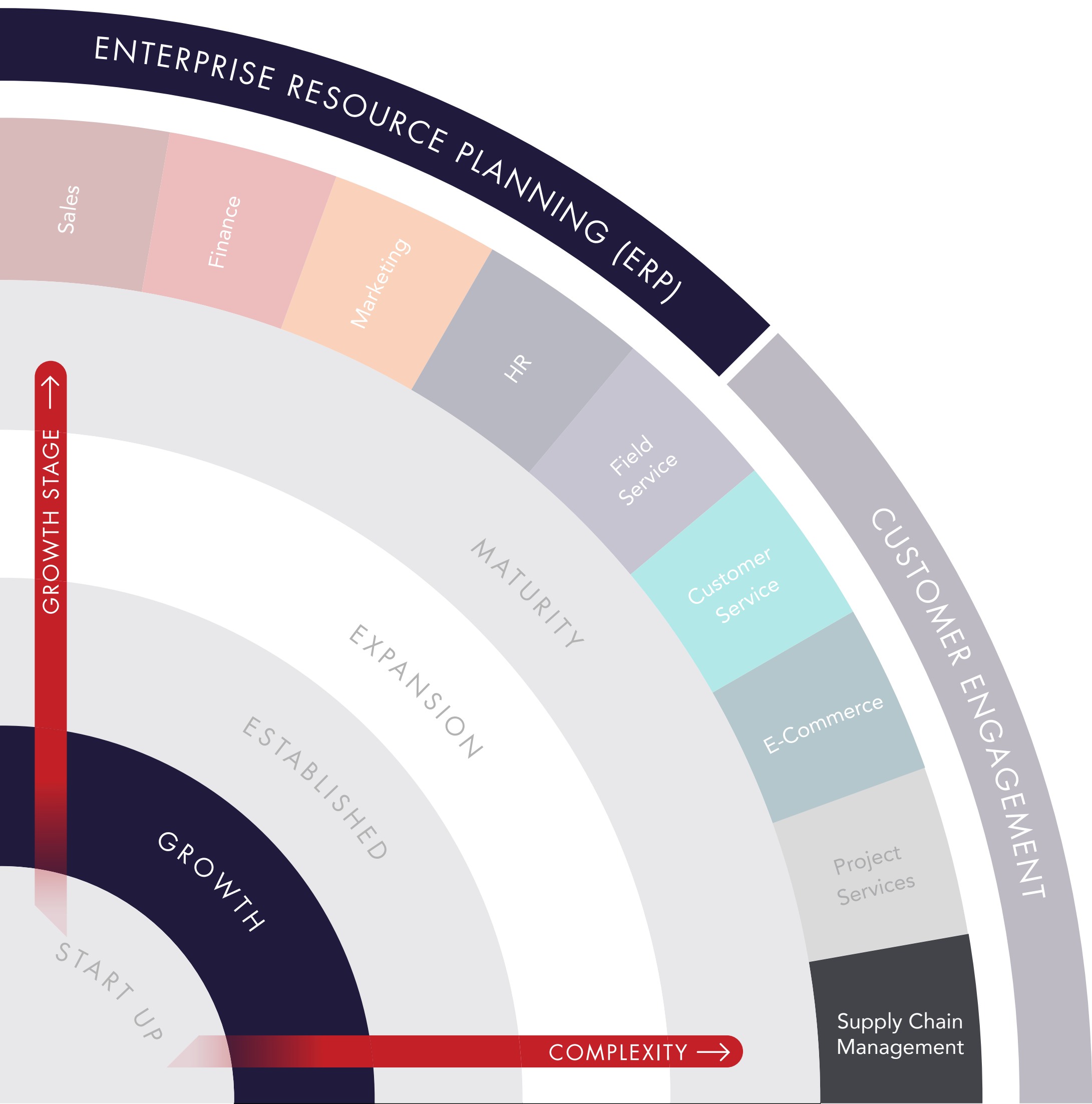
- 5 E-Commerce
Managing the right stock, fulfilling and tracking orders through digital shops

DYNAMICS CAPABILITIES

- Pricing
- Stores management
- Shift management
- Employee management
- Customer loyalty
- Replenishment
- Product categories
- Sales channel management

SKU_s

- Dynamics 365 E-Commerce
- Power Apps



SUPPLY CHAIN MANAGEMENT: GROWTH



PAIN POINTS

- 5 Supply Chain Management
Managing the right stock,
fulfilling and tracking orders
through digital shops

CHALLENGES

Without real-time information, it's difficult to efficiently manage logistics and supply chain operations. Maintenance ends up being reactive rather than proactive, stock levels have to be recorded manually (an error-prone process), and customers end up being given inaccurate delivery times. Without end-to-end visibility of the supply chain and warehousing operations, improvements can only be based on intuition.

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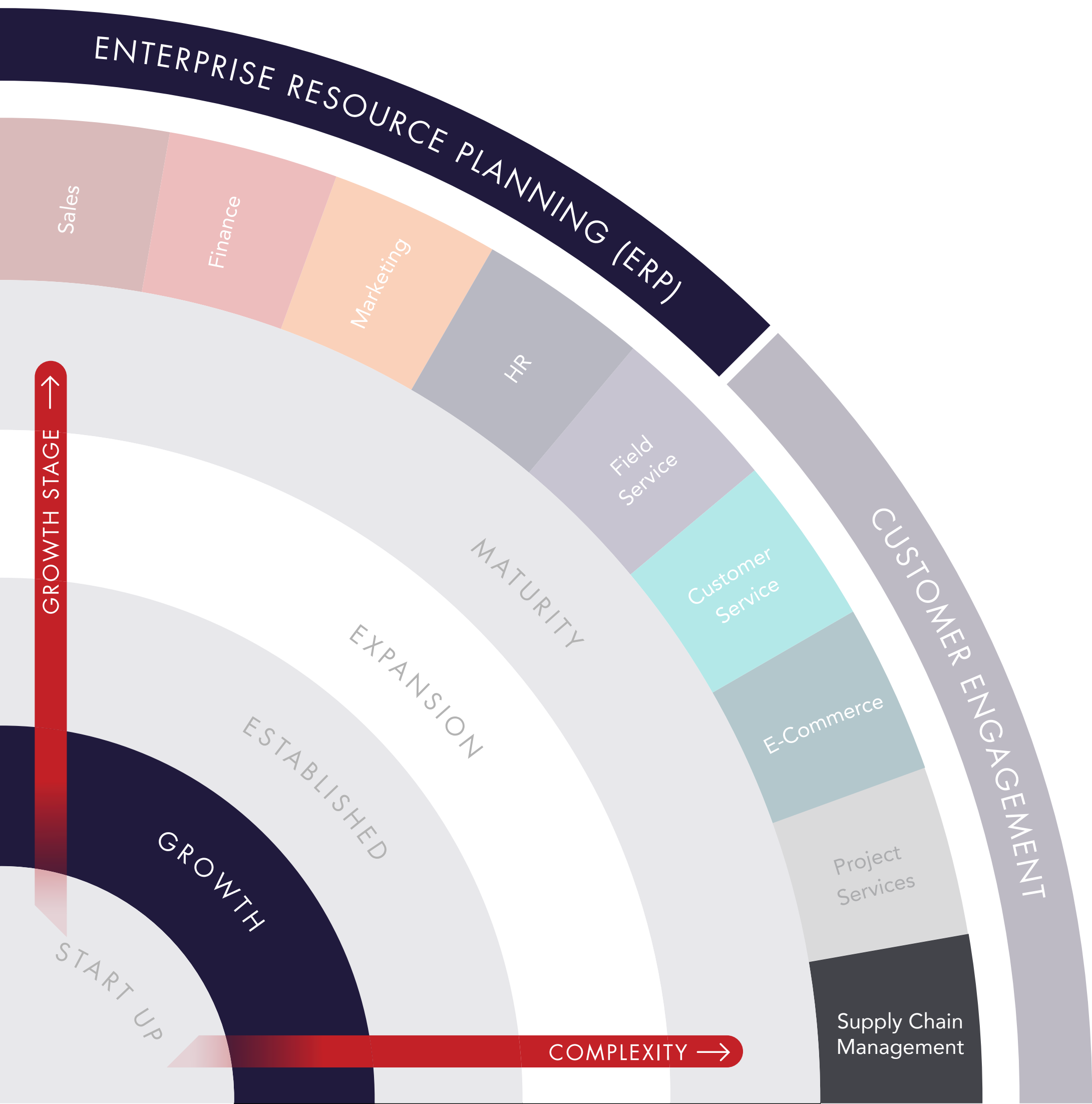
BENEFITS OF DYNAMICS

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And with powerful automation and analytics tools, the platform can also optimise planning and improve the fulfilment, material sourcing, and logistics of supply chains.

NEXT: VIEW CAPABILITIES

< 1/2



SUPPLY CHAIN MANAGEMENT: GROWTH



PAIN POINTS

- 5 Supply Chain Management
Managing the right stock,
fulfilling and tracking orders
through digital shops

DYNAMICS CAPABILITIES

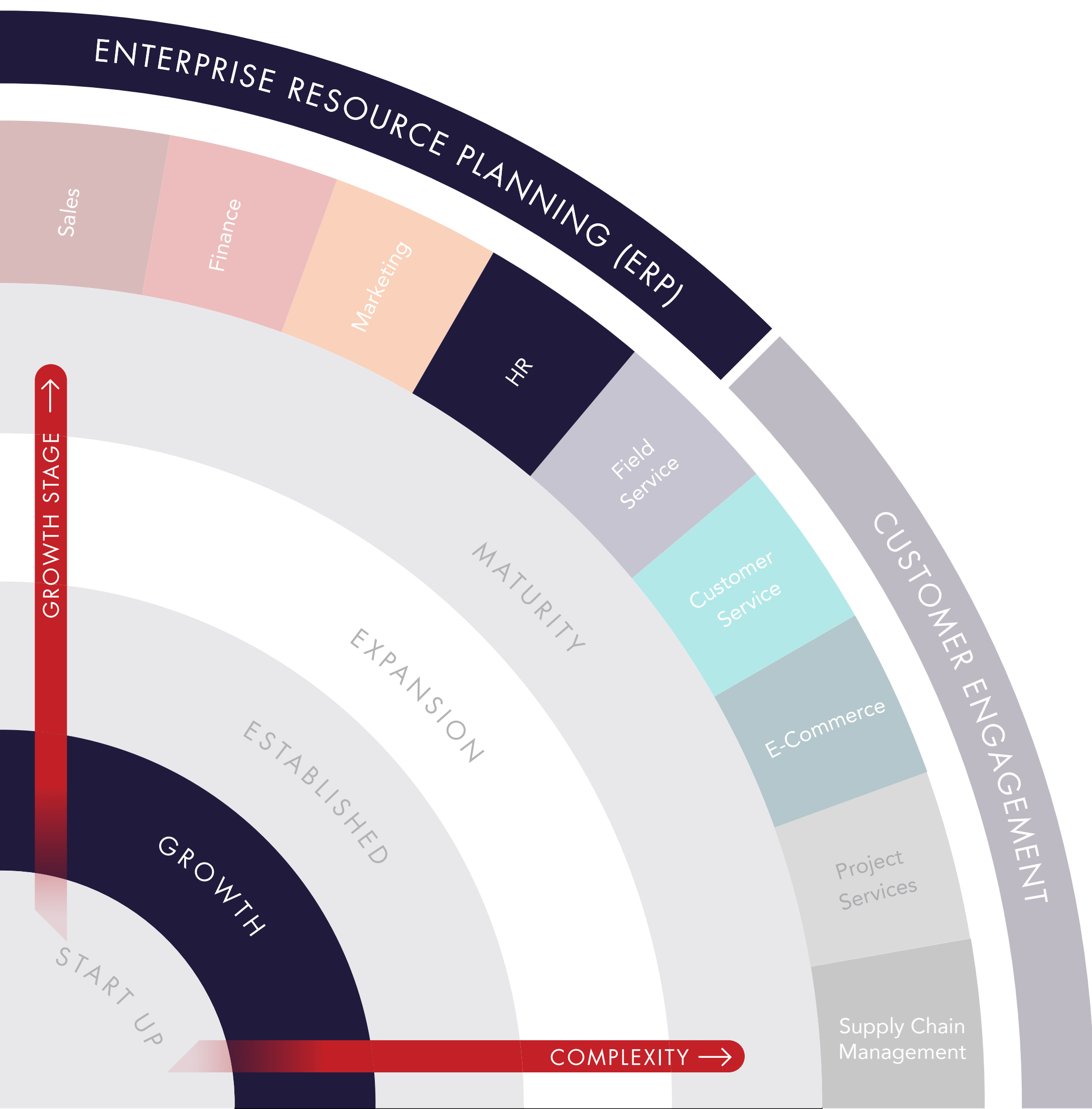
Asset management
Inventory management
Production central
Procurement and sourcing
Transportation
Warehouse management
Fleet management

SKUs

Dynamics 365 Supply Chain
Management



Click on the highlighted
Functions to learn more



GROWTH

As businesses grow, their software suite becomes more complex. The last thing they want are bespoke processes and systems that don't play together nicely. It's about setting up platforms that can work for ten employees or 200.

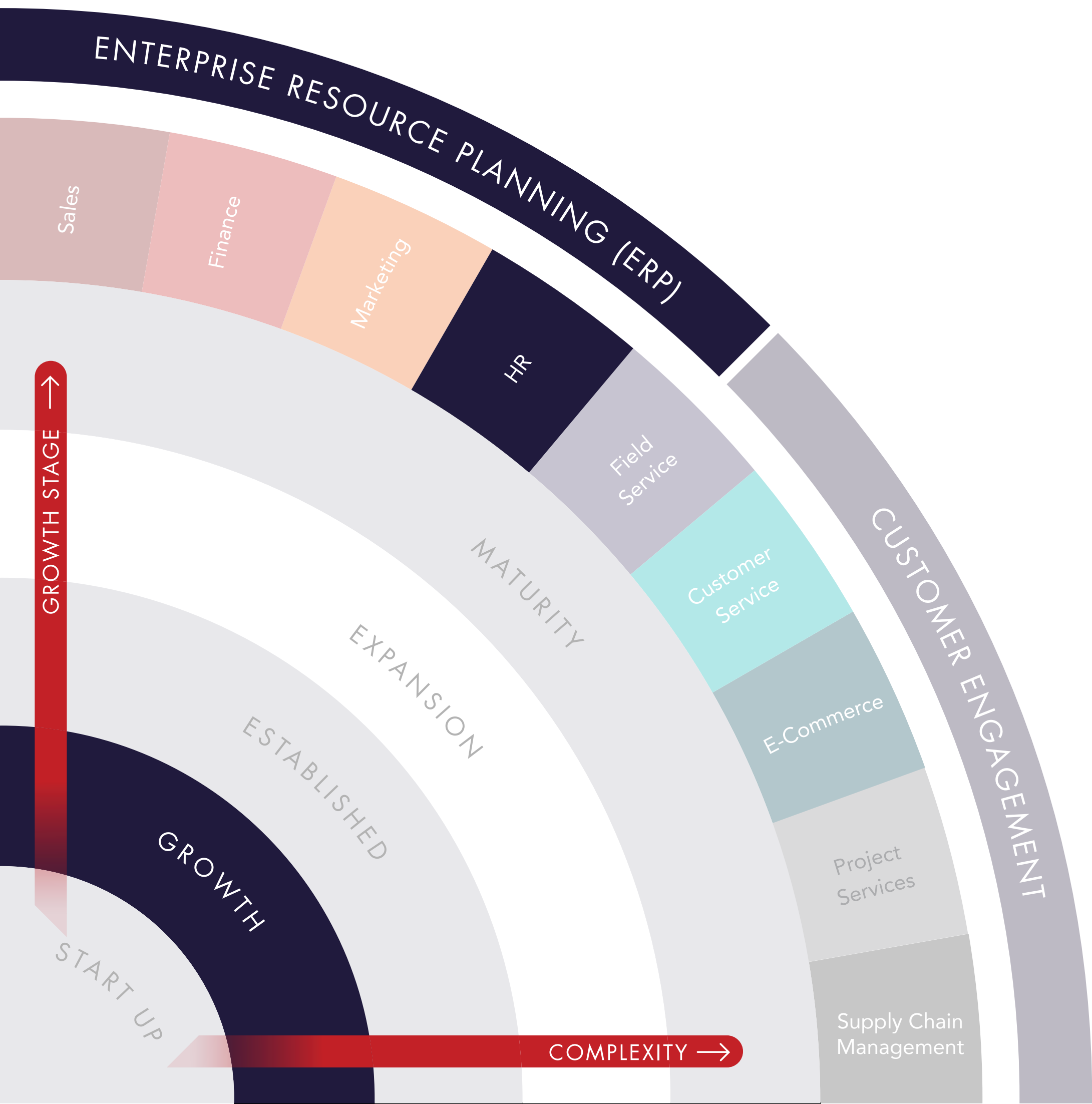
Dynamics offers the scalability and integration capabilities that are essential for an organisation to flourish. It knits together business functions, helping to avoid silos and ultimately, satisfy the customer.

PAIN POINTS

Click on a Pain Point below:

- 1 Expanding business operations are putting a strain on cashflow
- 2 Sales and marketing don't have the capacity or tools to tackle a larger database of customers and prospects
- 3 Inability to forecast demand to sustain business growth
- 4 Customer touchpoints are not joined up, leading to a backlog of complaints
- 5 Managing the right stock, fulfilling and tracking orders through digital shops
- 6 Finding the right people to grow with the business





HR: GROWTH



PAIN POINTS

- 6 HR
Finding the right people to grow with the business

CHALLENGES

As a business grows, its HR processes and systems become increasingly complex. HR managers need to report on employees' wellbeing, learning and development, absences, annual leave, and much more.

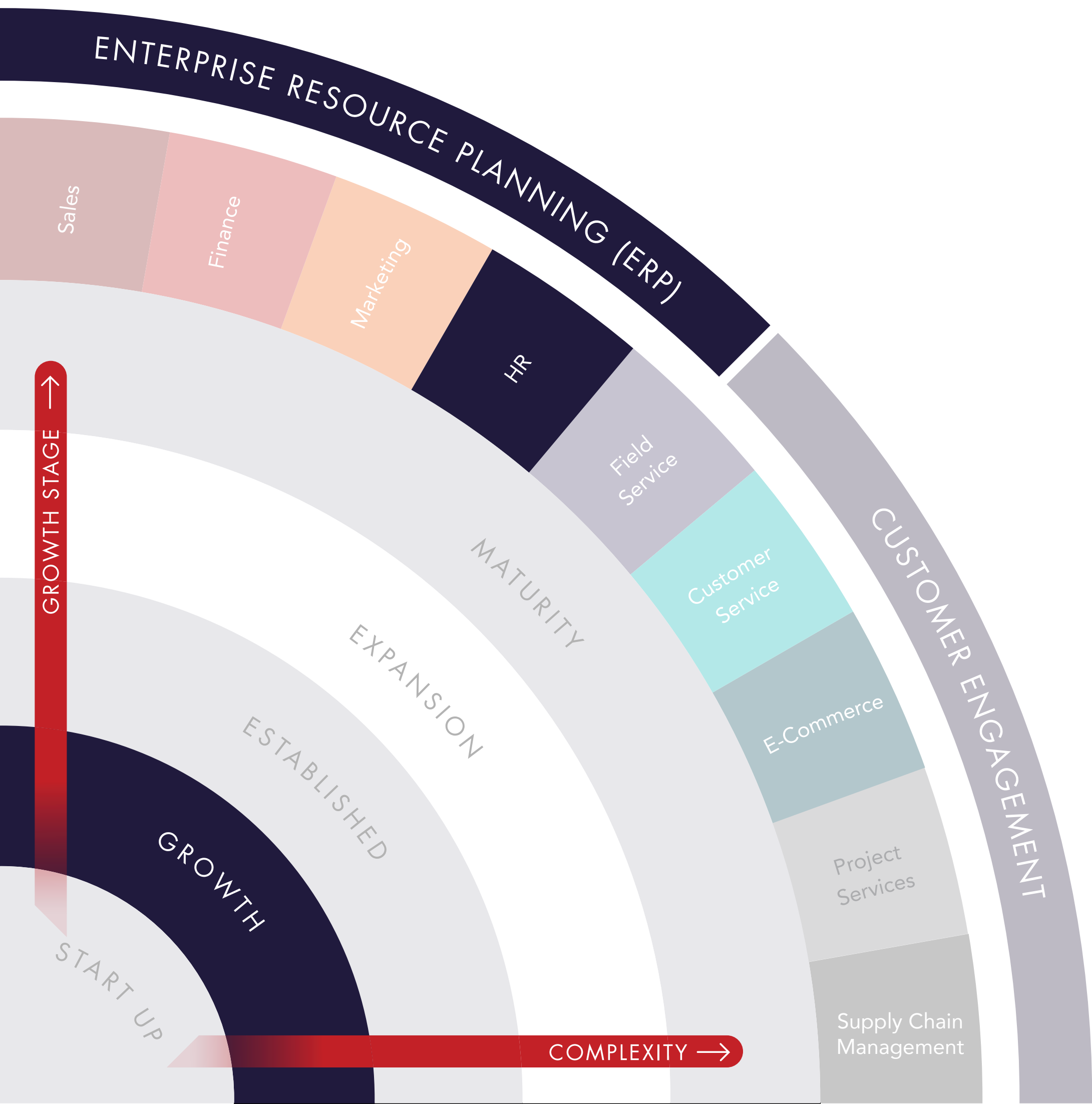
That's on top of trying to make recruitment and onboarding more efficient, centralising core HR processes, and giving managers the tools and training they need to manage their team members.

BENEFITS OF DYNAMICS

Dynamics helps deliver an HR solution that takes better care of your people, so they in turn can take better care of your business. It enables HR self-service for employees, provides a platform for training and certification, ensures security, privacy and compliance, and empowers managers to address concerns effectively.

At the same time, Dynamics can support HR teams to simplify reporting with rich dashboards, helping leaders make informed decisions. By identifying and engaging the right candidates, businesses can feel confident that they're bringing in the right people to support future growth.

NEXT: VIEW CAPABILITIES



HR: GROWTH



PAIN POINTS

- 6 HR
Finding the right people to grow with the business

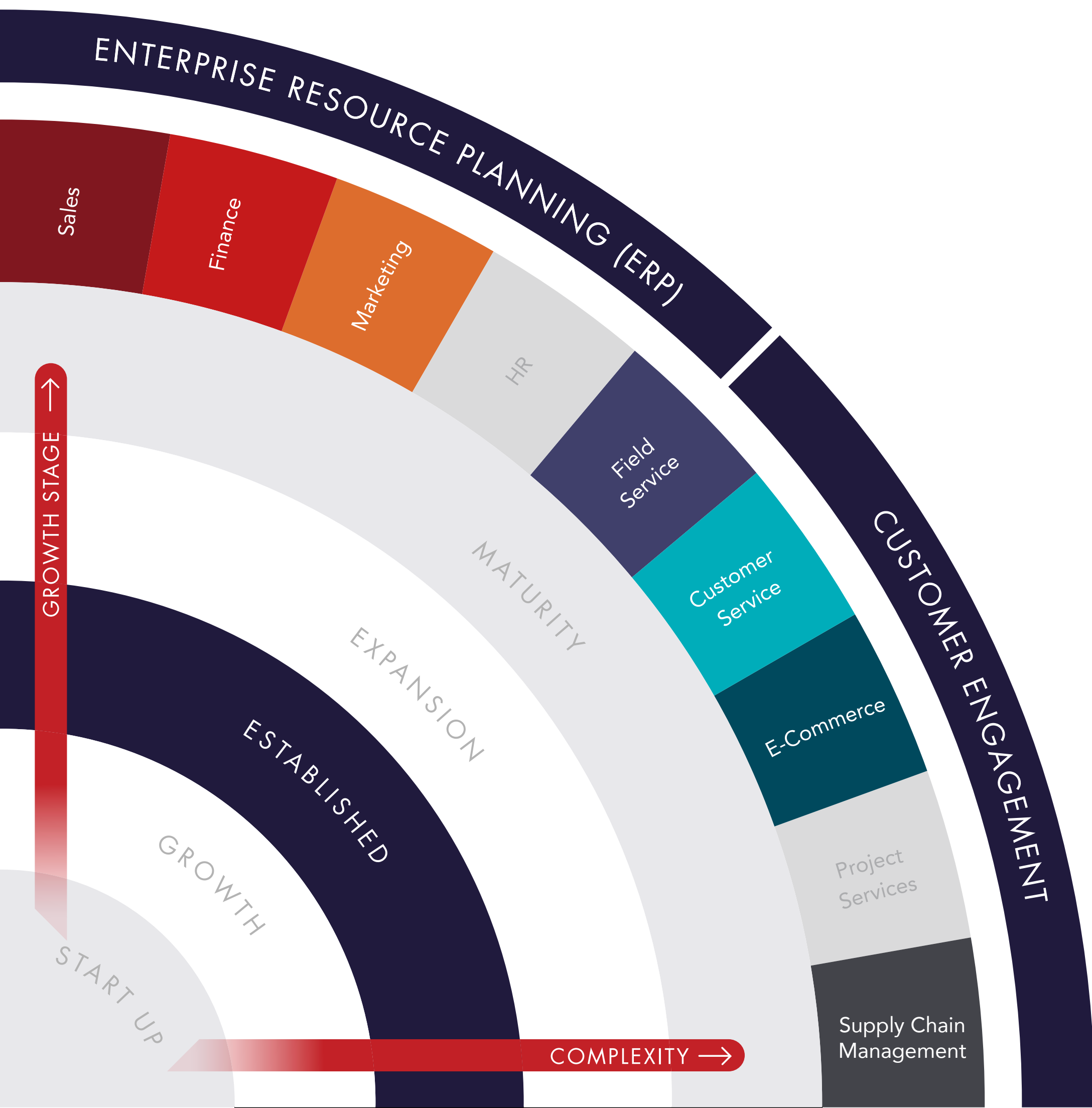
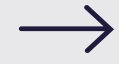
DYNAMICS CAPABILITIES

SKU_s

- People management
- Compensation management
- Compliance
- Leave and absence
- Benefits
- Learning and development
- Employee development
- Employee self-service
- Hiring and offer management

Dynamics 365 Human Resources

Click on a **Pain Point**
to filter the Functions



ESTABLISHED

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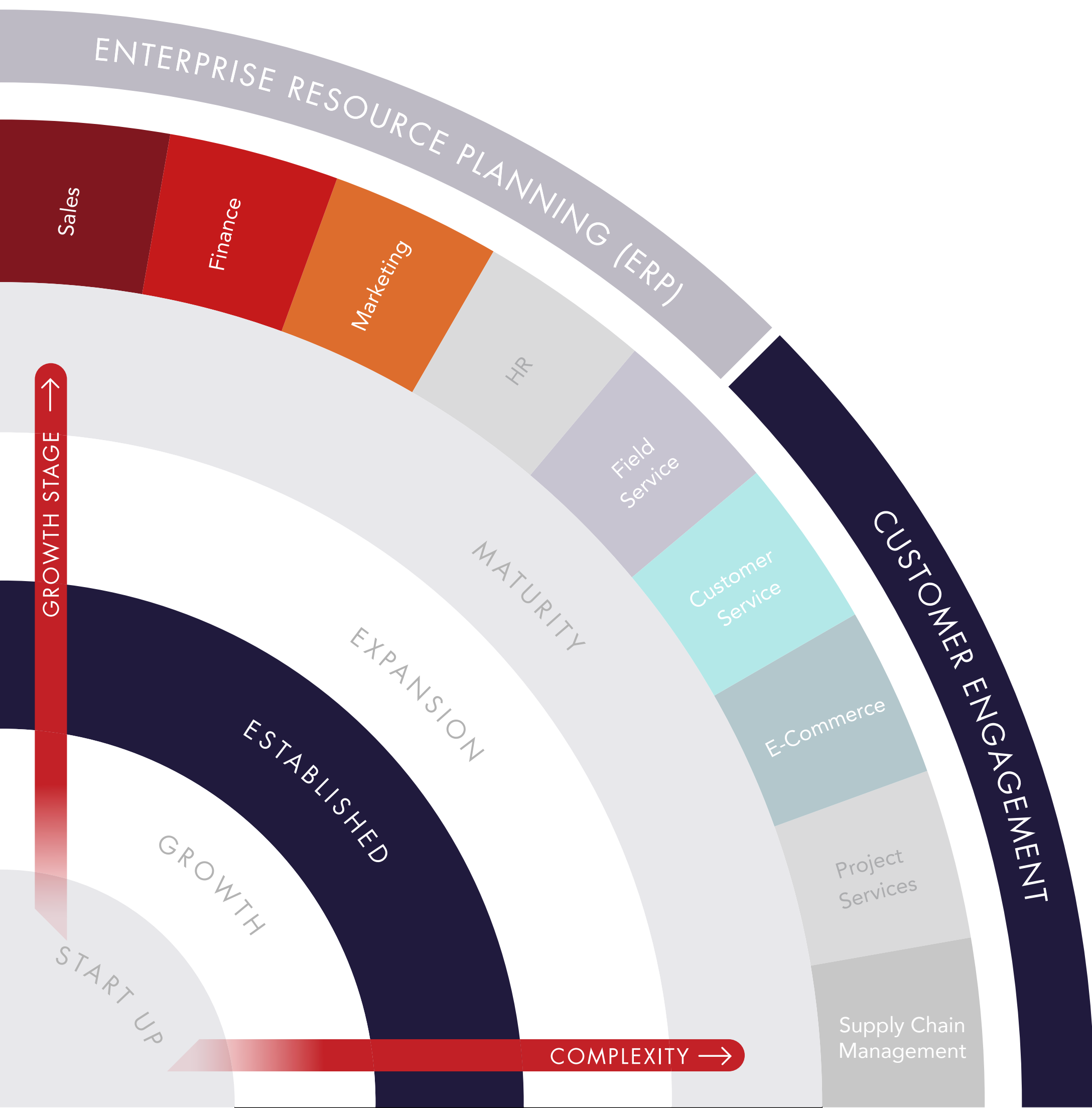
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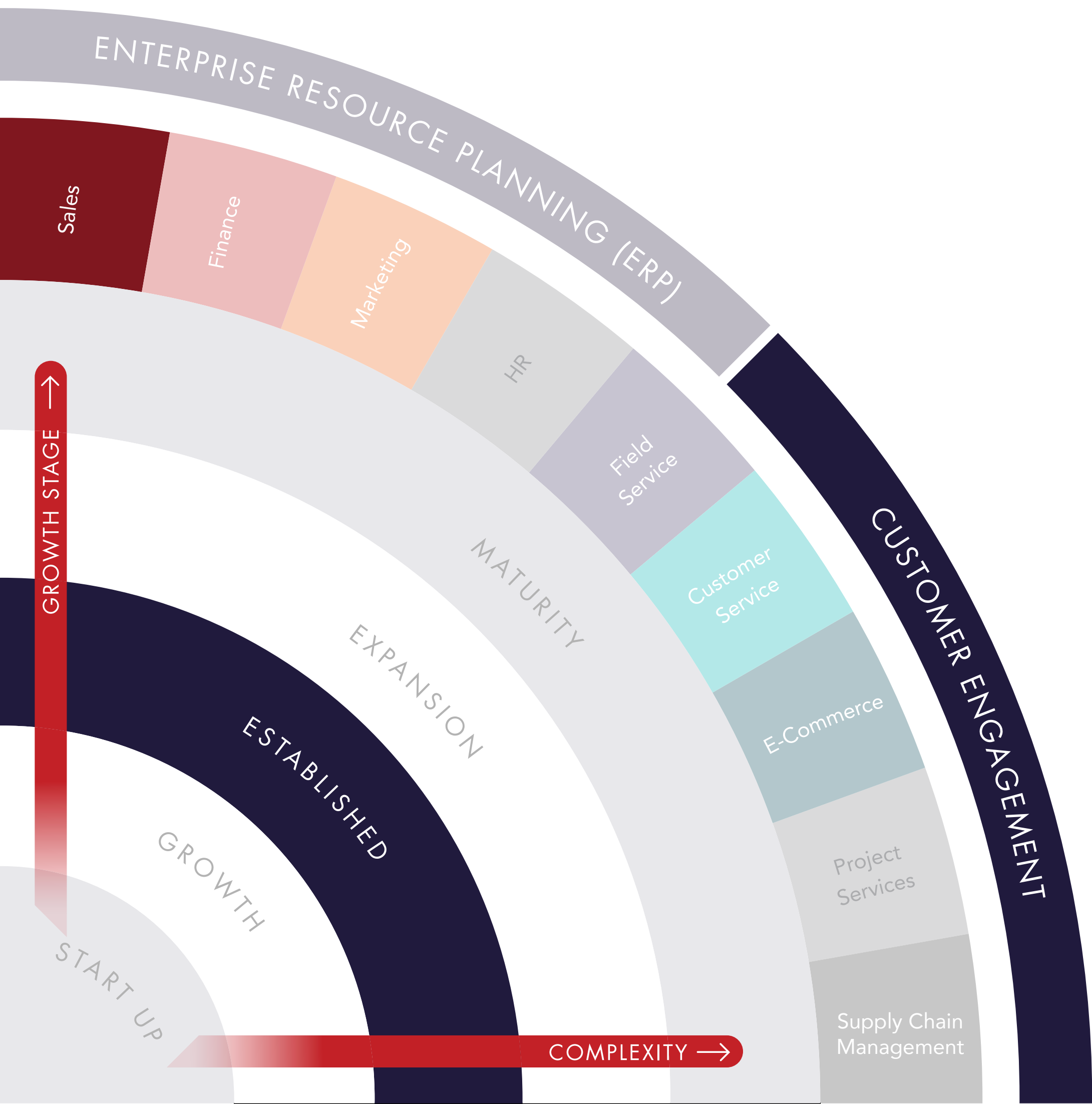
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SALES: ESTABLISHED



PAIN POINTS

- 1 Sales**
Multiple versions of the truth, which hamper accurate reporting and forecasting
- 2 Sales**
Misaligned sales and marketing departments struggling to drive new revenue into the business
- 3 Sales**
No way of gathering insights to understand issues and improve customer service

CHALLENGES

Whether managing a small number of high-value opportunities, or hundreds of smaller leads, salespeople rely on accurate data to succeed. They need to track ongoing opportunities and have a clear overview of all the customers they're currently working with – as well as how those customers are interacting with colleagues in other parts of the business.

Reporting is also vital. Salespeople are sometimes unable to run reports on opportunities and share that information with management. That makes it extremely difficult to collaborate with marketing, and prevents sales teams from following opportunities from start to finish. Individual salespeople can also struggle to receive rewards and recognition when they can't prove their work has contributed to business outcomes.

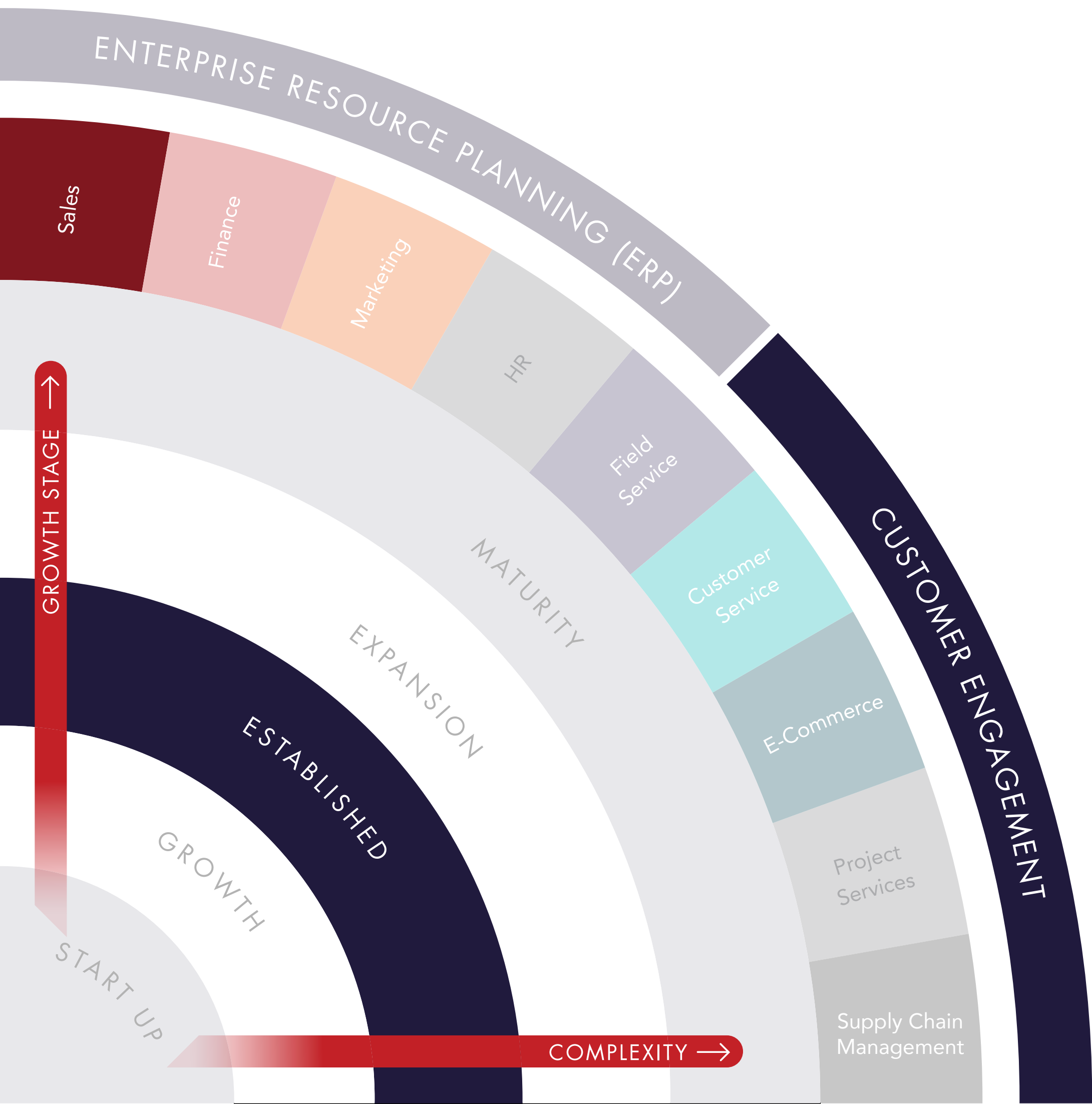
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With its background in CRM, Dynamics is well set up to support sales teams to integrate with marketing and the rest of the business. The comprehensive customer views help salespeople to better understand clients' needs, engage them effectively, and drive more sales revenue.

Dynamics can incorporate information from LinkedIn Sales Navigator, marketing automation platforms, and other sources. It uses intelligent data to bring those customer insights into Office 365 software, making the sales lifecycle simple and familiar. And the underlying AI enables smarter selling, letting salespeople cross-sell and upsell more effectively by targeting the right customers at the right times.

NEXT: VIEW CAPABILITIES

< 1/2



SALES: ESTABLISHED



PAIN POINTS

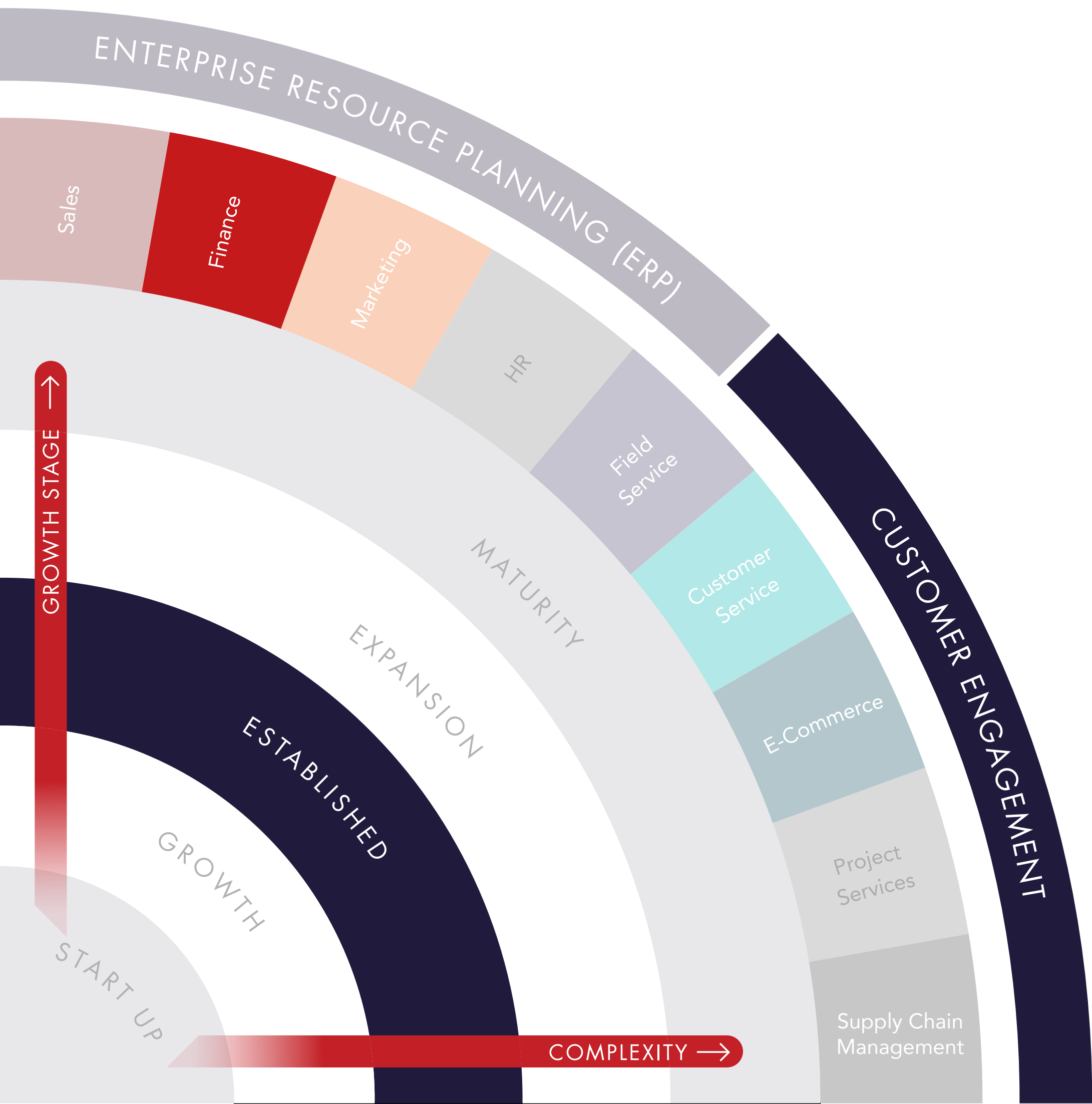
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No way of gathering insights to understand issues and improve customer service

DYNAMICS CAPABILITIES

Lead management
Opportunity management
Pipeline forecasting
Sales automation
Quote management
Marketing lists
Email marketing

SKU_s

Dynamics 365 Sales
Dynamics 365 Sales Insight
Dynamics 365 Product Visualise
Power BI



FINANCE: ESTABLISHED



PAIN POINTS

- 1 Finance
Multiple versions of the truth, which hamper accurate reporting and forecasting

CHALLENGES

Many finance teams still struggle with time-consuming tasks, sometimes having to integrate lots of different databases manually – even for basic processes like billing. It’s difficult to share information across departments for order processing, which results in longer lead times. And despite the wealth of financial data available, they might not have the reporting tools to get a look at the bigger picture for the business – which can hamper strategic decision-making.

This can be even harder if your clients offer subscription-based services rather than discrete products; managing subscriptions is a drain on finance teams’ time if they don’t have automation or digital tools at hand.

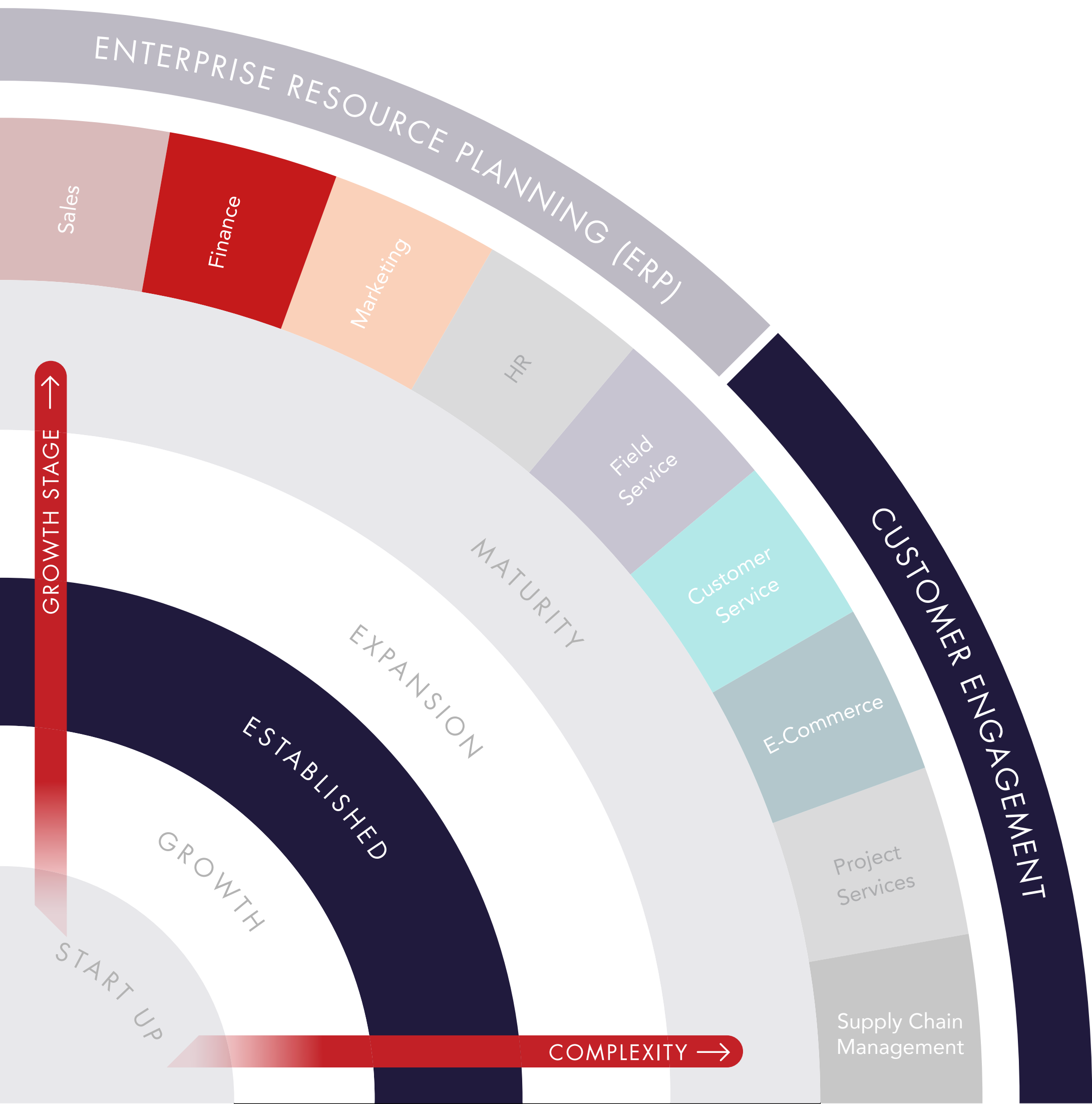
BENEFITS OF DYNAMICS

Dynamics can help finance teams maximise their profitability and automate financial operations to make their lives much easier and help them focus on more strategic work. It allows them to monitor performance in real time, predict future outcomes and make decisions to drive business growth.

Intelligent data insights can offer predictive recommendations, to increase profit and cashflow, while Dynamics also makes it easier to cut operational costs with process automation and more efficient financial planning.

And for clients with subscription services, automated recurring billing through Dynamics saves time and effort for the finance team.

NEXT: VIEW CAPABILITIES



FINANCE: ESTABLISHED



PAIN POINTS

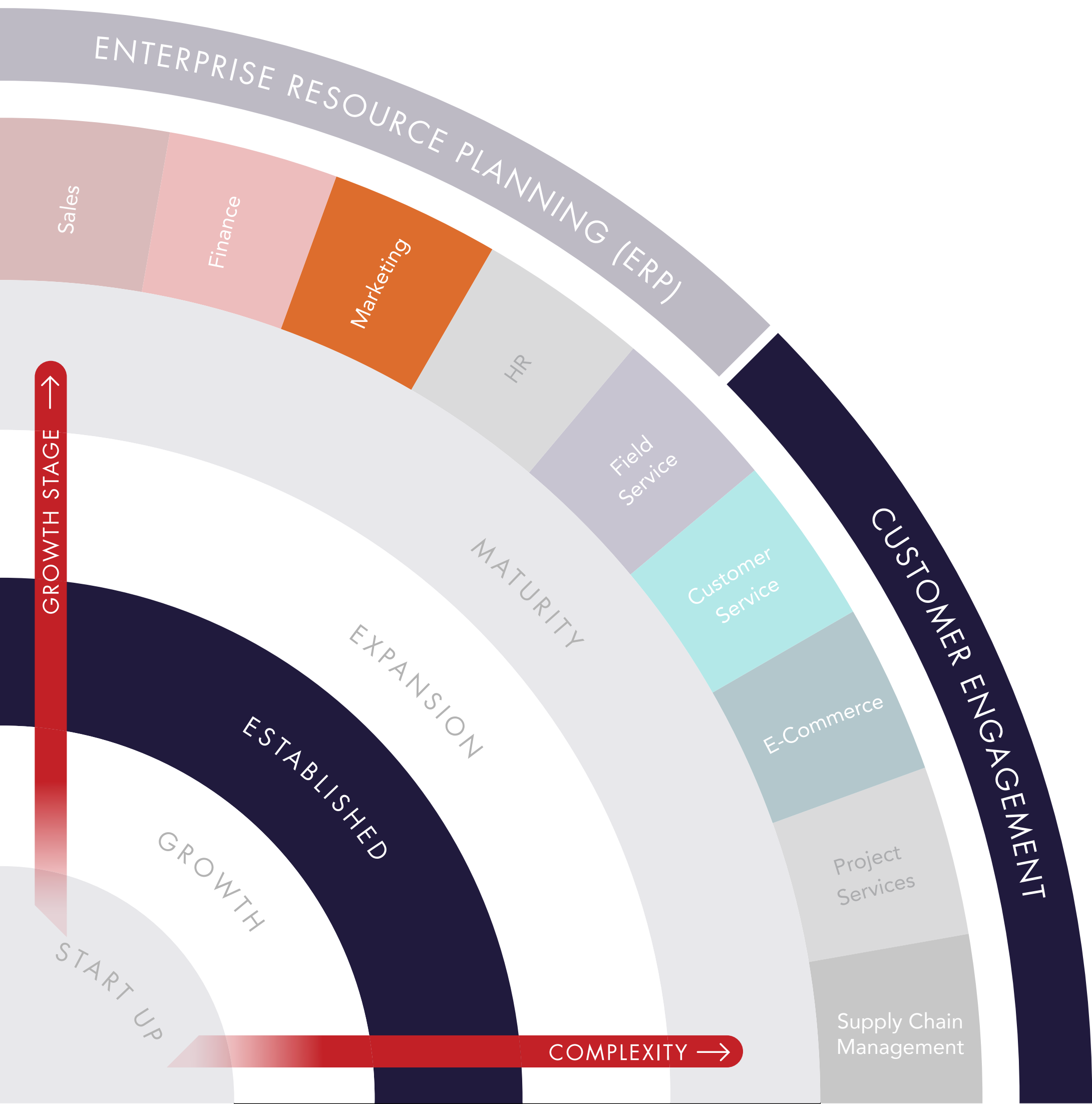
- 1 Finance
Multiple versions of the truth, which hamper accurate reporting and forecasting

DYNAMICS CAPABILITIES

- Credit management
- Treasury
- Accounts receivable
- Accounts payable
- Budgeting
- Cost management
- Fixed assets
- Payroll tax
- External compliance certification

SKU_s

Dynamics 365 for Finance



MARKETING: ESTABLISHED



PAIN POINTS

1 **Marketing**
Multiple versions of the truth, which hamper accurate reporting and forecasting

2 **Marketing**
Misaligned sales and marketing departments struggling to drive new revenue into the business

CHALLENGES

One of the biggest challenges for marketing departments is getting accurate, up-to-date data and making sense of how to use it effectively. They may have a large customer database that doesn't yield any useful insights from, or too few staff to consistently communicate with their network.

This makes it difficult to send timely information to the right customers, hampering cross-sell and upsell efforts, and opening the door for competitors. For those customers they do communicate with, marketers without a platform like Dynamics may struggle to monitor email open rates or link customer touchpoints to sales data. It's very hard to track results or understand whether they are adding value.

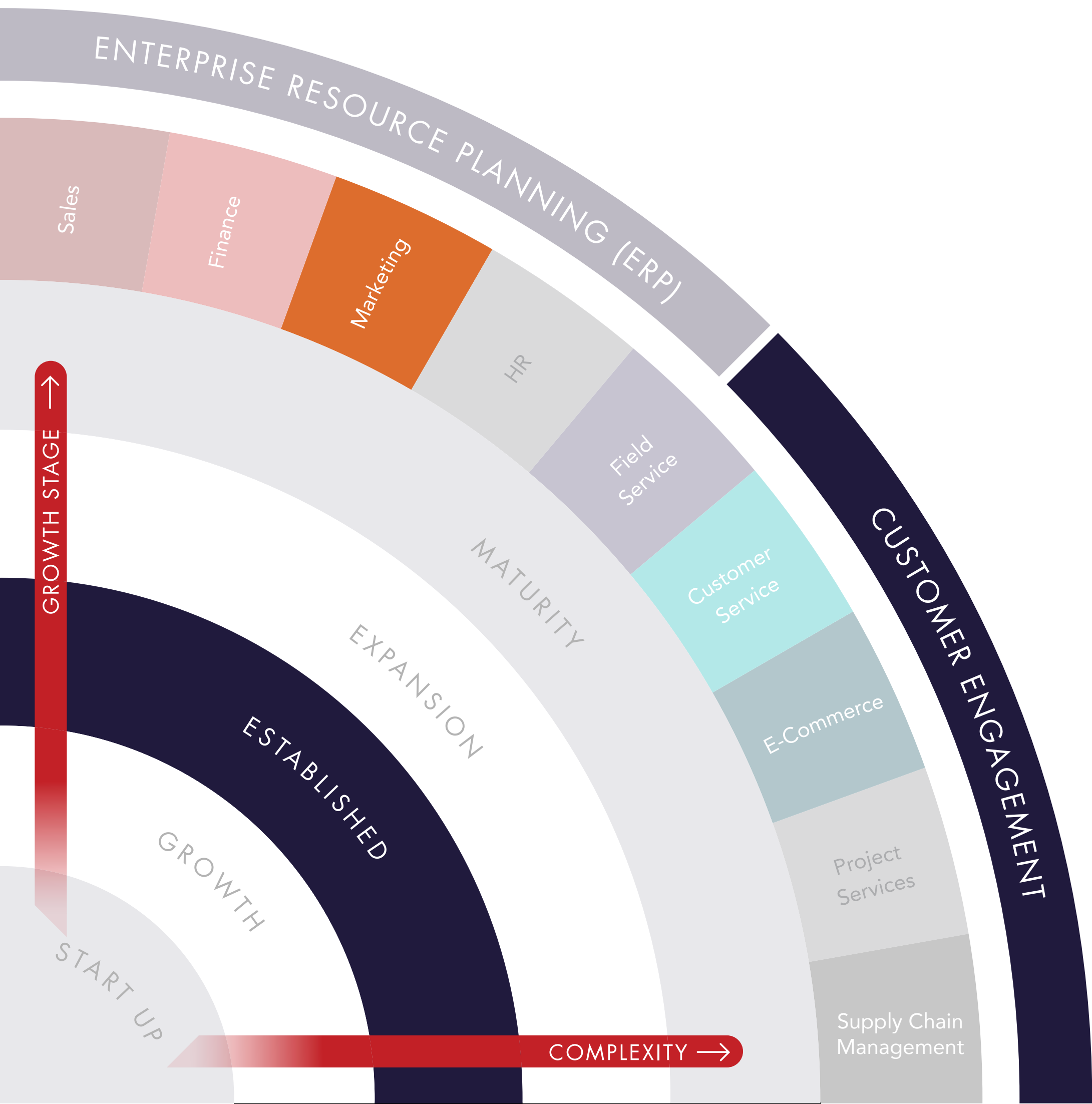
BENEFITS OF DYNAMICS

Dynamics for Marketing helps teams plan and deliver campaigns; increase customer demand for their products and services; create, track and nurture leads; and personalise communications for prospects and customers across channels.

It helps marketers align with their sales teams and create a single view of the prospect, delivering a seamless customer experience.

And by targeting the right customers and optimising marketing resources, it can ultimately help marketers improve the ROI of their activities.

NEXT: VIEW CAPABILITIES



MARKETING: ESTABLISHED



PAIN POINTS

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Multiple versions of the truth, which hamper accurate reporting and forecasting

2 **Marketing**
Misaligned sales and marketing departments struggling to drive new revenue into the business

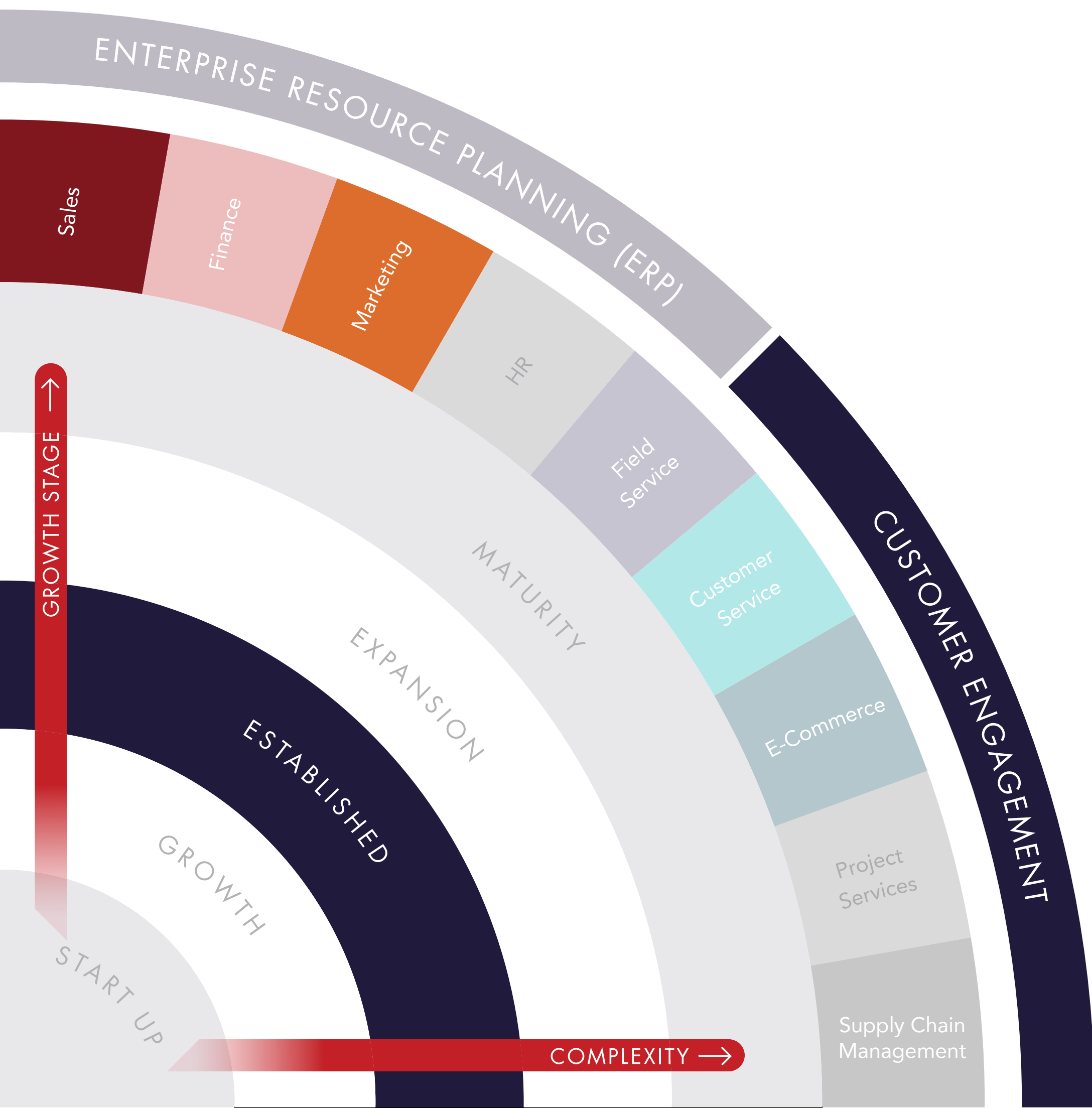
DYNAMICS CAPABILITIES

Email marketing
Lead scoring
Market segmentation
Customer journeys
Event management
Connector for LinkedIn
Lead generation forms

SKU_s

Dynamics 365 Marketing
Dynamics 365 Customer Insight
Power Apps

Click on the highlighted Functions to learn more



ESTABLISHED

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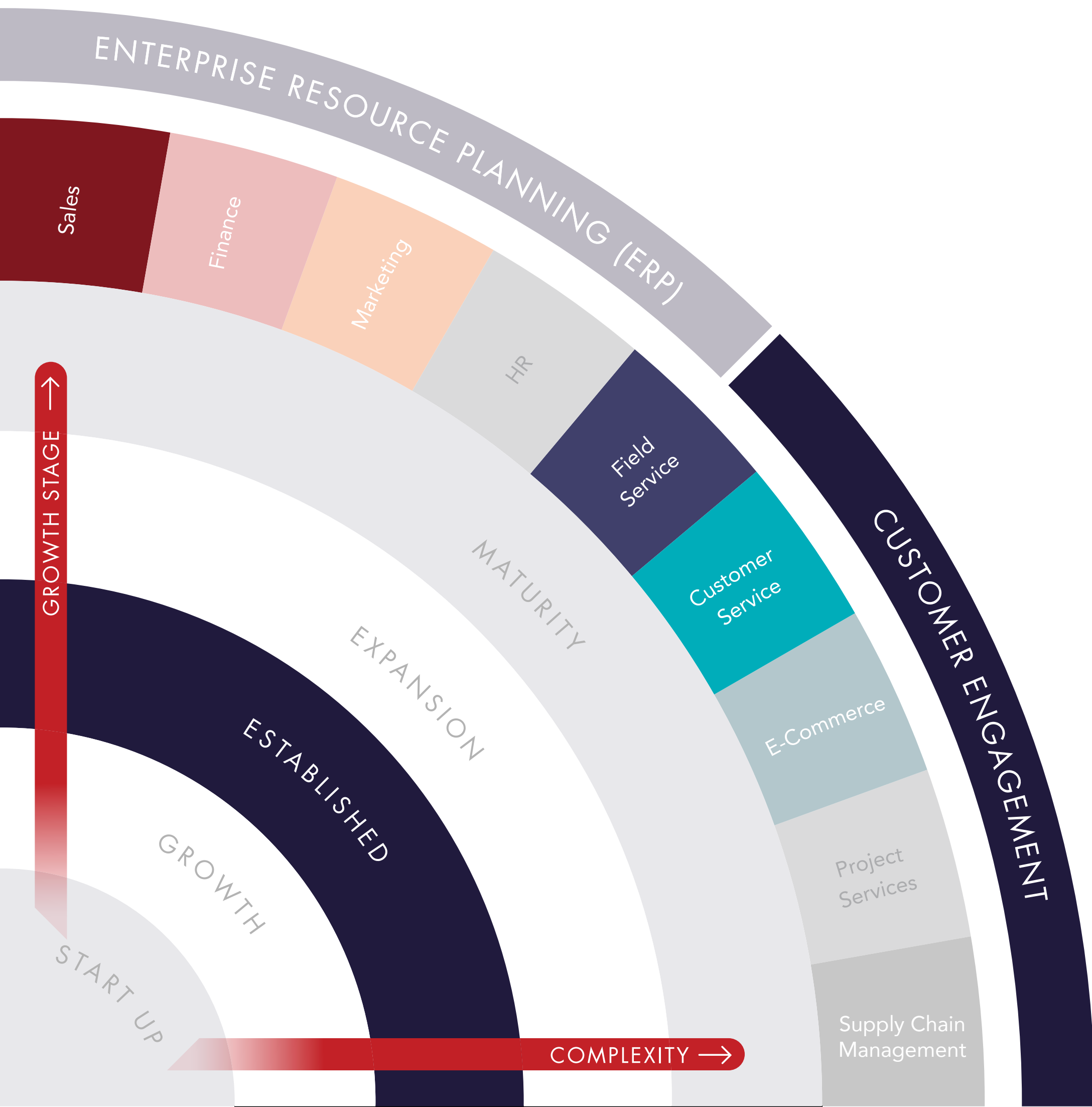
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Click on the highlighted Functions to learn more ↓



ESTABLISHED

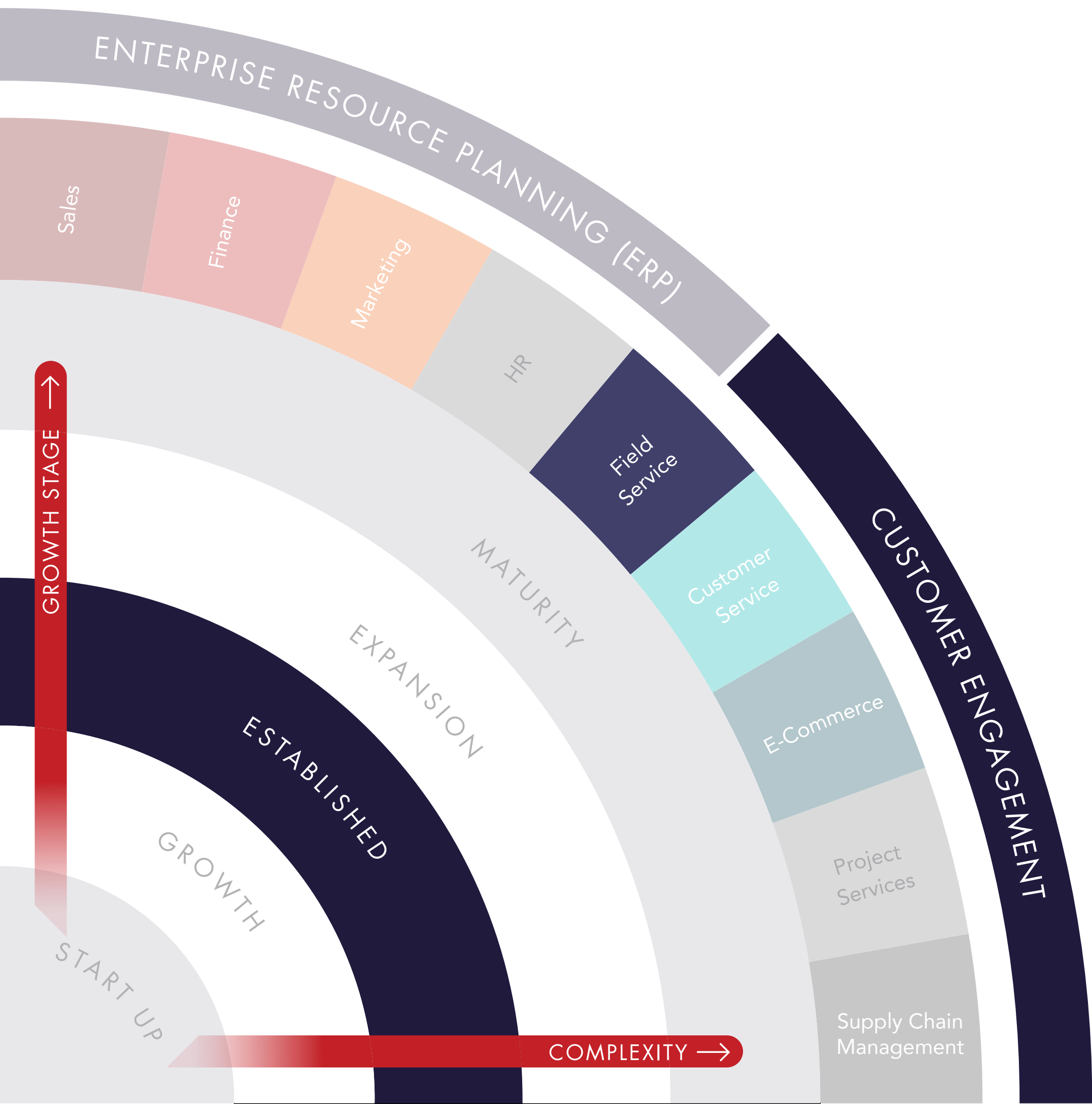
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FIELD SERVICE: ESTABLISHED



PAIN POINTS

3

Field Service

No way of gathering insights to understand issues and improve customer service

4

Field Service

Inability to predict demand and meet customer needs in the field

CHALLENGES

When you're out solving customer issues in the field, you need the information and the flexibility to come up with solutions on the fly. Many teams don't have access to the right tools to support technicians, or effective customer insight collection systems, and that makes it very difficult to prioritise faults or offer a triage service. Agents are forced to be reactive, rather than proactively finding fixes in advance.

Without accurate, real-time data, co-ordinators can also struggle to schedule field agents with the right skillsets at the right times, and customers don't always receive appropriate levels of communication throughout the process. All of this can have a negative impact on customer experiences.

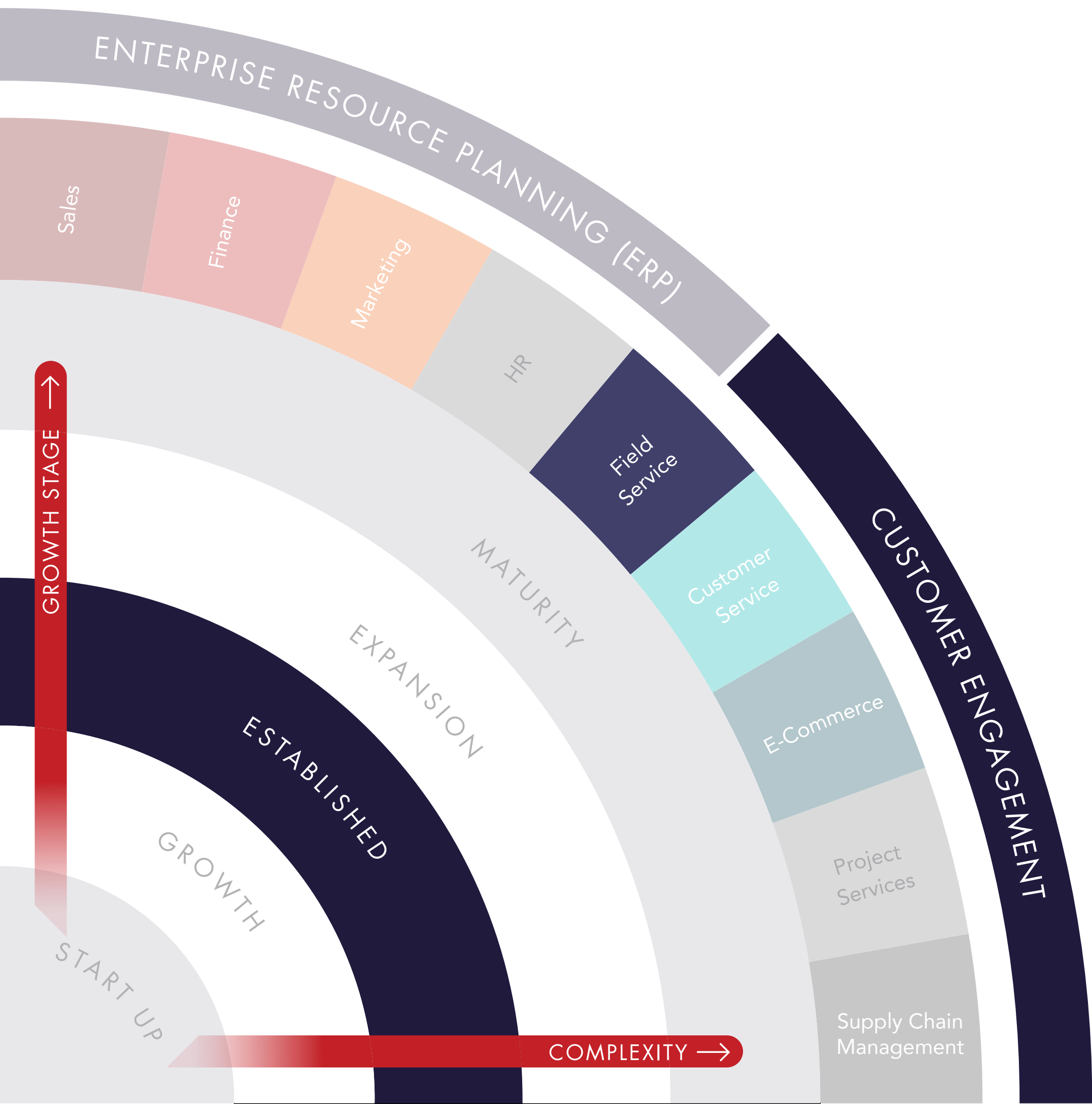
BENEFITS OF DYNAMICS

With effective information management through Dynamics, field service teams can get the right person to the right place at the right time with the right skills and equipment. That's thanks to effective scheduling processes and powerful analytics, making it easier to predict, detect and resolve issues in advance.

Rather than finger-in-the-air prioritisation, it's much easier for technicians and coordinators to prioritise and be proactive, so that customer issues are fixed first time. Which all leads to happier customers and more efficient operations.

NEXT: VIEW CAPABILITIES

< 1/2



FIELD SERVICE: ESTABLISHED



PAIN POINTS

3

Field Service
No way of gathering insights to understand issues and improve customer service

4

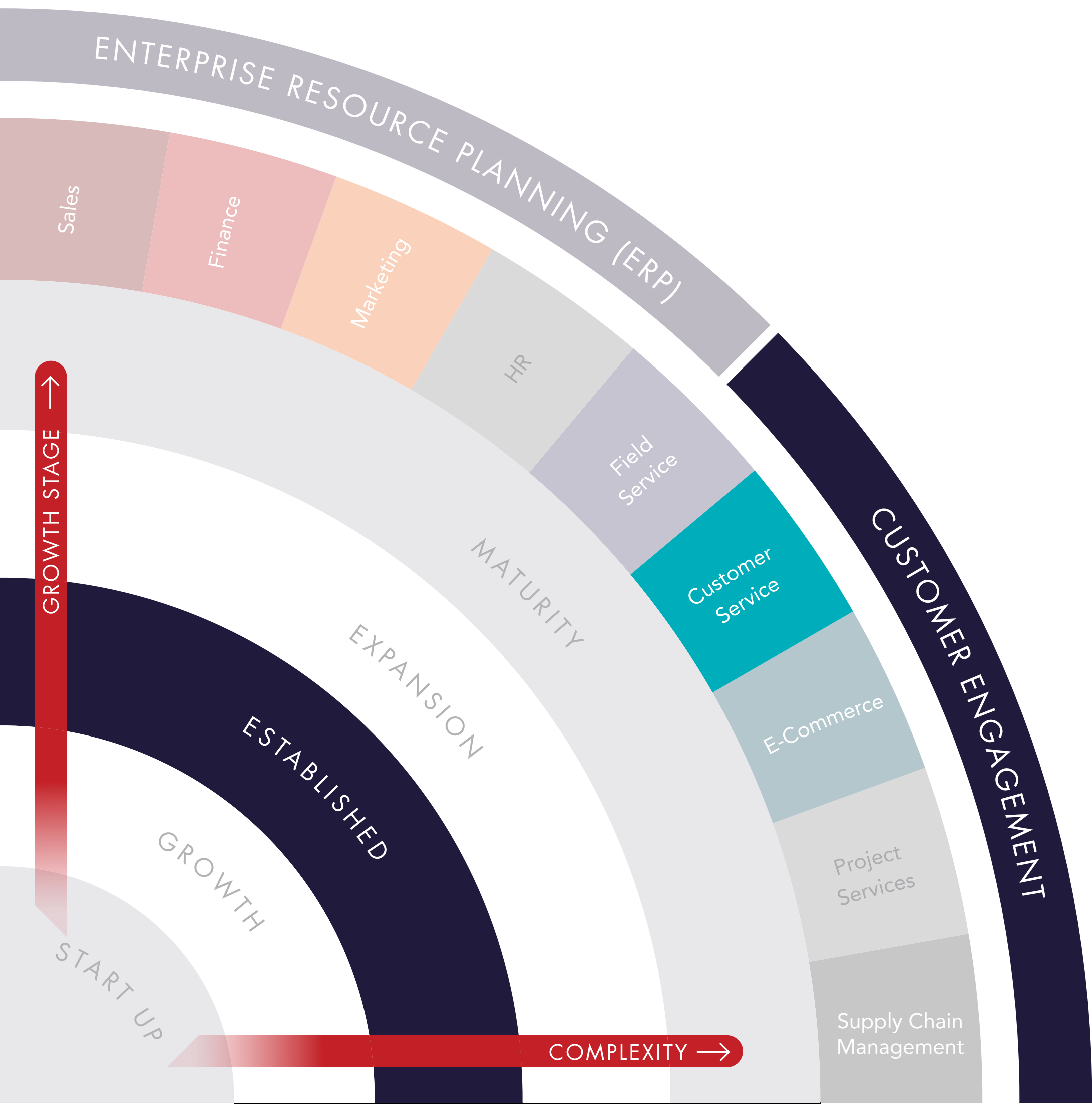
Field Service
Inability to predict demand and meet customer needs in the field

DYNAMICS CAPABILITIES

SKUs

Work orders
Service agreements
Schedule and dispatch
Schedule board
Inventory management
Mobile productivity
Connected devices

Dynamics 365 Field Service
Dynamics 365 Remote Assistant
Power Apps



CUSTOMER SERVICE: ESTABLISHED



PAIN POINTS

3

Customer Service

No way of gathering insights to understand issues and improve customer service

CHALLENGES

To meet high customer expectations, businesses are now under pressure to deliver omnichannel customer service. But for many, it's impossible to track when a customer has previously interacted with the company, even if they spoke to a different agent just minutes before.

Customer sales advisors may not have access to real-time, accurate information, or have collaboration tools in place to get quick answers from other departments.

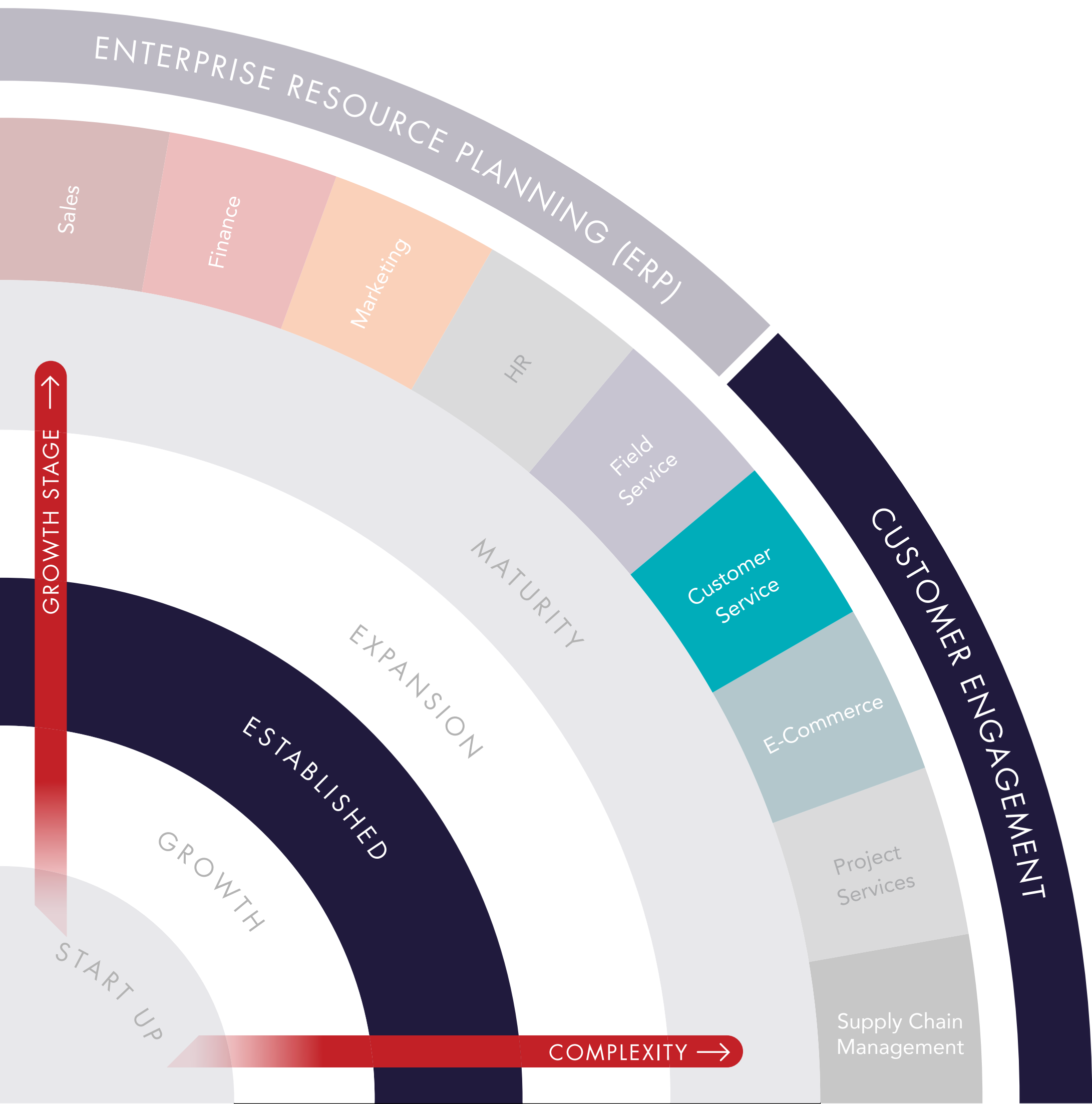
And when customer calls surge, they sometimes lack the call handling insight to resource their teams properly, or have no way to route customers through an interactive voice response (IVR).

BENEFITS OF DYNAMICS

The CRM capabilities within Dynamics, underpinned by AI, are an ideal platform to help customer service teams deliver seamless, personalised experiences. Dynamics brings all customer touchpoints into one comprehensive view, so agents are empowered to solve problems with a full picture of the situation.

NEXT: VIEW CAPABILITIES

< 1/2



CUSTOMER SERVICE: ESTABLISHED



PAIN POINTS

- 3 Customer Service
No way of gathering insights to understand issues and improve customer service

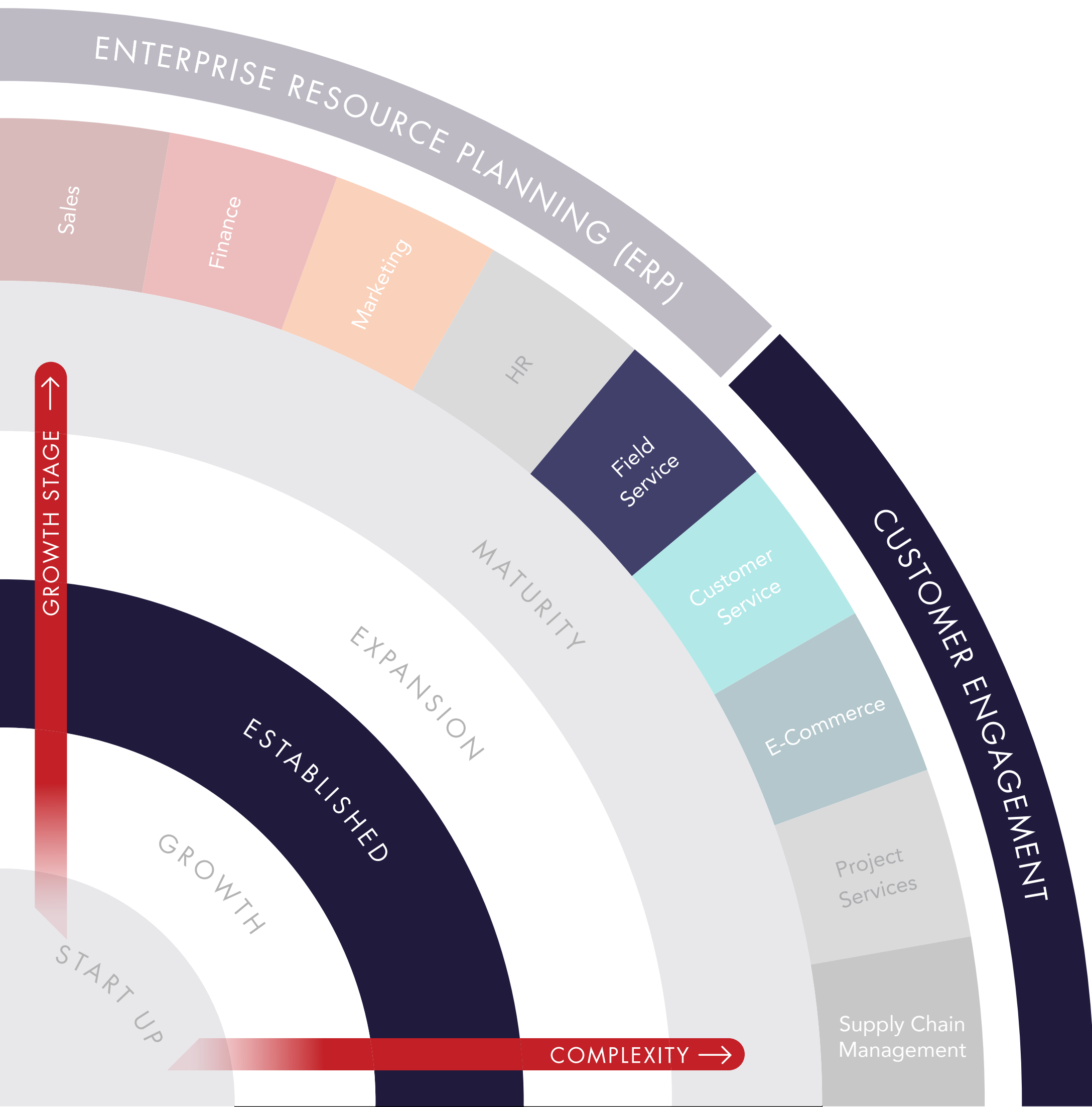
DYNAMICS CAPABILITIES

Case management
SLA support
Account management
Service automation
Customer web portals
Contract management
Service analytics

SKUs

Dynamics 365 Customer Service Enterprise
Power Apps
Power BI
Dynamics 365 Unified Service Desk

Click on the highlighted Functions to learn more ↓



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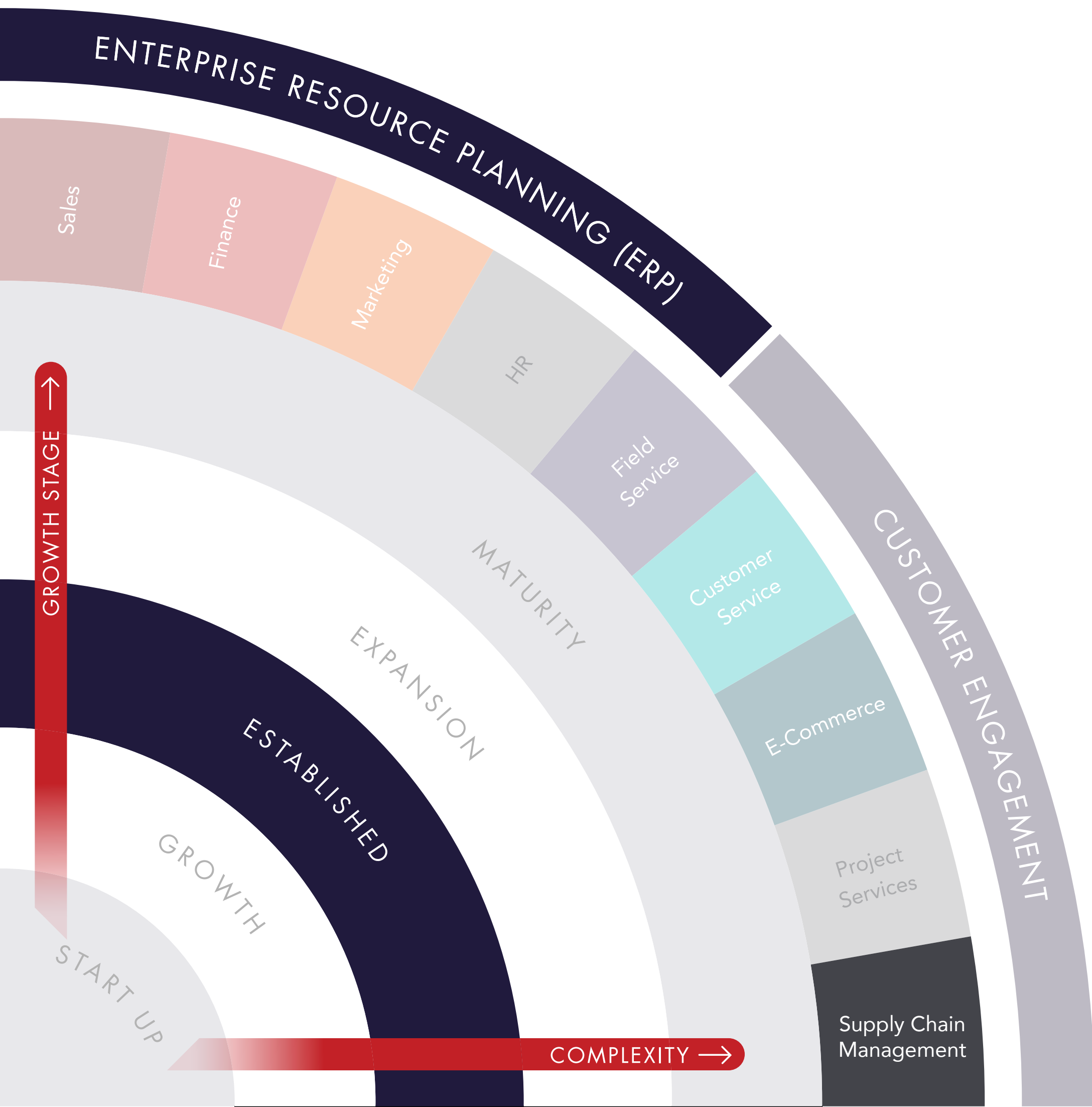
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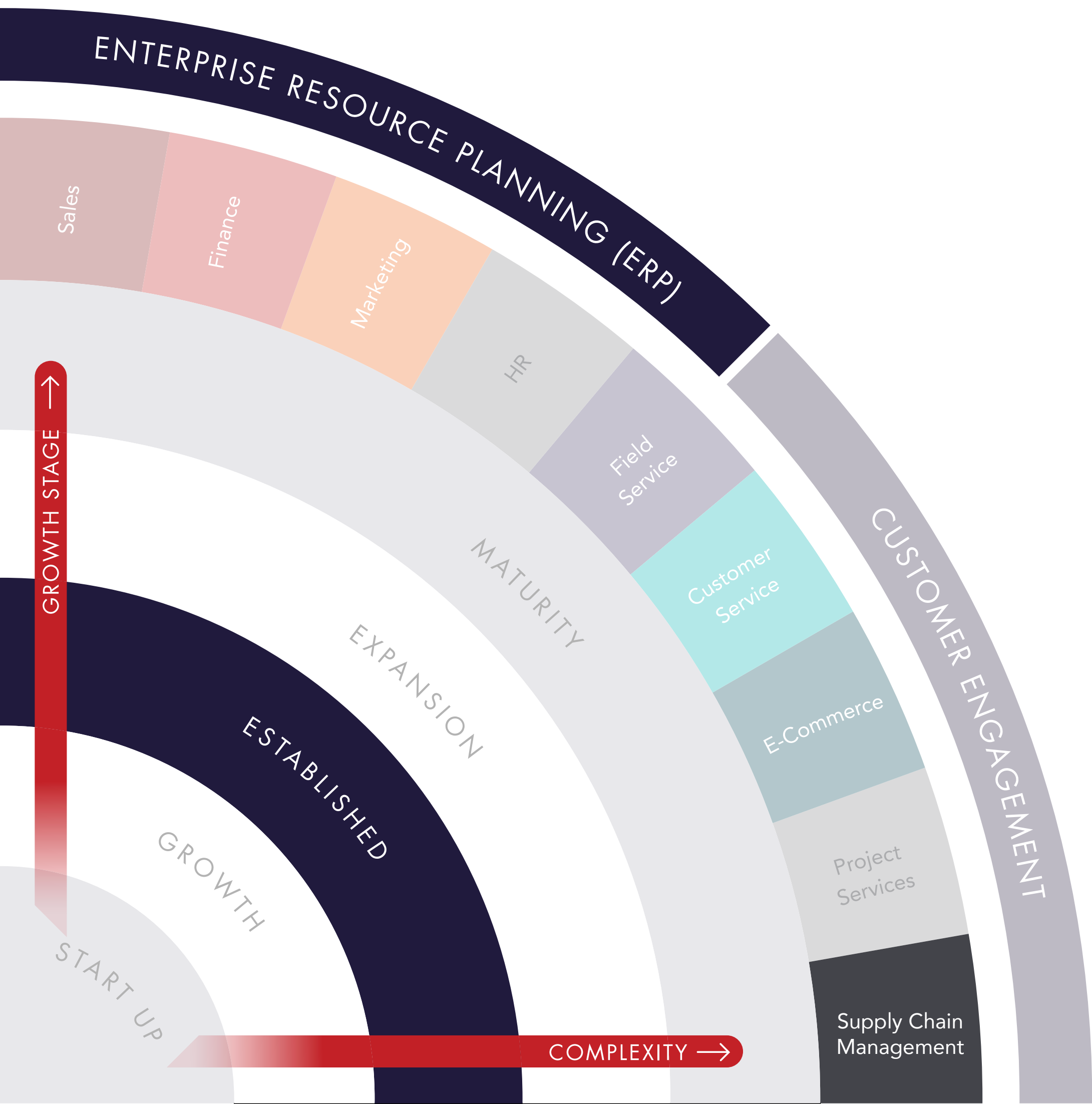
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SUPPLY CHAIN MANAGEMENT: ESTABLISHED



PAIN POINTS

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Long lead times, inefficiency and lack of transparency in the supply chain

CHALLENGES

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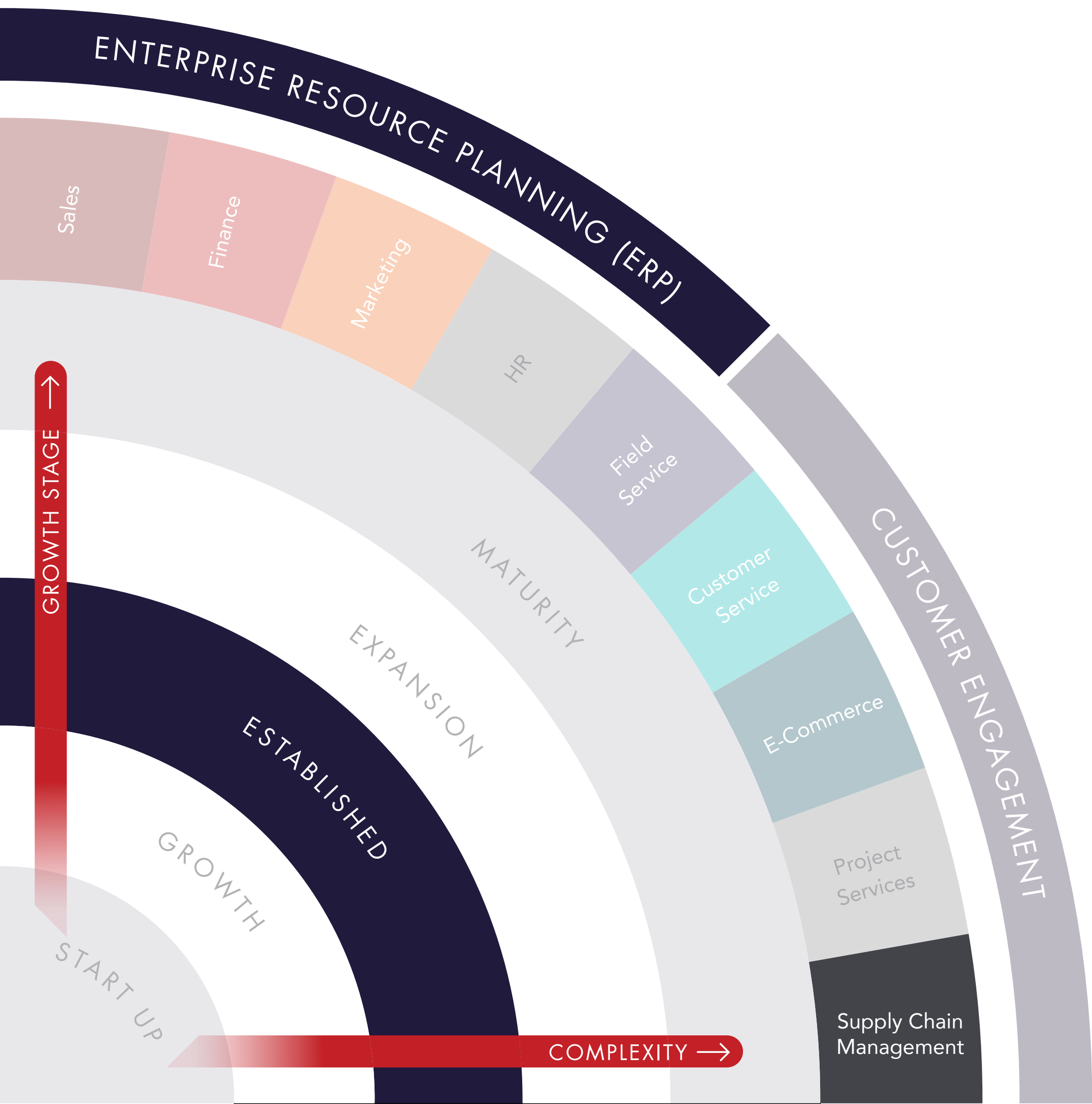
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NEXT: VIEW CAPABILITIES

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SUPPLY CHAIN MANAGEMENT: ESTABLISHED



PAIN POINTS

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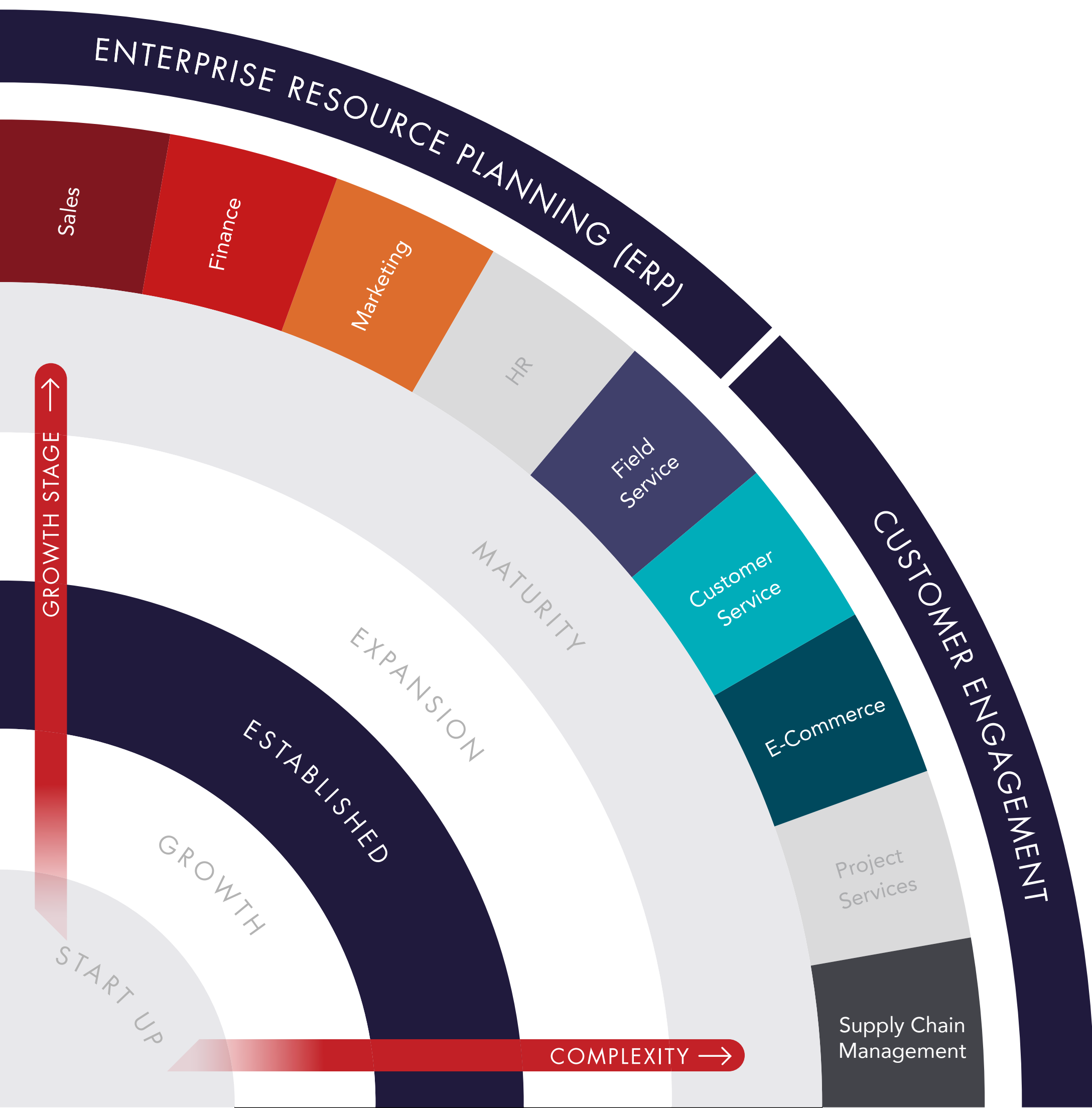
DYNAMICS CAPABILITIES

Asset management
Inventory management
Production central
Procurement and sourcing
Transportation
Warehouse management
Fleet management

SKUs

Dynamics 365 Supply Chain
Management

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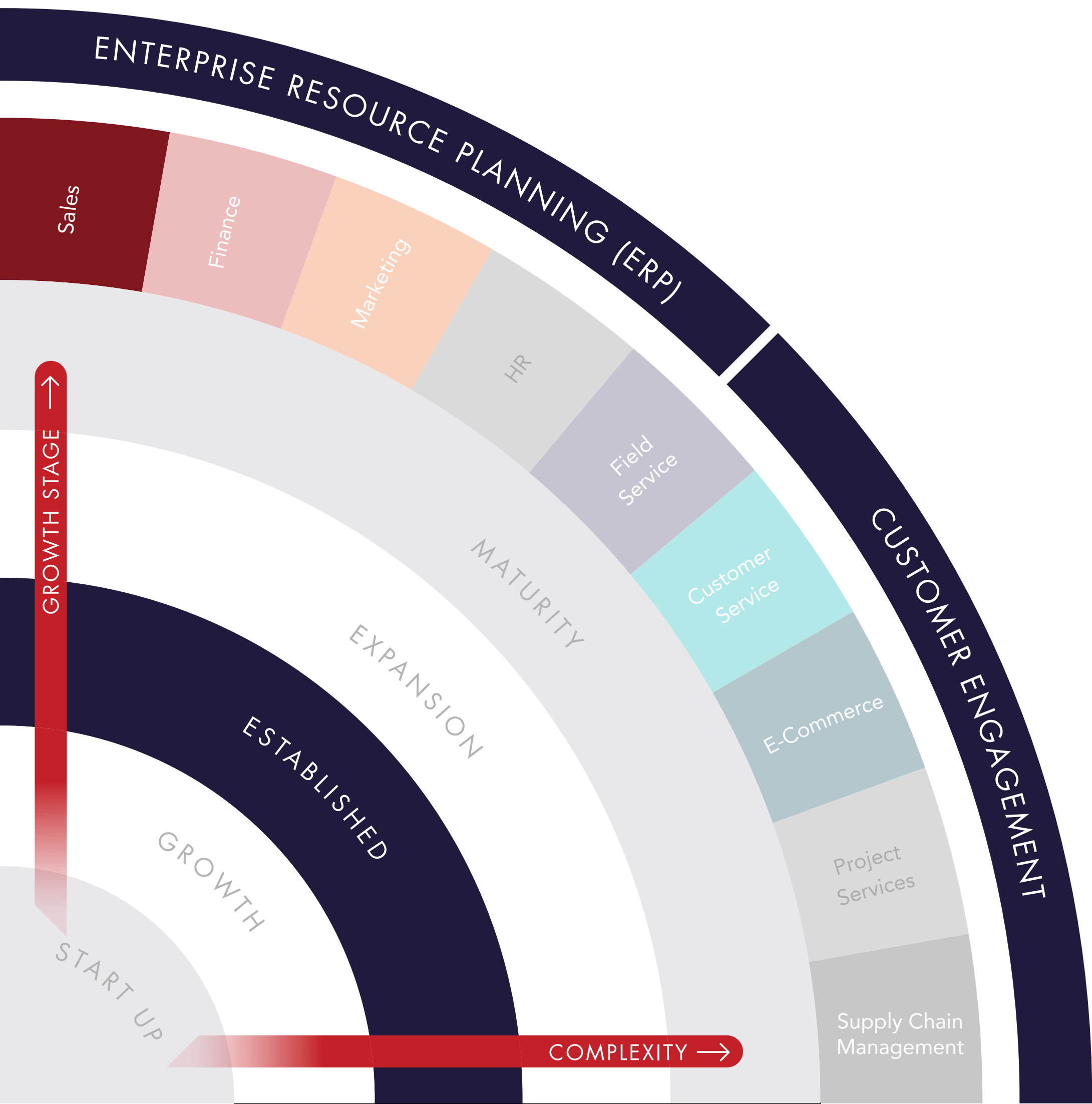
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SALES: ESTABLISHED



PAIN POINTS

6

Sales

High operational costs and overly complex processes across the whole business

CHALLENGES

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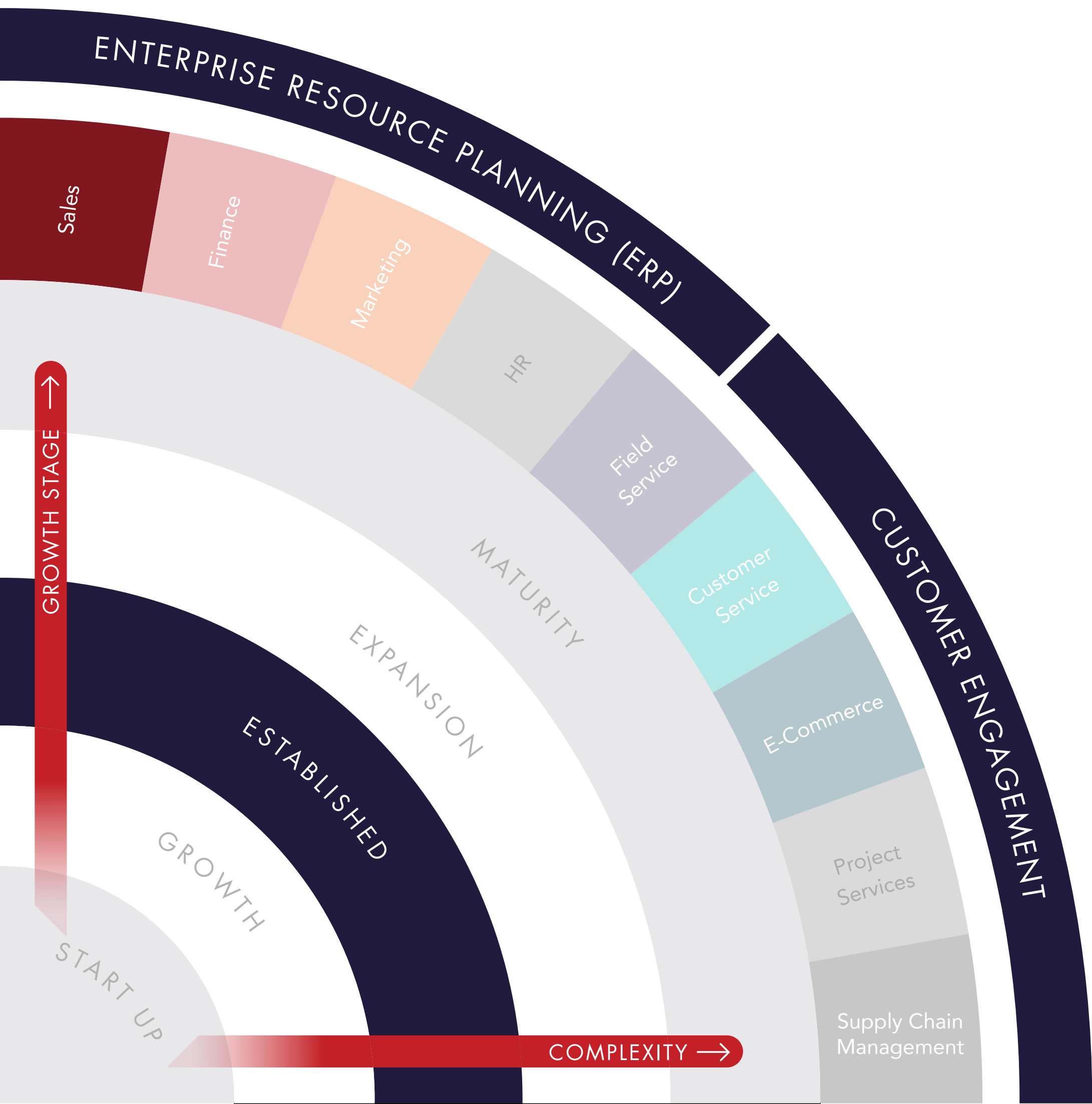
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NEXT: VIEW BENEFITS

< 1/2



SALES: ESTABLISHED



PAIN POINTS

6

Sales

High operational costs and overly complex processes across the whole business

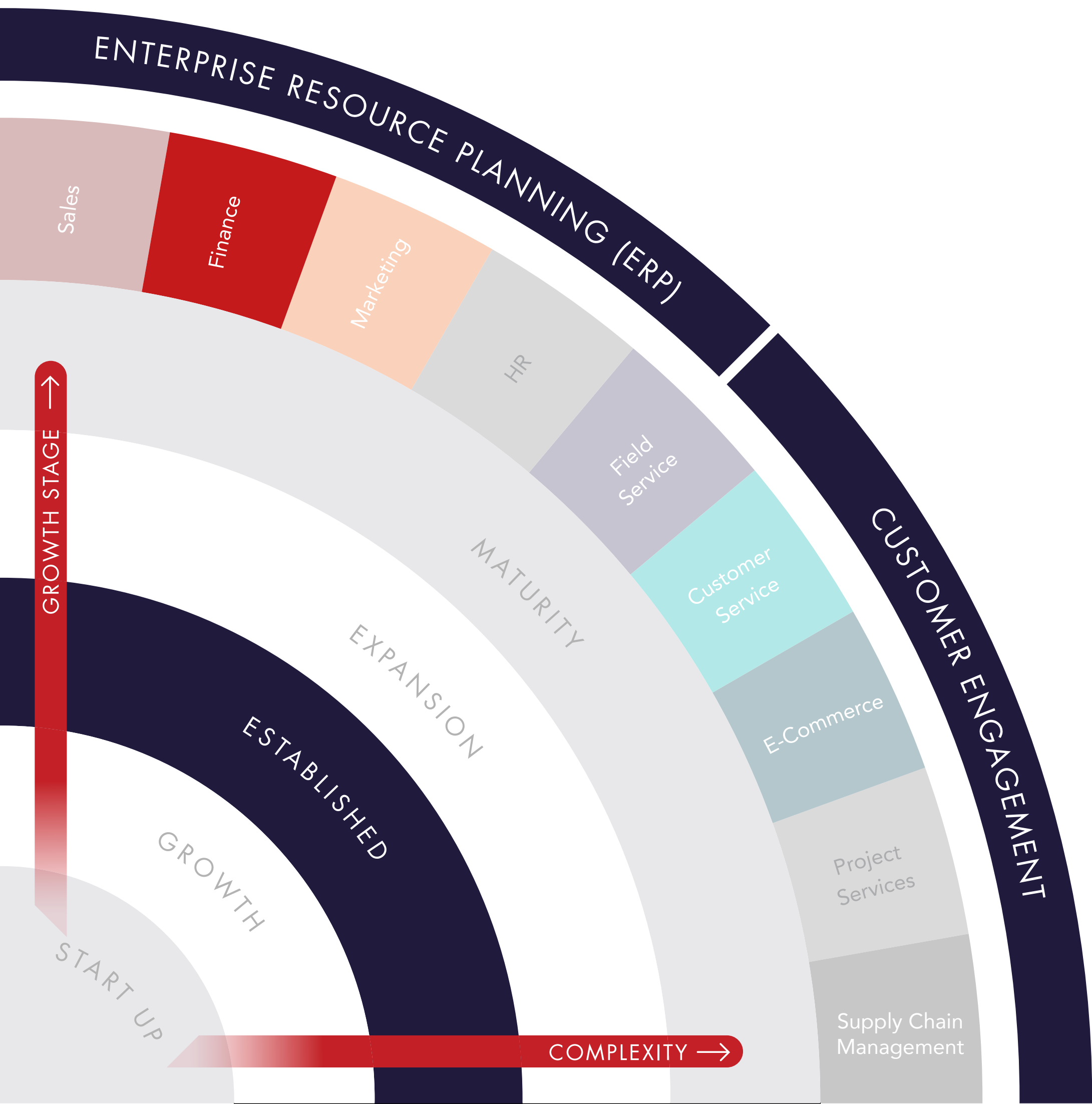
DYNAMICS CAPABILITIES

Lead management
Opportunity management
Pipeline forecasting
Sales automation
Quote management
Marketing lists
Email marketing

SKU_s

Dynamics 365 Sales
Dynamics 365 Sales Insight
Dynamics 365 Product Visualise
Power BI





FINANCE: ESTABLISHED



PAIN POINTS

6

Finance

High operational costs and overly complex processes across the whole business

CHALLENGES

Many finance teams still struggle with time-consuming tasks, sometimes having to integrate lots of different databases manually – even for basic processes like billing. It’s difficult to share information across departments for order processing, which results in longer lead times. And despite the wealth of financial data available, they might not have the reporting tools to get a look at the bigger picture for the business – which can hamper strategic decision making.

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BENEFITS OF DYNAMICS

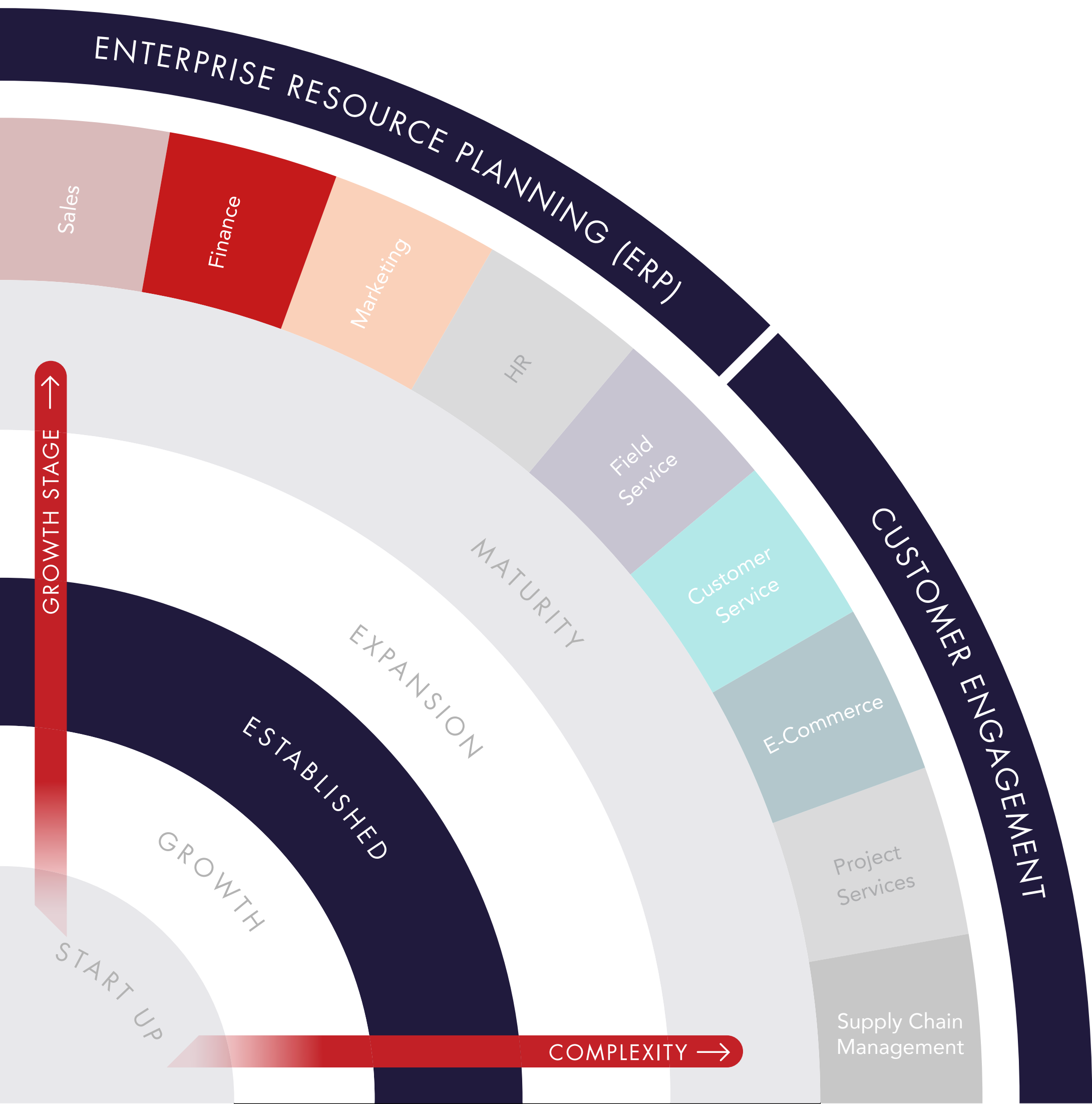
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NEXT: VIEW CAPABILITIES

< 1/2



FINANCE: ESTABLISHED



PAIN POINTS

6

Finance

High operational costs and overly complex processes across the whole business

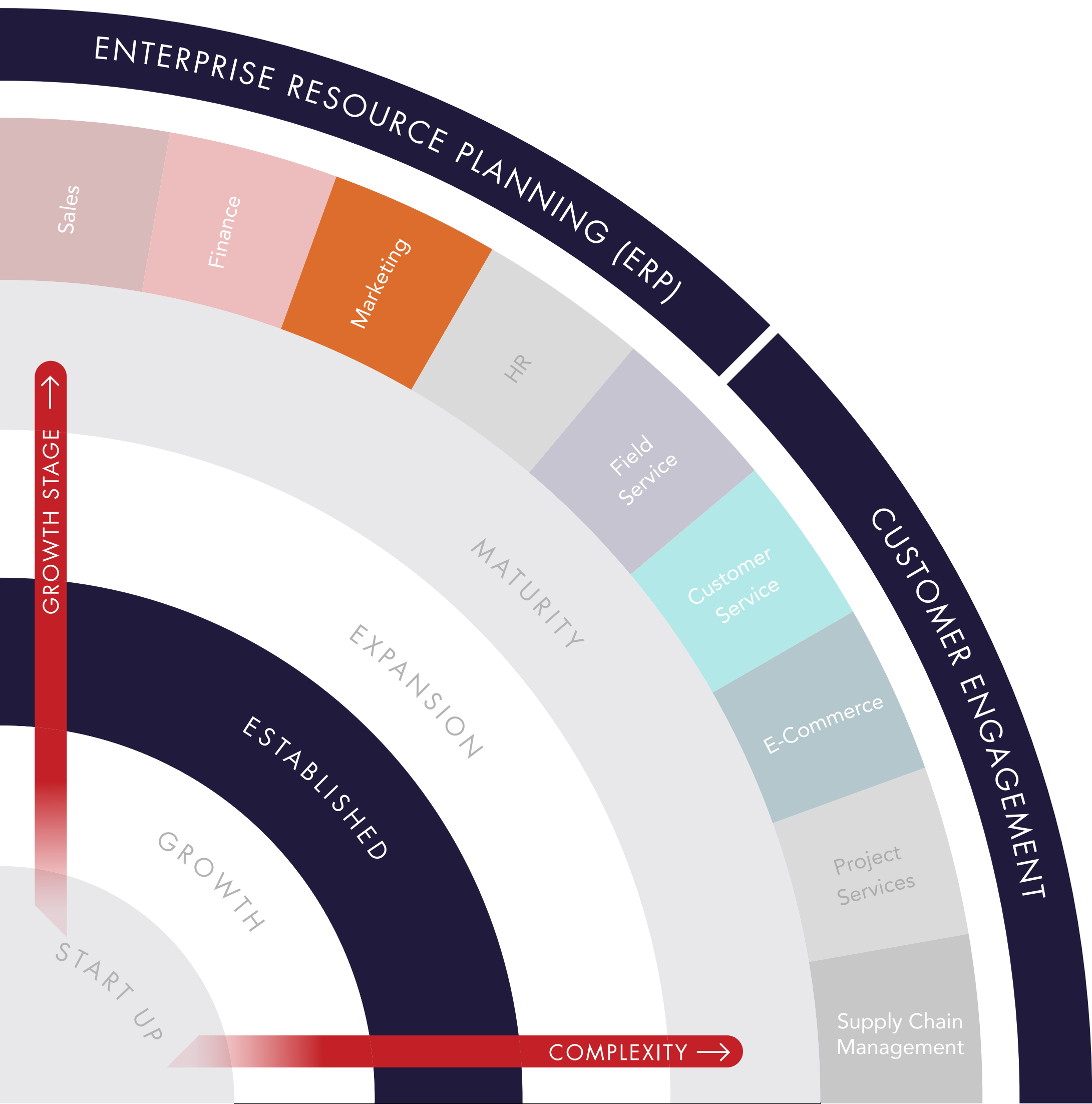
DYNAMICS CAPABILITIES

Credit management
Treasury
Accounts receivable and payable
Budgeting
Cost management
Fixed assets
Payroll tax
External compliance certification

SKU_s

Dynamics 365 for Finance





MARKETING: ESTABLISHED



PAIN POINTS

6

Marketing

High operational costs and overly complex processes across the whole business

CHALLENGES

One of the biggest challenges for marketing departments is getting accurate, up-to-date data and making sense of how to use it effectively. They may have a large customer database that doesn't yield any useful insights from, or too few staff to consistently communicate with their network.

This makes it difficult to send timely information to the right customers, hampering cross-sell and upsell efforts, and opening the door for competitors. For those customers they do communicate with, marketers without a platform like Dynamics may struggle to monitor email open rates or link customer touchpoints to sales data. It's very hard to track results or understand whether they are adding value.

BENEFITS OF DYNAMICS

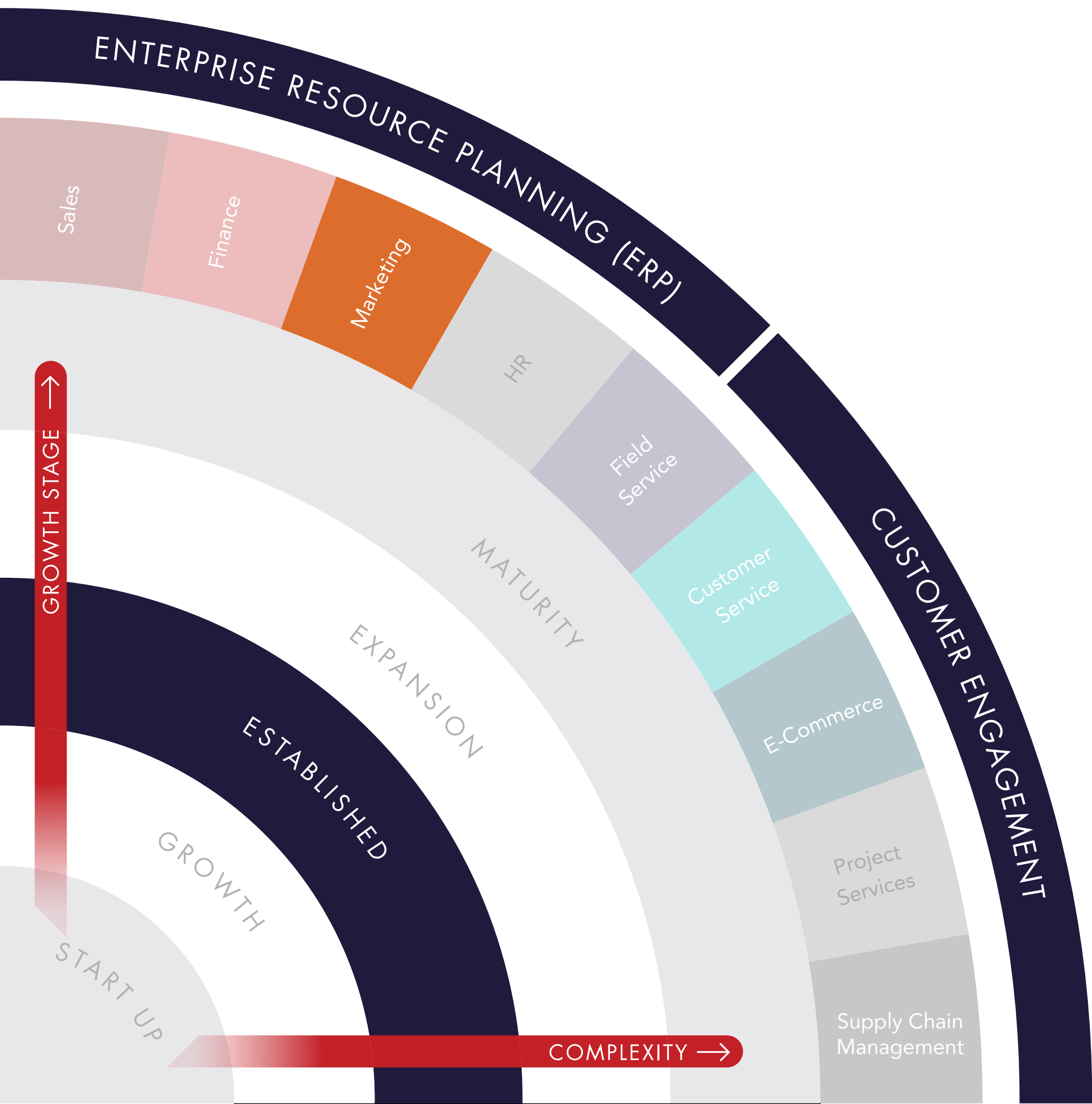
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It helps marketers align with their sales teams and create a single view of the prospect, delivering a seamless customer experience.

And by targeting the right customers and optimising marketing resources, it can ultimately help marketers improve the ROI of their activities.

NEXT: VIEW CAPABILITIES

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MARKETING: ESTABLISHED



PAIN POINTS

6

Marketing

High operational costs and overly complex processes across the whole business

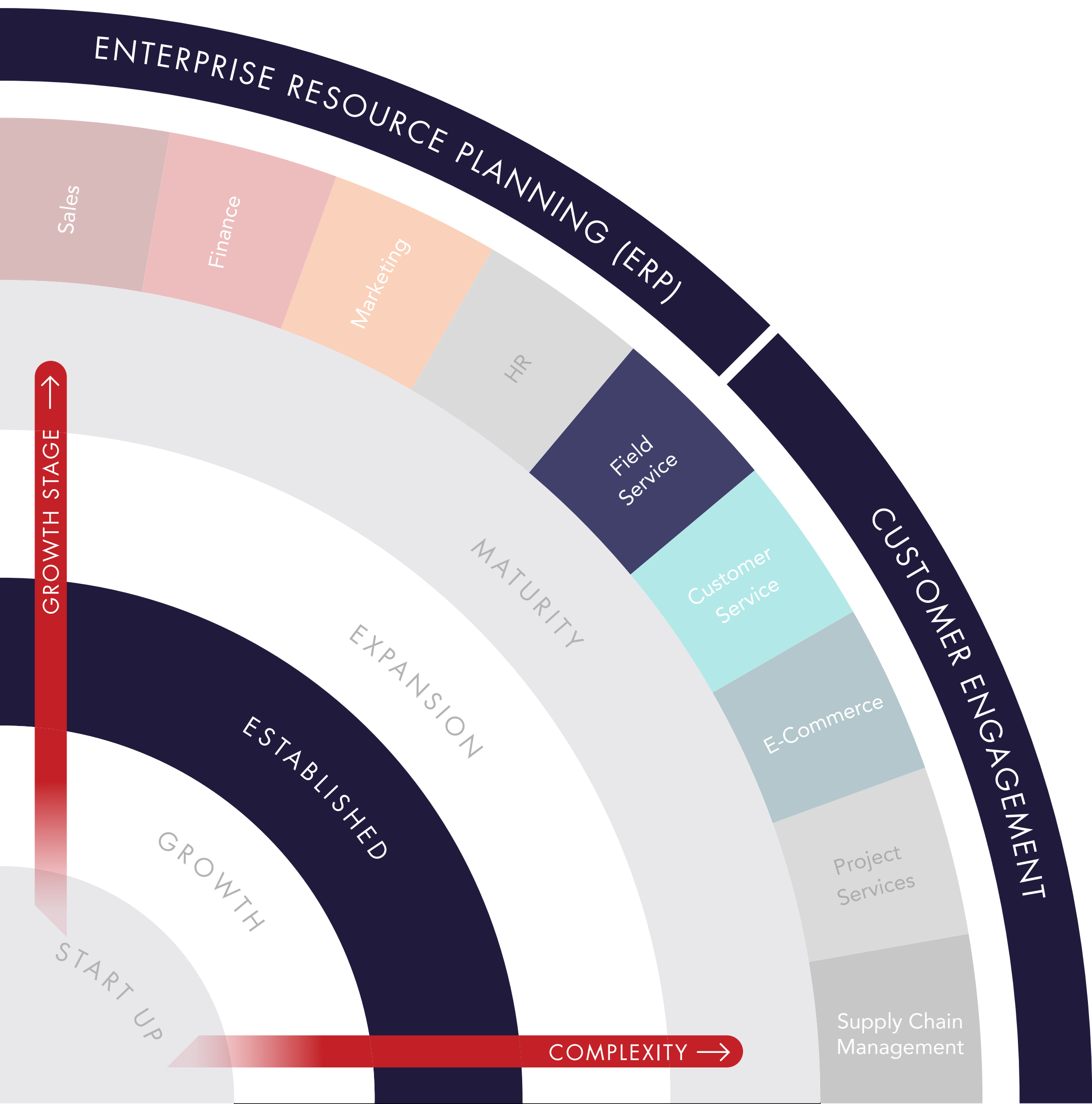
DYNAMICS CAPABILITIES

Email marketing
Lead scoring
Market segmentation
Customer journeys
Event management
Connector for LinkedIn
Lead generation forms

SKU_s

Dynamics 365 Marketing
Dynamics 365 Customer Insight
Power Apps





FIELD SERVICE: ESTABLISHED



PAIN POINTS

- 6 **Field Service**
High operational costs and overly complex processes across the whole business

CHALLENGES

When you're out solving customer issues in the field, you need the information and the flexibility to come up with solutions on the fly. Many teams don't have access to the right tools to support technicians, or effective customer insight collection systems, and that makes it very difficult to prioritise faults or offer a triage service. Agents are forced to be reactive, rather than proactively finding fixes in advance.

Without accurate, real-time data, co-ordinators can also struggle to schedule field agents with the right skillsets at the right times, and customers don't always receive appropriate levels of communication throughout the process. All of this can have a negative impact on customer experiences.

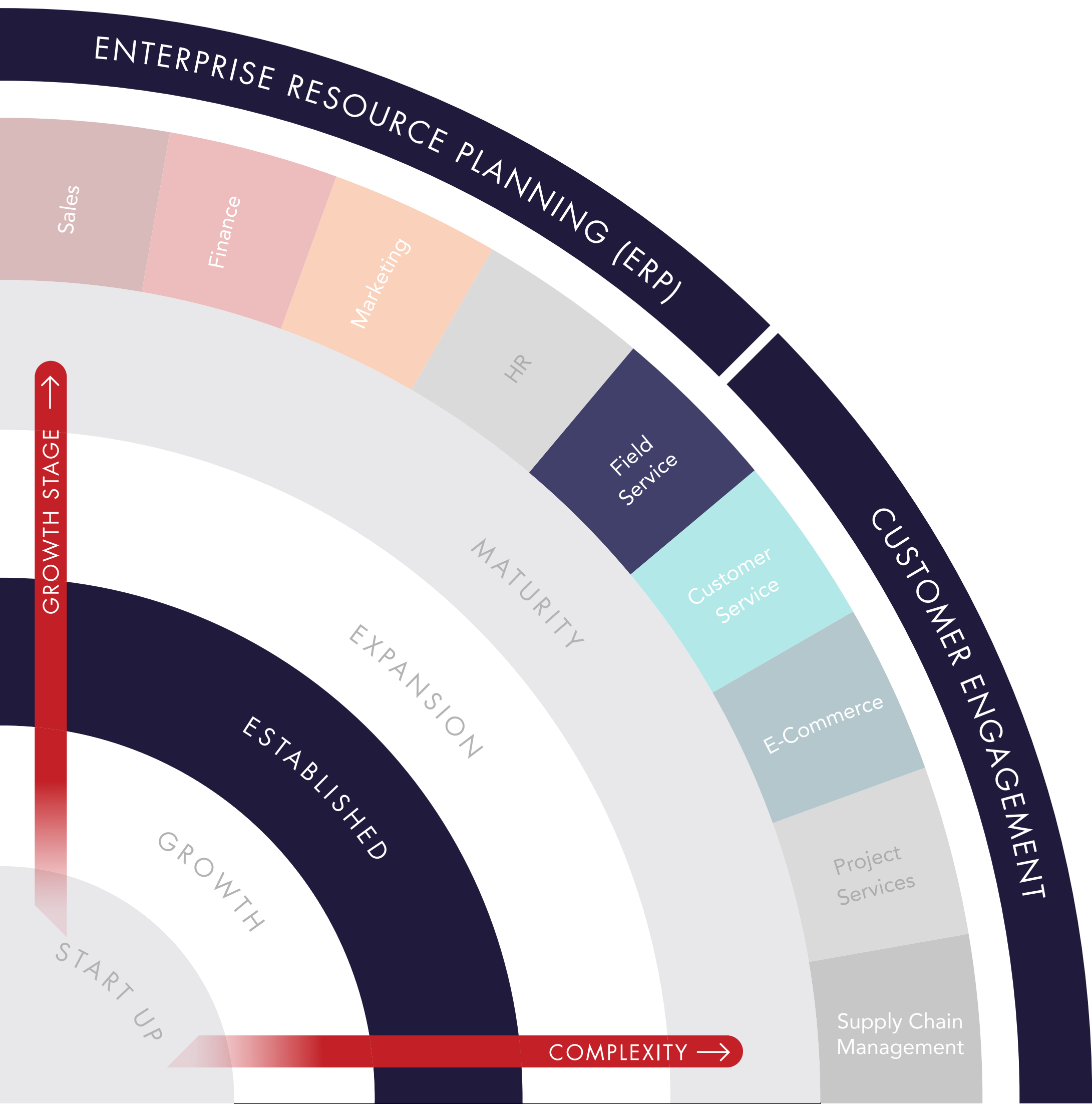
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With effective information management through Dynamics, field service teams can get the right person to the right place at the right time with the right skills and equipment. That's thanks to effective scheduling processes and powerful analytics, making it easier to predict, detect and resolve issues in advance.

Rather than finger-in-the-air prioritisation, it's much easier for technicians and coordinators to prioritise and be proactive, so that customer issues are fixed first time. Which all leads to happier customers and more efficient operations.

NEXT: VIEW CAPABILITIES

< 1/2



FIELD SERVICE: ESTABLISHED



PAIN POINTS

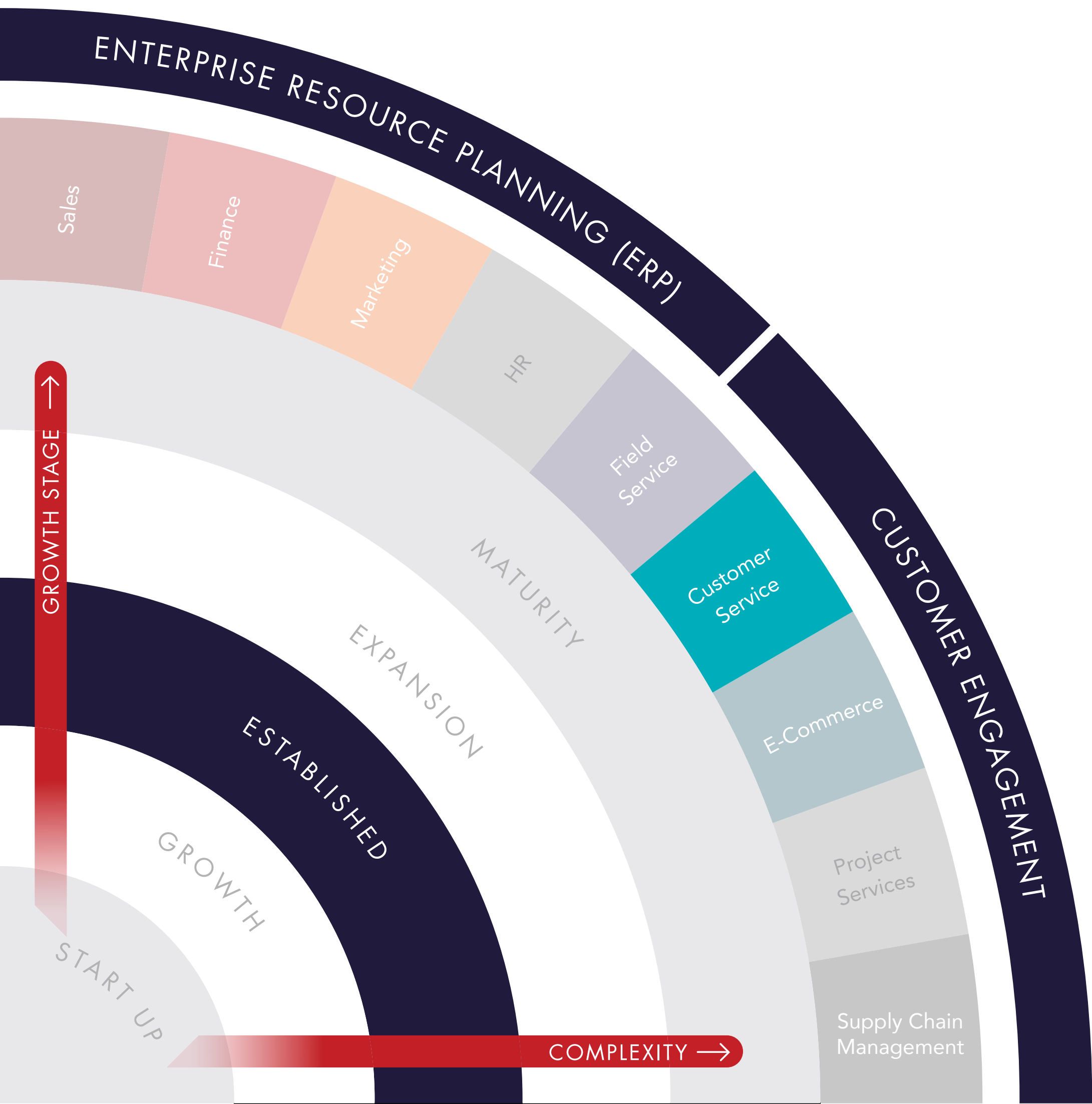
- 6 **Field Service**
High operational costs and overly complex processes across the whole business

DYNAMICS CAPABILITIES

Work orders
Service agreements
Schedule and dispatch
Schedule board
Inventory management
Mobile productivity
Connected devices

SKU_s

Dynamics 365 Field Service
Dynamics 365 Remote Assistant
Power Apps



CUSTOMER SERVICE: ESTABLISHED



PAIN POINTS

6

Customer Service
High operational costs
and overly complex
processes across the
whole business

CHALLENGES

To meet high customer expectations, businesses are now under pressure to deliver omnichannel customer service. But for many, it's impossible to track when a customer has previously interacted with the company, even if they spoke to a different agent just minutes before.

Customer sales advisors may not have access to real-time, accurate information, or have collaboration tools in place to get quick answers from other departments.

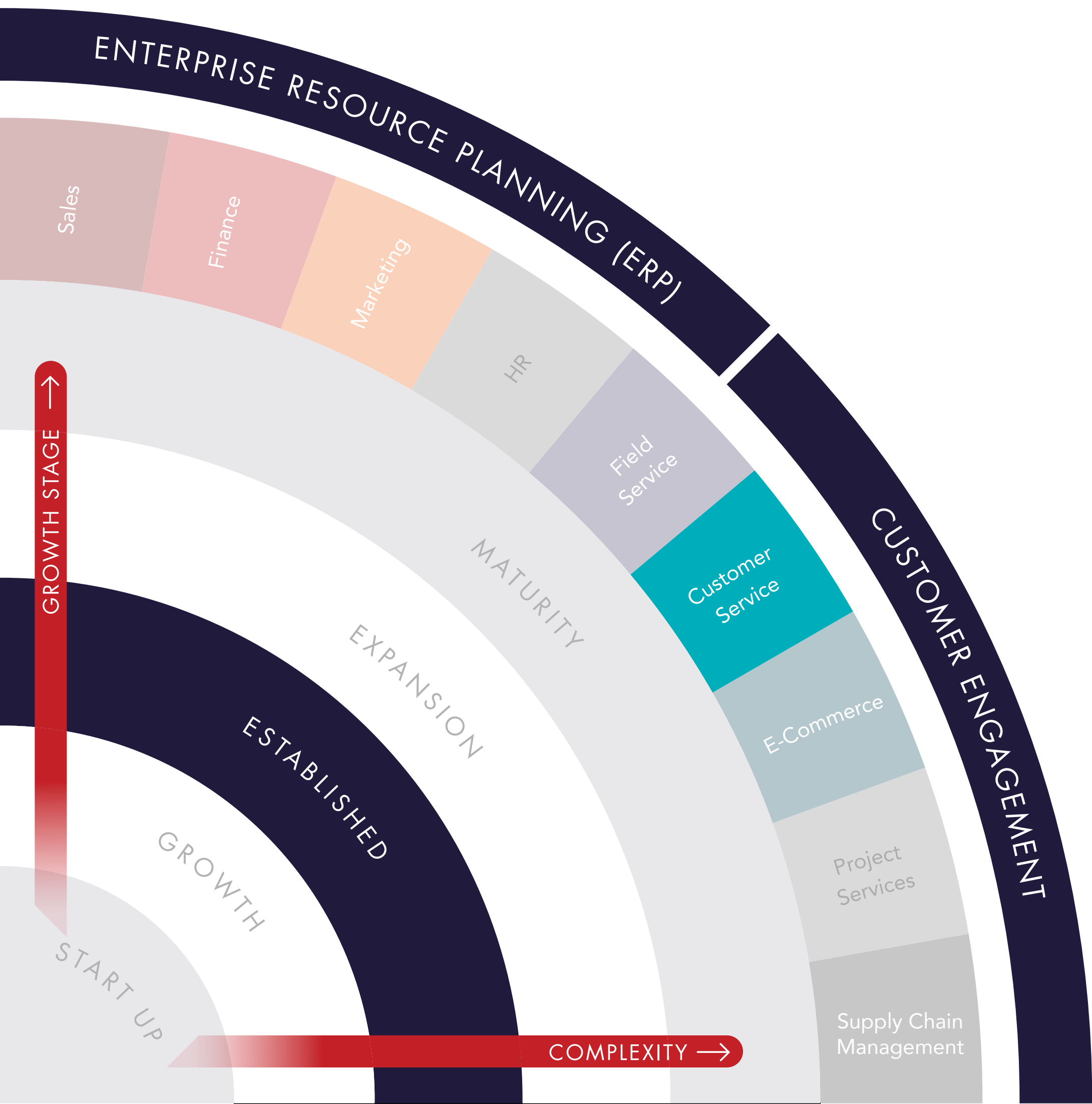
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BENEFITS OF DYNAMICS

The CRM capabilities within Dynamics, underpinned by AI, are an ideal platform to help customer service teams deliver seamless, personalised experiences. Dynamics brings all customer touchpoints into one comprehensive view, so agents are empowered to solve problems with a full picture of the situation.

NEXT: VIEW CAPABILITIES

< 1/2



CUSTOMER SERVICE: ESTABLISHED



PAIN POINTS

6

Customer Service
High operational costs
and overly complex
processes across the
whole business

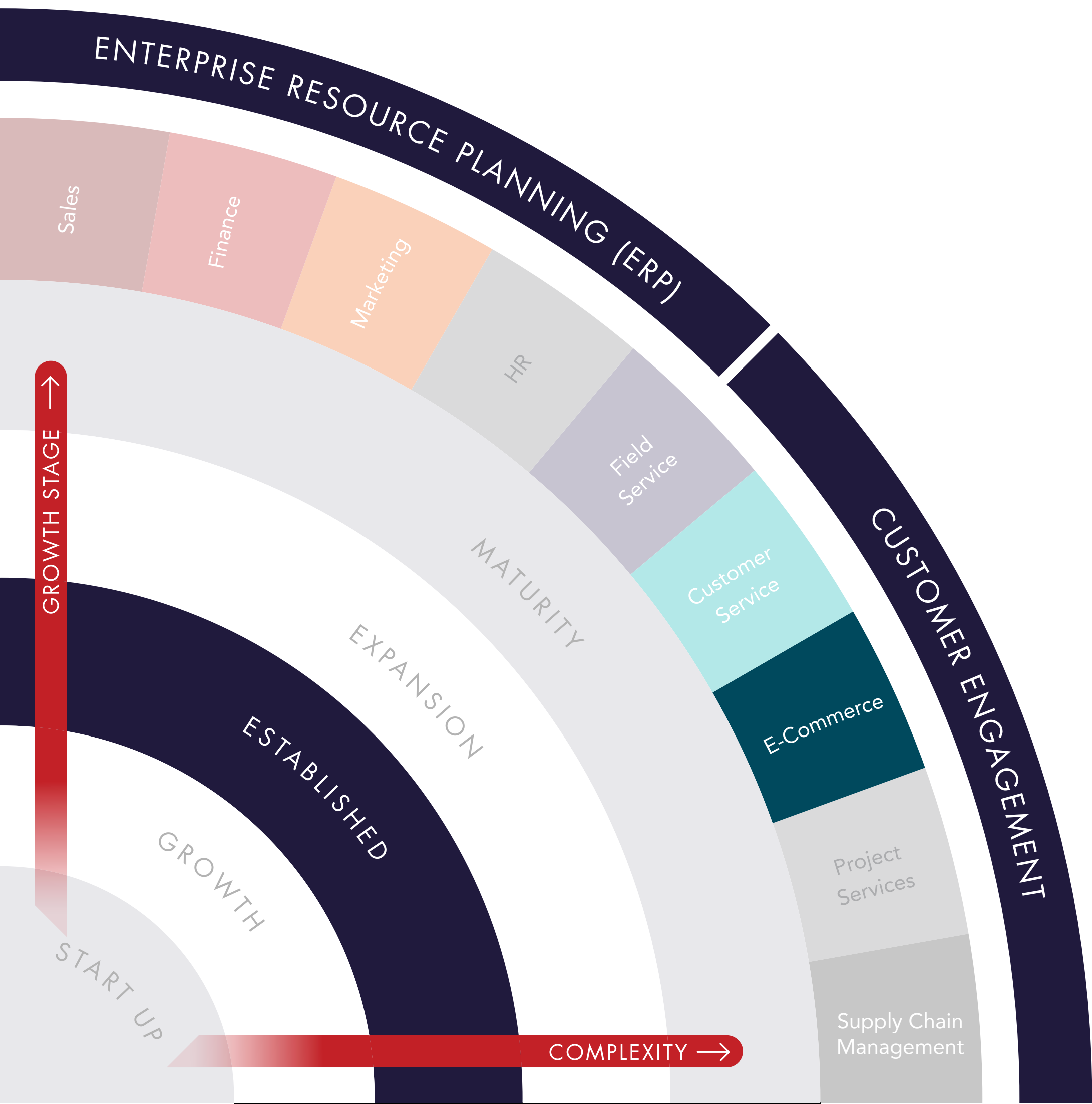
DYNAMICS CAPABILITIES

Case management
SLA support
Account management
Service automation
Customer web portals
Contract management
Service analytics

SKU_s

Dynamics 365 Customer
Service Enterprise
Power Apps
Power BI
Dynamics 365 Unified Service Desk





E-COMMERCE: ESTABLISHED



PAIN POINTS

6

E-Commerce
High operational costs and overly complex processes across the whole business

CHALLENGES

E-commerce is a business of fine margins – every click counts. Customers need to see the same content and promotions across different channels, for example, which is hard without a single, integrated platform. Equally, it's a challenge to fulfil orders efficiently online, and to offer flexible delivery models (particularly for smaller organisations).

Businesses also struggle with data: they need to predict customer demand and report on real-time stock levels, as well as needing accurate customer data so they can personalise offers.

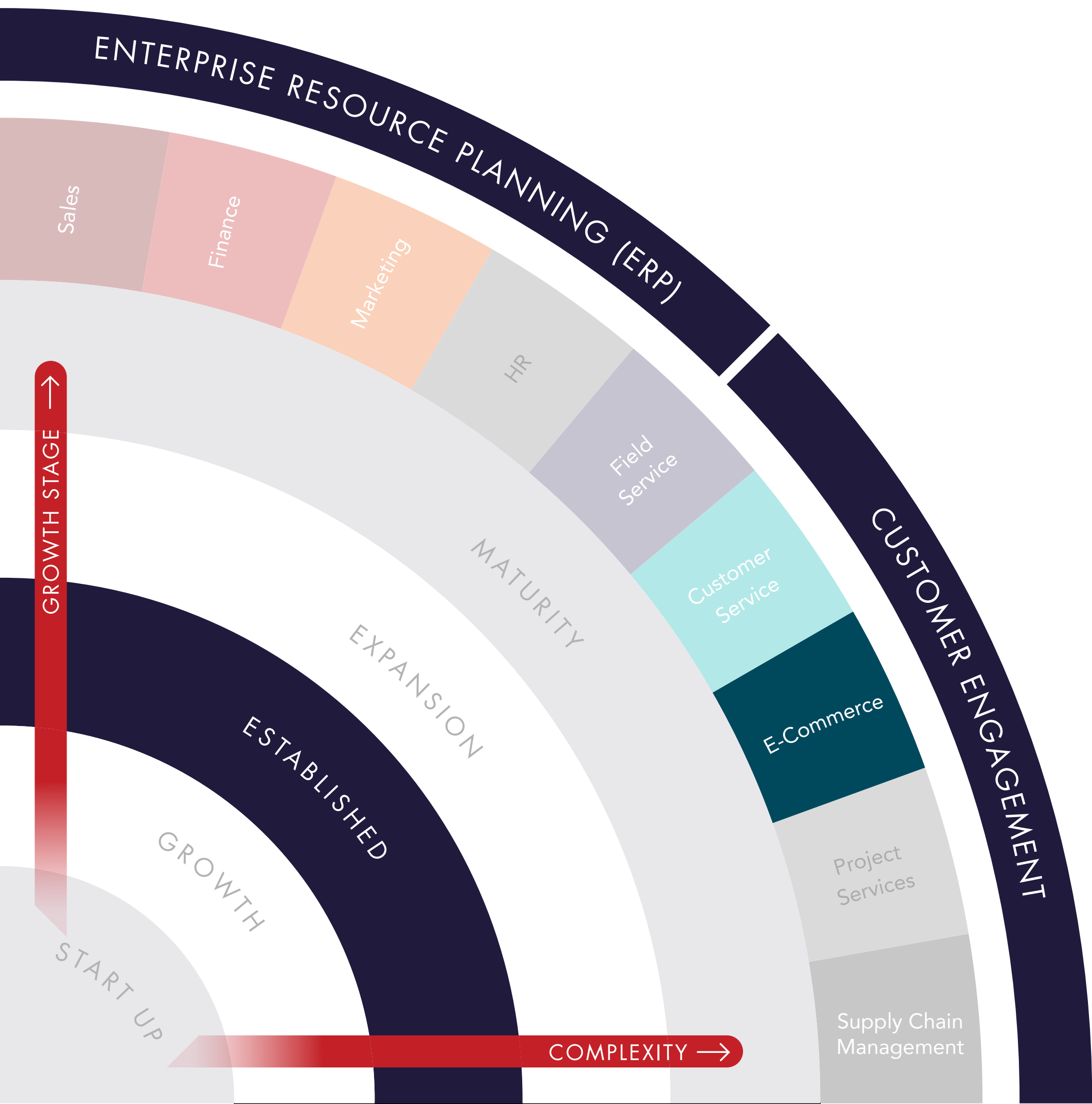
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E-commerce teams can use Dynamics to create exceptional shopping experiences. The platform's built-in AI and machine learning can help to integrate and optimise back-office processes, streamlining your retail operations. It is also extremely scalable, lending itself to growing businesses or those expanding into new territories and markets.

The single view of the customer that Dynamics facilitates gives businesses the option to serve customers when, how, and where they want – on any device. E-commerce teams can view each customer on a unified platform, which brings all customer touchpoints together.

NEXT: VIEW CAPABILITIES

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E-COMMERCE: ESTABLISHED



PAIN POINTS

6

E-Commerce
High operational costs
and overly complex
processes across the
whole business

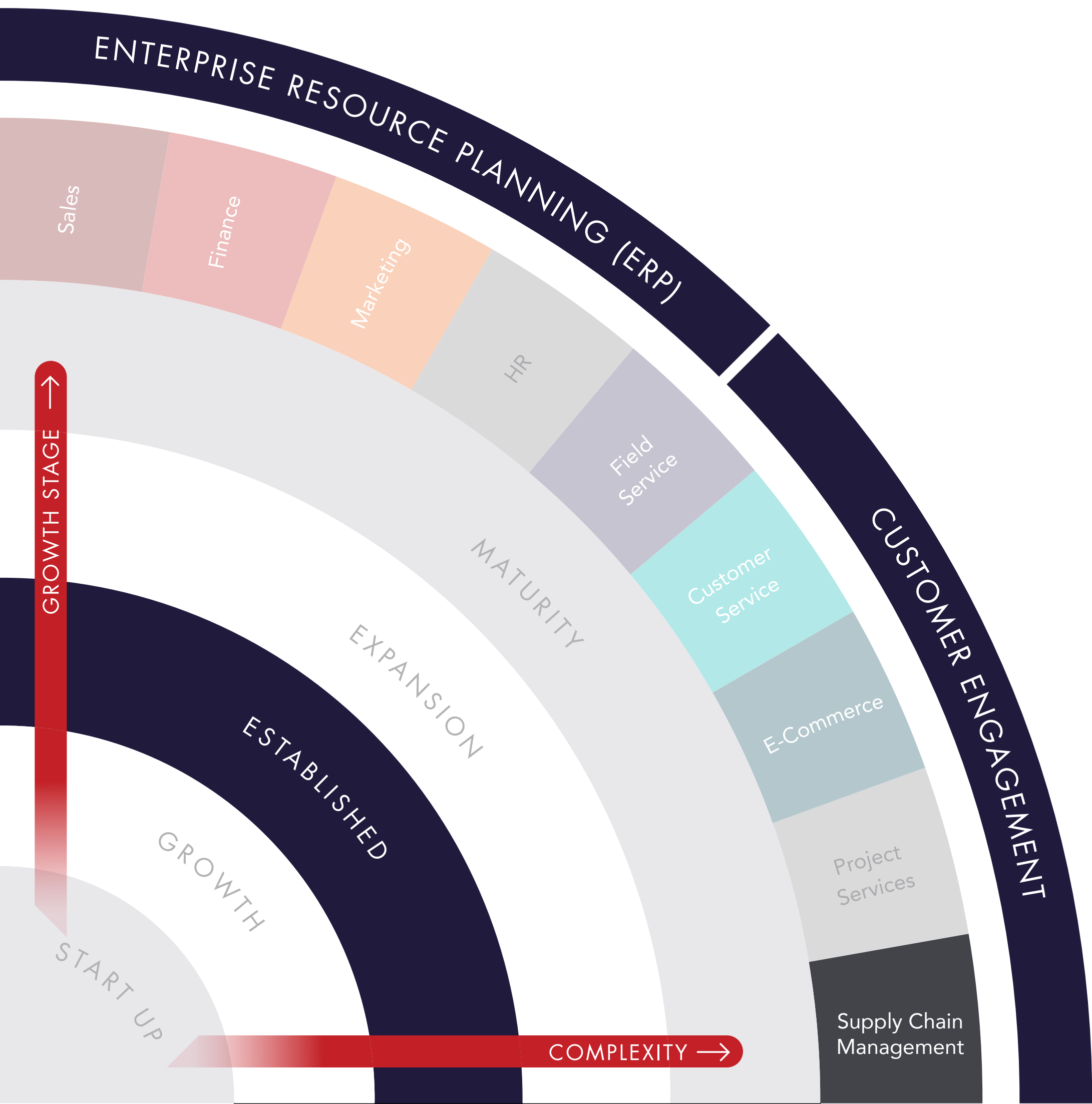
DYNAMICS CAPABILITIES

Pricing
Stores management
Shift management
Employee management
Customer loyalty
Replenishment
Product categories
Sales channel management

SKU_s

Dynamics 365 E-Commerce
Power Apps





SUPPLY CHAIN MANAGEMENT: ESTABLISHED



PAIN POINTS

- 6 Supply Chain Management
High operational costs and overly complex processes across the whole business

CHALLENGES

Without real-time information, it's difficult to efficiently manage logistics and supply chain operations. Maintenance ends up being reactive rather than proactive, stock levels have to be recorded manually (an error-prone process), and customers end up being given inaccurate delivery times. Without end-to-end visibility of the supply chain and warehousing operations, improvements can only be based on intuition.

Many businesses also have disparate or disconnected procurement systems, particularly as they grow across territories. This makes it difficult to spot cost inefficiencies.

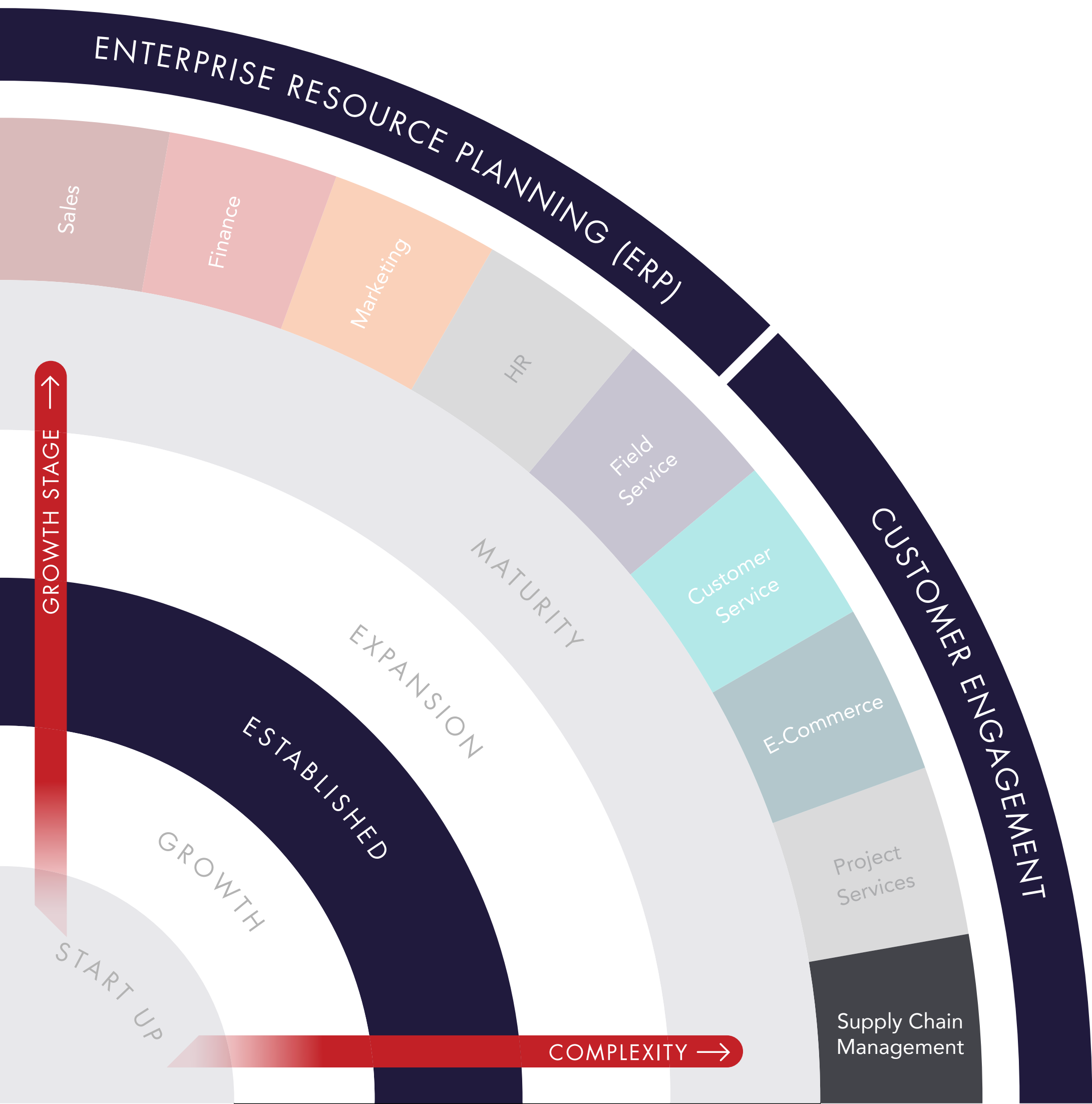
BENEFITS OF DYNAMICS

With machine-learning-enhanced warehouse management through Dynamics, your clients can accurately report and forecast stock levels, helping them to move from a reactive to proactive supply chain operation. Dynamics also integrates IoT devices, so they can fix issues in advance to prevent downtime and extend the life of equipment.

And with powerful automation and analytics tools, the platform can also optimise planning and improve the fulfilment, material sourcing, and logistics of supply chains.

NEXT: VIEW CAPABILITIES

< 1/2



SUPPLY CHAIN MANAGEMENT: ESTABLISHED



PAIN POINTS

- 6 Supply Chain Management
High operational costs and
overly complex processes
across the whole business

DYNAMICS CAPABILITIES

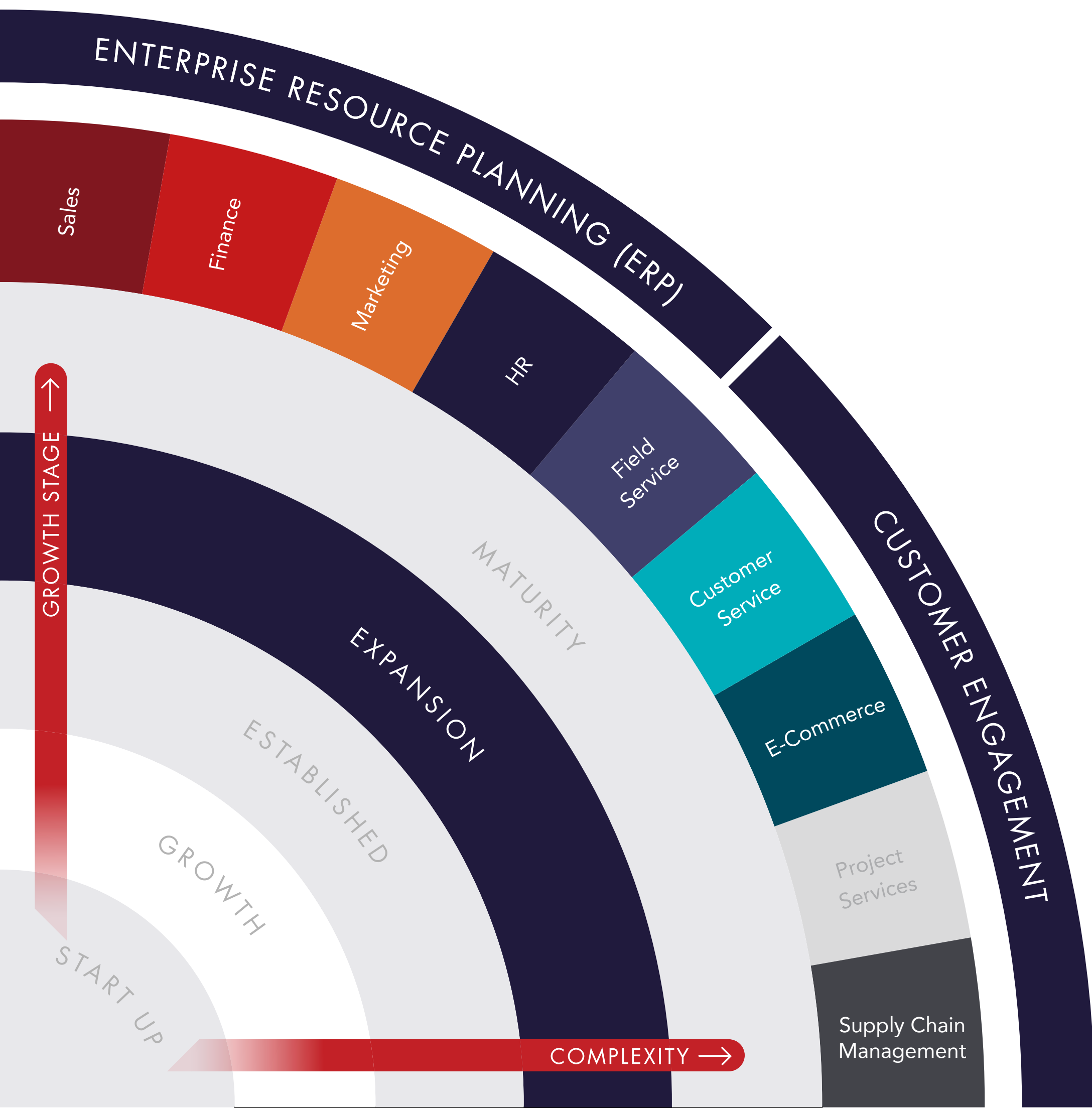
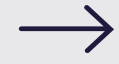
Asset management
Inventory management
Production central
Procurement and sourcing
Transportation
Warehouse management
Fleet management

SKUs

Dynamics 365 Supply Chain
Management



Click on a **Pain Point**
to filter the Functions



EXPANSION

Understanding how and where to expand are key challenges for midmarket businesses, who already have a solid base but need opportunities to continue growing. It's no longer good enough to make gambles and guesses – decision-makers want to know that their strategy is based on sound data, especially when weighing up the merits of mergers and acquisitions. Businesses are also under pressure from savvy competitors who are modernising and using tech to their own advantage.

Powerful analytics and machine learning in Dynamics make it an ideal platform for data-driven decision-making, whether it's the CFO writing annual budgets or the CMO investigating product innovation options.

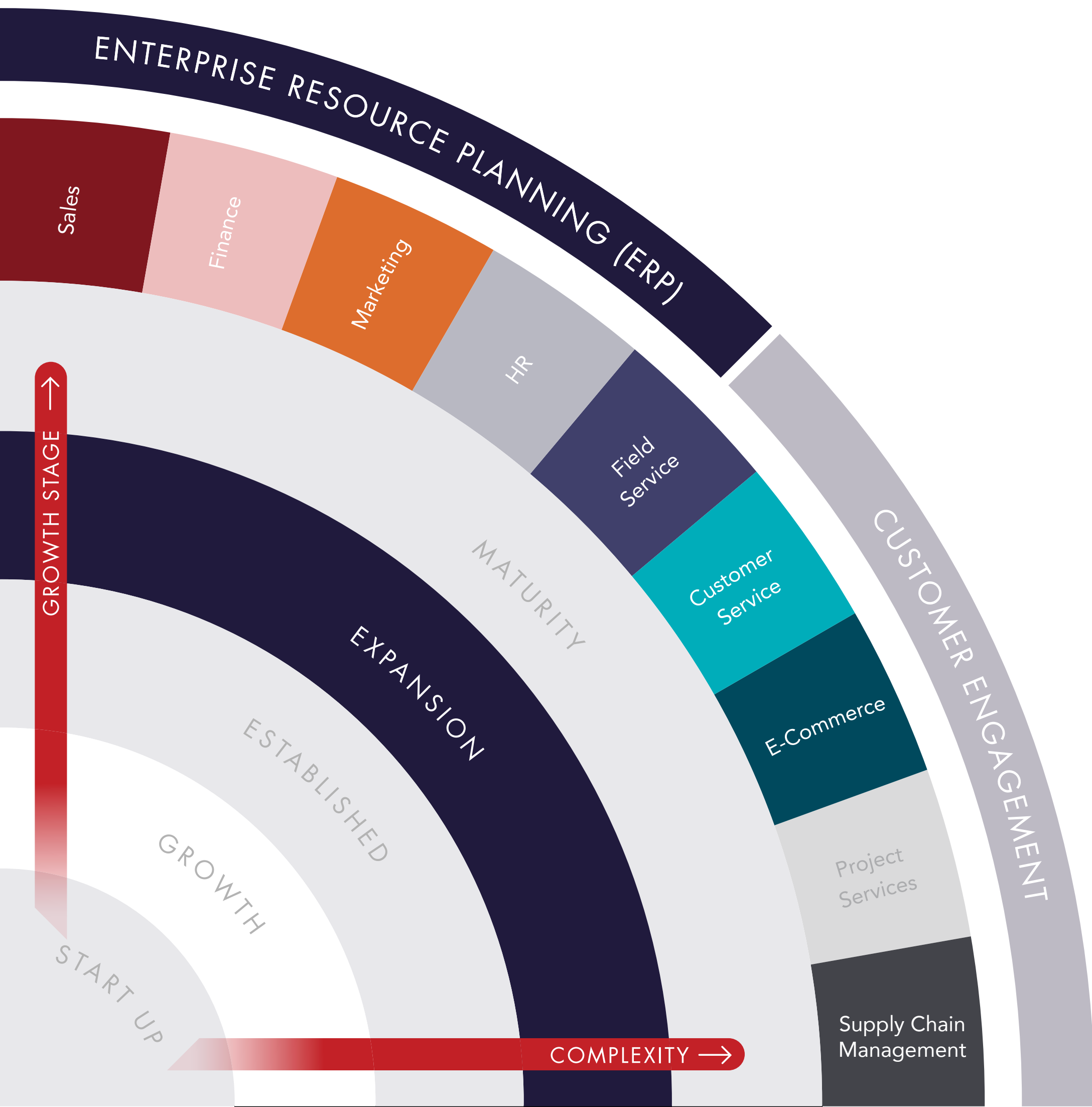
PAIN POINTS

Click on a Pain Point below:

- 1 Not knowing which markets to expand into, or how to scale to fulfil their needs
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- 4 Lack of insights on which to build a cohesive and effective marketing plan. This in turn impacts ROI
- 5 Expansion sometimes comes at the expense of current customers
- 6 Struggling to understand the preferences of the target market, and consider new and different channels to market
- 7 Inability to manage expansion amidst higher costs, greater risks, and the limits of manual and labour-intensive processes



Click on the highlighted Functions to learn more ↓



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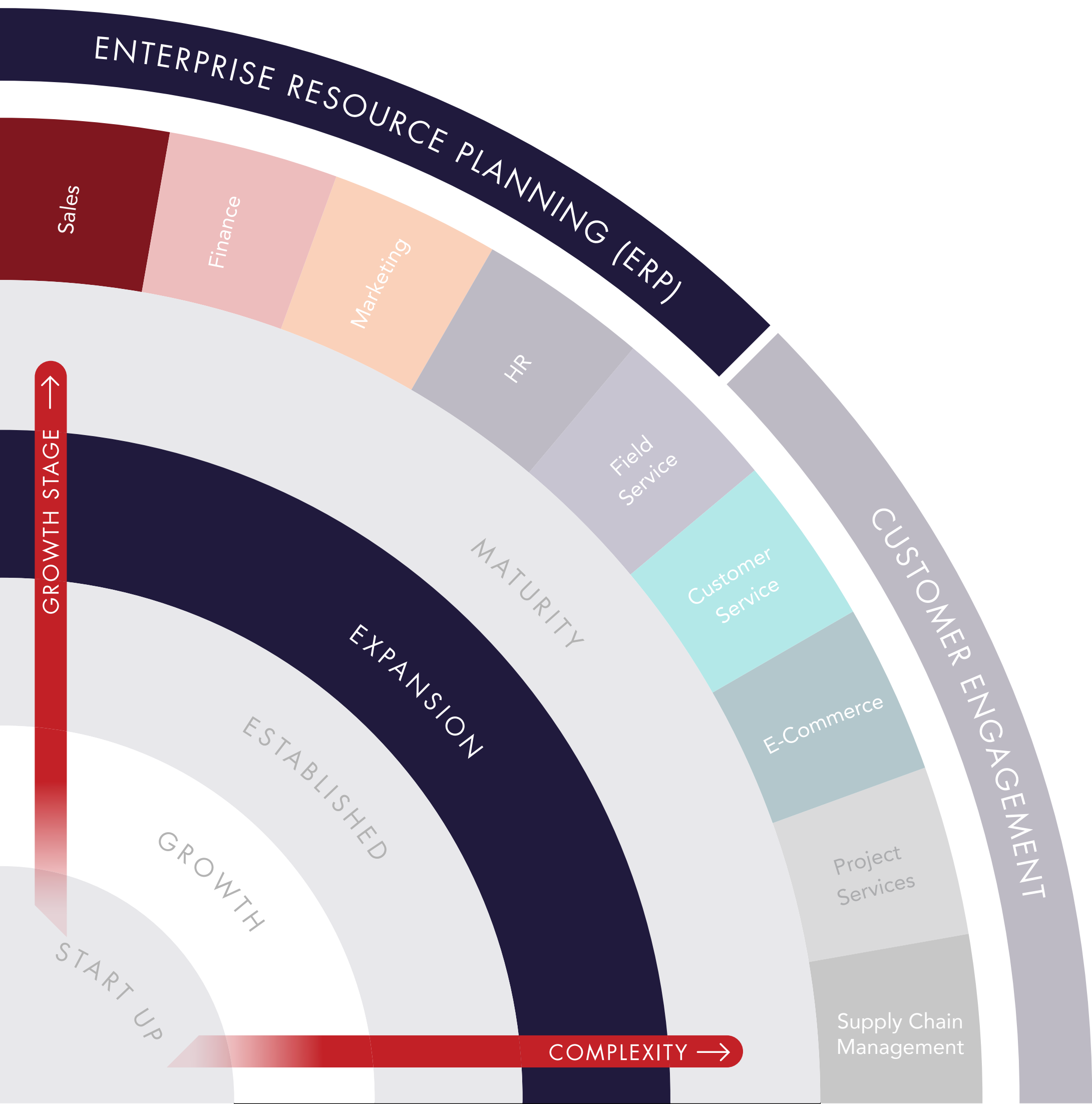
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SALES: EXPANSION



PAIN POINTS

- 1 Sales**
Not knowing which markets to expand into, or how to scale to fulfil their needs

CHALLENGES

Whether managing a small number of high-value opportunities, or hundreds of smaller leads, salespeople rely on accurate data to succeed. They need to track ongoing opportunities and have a clear overview of all the customers they're currently working with – as well as how those customers are interacting with colleagues in other parts of the business.

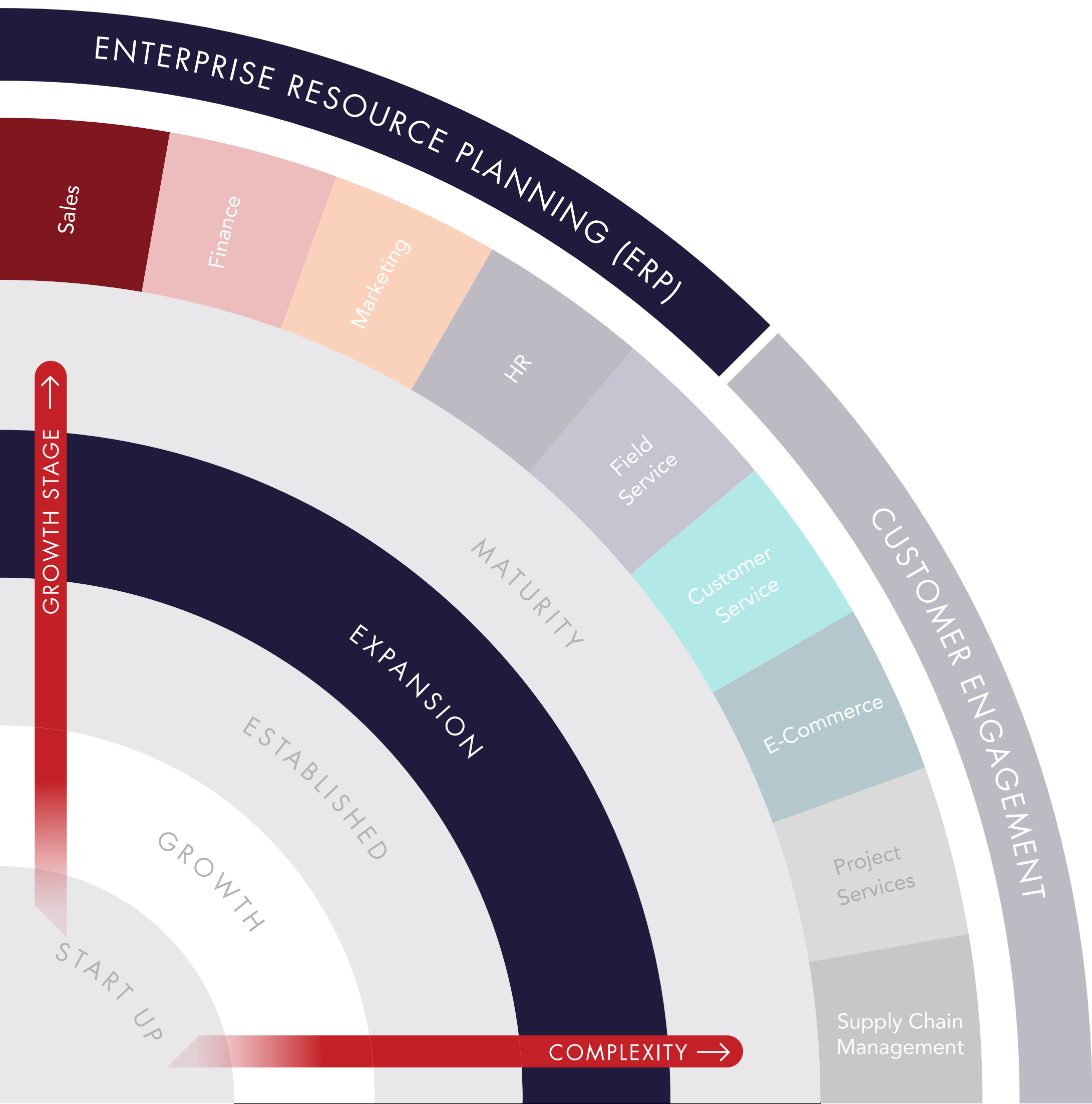
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BENEFITS OF DYNAMICS

With its background in CRM, Dynamics is well set up to support sales teams to integrate with marketing and the rest of the business. The comprehensive customer views help salespeople to better understand clients' needs, engage them effectively, and drive more sales revenue.

Dynamics can incorporate information from LinkedIn Sales Navigator, marketing automation platforms, and other sources. It uses intelligent data to bring those customer insights into Office 365 software, making the sales lifecycle simple and familiar. And the underlying AI enables smarter selling, letting salespeople cross-sell and upsell more effectively by targeting the right customers at the right times.

NEXT: VIEW CAPABILITIES



SALES: EXPANSION



PAIN POINTS

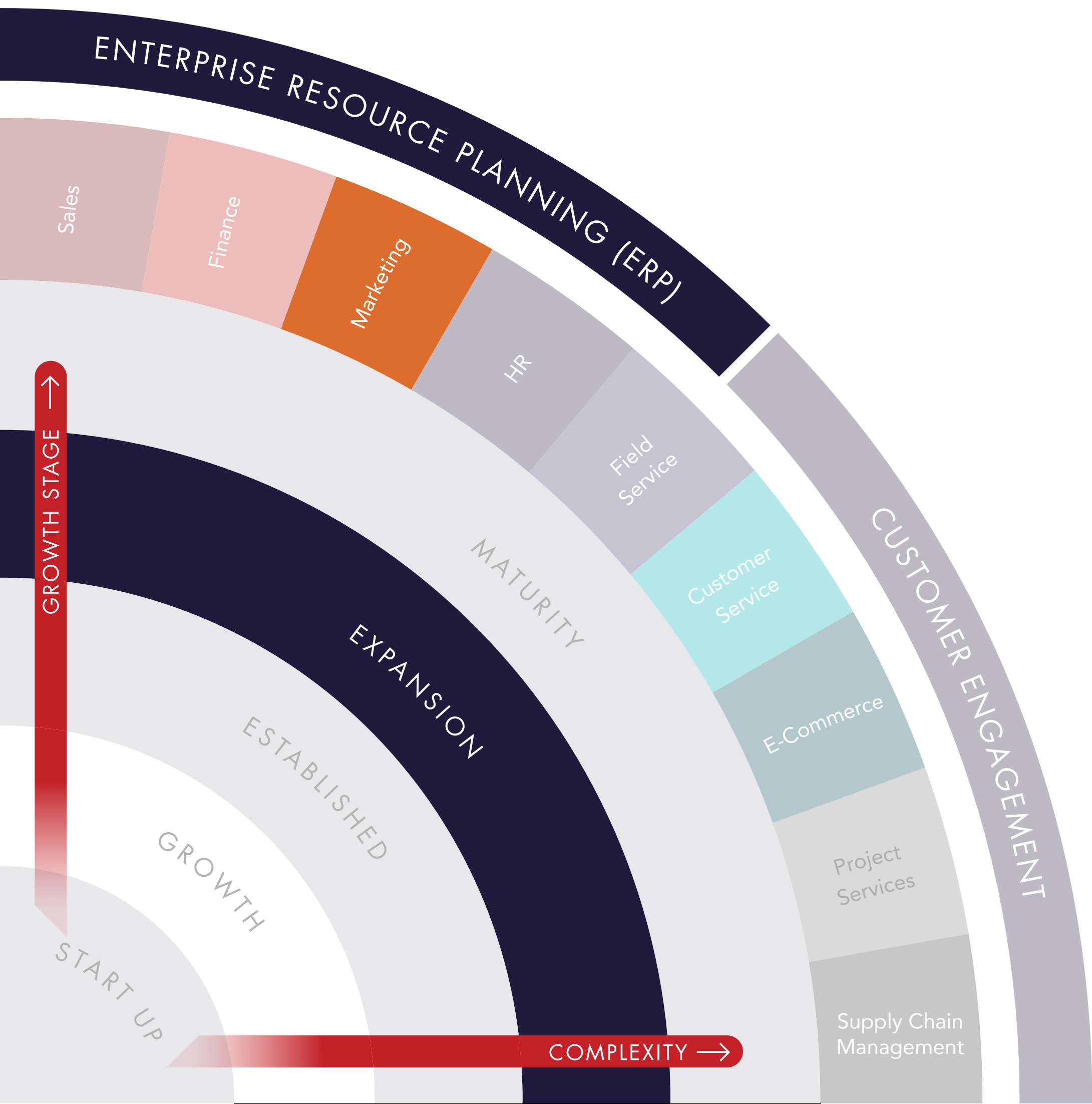
- 1 Sales**
Not knowing which markets to expand into, or how to scale to fulfil their needs

DYNAMICS CAPABILITIES

Lead management
Opportunity management
Pipeline forecasting
Sales automation
Quote management
Marketing lists
Email marketing

SKU_s

Dynamics 365 Sales
Dynamics 365 Sales Insight
Dynamics 365 Product Visualise
Power BI



MARKETING: EXPANSION



PAIN POINTS

- 1

Marketing
Not knowing which markets to expand into, or how to scale to fulfil their needs
- 4

Marketing
Lack of insights on which to build a cohesive and effective marketing plan. This in turn impacts ROI

CHALLENGES

One of the biggest challenges for marketing departments is getting accurate, up-to-date data and making sense of how to use it effectively. They may have a large customer database that doesn't yield any useful insights from, or too few staff to consistently communicate with their network.

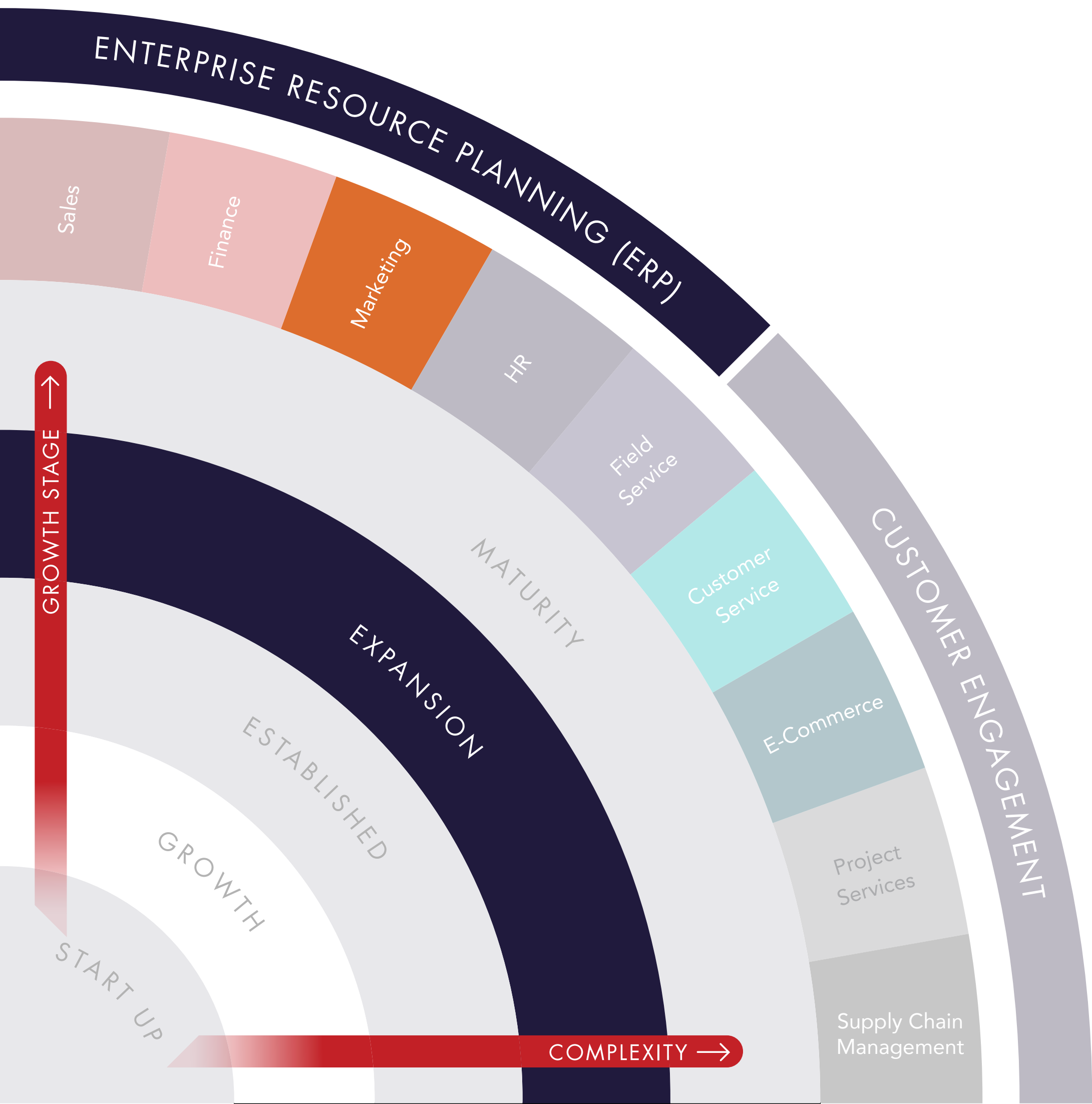
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And by targeting the right customers and optimising marketing resources, it can ultimately help marketers improve the ROI of their activities.



MARKETING: EXPANSION



PAIN POINTS

- 1

Marketing
Not knowing which markets to expand into, or how to scale to fulfil their needs
- 4

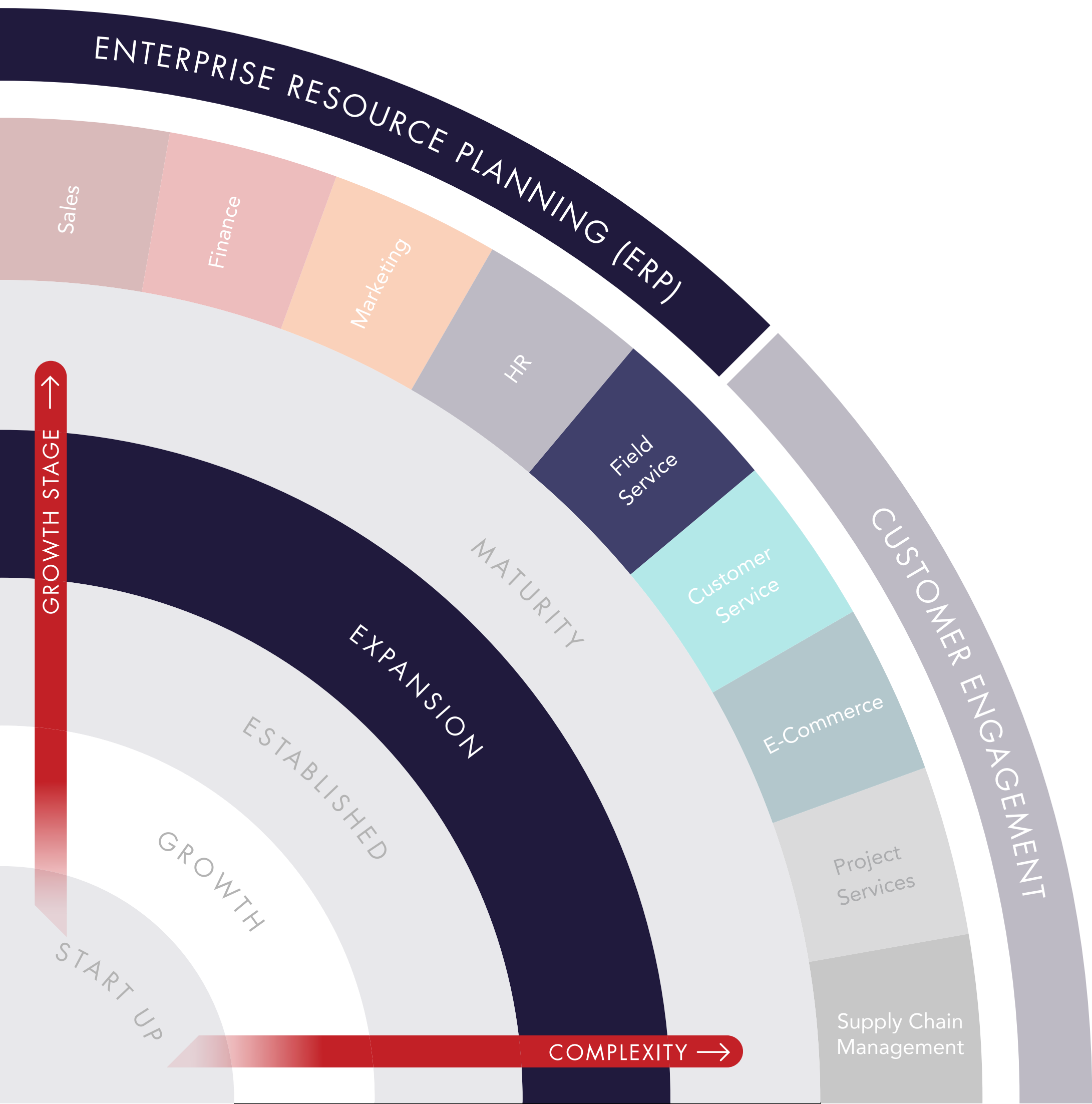
Marketing
Lack of insights on which to build a cohesive and effective marketing plan. This in turn impacts ROI

DYNAMICS CAPABILITIES

Email marketing
Lead scoring
Market segmentation
Customer journeys
Event management
Connector for LinkedIn
Lead generation forms

SKUs

Dynamics 365 Marketing
Dynamics 365 Customer Insight
Power Apps



FIELD SERVICE: EXPANSION



PAIN POINTS

- 1 Field Service**
Not knowing which markets to expand into, or how to scale to fulfil their needs

CHALLENGES

When you're out solving customer issues in the field, you need the information and the flexibility to come up with solutions on the fly. Many teams don't have access to the right tools to support technicians, or effective customer insight collection systems, and that makes it very difficult to prioritise faults or offer a triage service. Agents are forced to be reactive, rather than proactively finding fixes in advance.

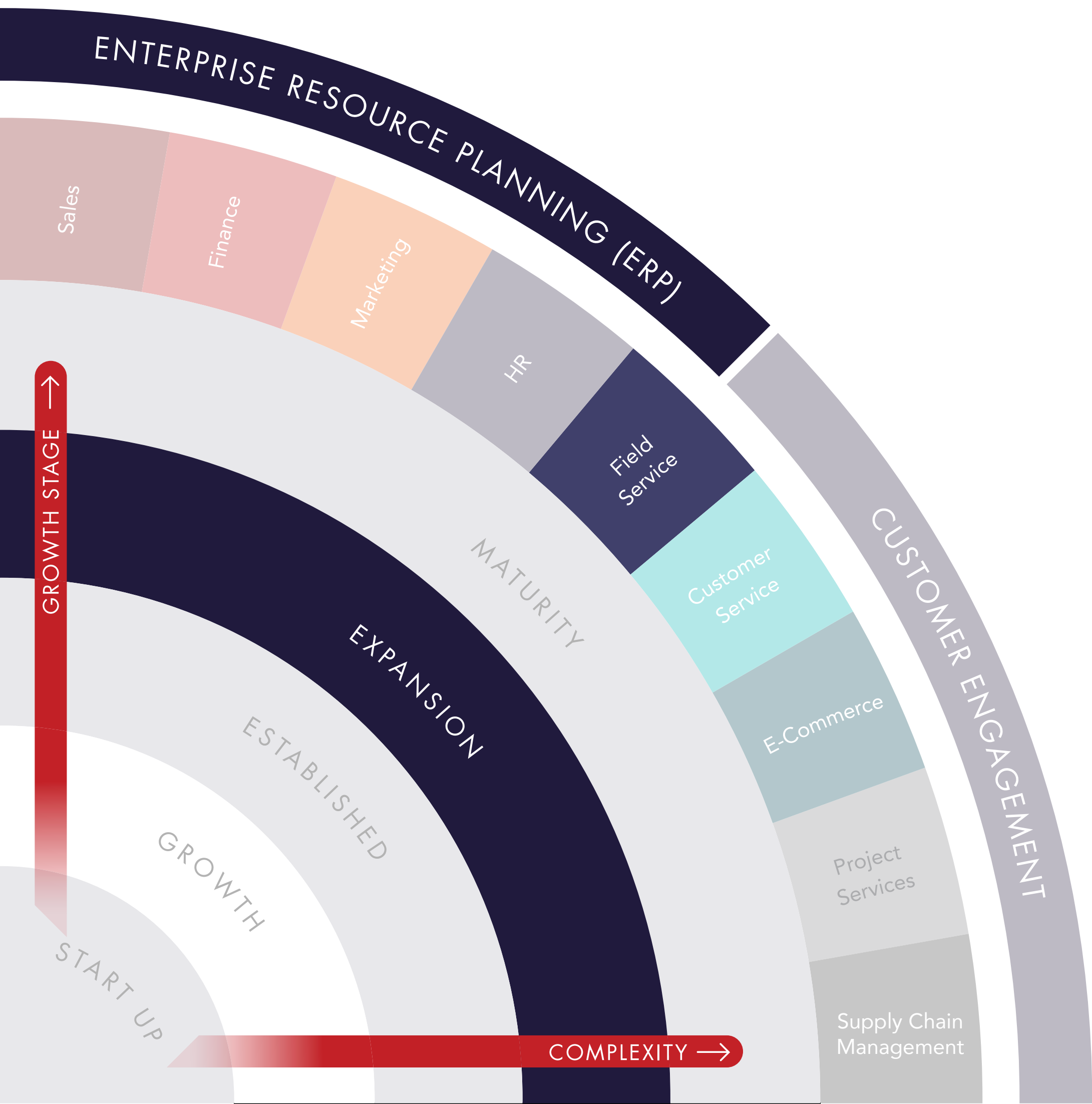
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NEXT: VIEW CAPABILITIES



FIELD SERVICE: EXPANSION



PAIN POINTS

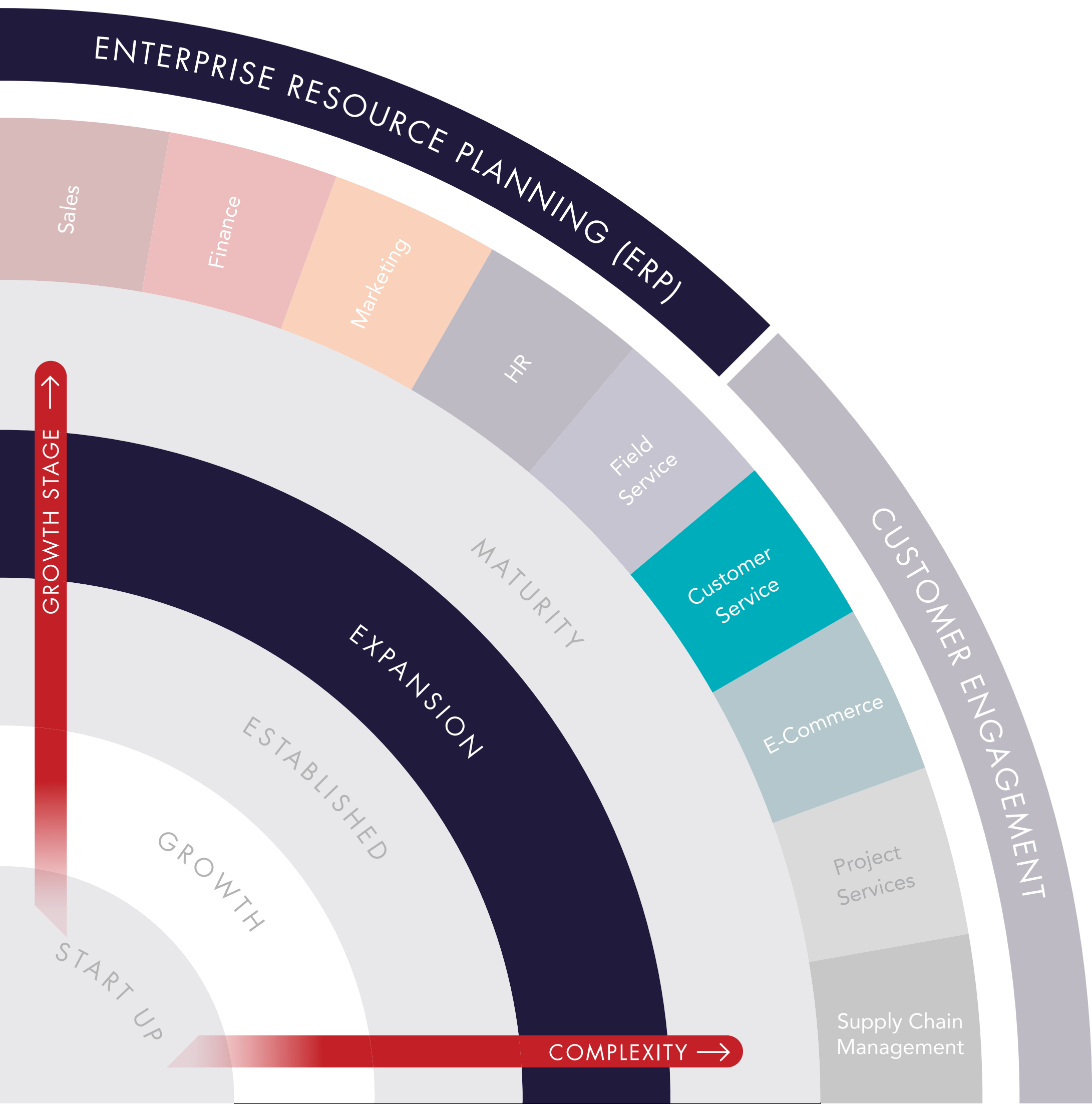
- 1 Field Service**
Not knowing which markets to expand into, or how to scale to fulfil their needs

DYNAMICS CAPABILITIES

Work orders
Service agreements
Schedule and dispatch
Schedule board
Inventory management
Mobile productivity
Connected devices

SKU_s

Dynamics 365 Field Service
Dynamics 365 Remote Assistant
Power Apps



CUSTOMER SERVICE: EXPANSION



PAIN POINTS

- 1 Customer Service**
Not knowing which markets to expand into, or how to scale to fulfil their needs

CHALLENGES

To meet high customer expectations, businesses are now under pressure to deliver omnichannel customer service. But for many, it's impossible to track when a customer has previously interacted with the company, even if they spoke to a different agent just minutes before.

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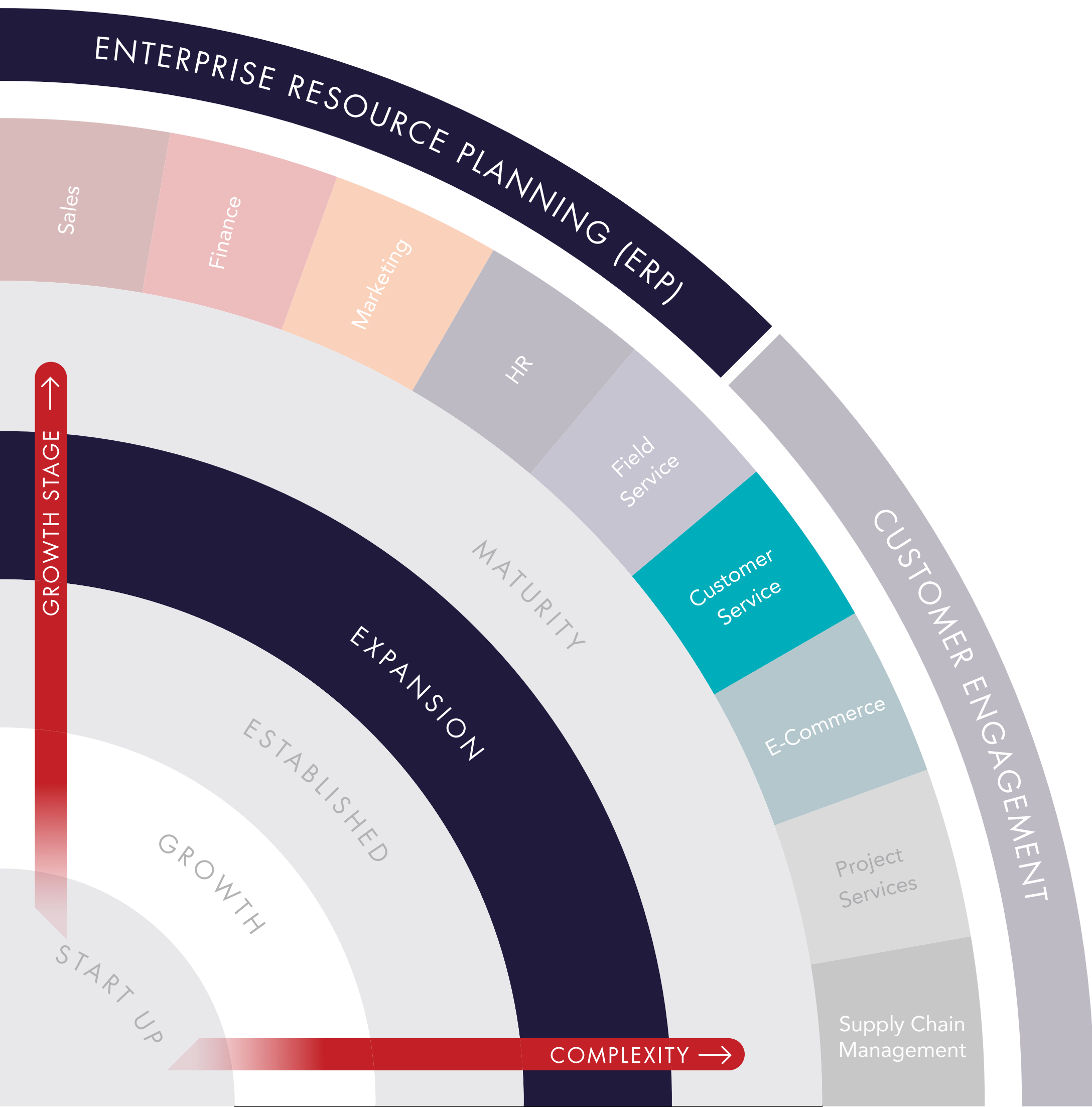
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NEXT: VIEW CAPABILITIES

< 1/2



CUSTOMER SERVICE: EXPANSION



PAIN POINTS

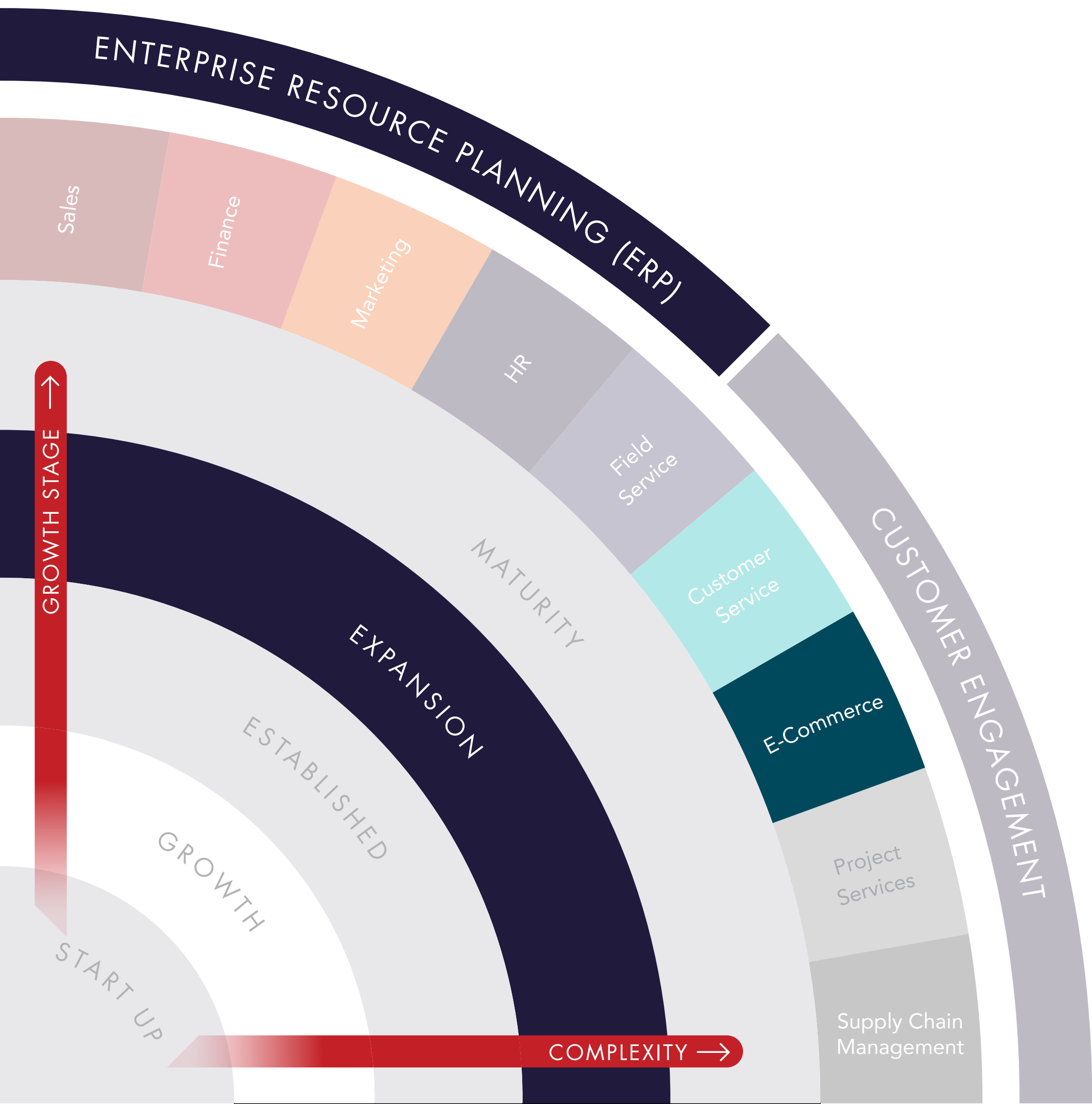
- 1 Customer Service**
Not knowing which markets to expand into, or how to scale to fulfil their needs

DYNAMICS CAPABILITIES

Case management
SLA support
Account management
Service automation
Customer web portals
Contract management
Service analytics

SKU_s

Dynamics 365 Customer Service Enterprise
Power Apps
Power BI
Dynamics 365 Unified Service Desk



E-COMMERCE: EXPANSION



PAIN POINTS

- 1 E-Commerce**
Not knowing which markets to expand into, or how to scale to fulfil their needs

CHALLENGES

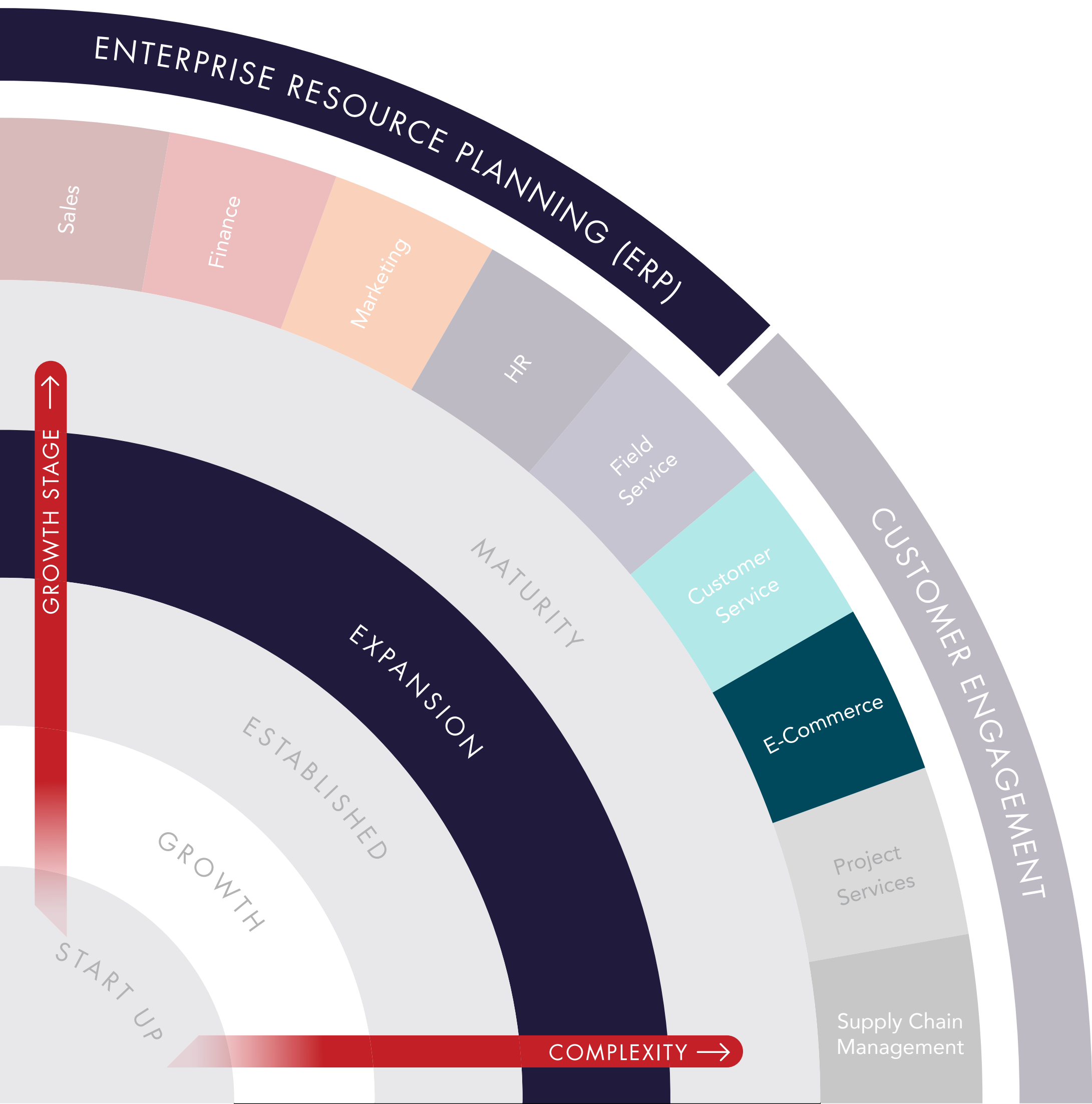
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Businesses also struggle with data: they need to predict customer demand and report on real-time stock levels, as well as needing accurate customer data so they can personalise offers.

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E-COMMERCE: EXPANSION



PAIN POINTS

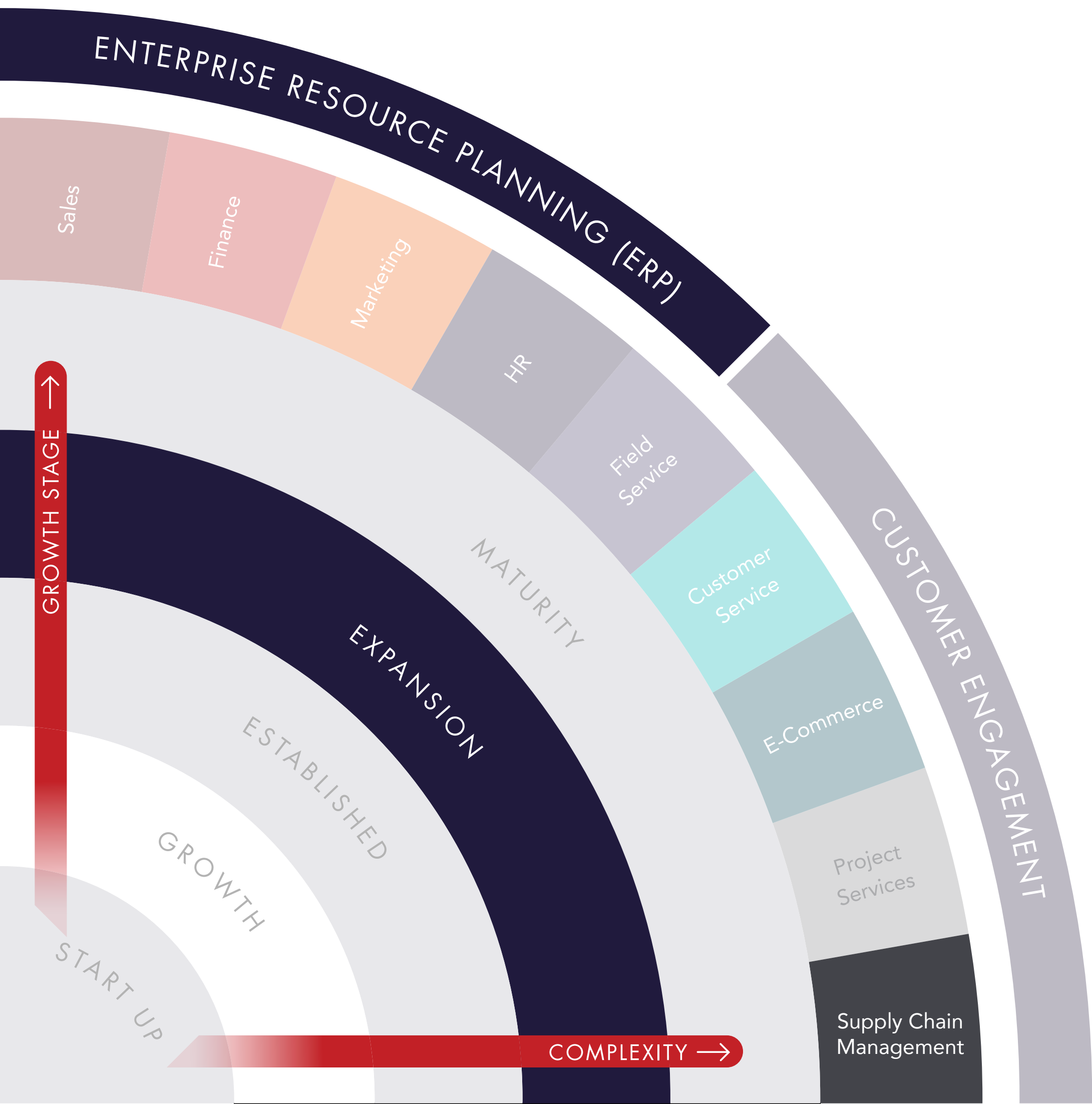
- 1 E-Commerce**
Not knowing which markets to expand into, or how to scale to fulfil their needs

DYNAMICS CAPABILITIES

Pricing
Stores management
Shift management
Employee management
Customer loyalty
Replenishment
Product categories
Sales channel management

SKUs

Dynamics 365 E-Commerce
Power Apps



SUPPLY CHAIN MANAGEMENT: EXPANSION



PAIN POINTS

- 1 Supply Chain Management**
Not knowing which markets to expand into, or how to scale to fulfil their needs

CHALLENGES

Without real-time information, it's difficult to efficiently manage logistics and supply chain operations. Maintenance ends up being reactive rather than proactive, stock levels have to be recorded manually (an error-prone process), and customers end up being given inaccurate delivery times. Without end-to-end visibility of the supply chain and warehousing operations, improvements can only be based on intuition.

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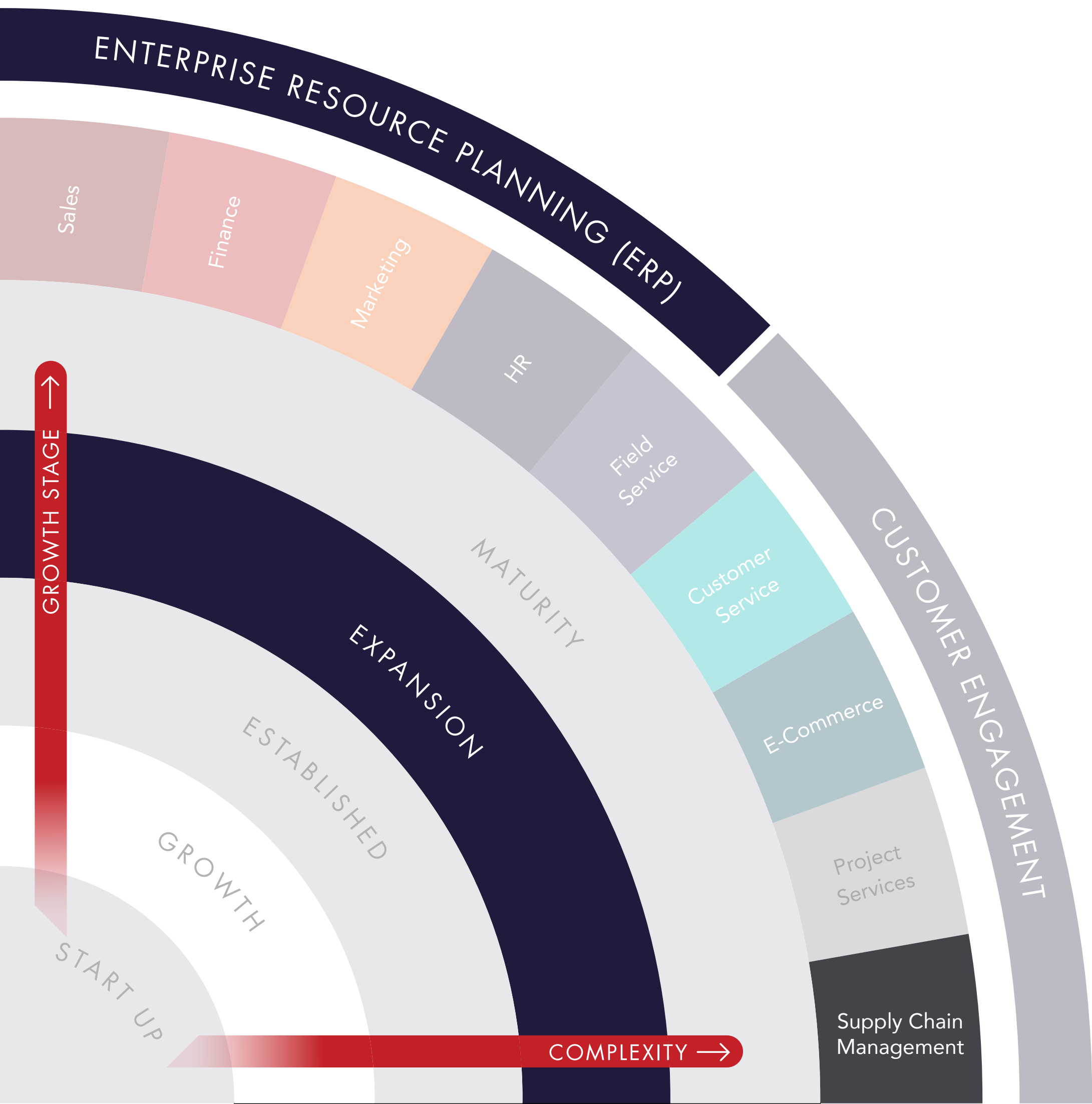
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NEXT: VIEW CAPABILITIES

< 1/2



SUPPLY CHAIN MANAGEMENT: EXPANSION



PAIN POINTS

- 1 Supply Chain Management
Not knowing which markets to expand into, or how to scale to fulfil their needs

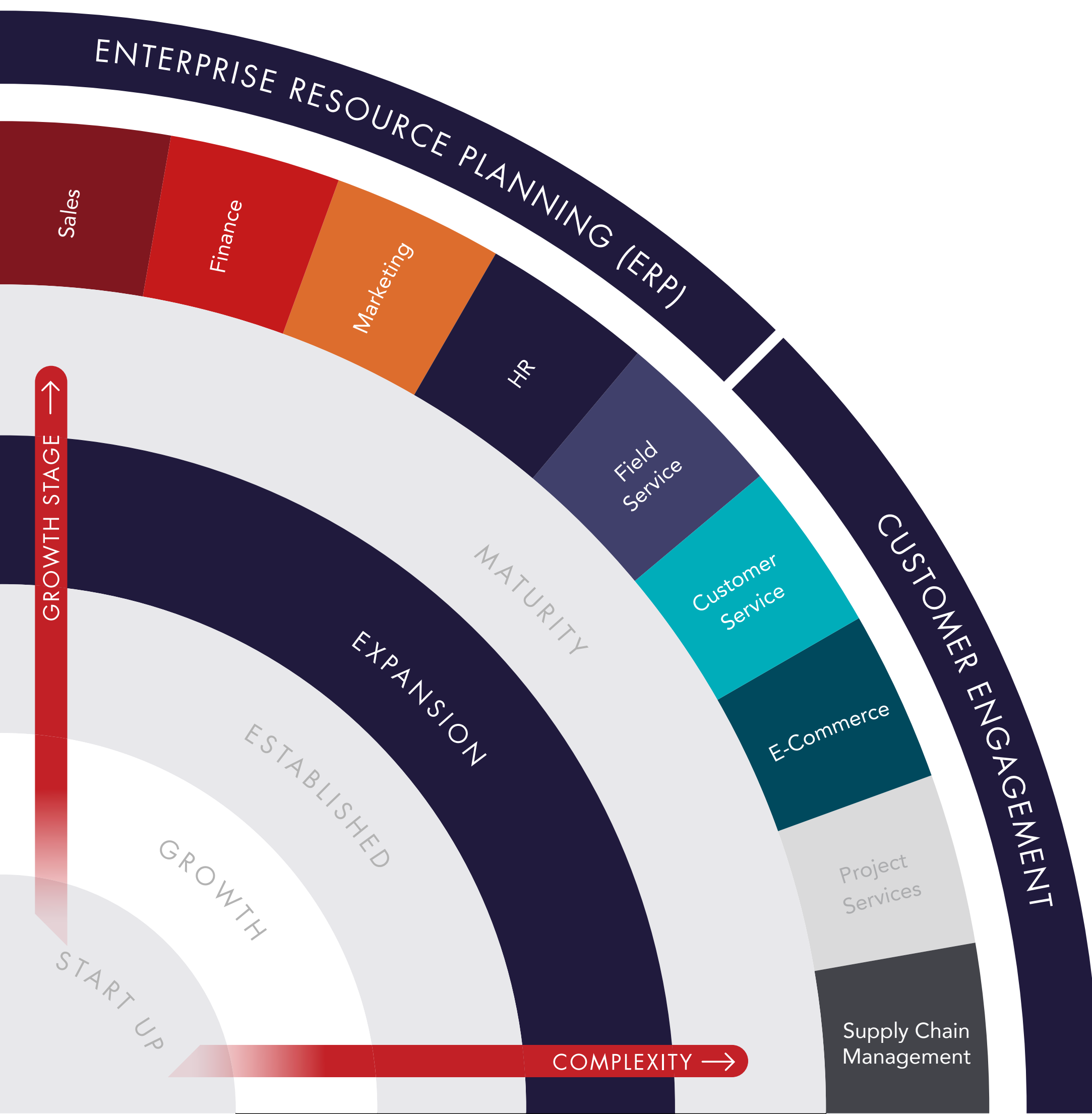
DYNAMICS CAPABILITIES

Asset management
Inventory management
Production central
Procurement and sourcing
Transportation
Warehouse management
Fleet management

SKU_s

Dynamics 365 Supply Chain Management

This Pain Point affects all functions of the business – it requires significant strategic digital transformation, not a quick fix. Dynamics is part of the solution, but we'd encourage you to contact us for a deeper discussion about how best to address the challenges with your customer. In the meantime, you can click on each function to explore how Dynamics can meet their specific needs.



EXPANSION

Understanding how and where to expand are key challenges for midmarket businesses, who already have a solid base but need opportunities to continue growing. It's no longer good enough to make gambles and guesses – decision-makers want to know that their strategy is based on sound data, especially when weighing up the merits of mergers and acquisitions. Businesses are also under pressure from savvy competitors who are modernising and using tech to their own advantage.

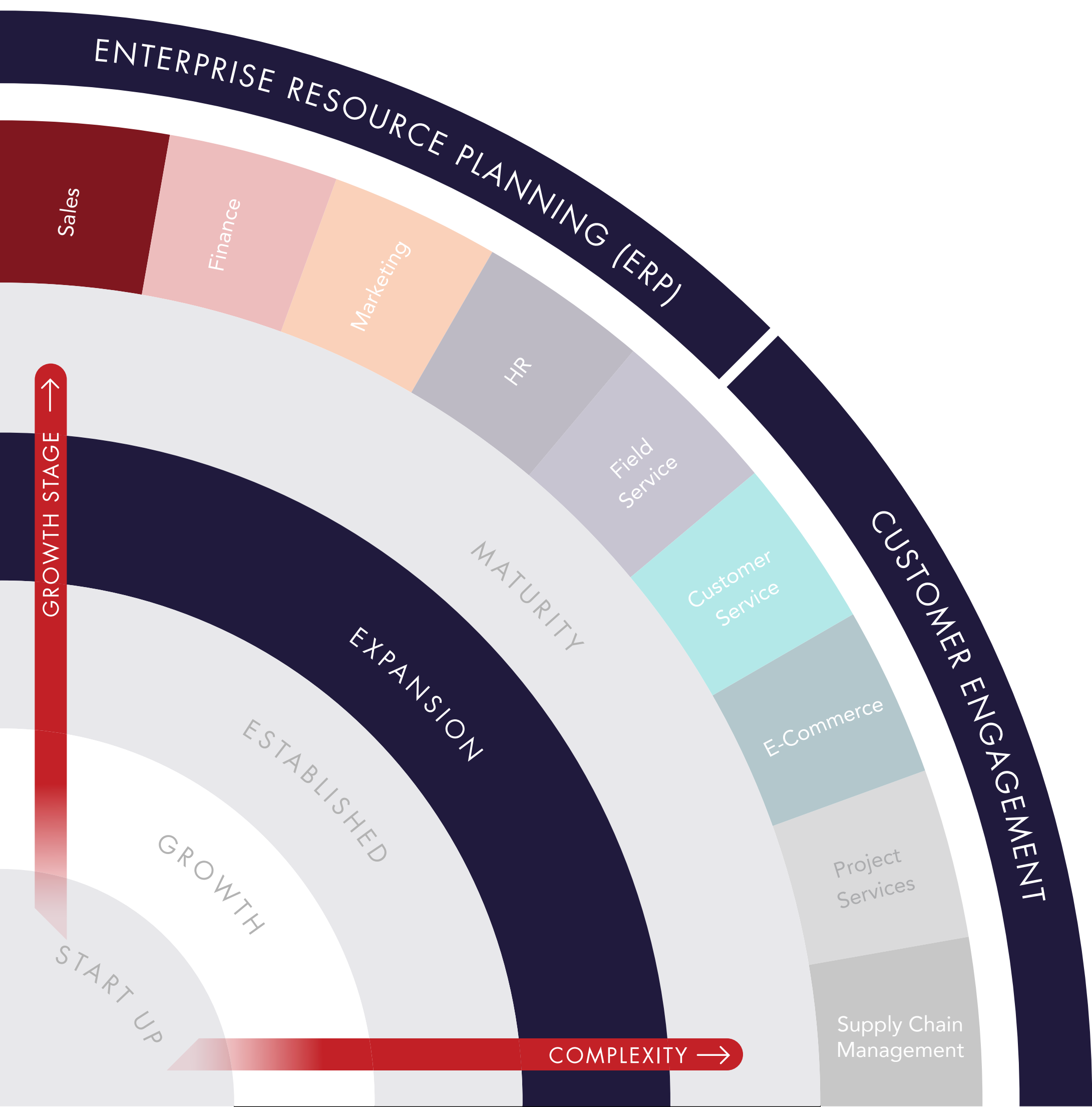
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PAIN POINTS

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SALES: EXPANSION



PAIN POINTS

2

Sales

Disparate systems are difficult to integrate, particularly during M&A

CHALLENGES

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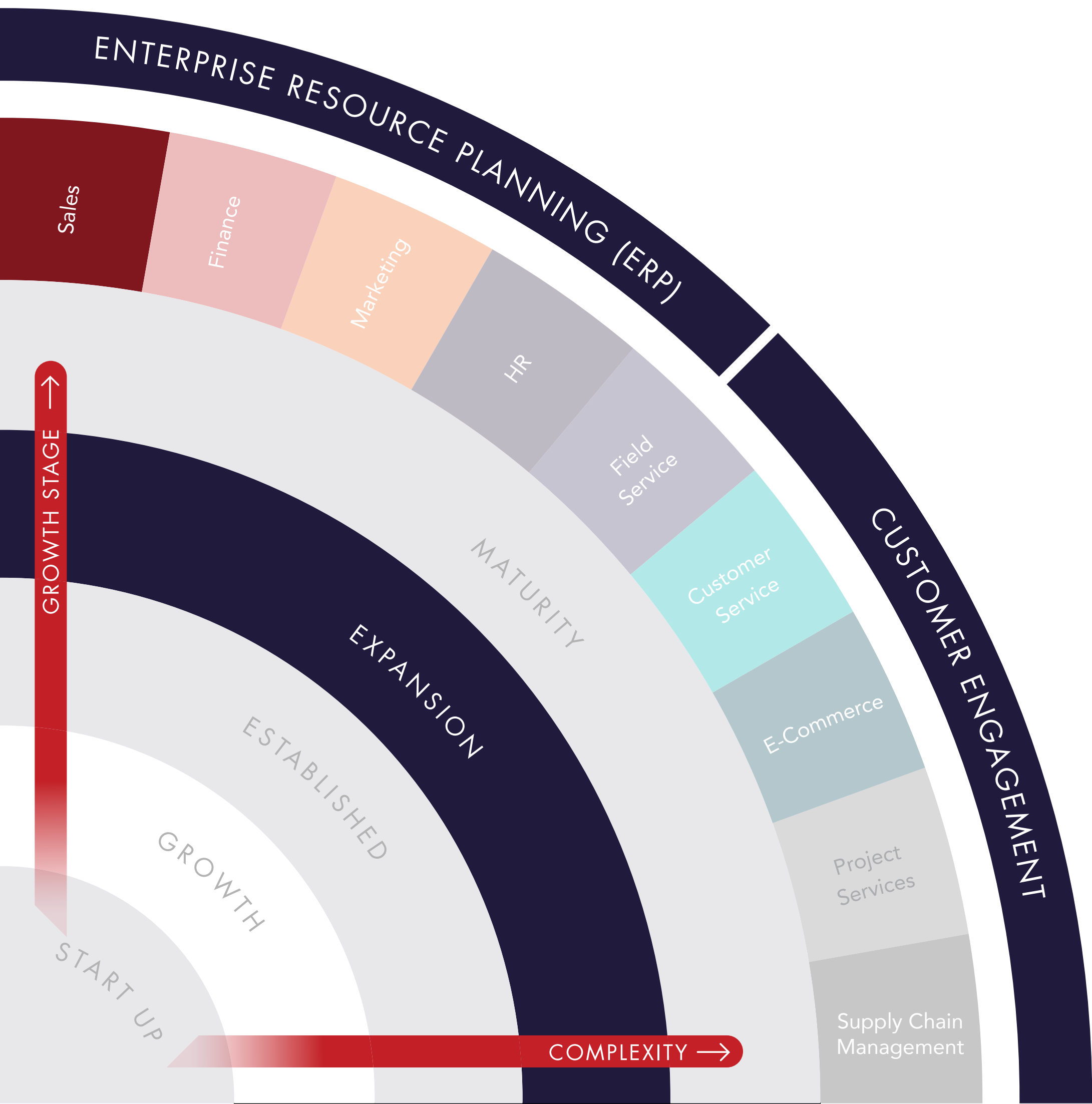
BENEFITS OF DYNAMICS

With its background in CRM, Dynamics is well set up to support sales teams to integrate with marketing and the rest of the business. The comprehensive customer views help salespeople to better understand clients' needs, engage them effectively, and drive more sales revenue.

Dynamics can incorporate information from LinkedIn Sales Navigator, marketing automation platforms, and other sources. It uses intelligent data to bring those customer insights into Office 365 software, making the sales lifecycle simple and familiar. And the underlying AI enables smarter selling, letting salespeople cross-sell and upsell more effectively by targeting the right customers at the right times.

NEXT: VIEW CAPABILITIES

< 1/2



SALES: EXPANSION



PAIN POINTS

2

Sales

Disparate systems are difficult to integrate, particularly during M&A

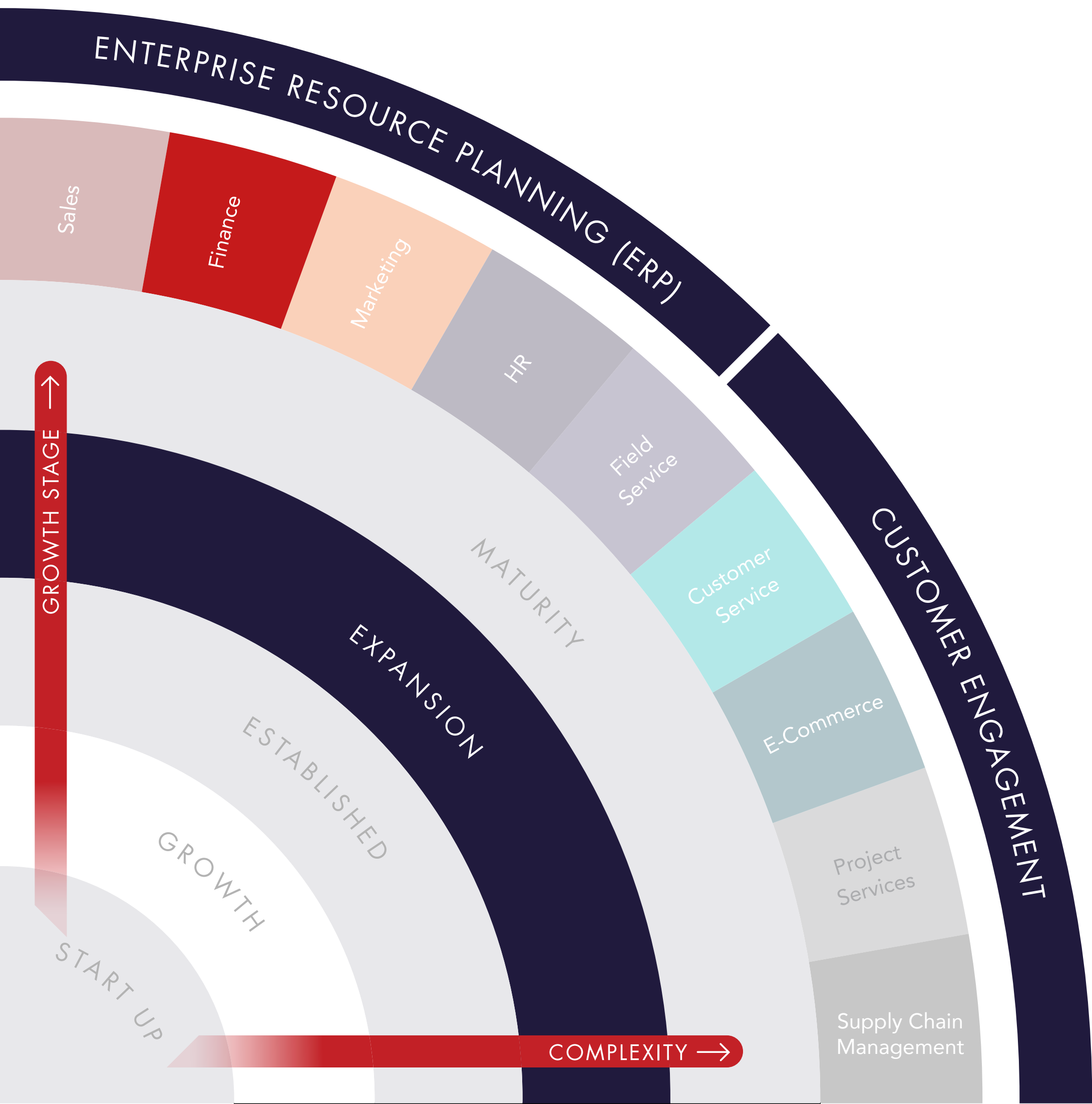
DYNAMICS CAPABILITIES

Lead management
Opportunity management
Pipeline forecasting
Sales automation
Quote management
Marketing lists
Email marketing

SKU_s

Dynamics 365 Sales
Dynamics 365 Sales Insight
Dynamics 365 Product Visualise
Power BI





FINANCE: EXPANSION



PAIN POINTS

2

Finance

Disparate systems are difficult to integrate, particularly during M&A

CHALLENGES

Many finance teams still struggle with time-consuming tasks, sometimes having to integrate lots of different databases manually – even for basic processes like billing. It’s difficult to share information across departments for order processing, which results in longer lead times. And despite the wealth of financial data available, they might not have the reporting tools to get a look at the bigger picture for the business – which can hamper strategic decision-making.

This can be even harder if your clients offer subscription-based services rather than discrete products; managing subscriptions is a drain on finance teams’ time if they don’t have automation or digital tools at hand.

BENEFITS OF DYNAMICS

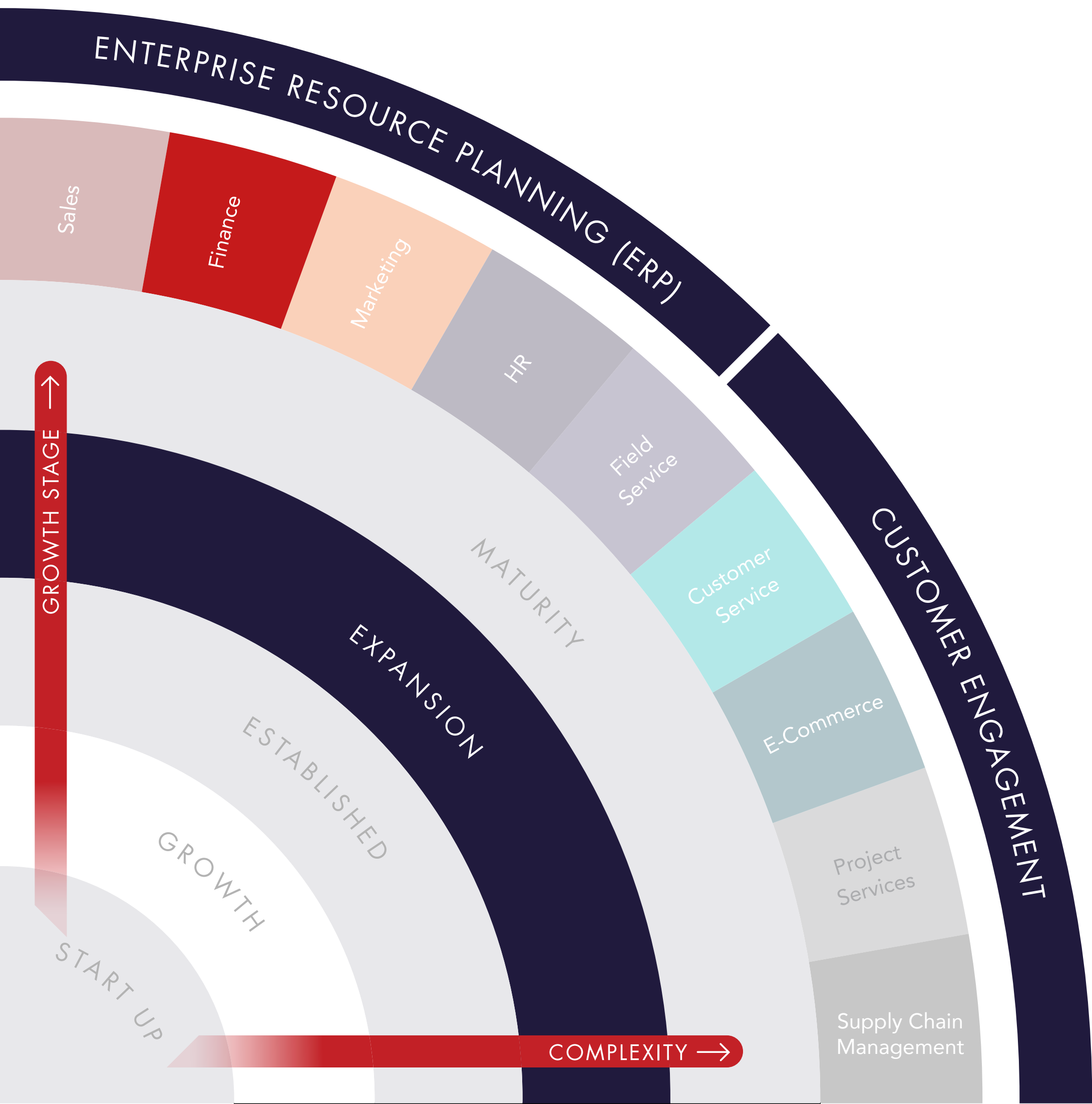
Dynamics can help finance teams maximise their profitability and automate financial operations to make their lives much easier and help them focus on more strategic work. It allows them to monitor performance in real time, predict future outcomes and make decisions to drive business growth.

Intelligent data insights can offer predictive recommendations, to increase profit and cashflow, while Dynamics also makes it easier to cut operational costs with process automation and more efficient financial planning.

And for clients with subscription services, automated recurring billing through Dynamics saves time and effort for the finance team.

NEXT: VIEW CAPABILITIES

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FINANCE: EXPANSION



PAIN POINTS

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Finance

Disparate systems are difficult to integrate, particularly during M&A

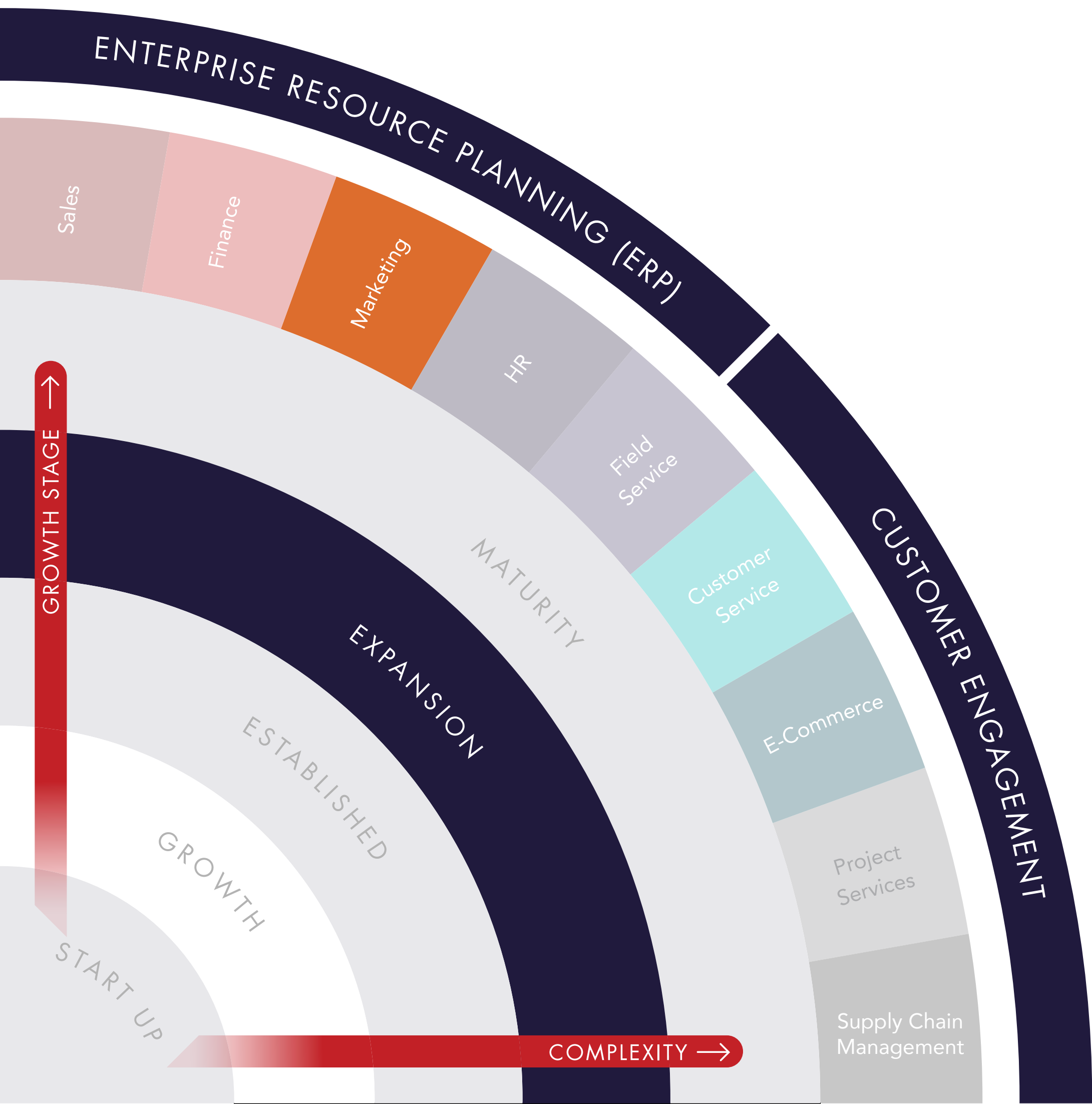
DYNAMICS CAPABILITIES

SKU_s

Credit management
Treasury
Accounts receivable
Accounts payable
Budgeting
Cost management
Fixed assets
Payroll tax
External compliance certification

Dynamics 365 for Finance





MARKETING: EXPANSION



PAIN POINTS

2

Marketing

Disparate systems are difficult to integrate, particularly during M&A

CHALLENGES

One of the biggest challenges for marketing departments is getting accurate, up-to-date data and making sense of how to use it effectively. They may have a large customer database that doesn't yield any useful insights from, or too few staff to consistently communicate with their network.

This makes it difficult to send timely information to the right customers, hampering cross-sell and upsell efforts, and opening the door for competitors. For those customers they do communicate with, marketers without a platform like Dynamics may struggle to monitor email open rates or link customer touchpoints to sales data. It's very hard to track results or understand whether they are adding value.

BENEFITS OF DYNAMICS

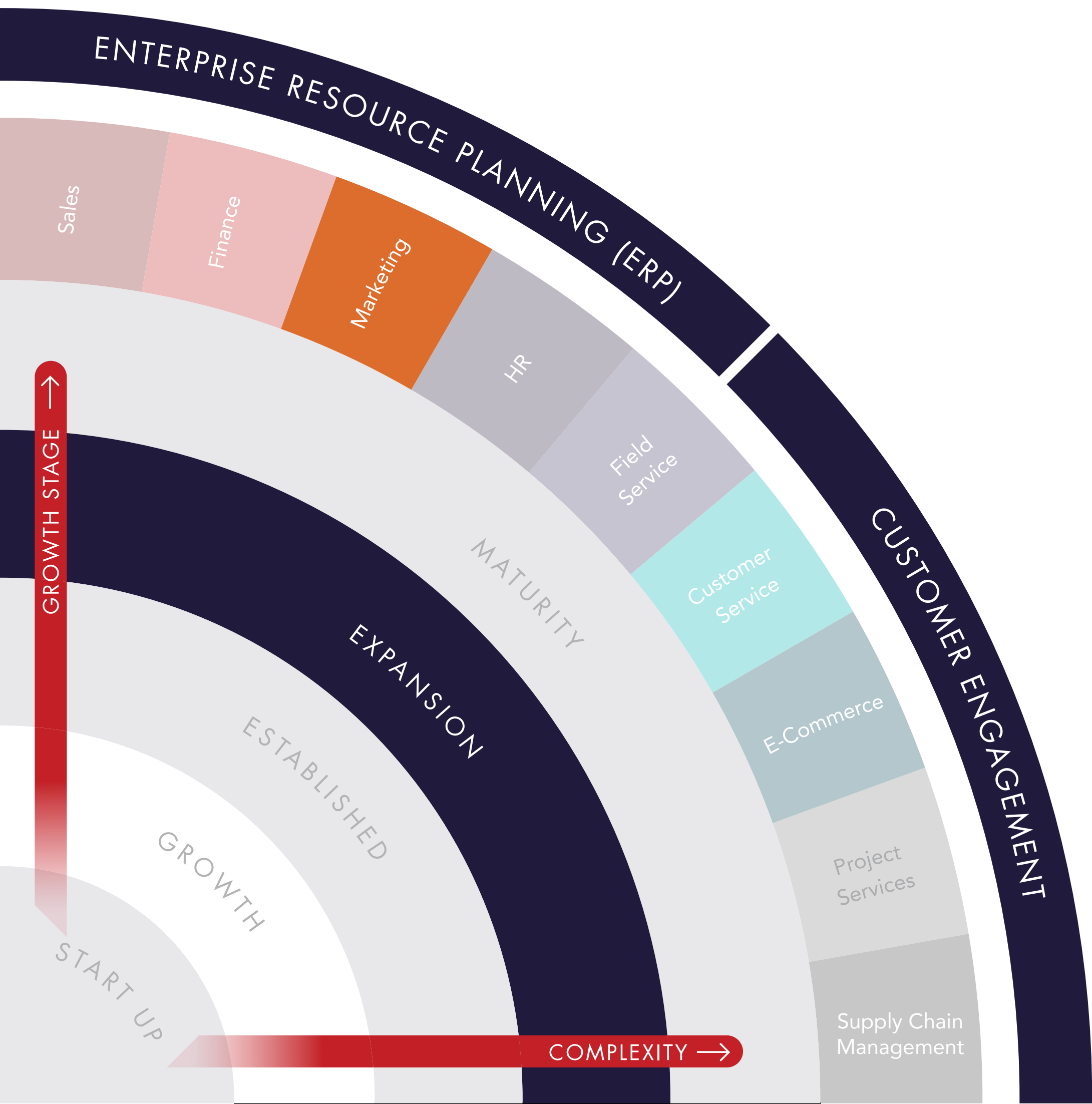
Dynamics for Marketing helps teams plan and deliver campaigns; increase customer demand for their products and services; create, track and nurture leads; and personalise communications for prospects and customers across channels.

It helps marketers align with their sales teams and create a single view of the prospect, delivering a seamless customer experience.

By targeting the right customers and optimising marketing resources, it can ultimately help marketers improve the ROI of their activities.

NEXT: VIEW CAPABILITIES

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MARKETING: EXPANSION



PAIN POINTS

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Marketing

Disparate systems are difficult to integrate, particularly during M&A

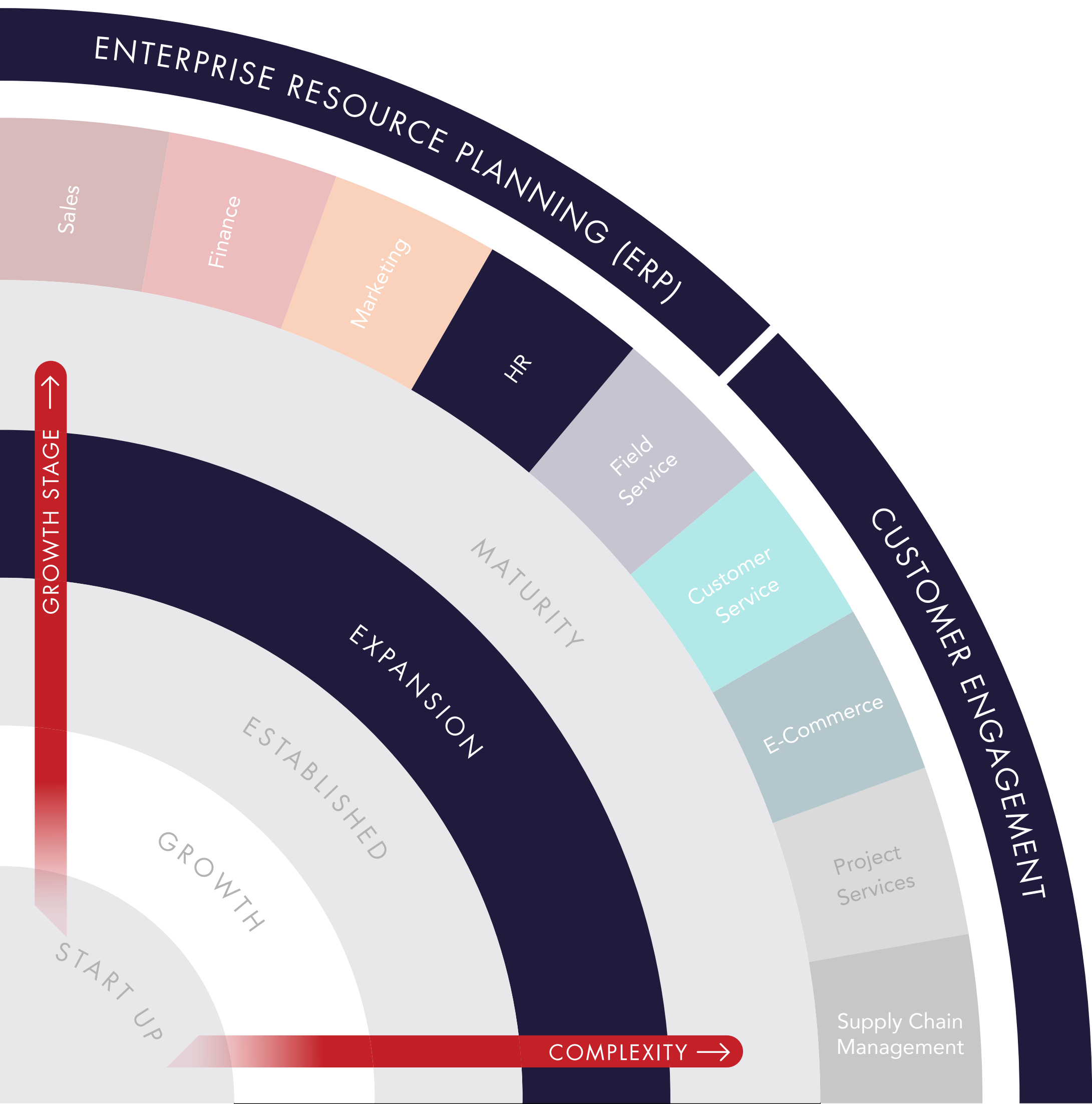
DYNAMICS CAPABILITIES

Email marketing
Lead scoring
Marketing segmenting
Customer journeys
Event management
Connector for LinkedIn
Lead generation forms

SKUs

Dynamics 365 Marketing
Dynamics 365 Customer Insight
Power Apps





HR: EXPANSION



PAIN POINTS

- 2 HR
Disparate systems are difficult to integrate, particularly during M&A

CHALLENGES

As a business grows, its HR processes and systems become increasingly complex. HR managers need to report on employees' wellbeing, learning and development, absences, annual leave, and much more.

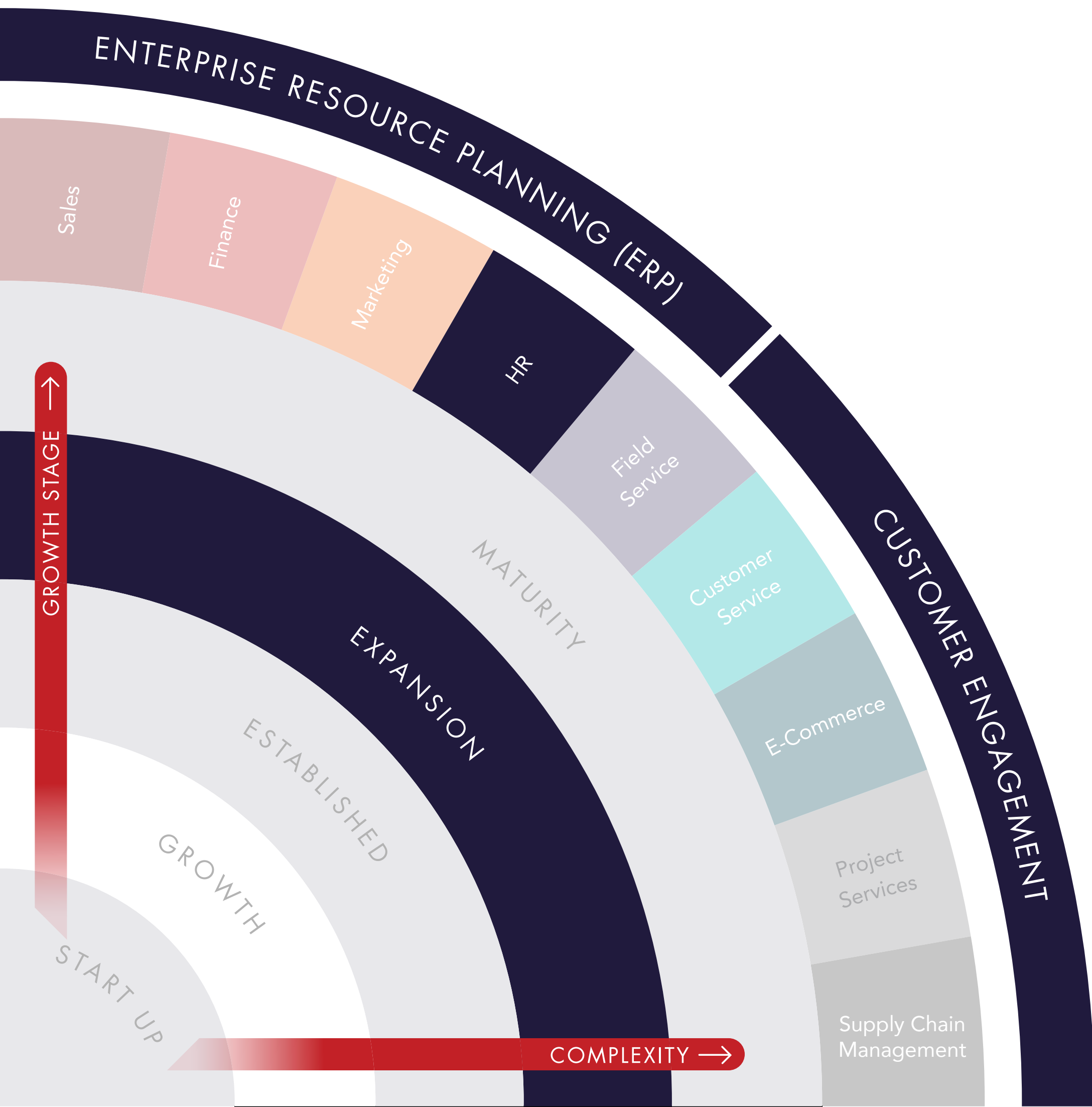
That's on top of trying to make recruitment and onboarding more efficient, centralising core HR processes, and giving managers the tools and training they need to manage their team members.

BENEFITS OF DYNAMICS

Dynamics helps deliver an HR solution that takes better care of your people, so they in turn can take better care of your business. It enables HR self-service for employees, provides a platform for training and certification, ensures security, privacy and compliance, and empowers managers to address concerns effectively.

At the same time, Dynamics can support HR teams to simplify reporting with rich dashboards, helping leaders make informed decisions. By identifying and engaging the right candidates, businesses can feel confident that they're bringing in the right people to support future growth.

NEXT: VIEW CAPABILITIES



HR: EXPANSION



PAIN POINTS

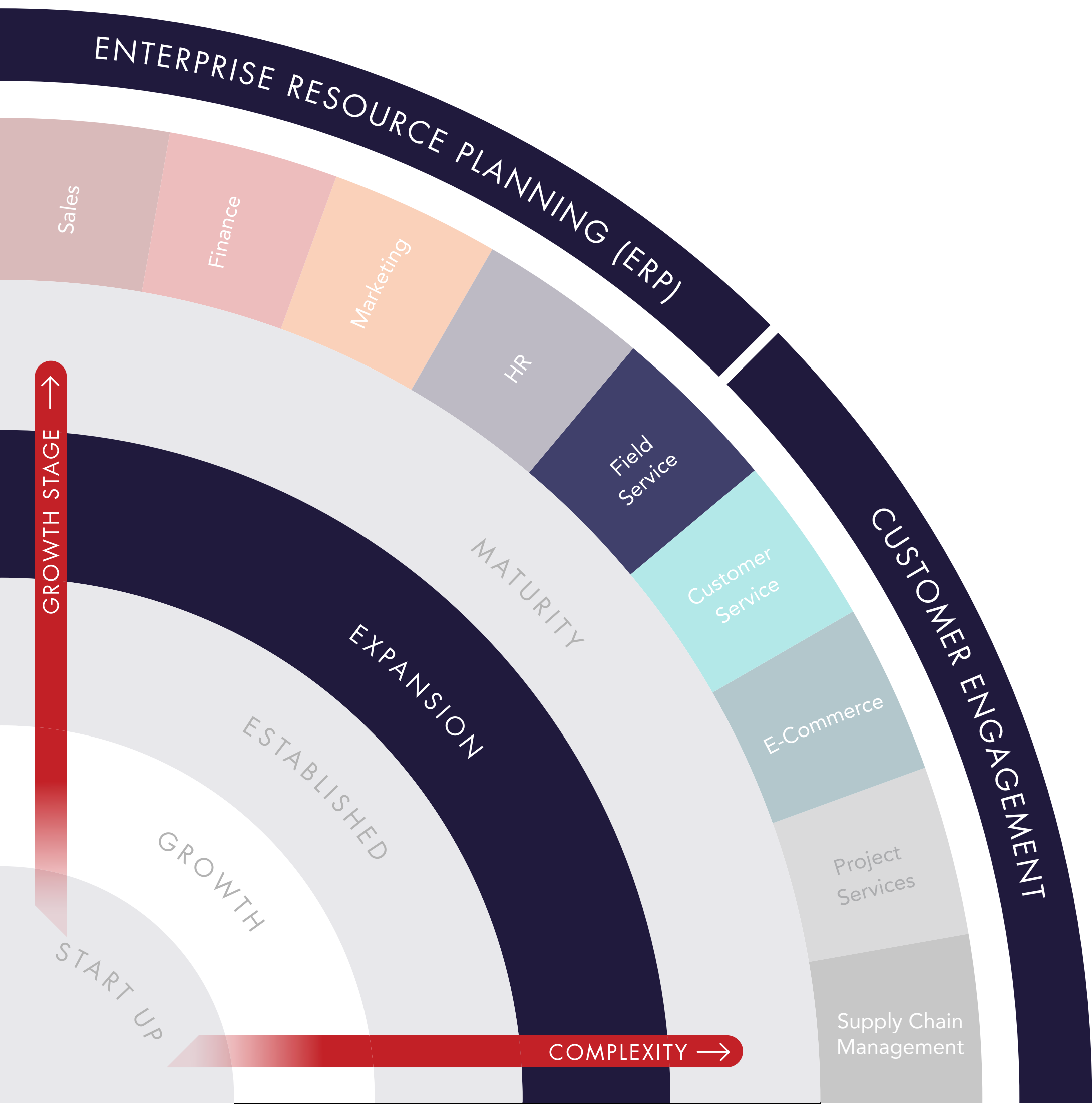
- 2 HR
Disparate systems are difficult to integrate, particularly during M&A

DYNAMICS CAPABILITIES

- People management
- Compensation management
- Compliance
- Leave and absence
- Benefits
- Learning and development
- Employee development
- Employee self-service
- Hiring and offer management

SKU_s

Dynamics 365 Human Resources



FIELD SERVICE: EXPANSION



PAIN POINTS

- 2 **Field Service**
Disparate systems are difficult to integrate, particularly during M&A

CHALLENGES

When you're out solving customer issues in the field, you need the information and the flexibility to come up with solutions on the fly. Many teams don't have access to the right tools to support technicians, or effective customer insight collection systems, and that makes it very difficult to prioritise faults or offer a triage service. Agents are forced to be reactive, rather than proactively finding fixes in advance.

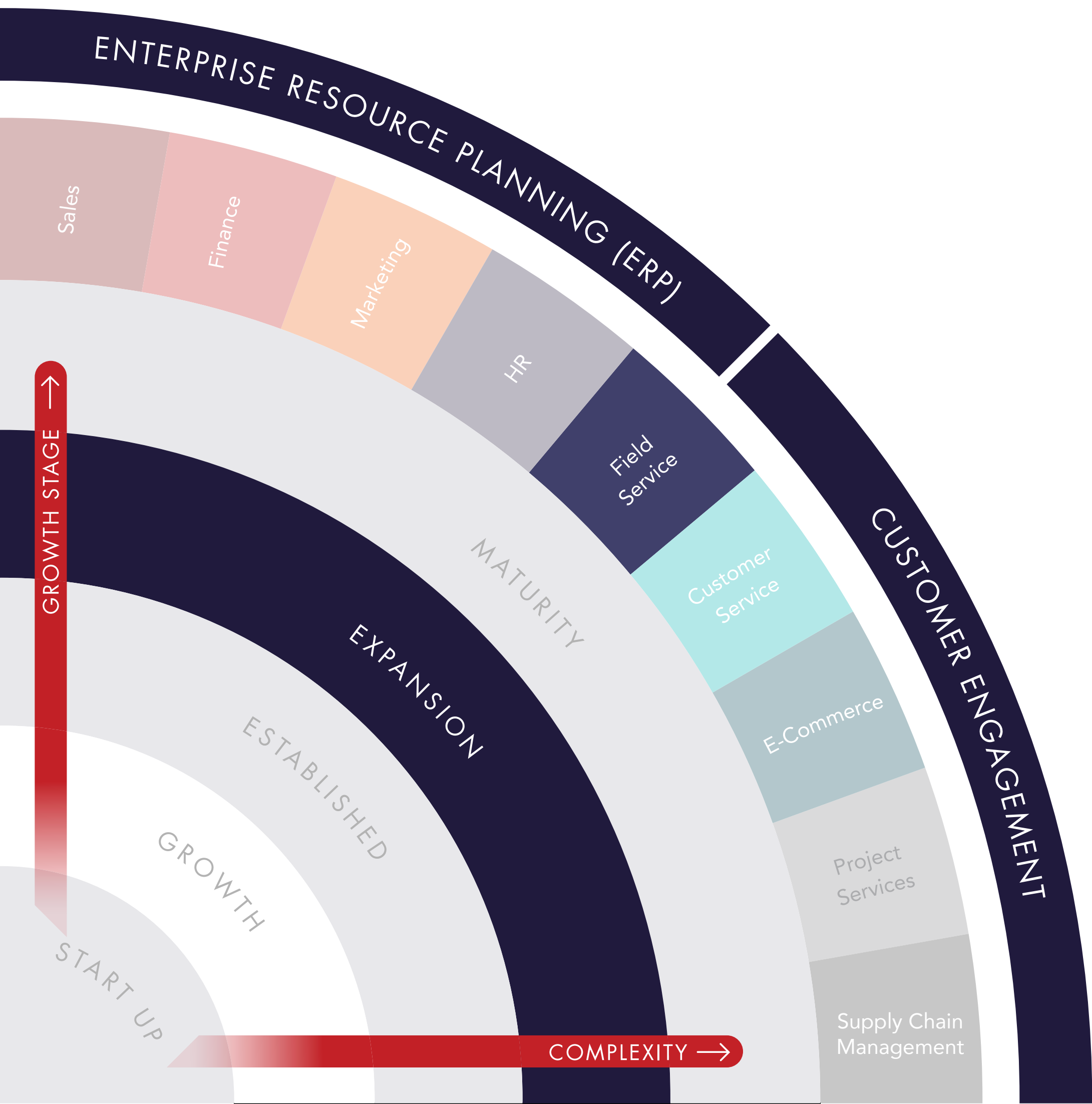
Without accurate, real-time data, co-ordinators can also struggle to schedule field agents with the right skillsets at the right times, and customers don't always receive appropriate levels of communication throughout the process. All of this can have a negative impact on customer experiences.

BENEFITS OF DYNAMICS

With effective information management through Dynamics, field service teams can get the right person to the right place at the right time with the right skills and equipment. That's thanks to effective scheduling processes and powerful analytics, making it easier to predict, detect and resolve issues in advance.

Rather than finger-in-the-air prioritisation, it's much easier for technicians and coordinators to prioritise and be proactive, so that customer issues are fixed first time. Which all leads to happier customers and more efficient operations.

NEXT: VIEW CAPABILITIES



FIELD SERVICE: EXPANSION



PAIN POINTS

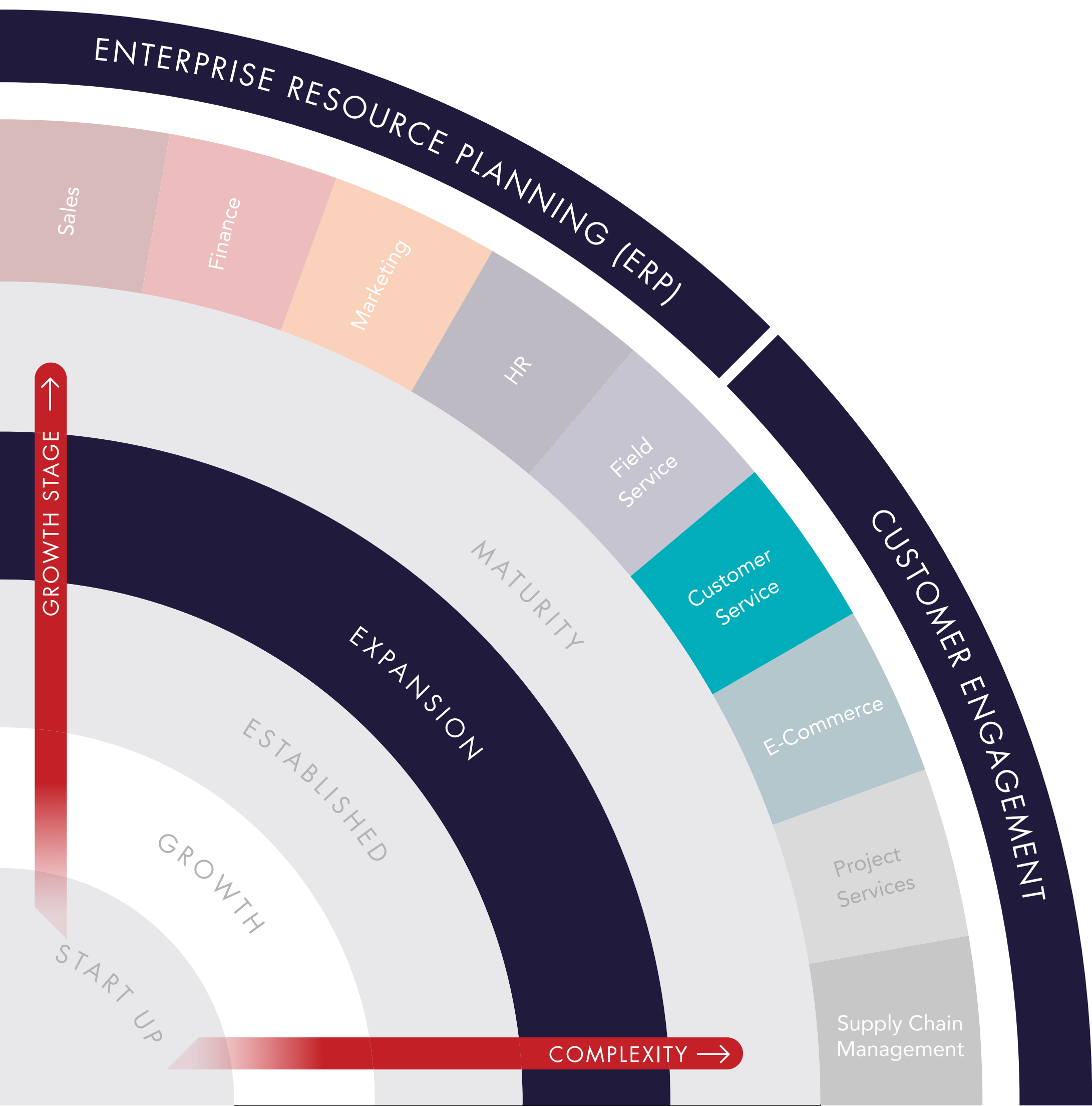
- 2 Field Service
Disparate systems are difficult to integrate, particularly during M&A

DYNAMICS CAPABILITIES

Work orders
Service agreements
Schedule and dispatch
Schedule board
Inventory management
Mobile productivity
Connected devices

SKUs

Dynamics 365 Field Service
Dynamics 365 Remote Assistant
Power Apps



CUSTOMER SERVICE: EXPANSION



PAIN POINTS

2

Customer Service

Disparate systems are difficult to integrate, particularly during M&A

CHALLENGES

To meet high customer expectations, businesses are now under pressure to deliver omnichannel customer service. But for many, it's impossible to track when a customer has previously interacted with the company, even if they spoke to a different agent just minutes before.

Customer sales advisors may not have access to real-time, accurate information, or have collaboration tools in place to get quick answers from other departments.

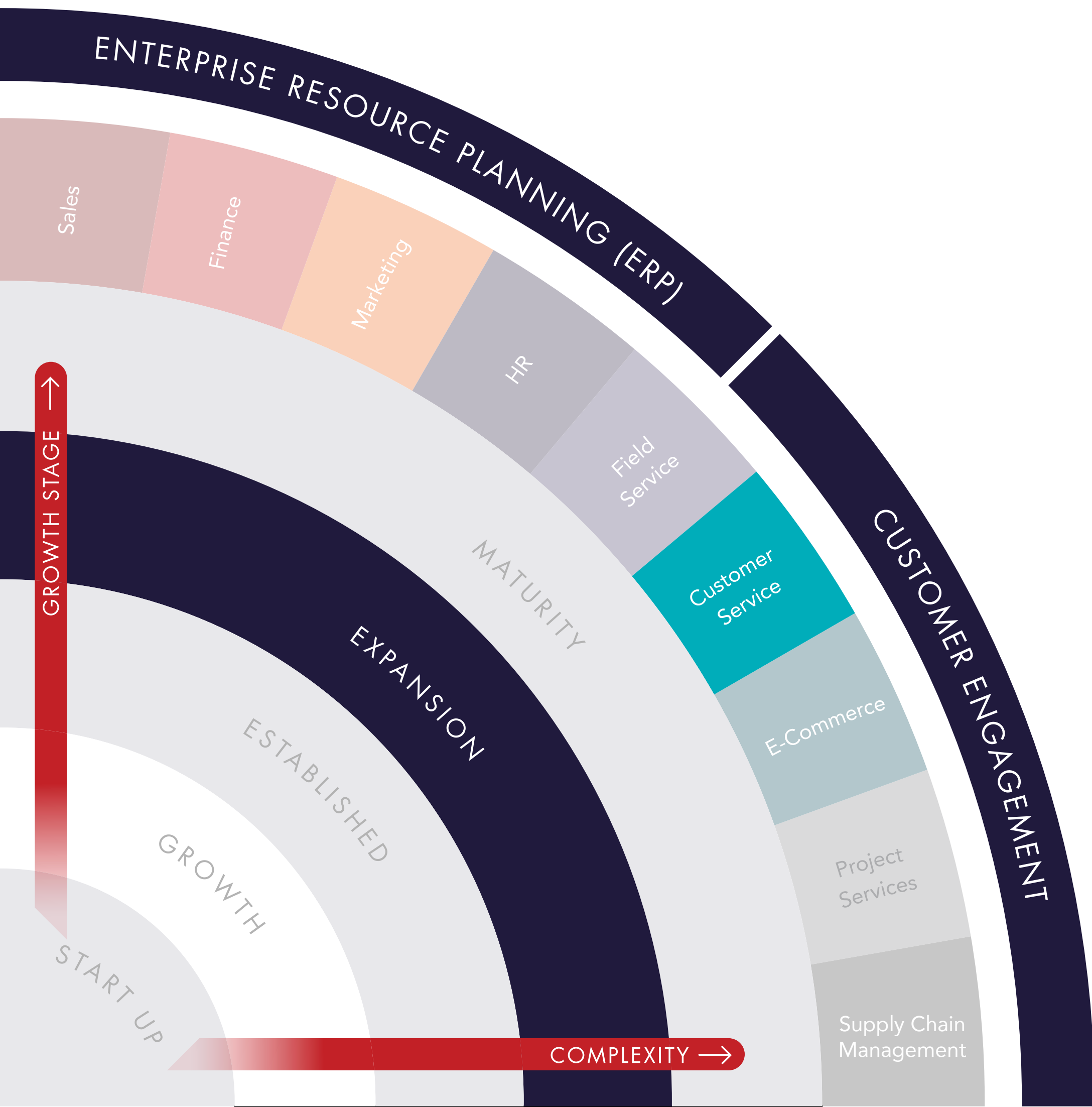
And when customer calls surge, they sometimes lack the call handling insight to resource their teams properly, or have no way to route customers through an interactive voice response (IVR).

BENEFITS OF DYNAMICS

The CRM capabilities within Dynamics, underpinned by AI, are an ideal platform to help customer service teams deliver seamless, personalised experiences. Dynamics brings all customer touchpoints into one comprehensive view, so agents are empowered to solve problems with a full picture of the situation.

NEXT: VIEW CAPABILITIES

< 1/2



CUSTOMER SERVICE: EXPANSION



PAIN POINTS

2

Customer Service
Disparate systems are difficult to integrate, particularly during M&A

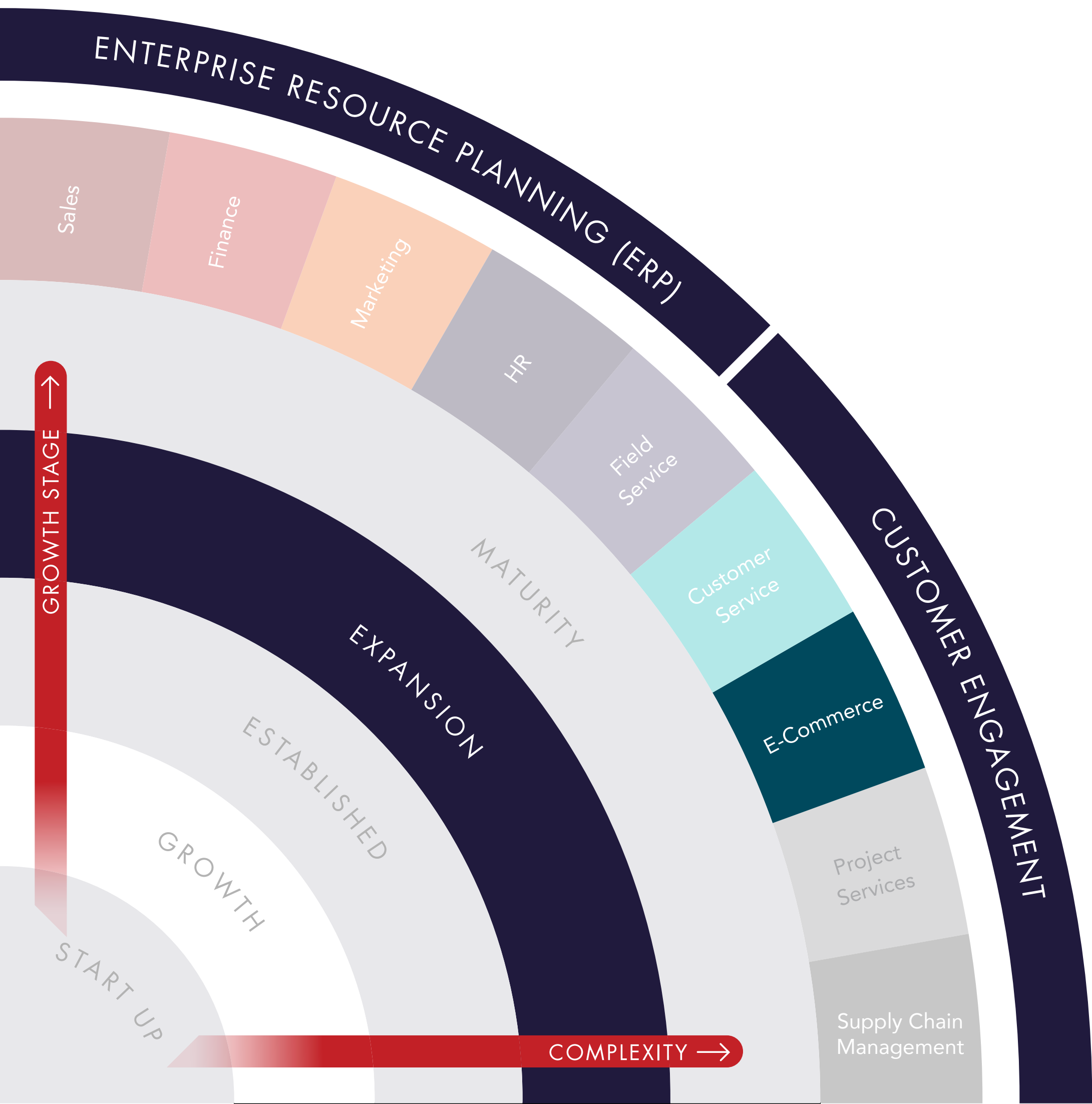
DYNAMICS CAPABILITIES

Case management
SLA support
Account management
Service automation
Customer web portals
Contract management
Service analytics

SKU_s

Dynamics 365 Customer Service Enterprise
Power Apps
Power BI
Dynamics 365 Unified Service Desk





E-COMMERCE: EXPANSION



PAIN POINTS

2

E-Commerce

Disparate systems are difficult to integrate, particularly during M&A

CHALLENGES

E-commerce is a business of fine margins – every click counts. Customers need to see the same content and promotions across different channels, for example, which is hard without a single, integrated platform. Equally, it's a challenge to fulfil orders efficiently online, and to offer flexible delivery models (particularly for smaller organisations).

Businesses also struggle with data: they need to predict customer demand and report on real-time stock levels, as well as needing accurate customer data so they can personalise offers.

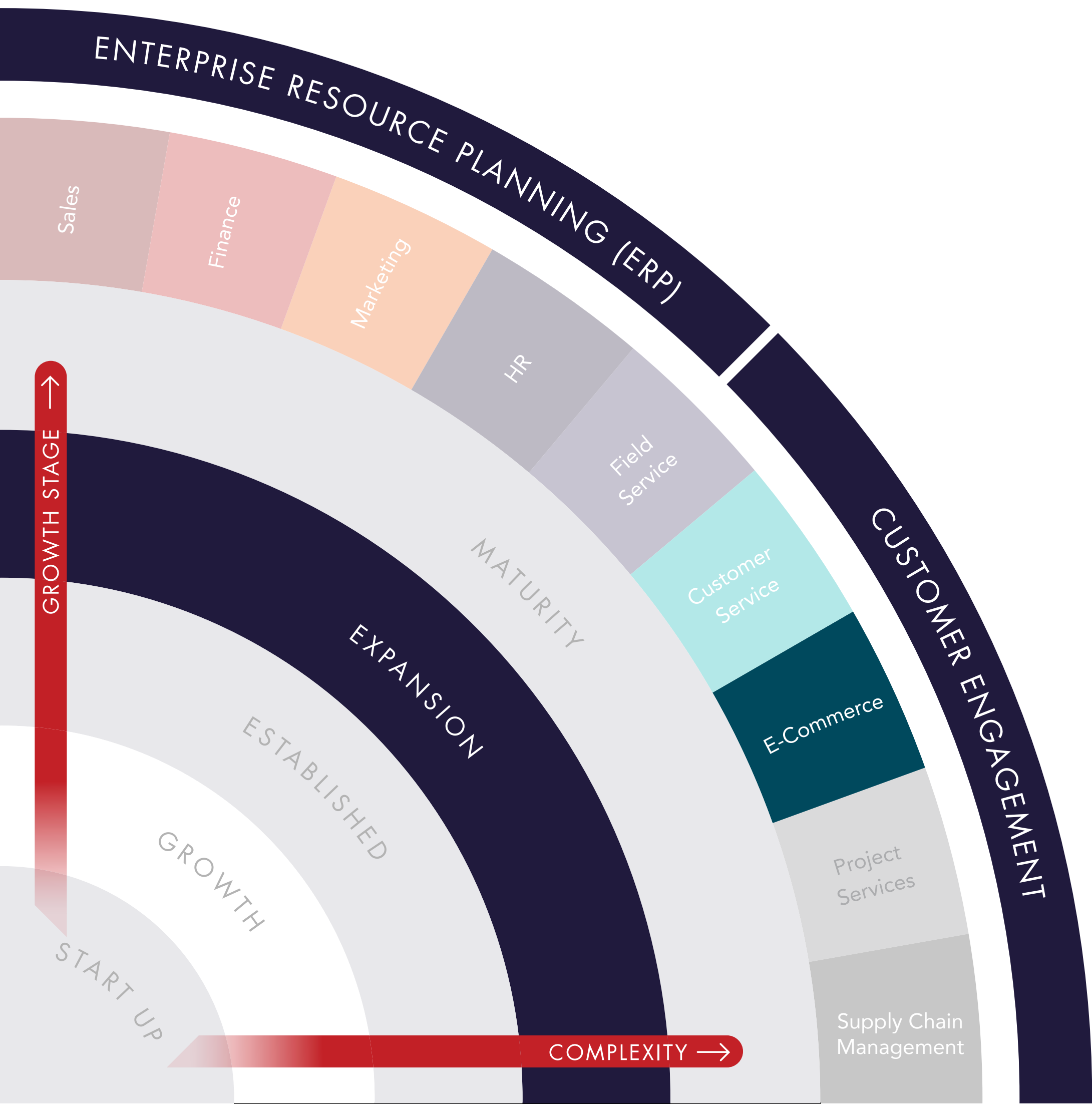
BENEFITS OF DYNAMICS

E-commerce teams can use Dynamics to create exceptional shopping experiences. The platform's built-in AI and machine learning can help to integrate and optimise back-office processes, streamlining your retail operations. It is also extremely scalable, lending itself to growing businesses or those expanding into new territories and markets.

The single view of the customer that Dynamics facilitates gives businesses the option to serve customers when, how, and where they want – on any device. E-commerce teams can view each customer on a unified platform, which brings all customer touchpoints together.

NEXT: VIEW CAPABILITIES

< 1/2



E-COMMERCE: EXPANSION



PAIN POINTS

2

E-Commerce
Disparate systems are difficult to integrate, particularly during M&A

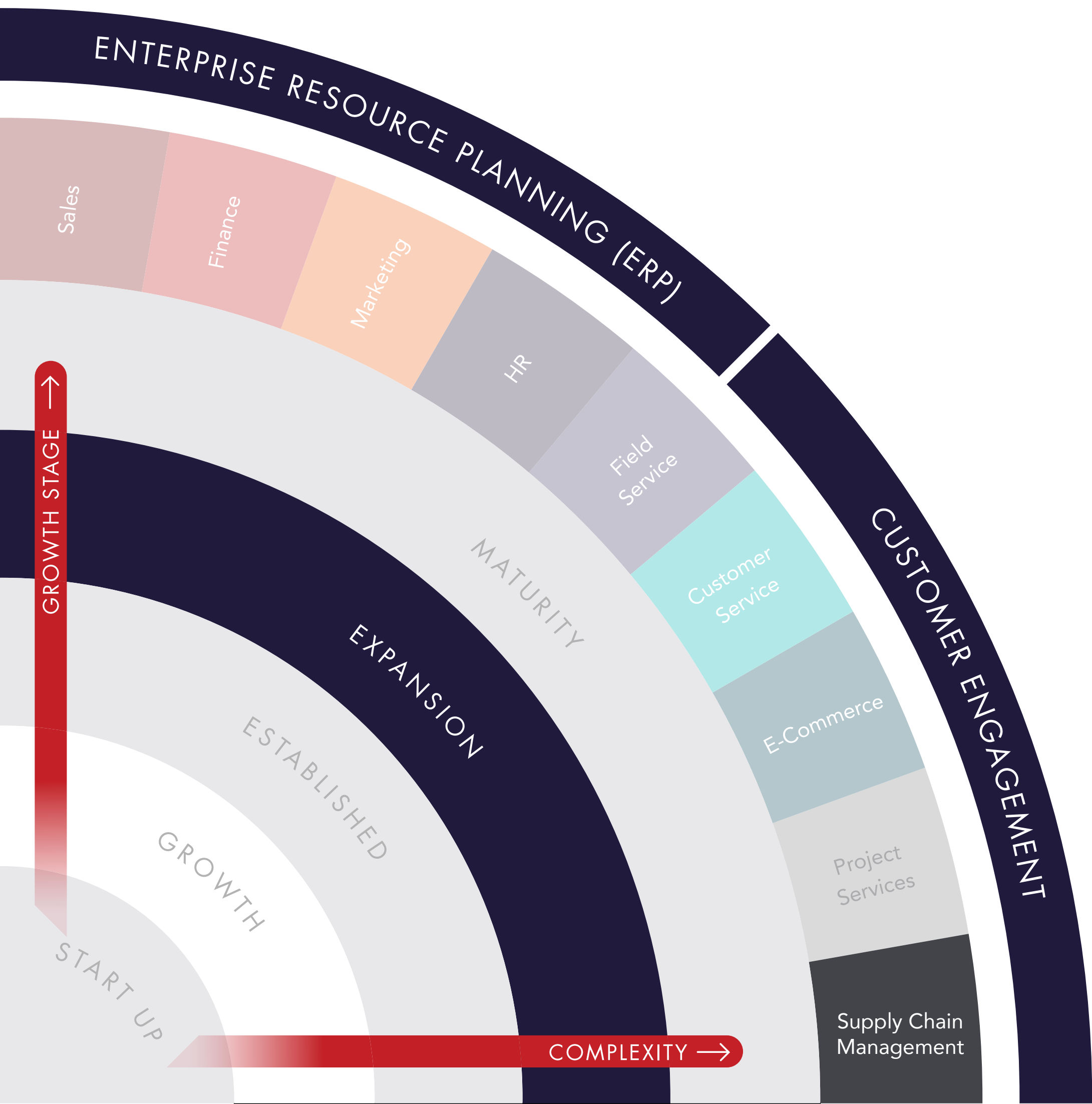
DYNAMICS CAPABILITIES

Pricing
Stores management
Shift management
Employee management
Customer loyalty
Replenishment
Product categories
Sales channel management

SKU_s

Dynamics 365 E-Commerce
Power Apps





SUPPLY CHAIN MANAGEMENT: EXPANSION



PAIN POINTS

- 2 Supply Chain Management
Disparate systems are difficult to integrate, particularly during M&A

CHALLENGES

Without real-time information, it's difficult to efficiently manage logistics and supply chain operations. Maintenance ends up being reactive rather than proactive, stock levels have to be recorded manually (an error-prone process), and customers end up being given inaccurate delivery times. Without end-to-end visibility of the supply chain and warehousing operations, improvements can only be based on intuition.

Many businesses also have disparate or disconnected procurement systems, particularly as they grow across territories. This makes it difficult to spot cost inefficiencies.

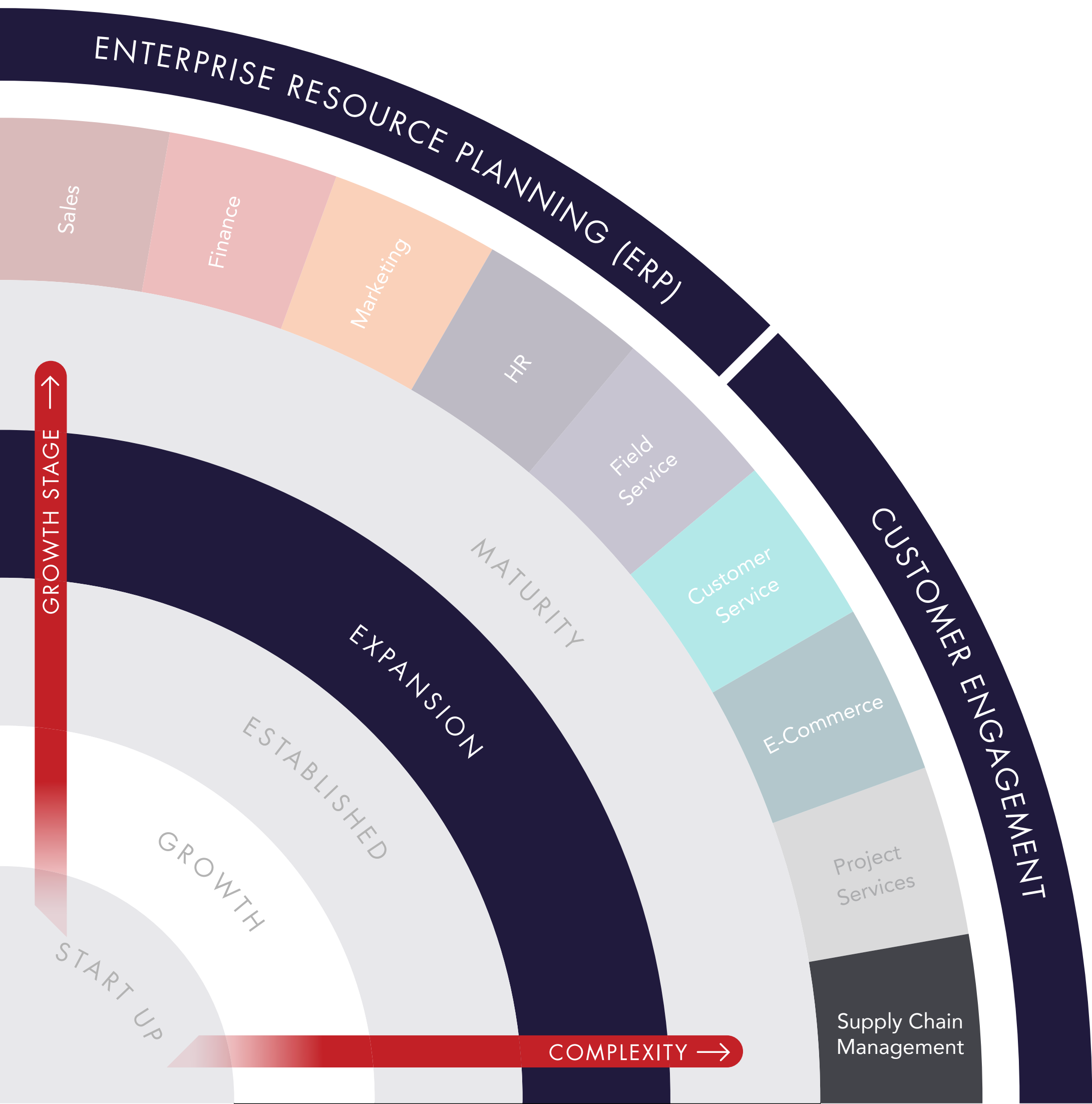
BENEFITS OF DYNAMICS

With machine-learning-enhanced warehouse management through Dynamics, your clients can accurately report and forecast stock levels, helping them to move from a reactive to proactive supply chain operation. Dynamics also integrates IoT devices, so they can fix issues in advance to prevent downtime and extend the life of equipment.

And with powerful automation and analytics tools, the platform can also optimise planning and improve the fulfilment, material sourcing, and logistics of supply chains.

NEXT: VIEW CAPABILITIES

< 1/2



SUPPLY CHAIN MANAGEMENT: EXPANSION



PAIN POINTS

- 2 Supply Chain Management
Disparate systems are difficult to integrate, particularly during M&A

DYNAMICS CAPABILITIES

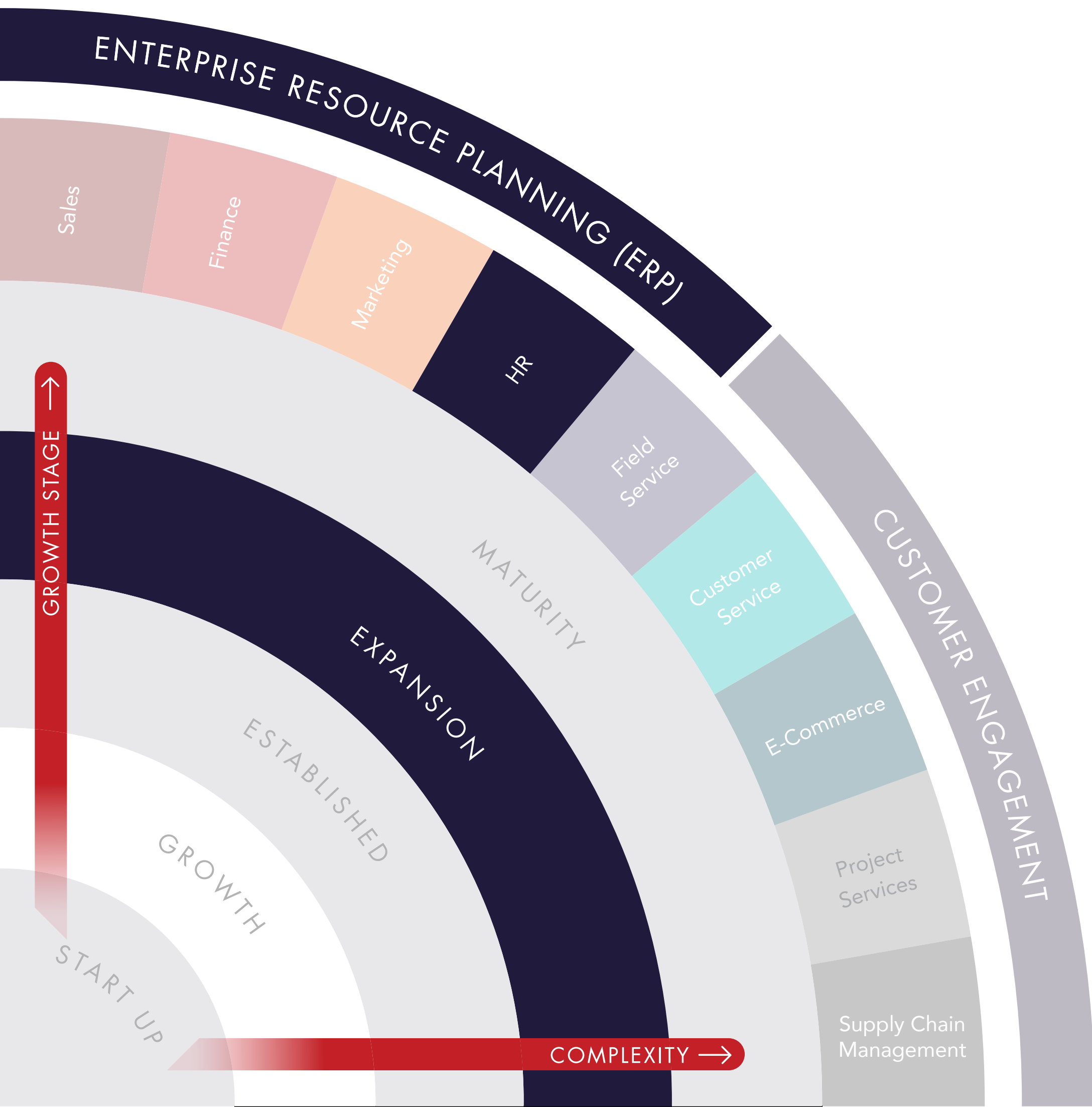
Asset management
Inventory management
Production central
Procurement and sourcing
Transportation
Warehouse management
Fleet management

SKU_s

Dynamics 365 Supply Chain Management



Click on the highlighted Functions to learn more ↓



EXPANSION

Understanding how and where to expand are key challenges for midmarket businesses, who already have a solid base but need opportunities to continue growing. It's no longer good enough to make gambles and guesses – decision-makers want to know that their strategy is based on sound data, especially when weighing up the merits of mergers and acquisitions. Businesses are also under pressure from savvy competitors who are modernising and using tech to their own advantage.

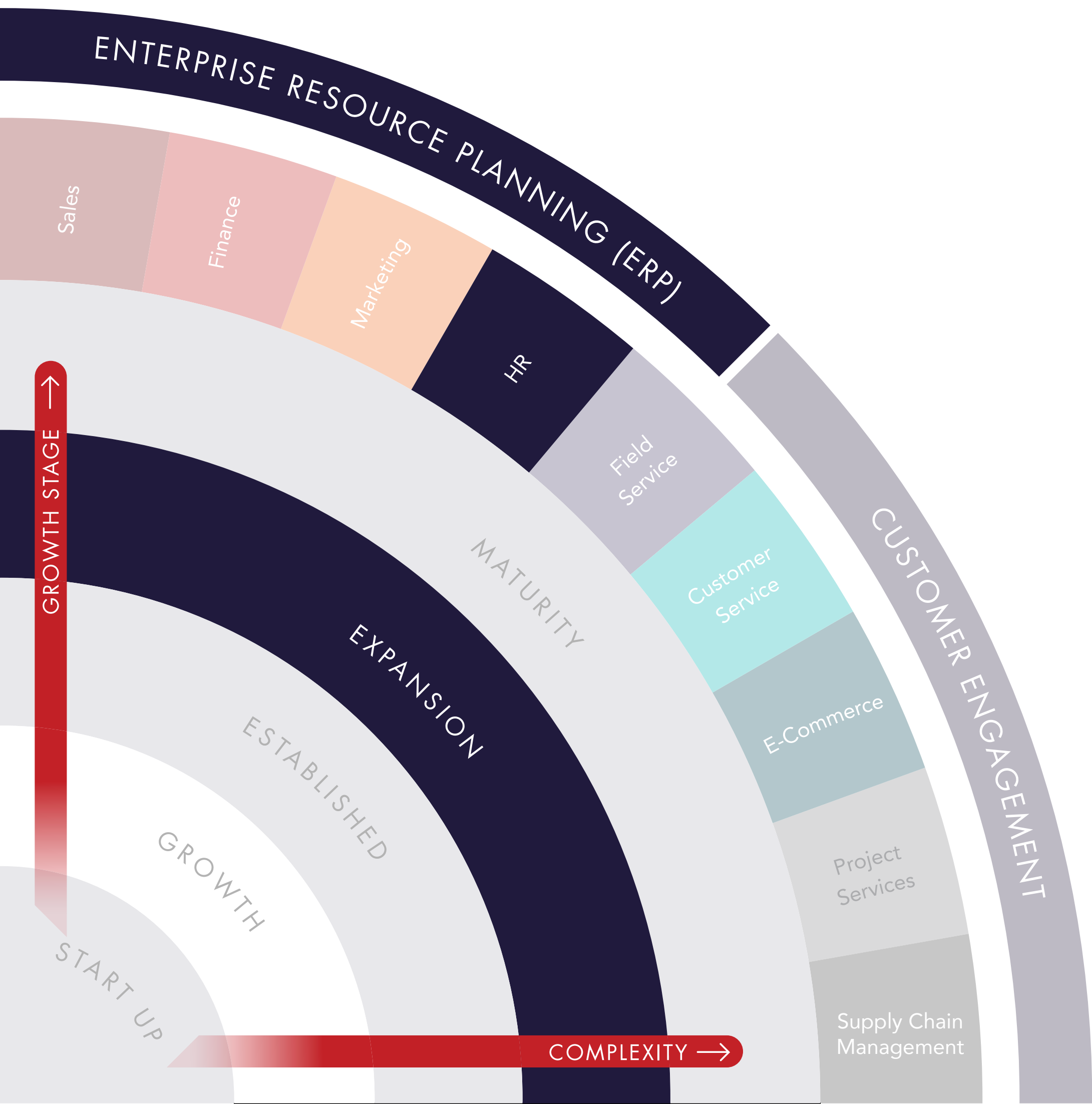
Powerful analytics and machine learning in Dynamics make it an ideal platform for data-driven decision-making, whether it's the CFO writing annual budgets or the CMO investigating product innovation options.

PAIN POINTS

Click on a Pain Point below:

- 1 Not knowing which markets to expand into, or how to scale to fulfil their needs
- 2 Disparate systems are difficult to integrate, particularly during M&A
- 3 The challenge of nurturing staff and recruiting top talent quickly – particularly in new geographies
- 4 Lack of insights on which to build a cohesive and effective marketing plan. This in turn impacts ROI
- 5 Expansion sometimes comes at the expense of current customers
- 6 Struggling to understand the preferences of the target market, and consider new and different channels to market
- 7 Inability to manage expansion amidst higher costs, greater risks, and the limits of manual and labour-intensive processes





HR: EXPANSION



PAIN POINTS

- 3 HR
The challenge of nurturing staff and recruiting top talent quickly – particularly in new geographies

CHALLENGES

As a business grows, its HR processes and systems become increasingly complex. HR managers need to report on employees' wellbeing, learning and development, absences, annual leave, and much more.

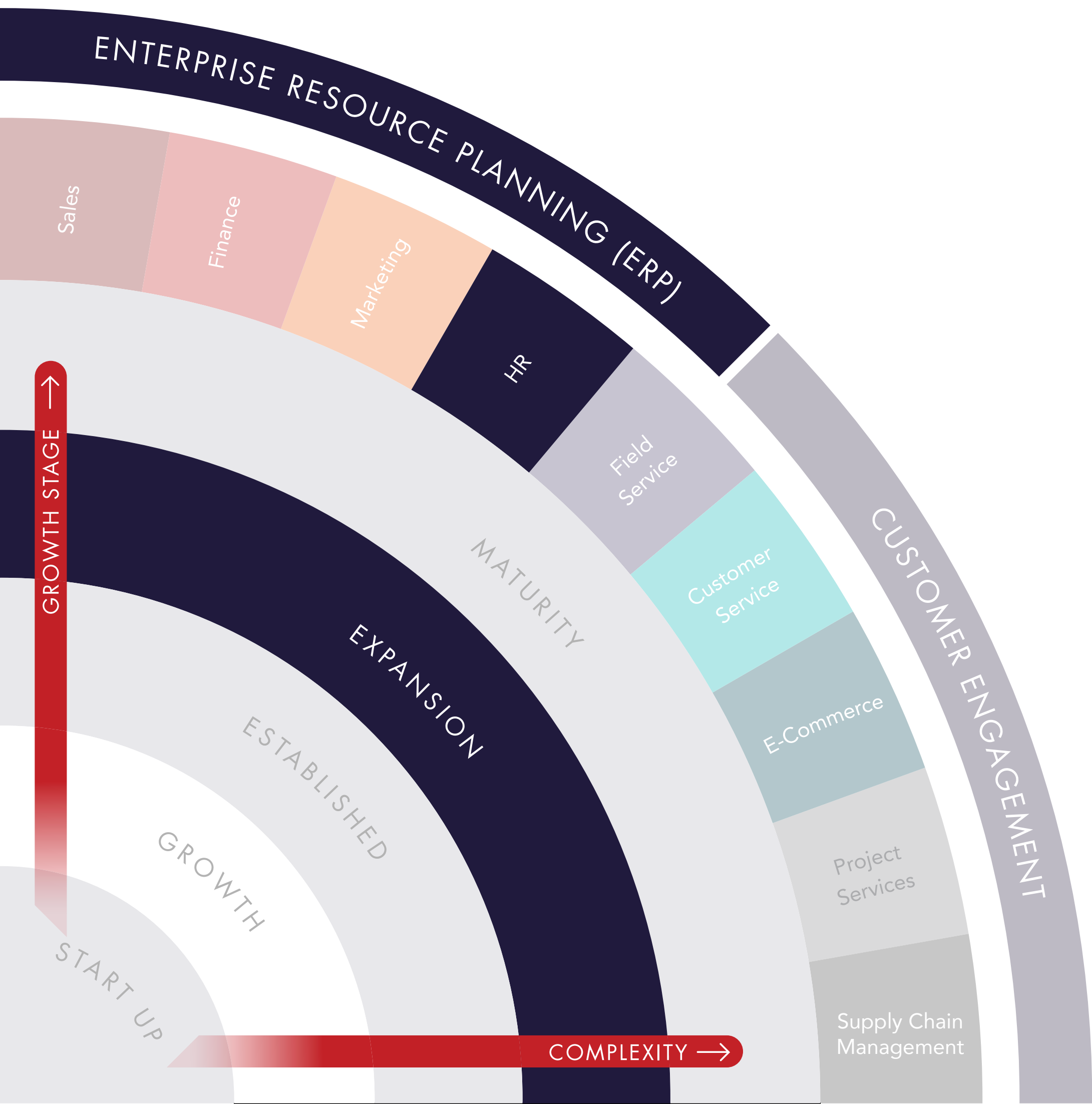
That's on top of trying to make recruitment and onboarding more efficient, centralising core HR processes, and giving managers the tools and training they need to manage their team members.

BENEFITS OF DYNAMICS

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At the same time, Dynamics can support HR teams to simplify reporting with rich dashboards, helping leaders make informed decisions. By identifying and engaging the right candidates, businesses can feel confident that they're bringing in the right people to support future growth.

NEXT: VIEW CAPABILITIES



HR: EXPANSION



PAIN POINTS

- 3 HR
The challenge of nurturing staff and recruiting top talent quickly – particularly in new geographies

DYNAMICS CAPABILITIES

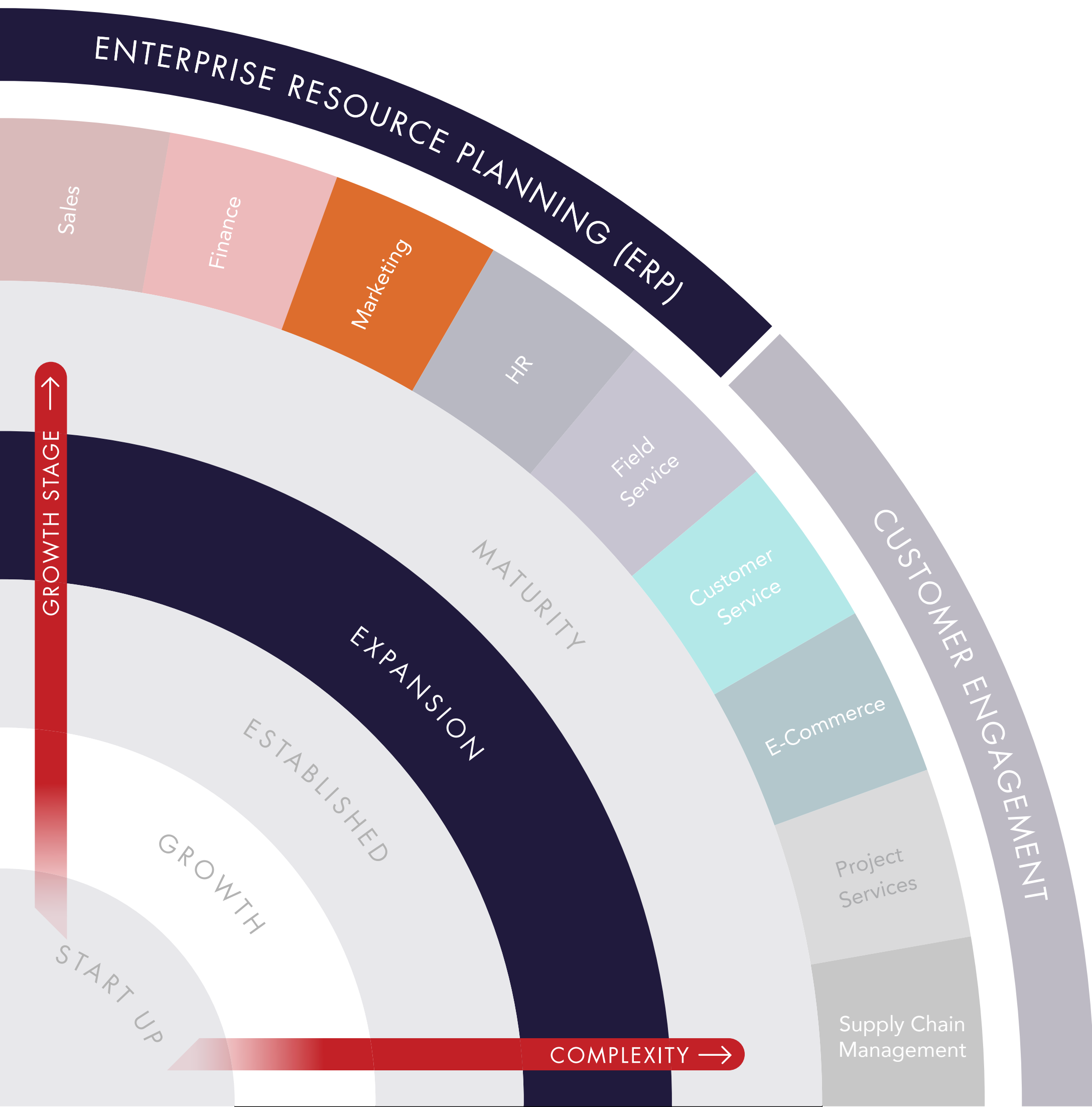
People management
Compensation management
Compliance
Leave and absence
Benefits
Learning and development
Employee development
Employee self-service
Hiring and offer management

SKUs

Dynamics 365 Human Resources



Click on the highlighted Functions to learn more ↓



EXPANSION

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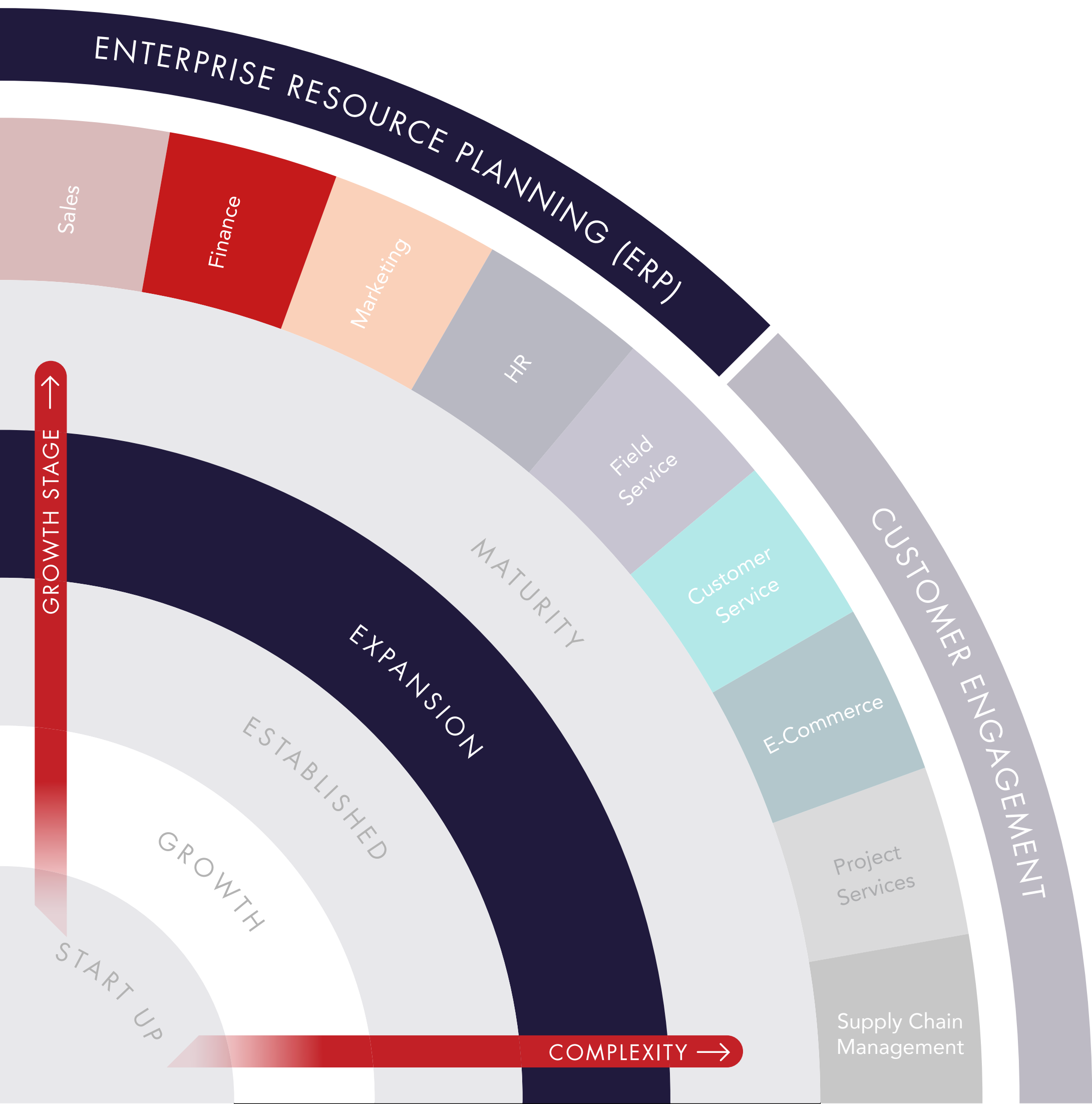
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FINANCE: EXPANSION



PAIN POINTS

4

Finance

Lack of insights on which to build a cohesive and effective marketing plan. This in turn impacts ROI

7

Finance

Inability to manage expansion amidst higher costs, greater risks, and the limits of manual and labour-intensive processes

CHALLENGES

Many finance teams still struggle with time-consuming tasks, sometimes having to integrate lots of different databases manually – even for basic processes like billing. It’s difficult to share information across departments for order processing, which results in longer lead times. And despite the wealth of financial data available, they might not have the reporting tools to get a look at the bigger picture for the business – which can hamper strategic decision-making.

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BENEFITS OF DYNAMICS

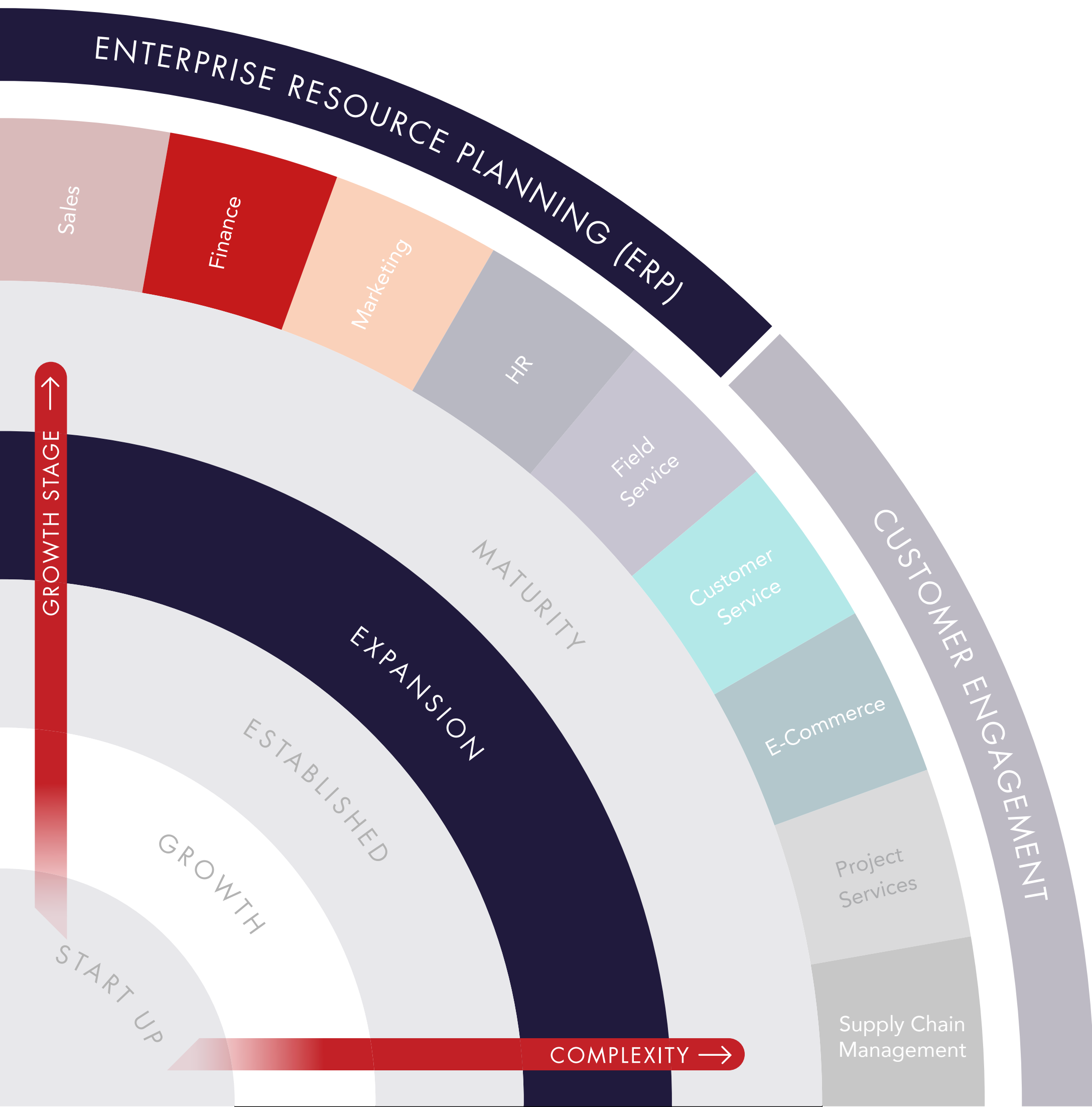
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NEXT: VIEW CAPABILITIES

< 1/2



FINANCE: EXPANSION



PAIN POINTS

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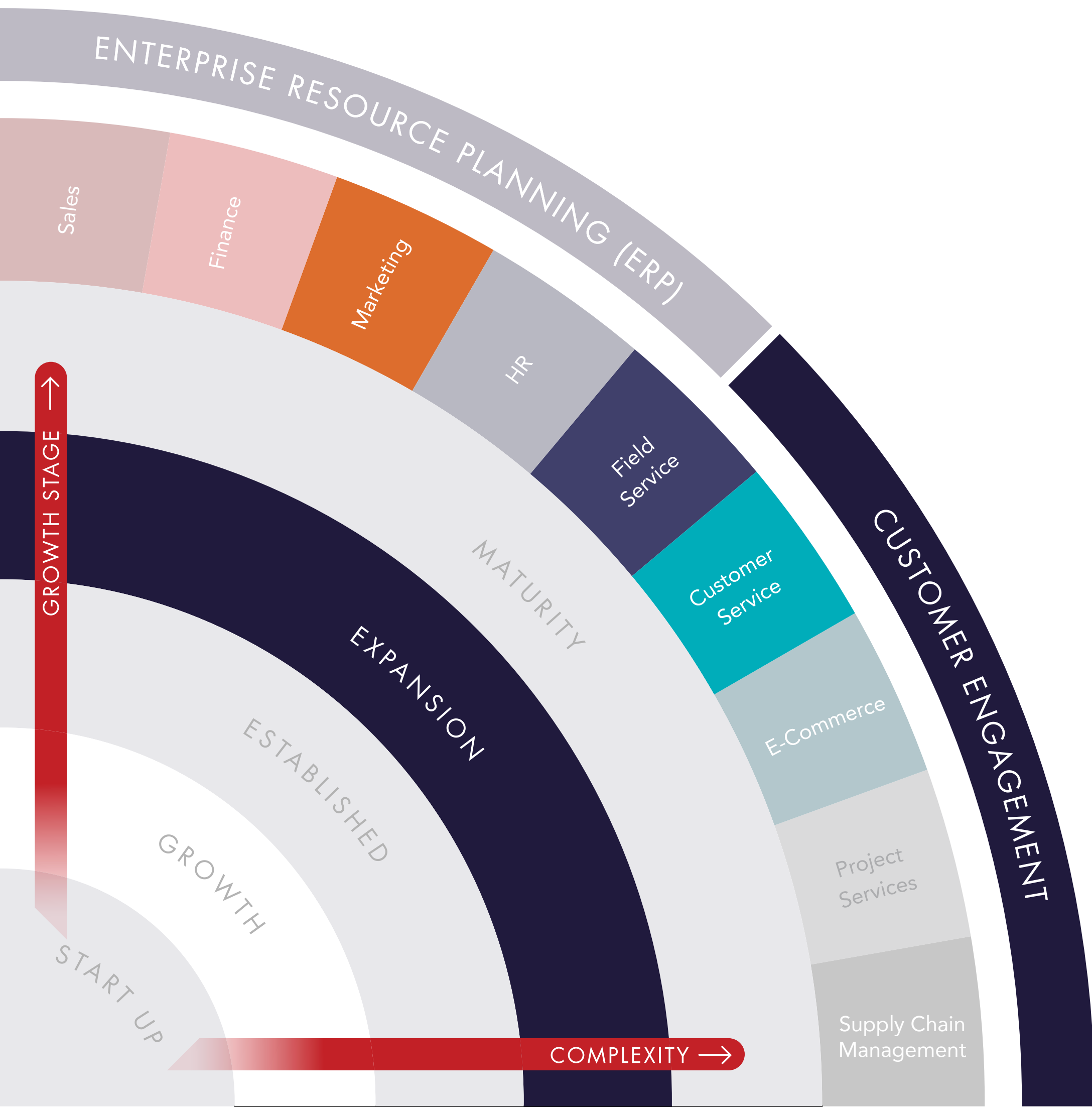
DYNAMICS CAPABILITIES

SKU_s

Credit management
Treasury
Accounts receivable
Accounts payable
Budgeting
Cost management
Fixed assets
Payroll tax
External compliance certification

Dynamics 365 for Finance

Click on the highlighted Functions to learn more



EXPANSION

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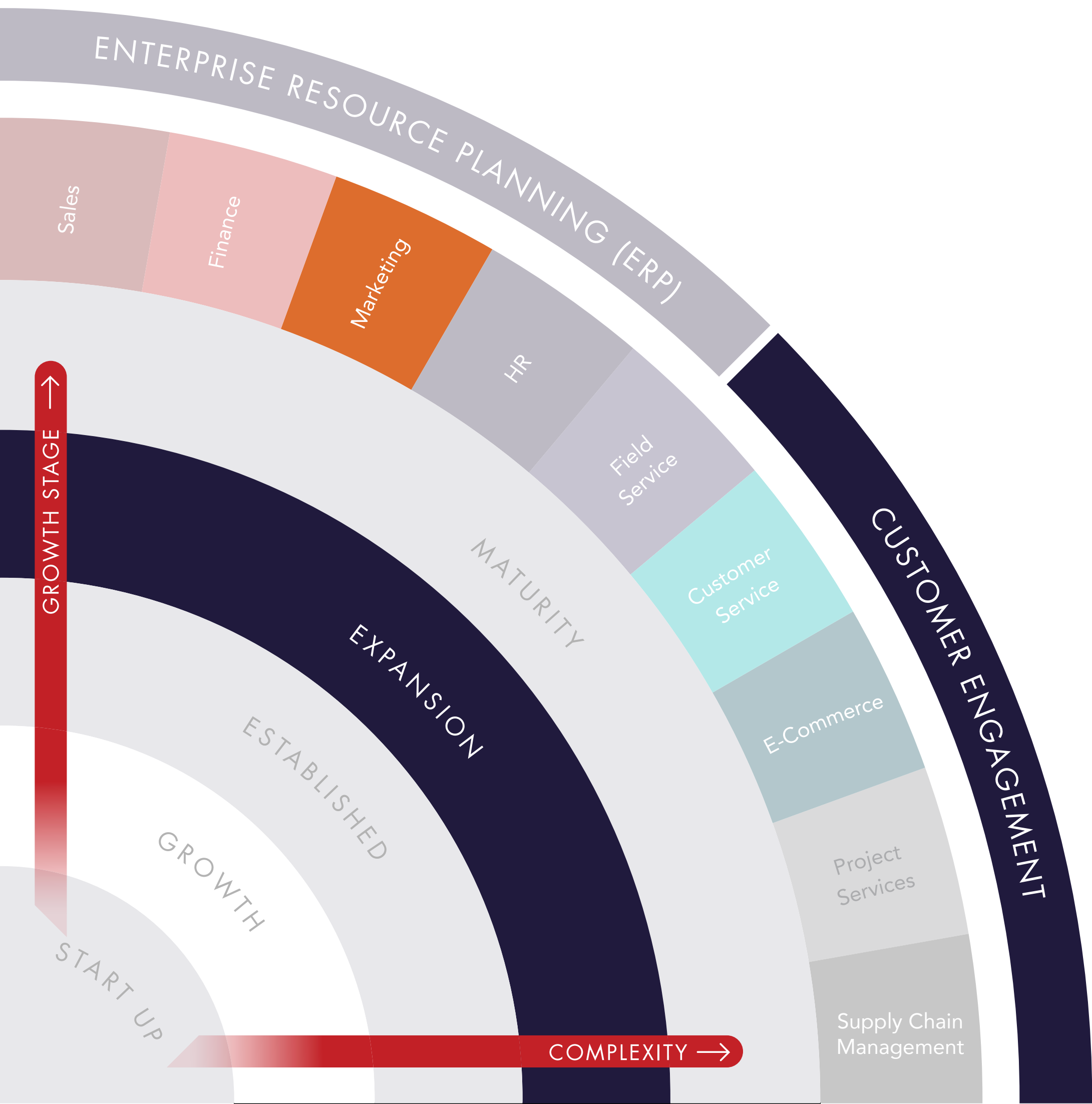
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MARKETING: EXPANSION



PAIN POINTS

- 5

Marketing
Expansion sometimes comes at the expense of current customers
- 6

Marketing
Struggling to understand the preferences of the target market, and consider new and different channels to market

CHALLENGES

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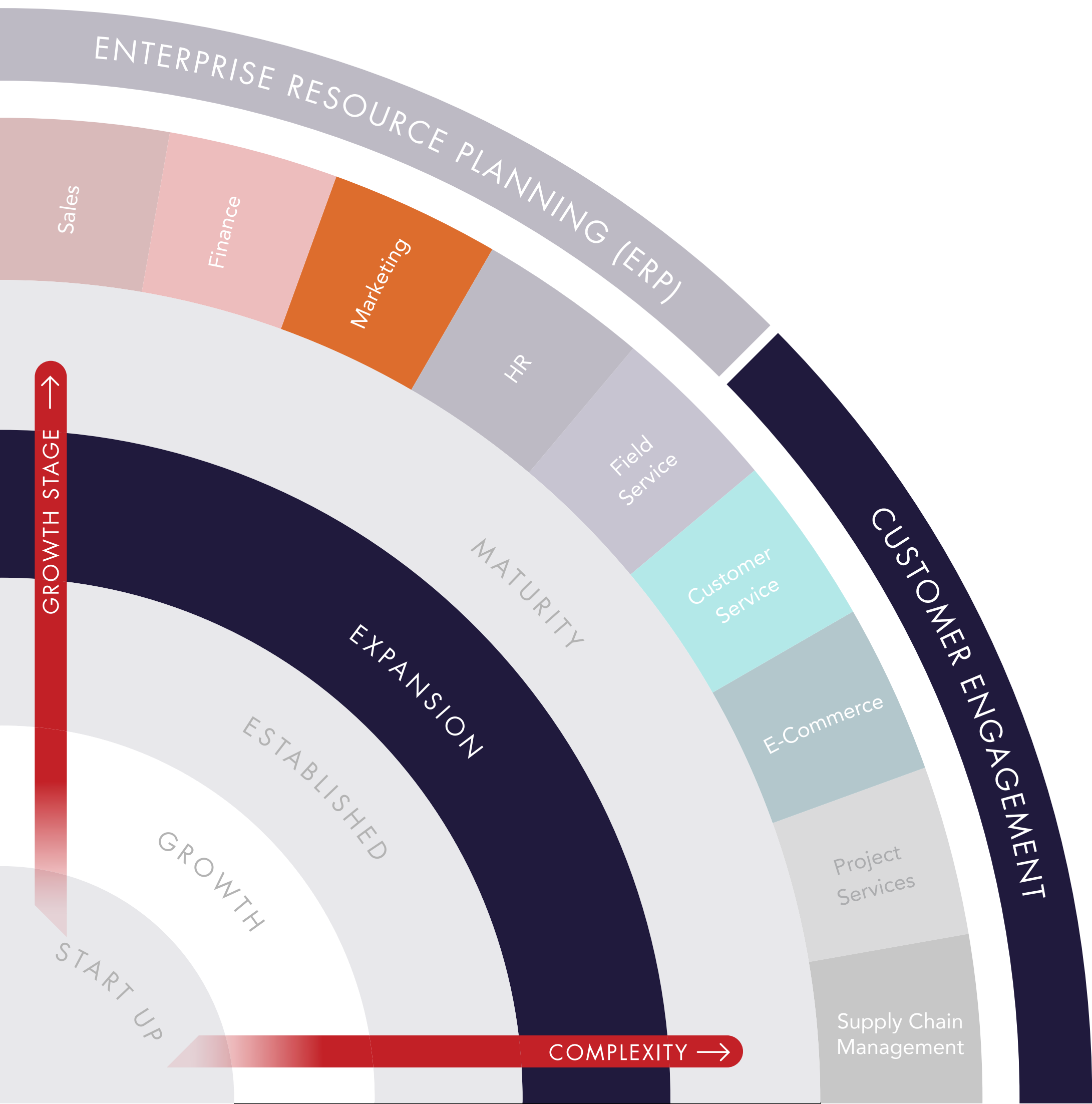
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MARKETING: EXPANSION



PAIN POINTS

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Marketing

Expansion sometimes comes at the expense of current customers

6

Marketing

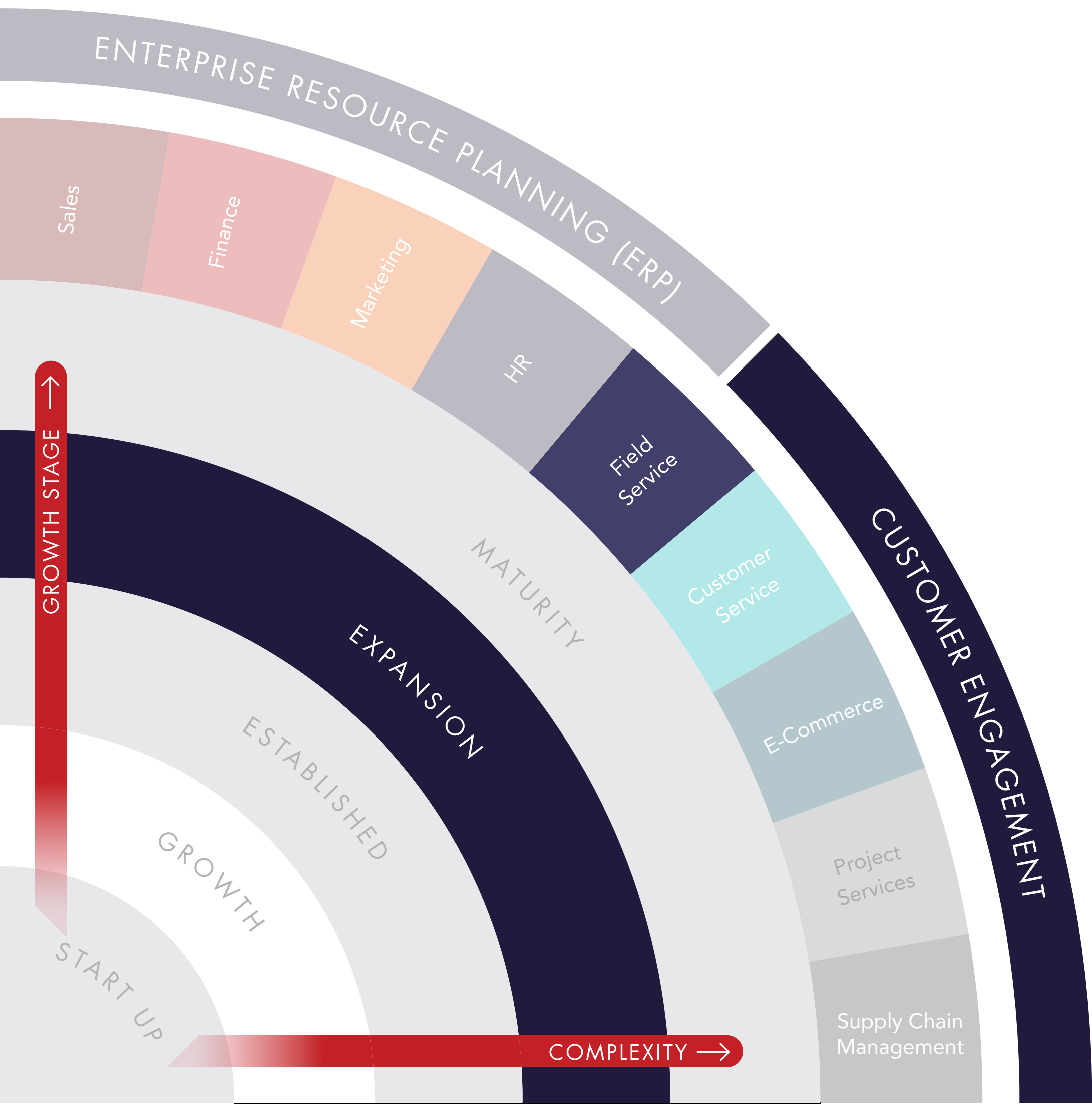
Struggling to understand the preferences of the target market, and consider new and different channels to market

DYNAMICS CAPABILITIES

Email marketing
Lead scoring
Marketing segmenting
Customer journeys
Event management
Connector for LinkedIn
Lead generation forms

SKUs

Dynamics 365 Marketing
Dynamics 365 Customer Insight
Power Apps



FIELD SERVICE: EXPANSION



PAIN POINTS

5

Field Service

Expansion sometimes comes at the expense of current customers

CHALLENGES

When you're out solving customer issues in the field, you need the information and the flexibility to come up with solutions on the fly. Many teams don't have access to the right tools to support technicians, or effective customer insight collection systems, and that makes it very difficult to prioritise faults or offer a triage service. Agents are forced to be reactive, rather than proactively finding fixes in advance.

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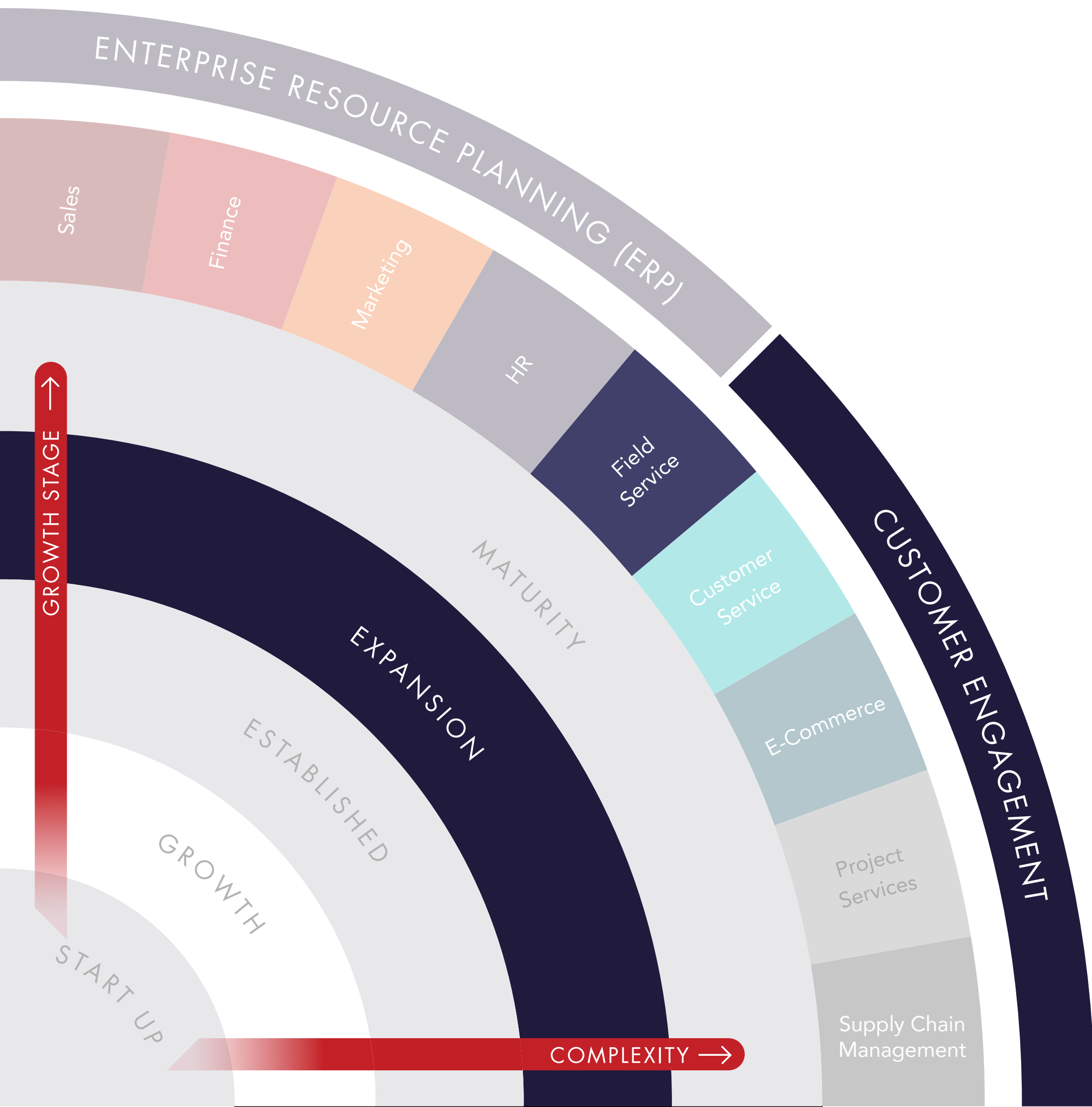
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FIELD SERVICE: EXPANSION



PAIN POINTS

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Field Service
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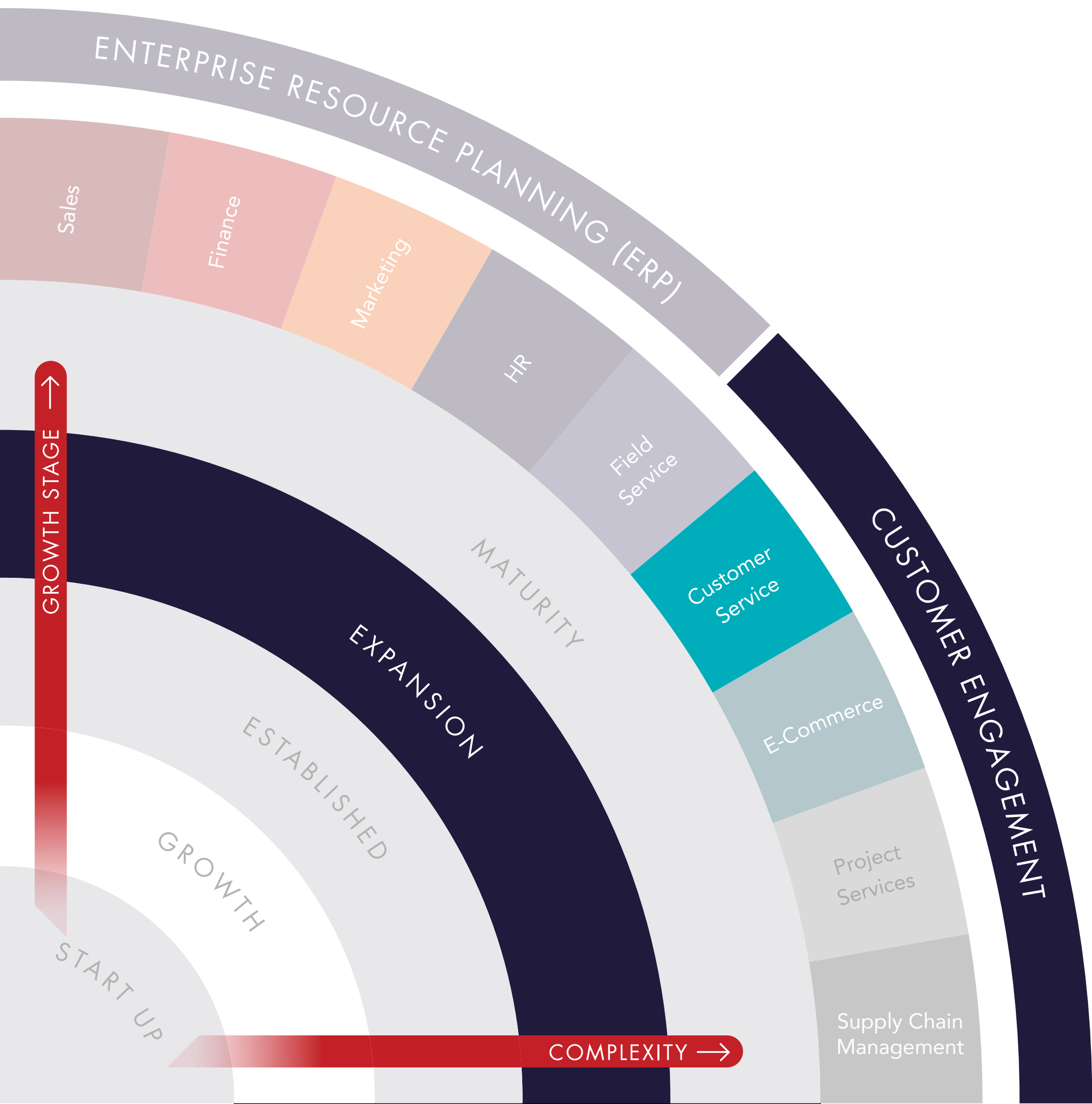
DYNAMICS CAPABILITIES

Work orders
Service agreements
Schedule and dispatch
Schedule board
Inventory management
Mobile productivity
Connected devices

SKU_s

Dynamics 365 Field Service
Dynamics 365 Remote Assistant
Power Apps





CUSTOMER SERVICE: EXPANSION



PAIN POINTS

5

Customer Service
Expansion sometimes comes at the expense of current customers

6

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Struggling to understand the preferences of the target market, and consider new and different channels to market

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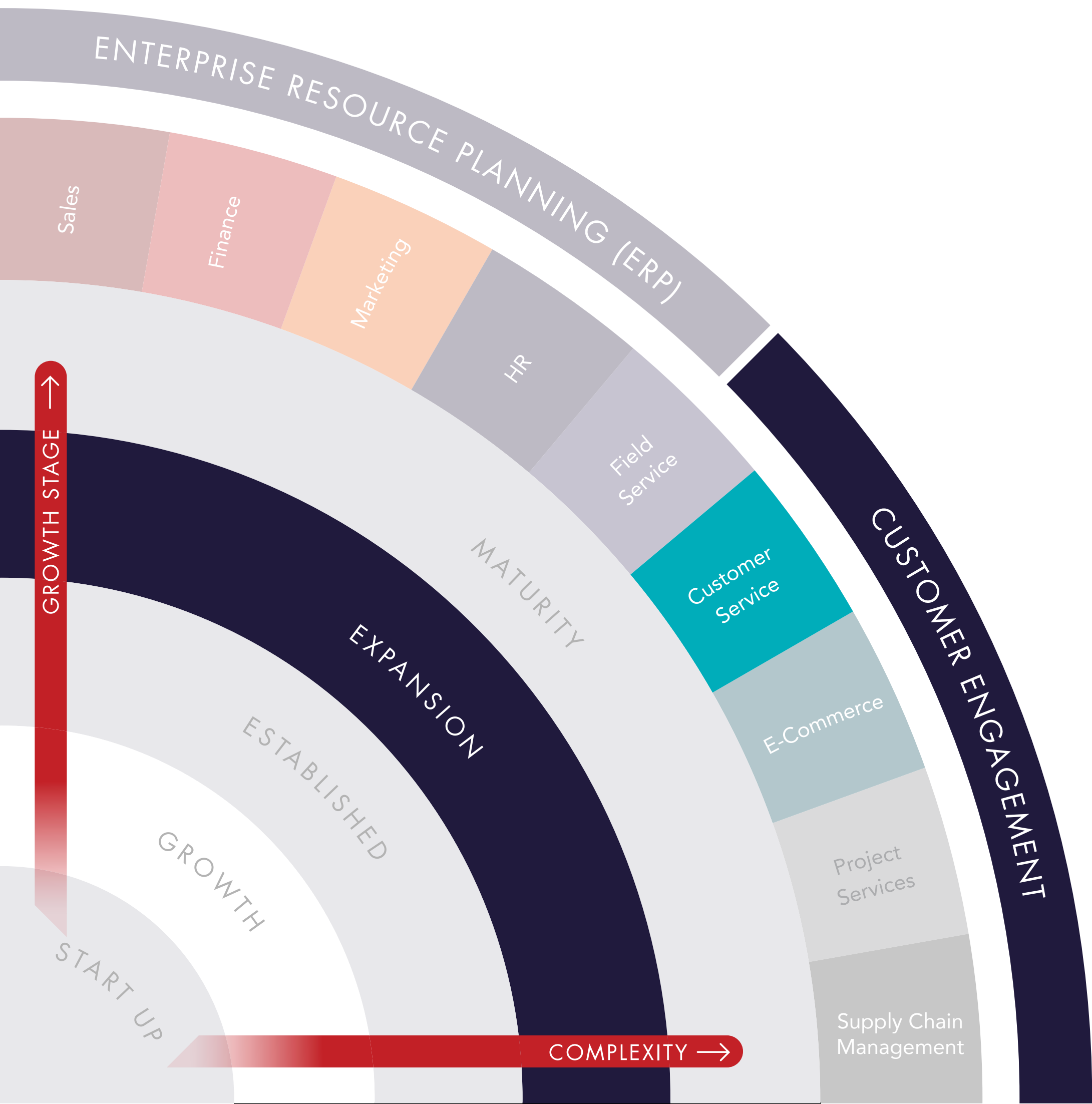
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NEXT: VIEW CAPABILITIES

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CUSTOMER SERVICE: EXPANSION



PAIN POINTS

5

Customer Service
Expansion sometimes comes at the expense of current customers

6

Customer Service
Struggling to understand the preferences of the target market, and consider new and different channels to market

DYNAMICS CAPABILITIES

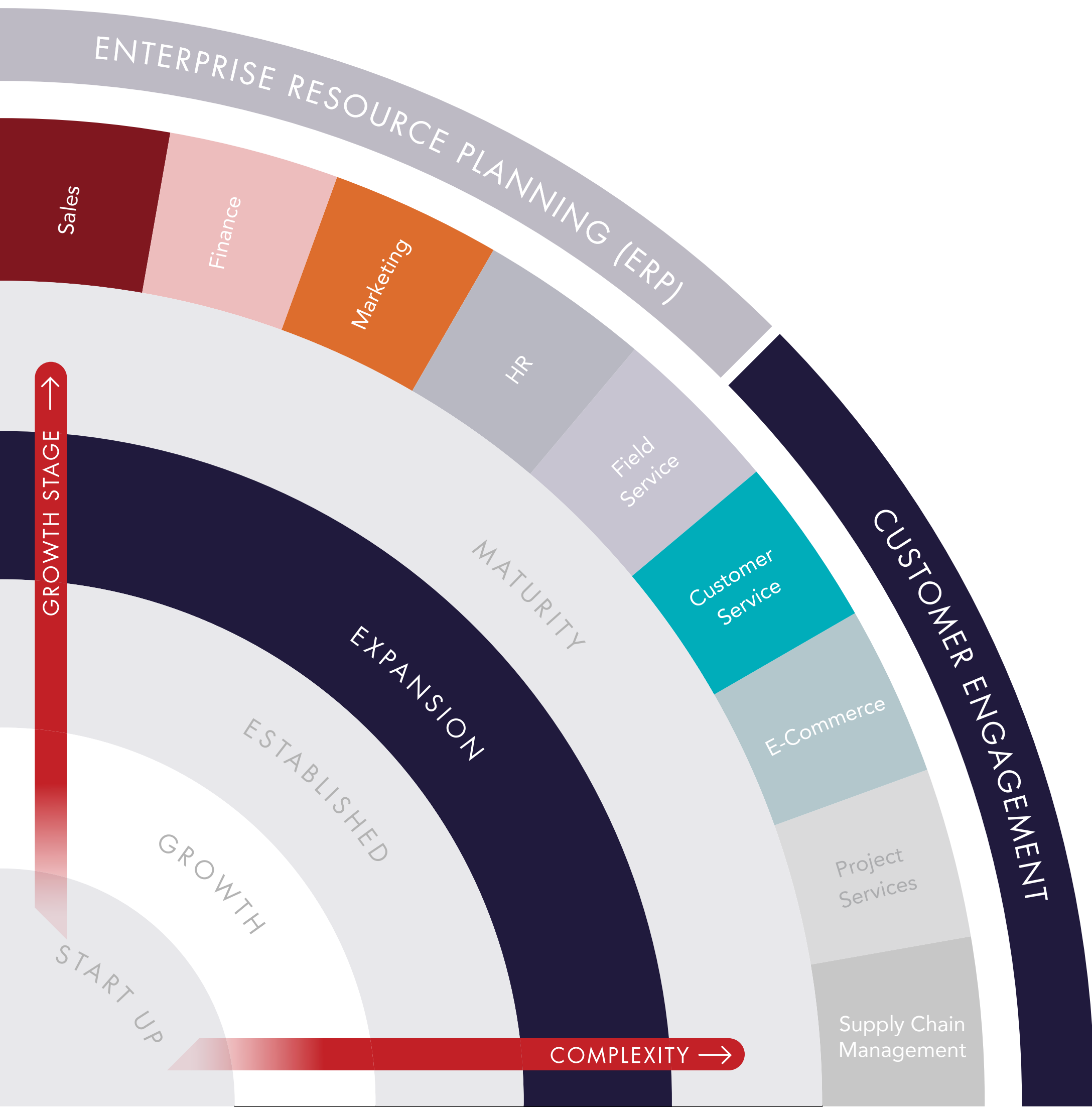
Case management
SLA support
Account management
Service automation
Customer web portals
Contract management
Service analytics

SKUs

Dynamics 365 Customer Service Enterprise
Power Apps
Power BI
Dynamics 365 Unified Service Desk



Click on the highlighted
Functions to learn more



EXPANSION

Understanding how and where to expand are key challenges for midmarket businesses, who already have a solid base but need opportunities to continue growing. It's no longer good enough to make gambles and guesses – decision-makers want to know that their strategy is based on sound data, especially when weighing up the merits of mergers and acquisitions. Businesses are also under pressure from savvy competitors who are modernising and using tech to their own advantage.

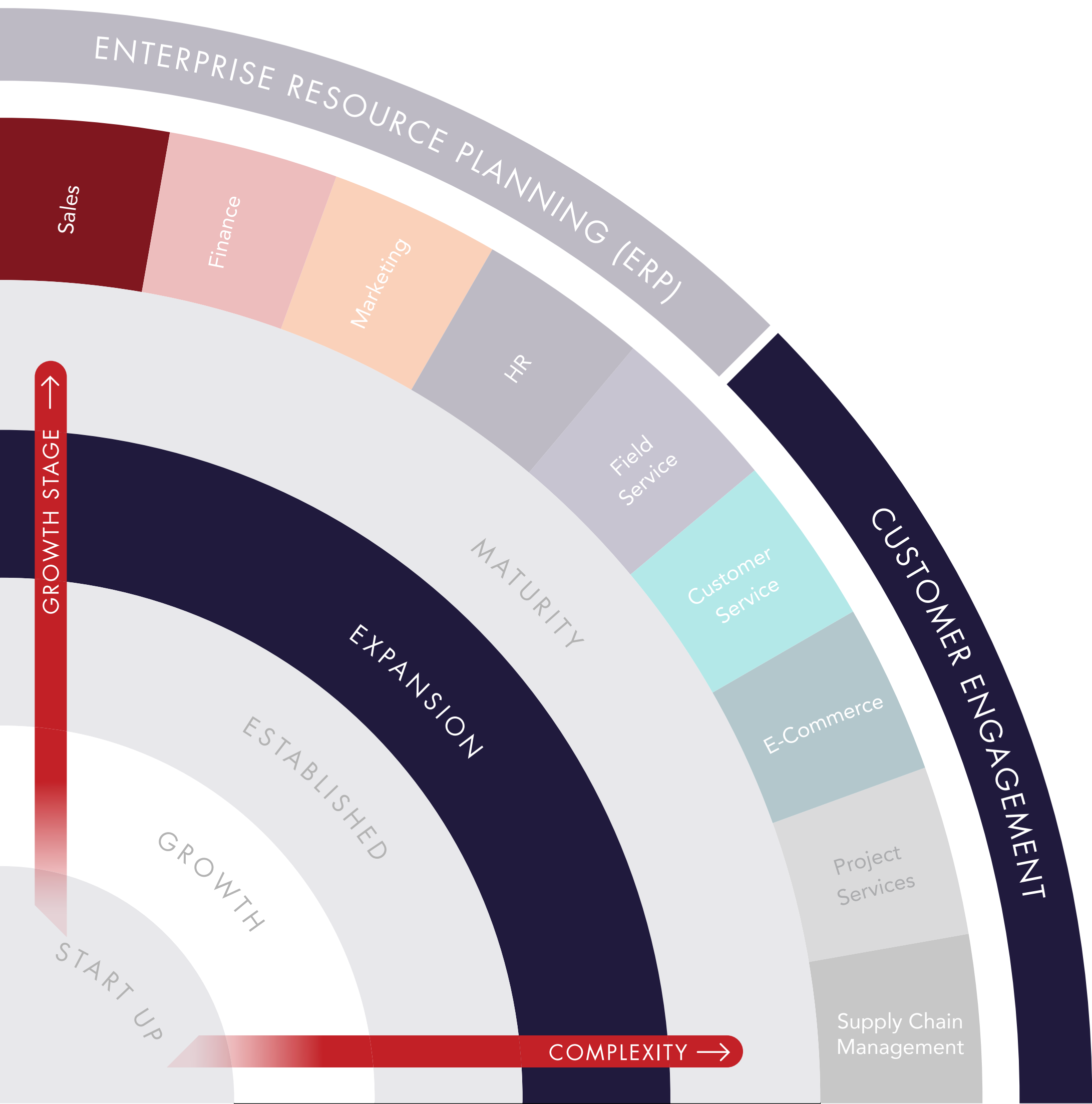
Powerful analytics and machine learning in Dynamics make it an ideal platform for data-driven decision-making, whether it's the CFO writing annual budgets or the CMO investigating product innovation options.

PAIN POINTS

Click on a Pain Point below:

- 1 Not knowing which markets to expand into, or how to scale to fulfil their needs
- 2 Disparate systems are difficult to integrate, particularly during M&A
- 3 The challenge of nurturing staff and recruiting top talent quickly – particularly in new geographies
- 4 Lack of insights on which to build a cohesive and effective marketing plan. This in turn impacts ROI
- 5 Expansion sometimes comes at the expense of current customers
- 6 Struggling to understand the preferences of the target market, and consider new and different channels to market
- 7 Inability to manage expansion amidst higher costs, greater risks, and the limits of manual and labour-intensive processes





SALES: EXPANSION



PAIN POINTS

6

Sales

Struggling to understand the preferences of the target market, and consider new and different channels to market

CHALLENGES

Whether managing a small number of high-value opportunities, or hundreds of smaller leads, salespeople rely on accurate data to succeed. They need to track ongoing opportunities and have a clear overview of all the customers they're currently working with – as well as how those customers are interacting with colleagues in other parts of the business.

Reporting is also vital. Salespeople are sometimes unable to run reports on opportunities and share that information with management. That makes it extremely difficult to collaborate with marketing, and prevents sales teams pursuing opportunities from start to finish. Individual salespeople can also struggle to receive rewards and recognition when they can't prove their work has contributed to business outcomes.

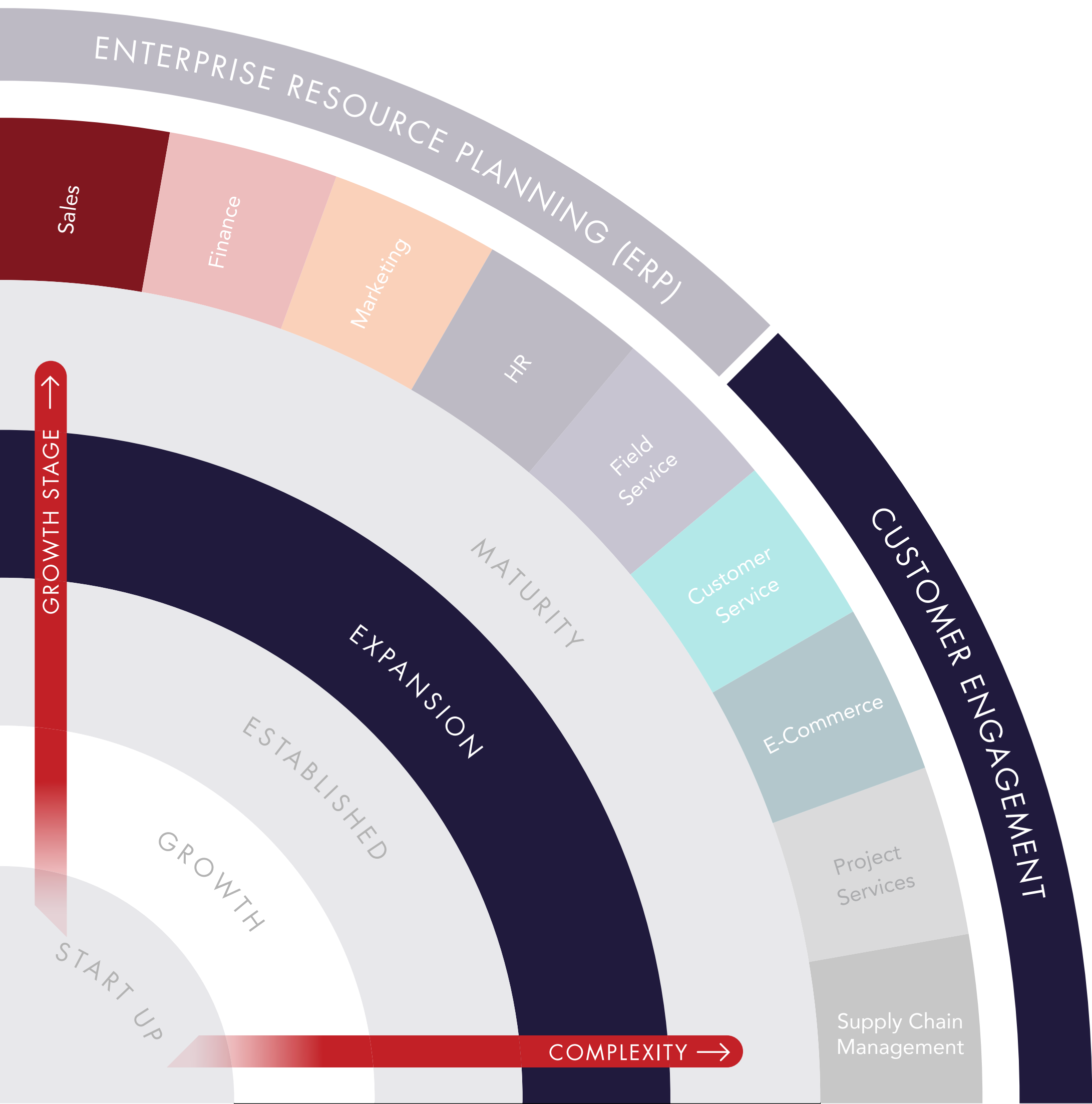
BENEFITS OF DYNAMICS

With its background in CRM, Dynamics is well set up to support sales teams to integrate with marketing and the rest of the business. The comprehensive customer views help salespeople to better understand clients' needs, engage them effectively, and drive more sales revenue.

Dynamics can incorporate information from LinkedIn Sales Navigator, marketing automation platforms, and other sources. It uses intelligent data to bring those customer insights into Office 365 software, making the sales lifecycle simple and familiar. And the underlying AI enables smarter selling, letting salespeople cross-sell and upsell more effectively by targeting the right customers at the right times.

NEXT: VIEW CAPABILITIES

< 1/2



SALES: EXPANSION



PAIN POINTS

6

Sales

Struggling to understand the preferences of the target market, and consider new and different channels to market

DYNAMICS CAPABILITIES

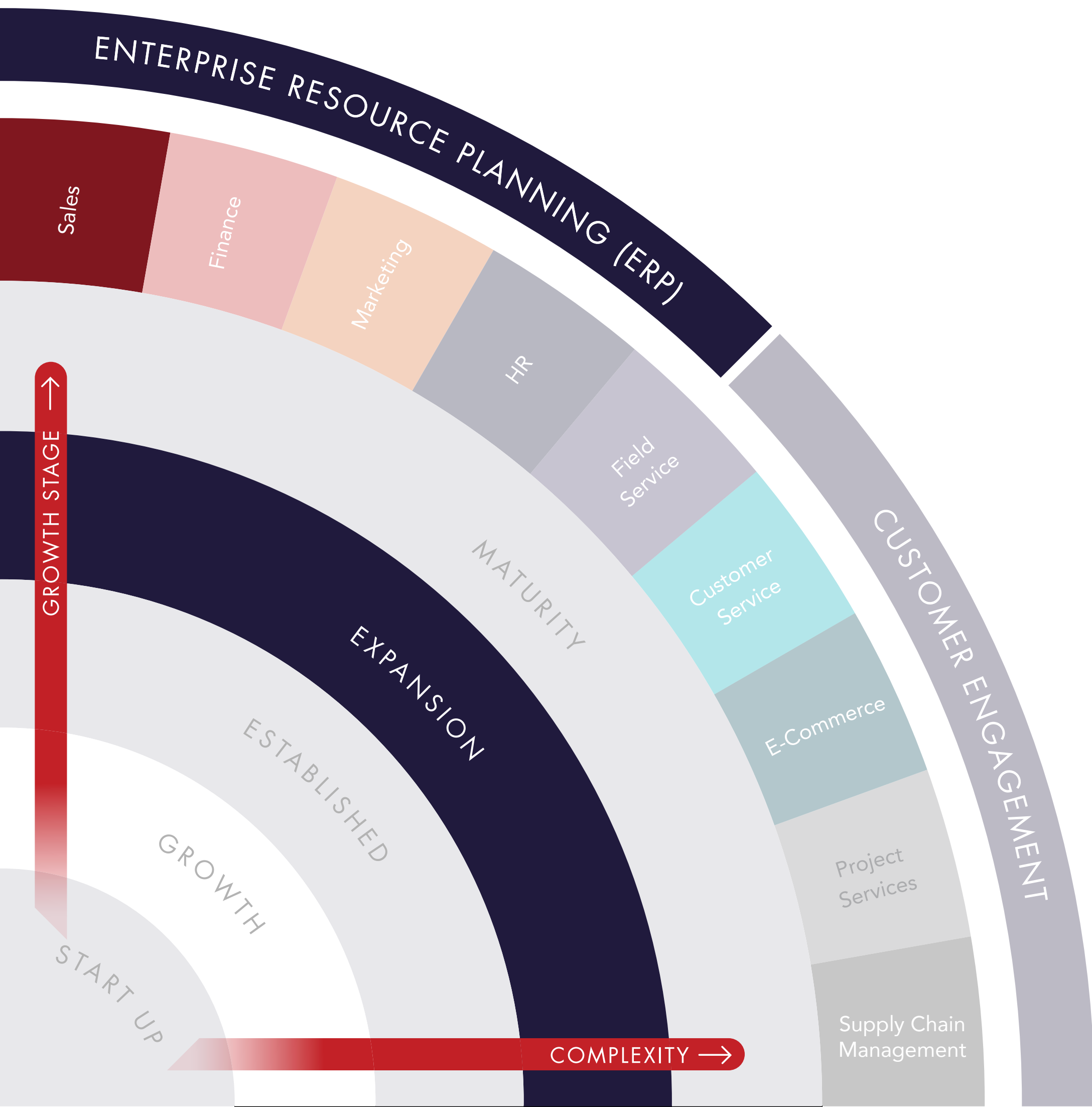
Lead management
Opportunity management
Pipeline forecasting
Sales automation
Quote management
Marketing lists
Email marketing

SKUs

Dynamics 365 Sales
Dynamics 365 Sales Insight
Dynamics 365 Product Visualise
Power BI



Click on the highlighted Functions to learn more ↓



EXPANSION

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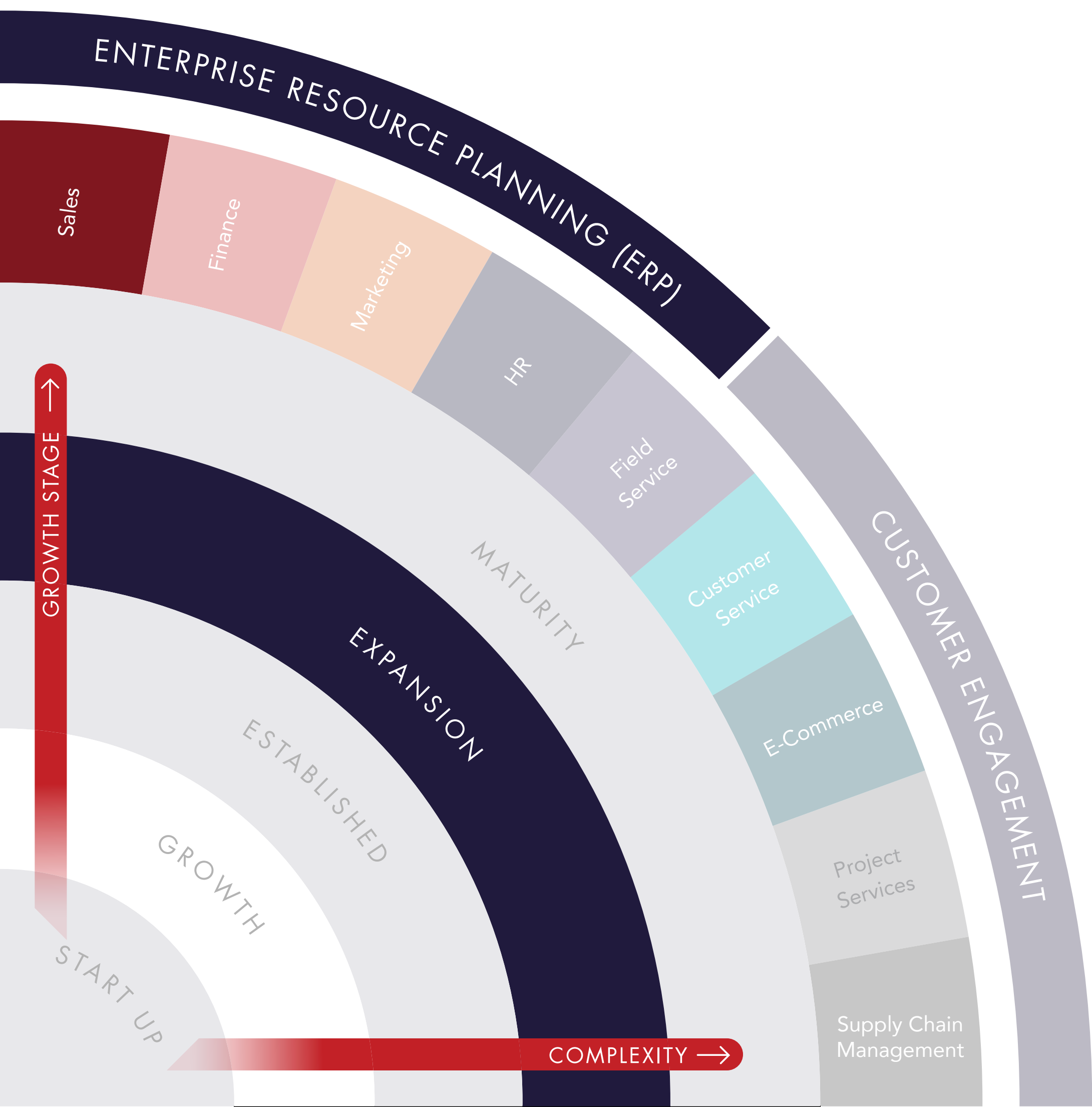
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SALES: EXPANSION



PAIN POINTS

7

Sales

Inability to manage expansion amidst higher costs, greater risks, and the limits of manual and labour-intensive processes

CHALLENGES

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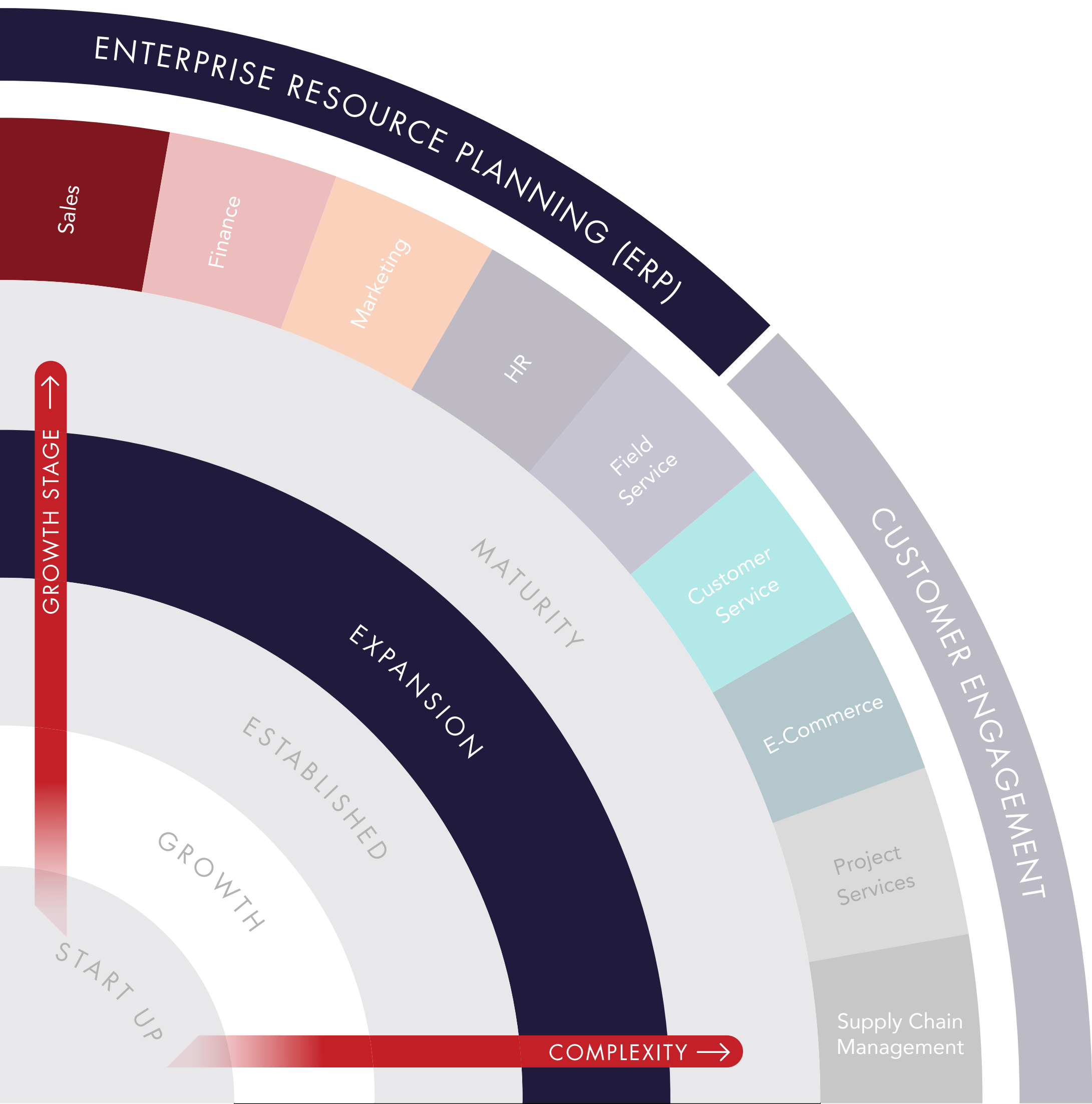
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NEXT: VIEW CAPABILITIES

< 1/2



SALES: EXPANSION



PAIN POINTS

7

Sales

Inability to manage expansion amidst higher costs, greater risks, and the limits of manual and labour-intensive processes

DYNAMICS CAPABILITIES

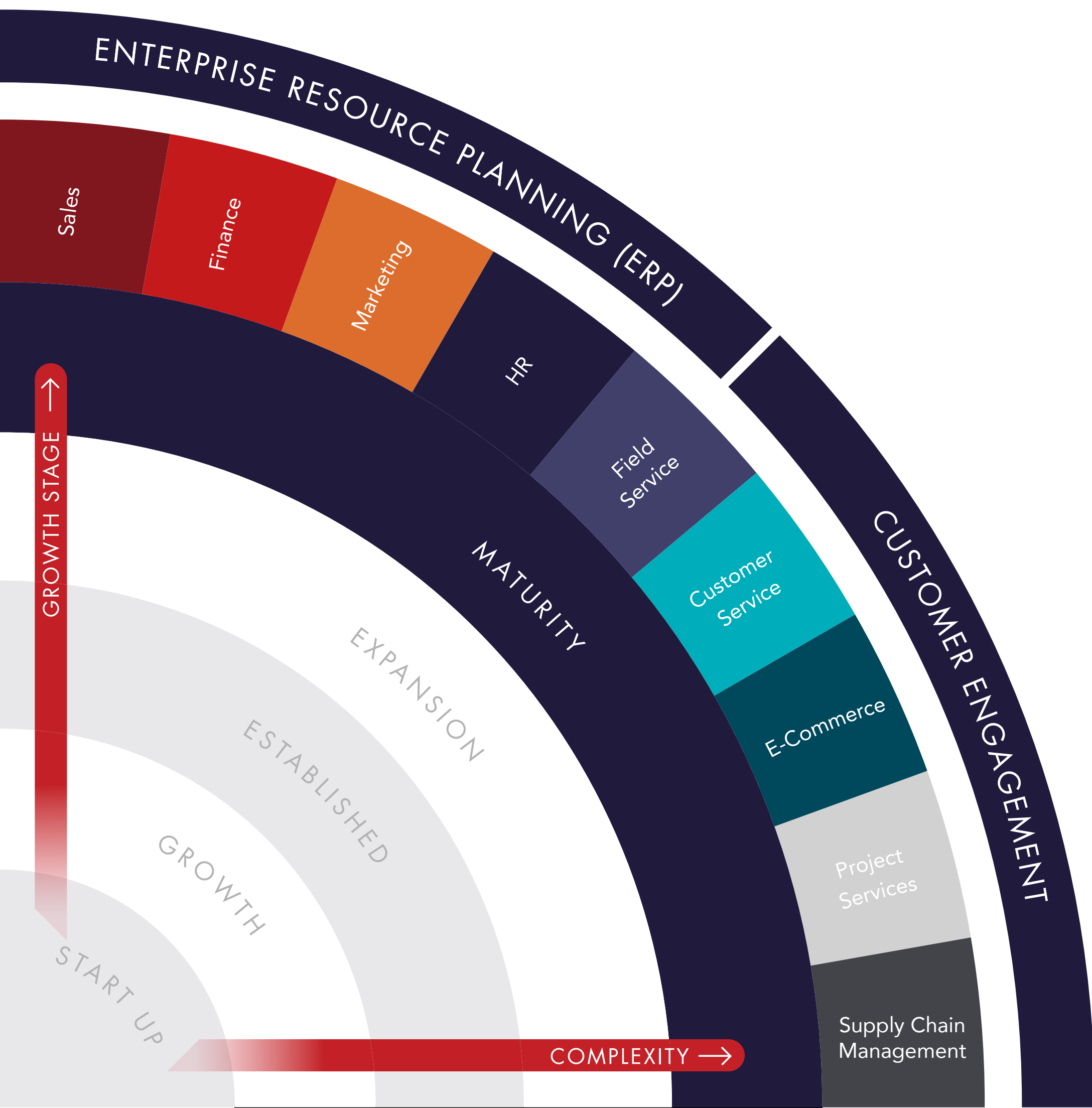
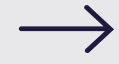
Lead management
Opportunity management
Pipeline forecasting
Sales automation
Quote management
Marketing lists
Email marketing

SKUs

Dynamics 365 Sales
Dynamics 365 Sales Insight
Dynamics 365 Product Visualise
Power BI



Click on a **Pain Point**
to filter the Functions



START UP

Large, mature businesses face a different set of challenges to those of newer competitors in their markets. For one thing, they often have a plethora of disparate, legacy systems which are deeply entrenched in their business processes. And their business objectives – cutting costs, digital transformation, differentiation – require them to work across siloed teams and systems.

Dynamics can provide a platform for that kind of big-picture, transformative action. It helps link up or replace legacy systems, and offers the kind of innovation that is sometimes harder to realise in a slow-moving business.

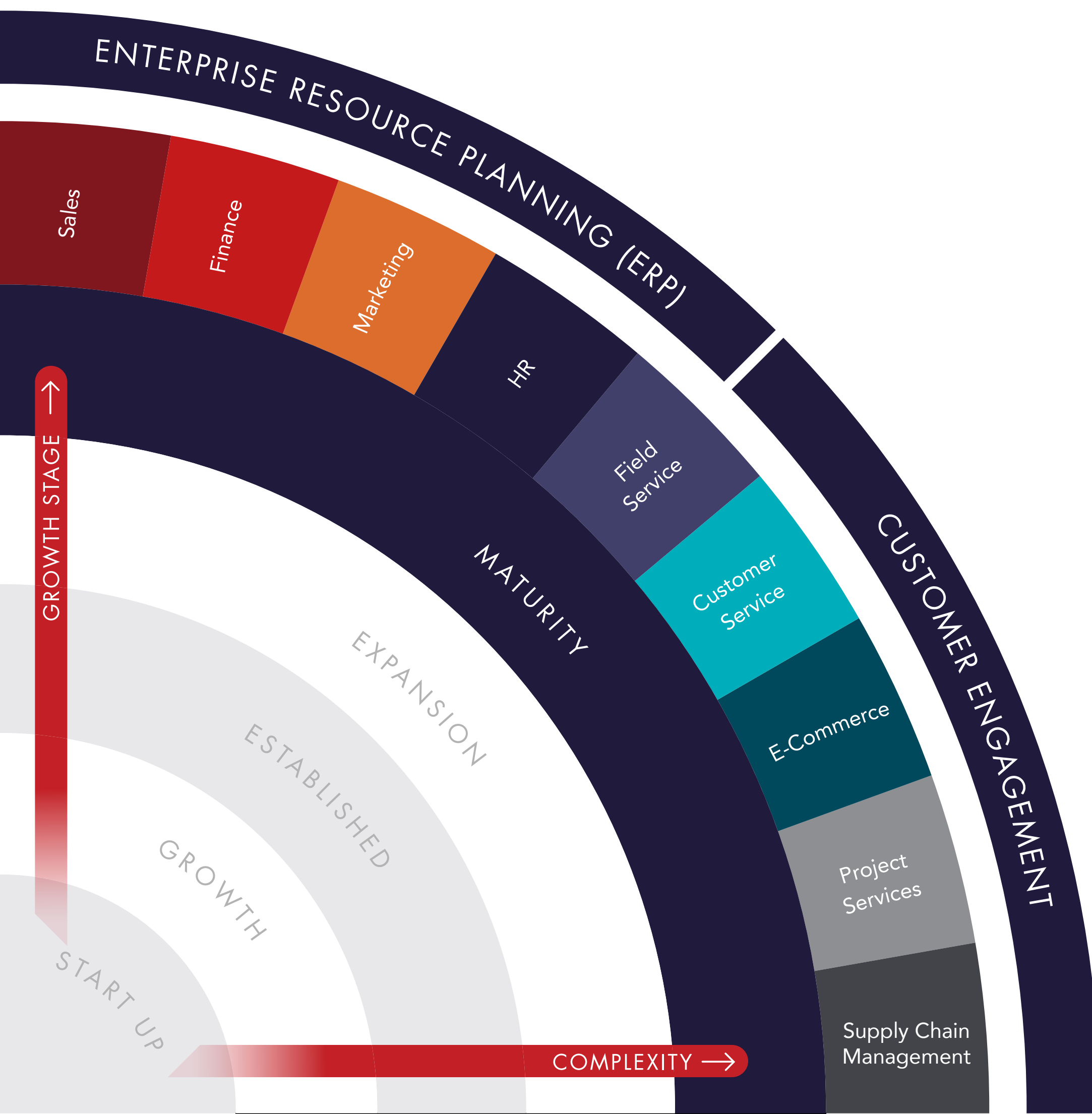
PAIN POINTS

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- 1 Inefficiencies and unnecessarily high operational costs across the business
- 2 Legacy systems which aren't integrated or powerful enough for modern needs
- 3 Lack of understanding about where to focus efforts, in order to attract new customers and nurture existing accounts
- 4 Difficulty adopting a working culture and development programme suited to a multi-generational business
- 5 A constant stream of new competitors in the market make it hard to maintain a differentiated customer offering
- 6 The challenge of exploiting new technologies such as AI and IoT



This Pain Point affects all functions of the business – it requires significant strategic digital transformation, not a quick fix. Dynamics is part of the solution, but we'd encourage you to contact us for a deeper discussion about how best to address the challenges with your customer. In the meantime, you can click on each function to explore how Dynamics can meet their specific needs.



MATURITY

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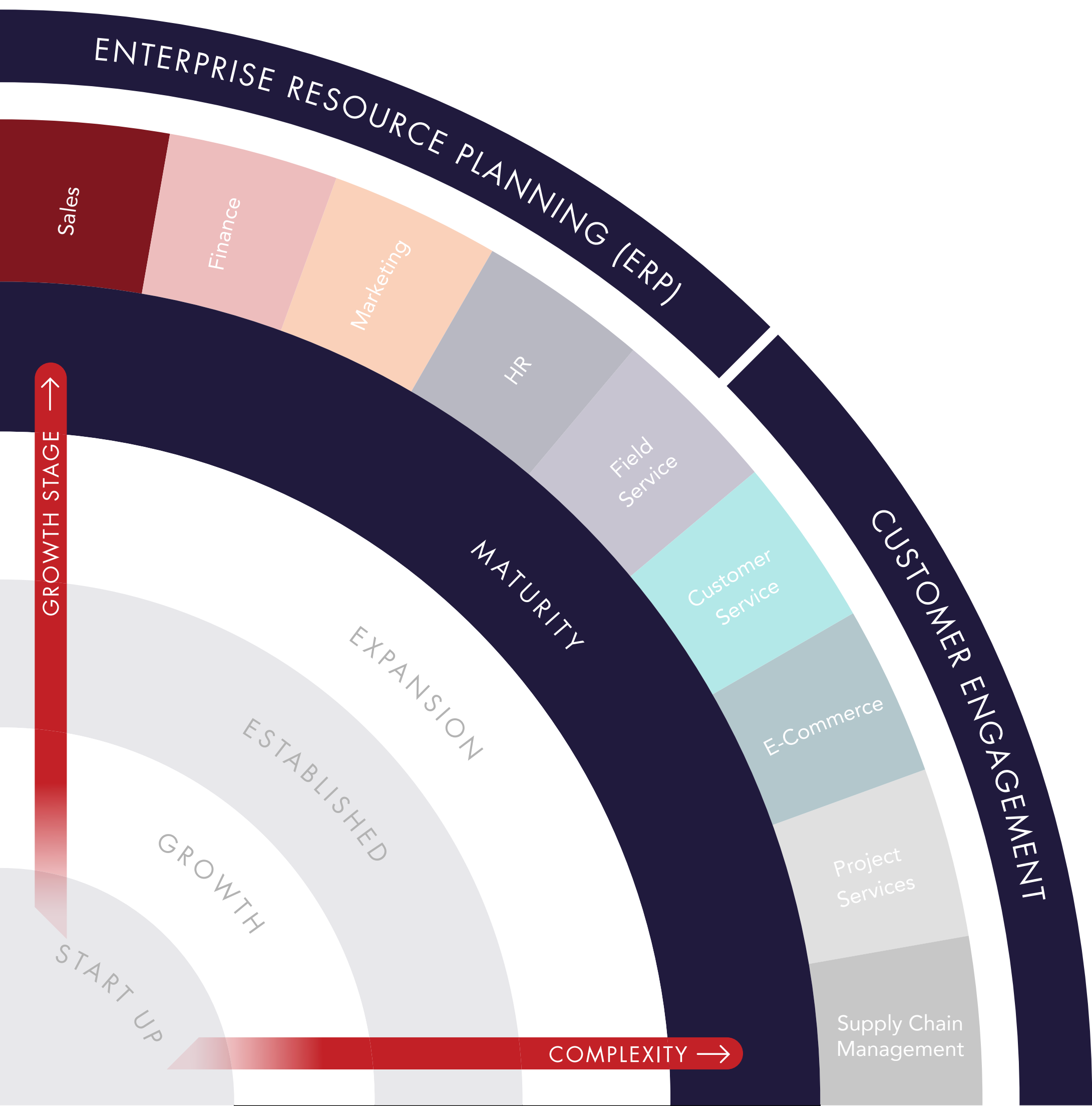
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SALES: MATURITY



PAIN POINTS

- 1 Sales**
Inefficiencies and unnecessarily high operational costs across the business
- 2 Sales**
Disparate systems are difficult to integrate, particularly during M&A
- 6 Sales**
The challenge of exploiting new technologies such as AI and IoT

CHALLENGES

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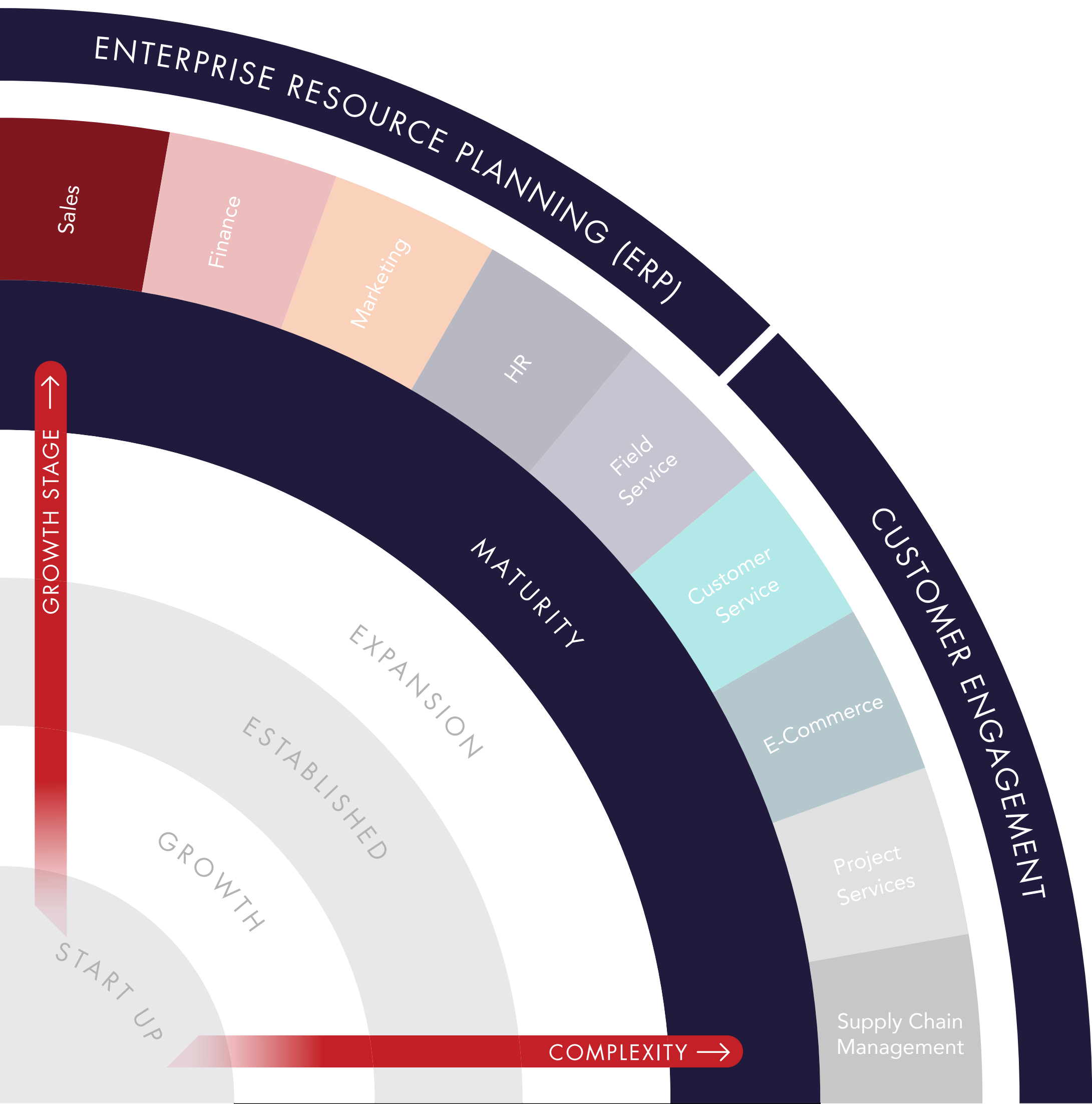
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NEXT: VIEW CAPABILITIES

< 1/2



SALES: MATURITY



PAIN POINTS

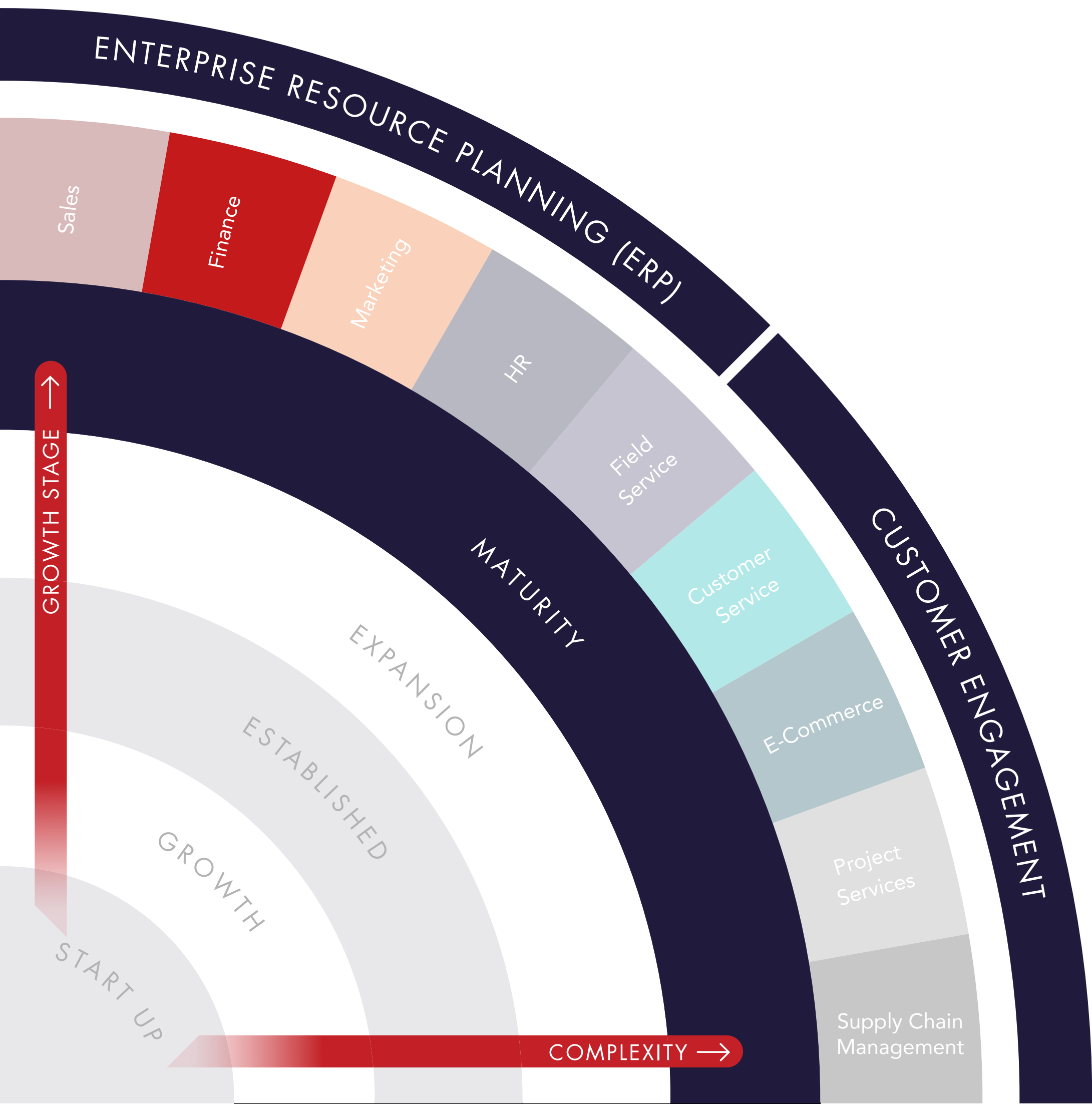
- 1 Sales**
Inefficiencies and unnecessarily high operational costs across the business
- 2 Sales**
Disparate systems are difficult to integrate, particularly during M&A
- 6 Sales:**
The challenge of exploiting new technologies such as AI and IoT

DYNAMICS CAPABILITIES

Lead management
Opportunity management
Pipeline forecasting
Sales automation
Quote management
Marketing lists
Email marketing

SKU_s

Dynamics 365 Sales
Dynamics 365 Sales Insight
Dynamics 365 Product Visualise
Power BI



FINANCE: MATURITY



PAIN POINTS

- 1

Finance
Inefficiencies and unnecessarily high operational costs across the business
- 2

Finance
Disparate systems are difficult to integrate, particularly during M&A
- 6

Finance
The challenge of exploiting new technologies such as AI and IoT

CHALLENGES

Many finance teams still struggle with time-consuming tasks, sometimes having to integrate lots of different databases manually – even for basic processes like billing. It’s difficult to share information across departments for order processing, which results in longer lead times. And despite the wealth of financial data available, they might not have the reporting tools to get a look at the bigger picture for the business – which can hamper strategic decision-making.

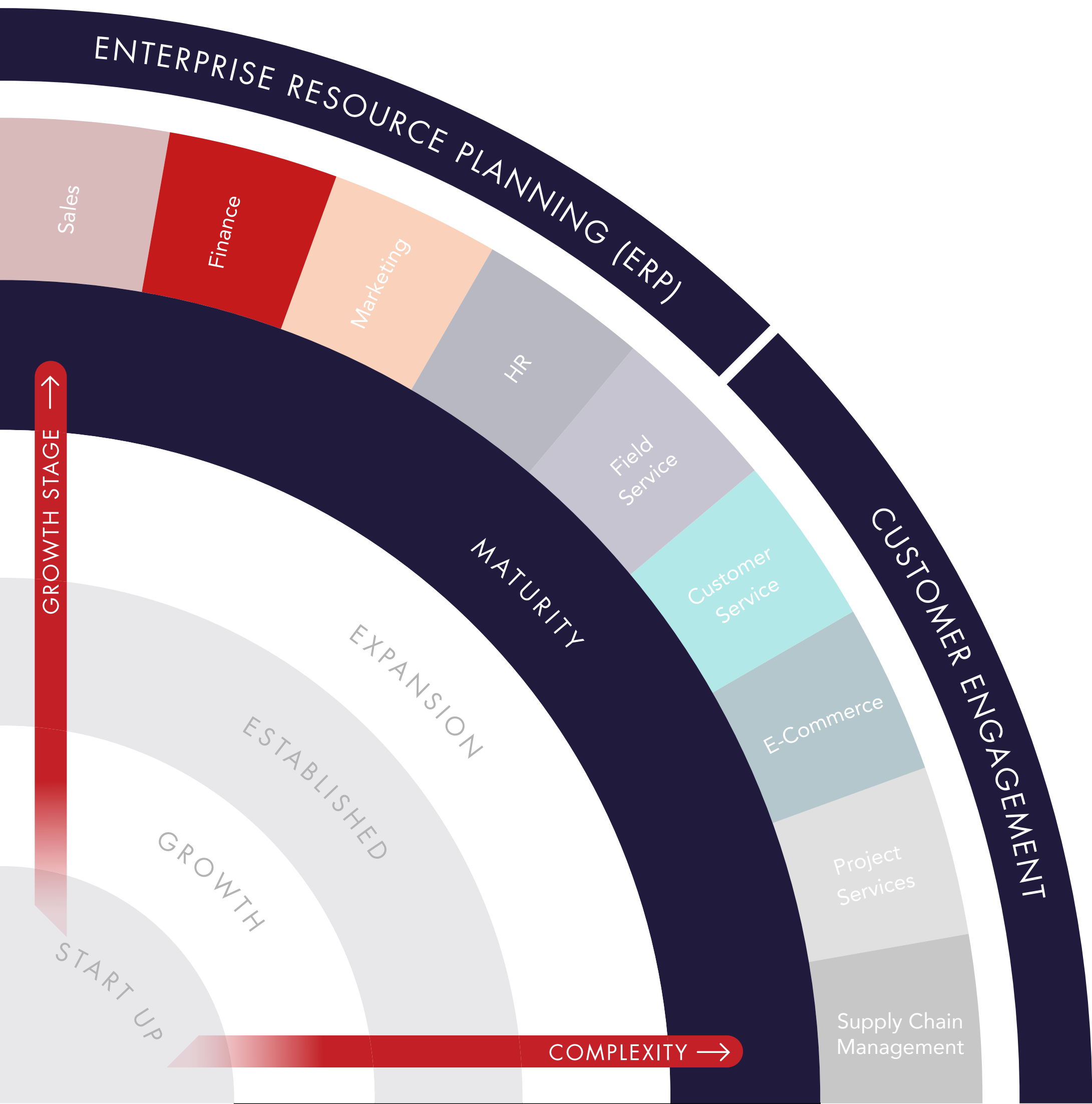
This can be even harder if your clients offer subscription-based services rather than discrete products; managing subscriptions is a drain on finance teams’ time if they don’t have automation or digital tools at hand.

BENEFITS OF DYNAMICS

Dynamics can help finance teams maximise their profitability and automate financial operations to make their lives much easier and help them focus on more strategic work. It allows them to monitor performance in real time, predict future outcomes and make decisions to drive business growth.

Intelligent data insights can offer predictive recommendations, to increase profit and cashflow, while Dynamics also makes it easier to cut operational costs with process automation and more efficient financial planning.

And for clients with subscription services, automated recurring billing through Dynamics saves time and effort for the finance team.



FINANCE: MATURITY



PAIN POINTS

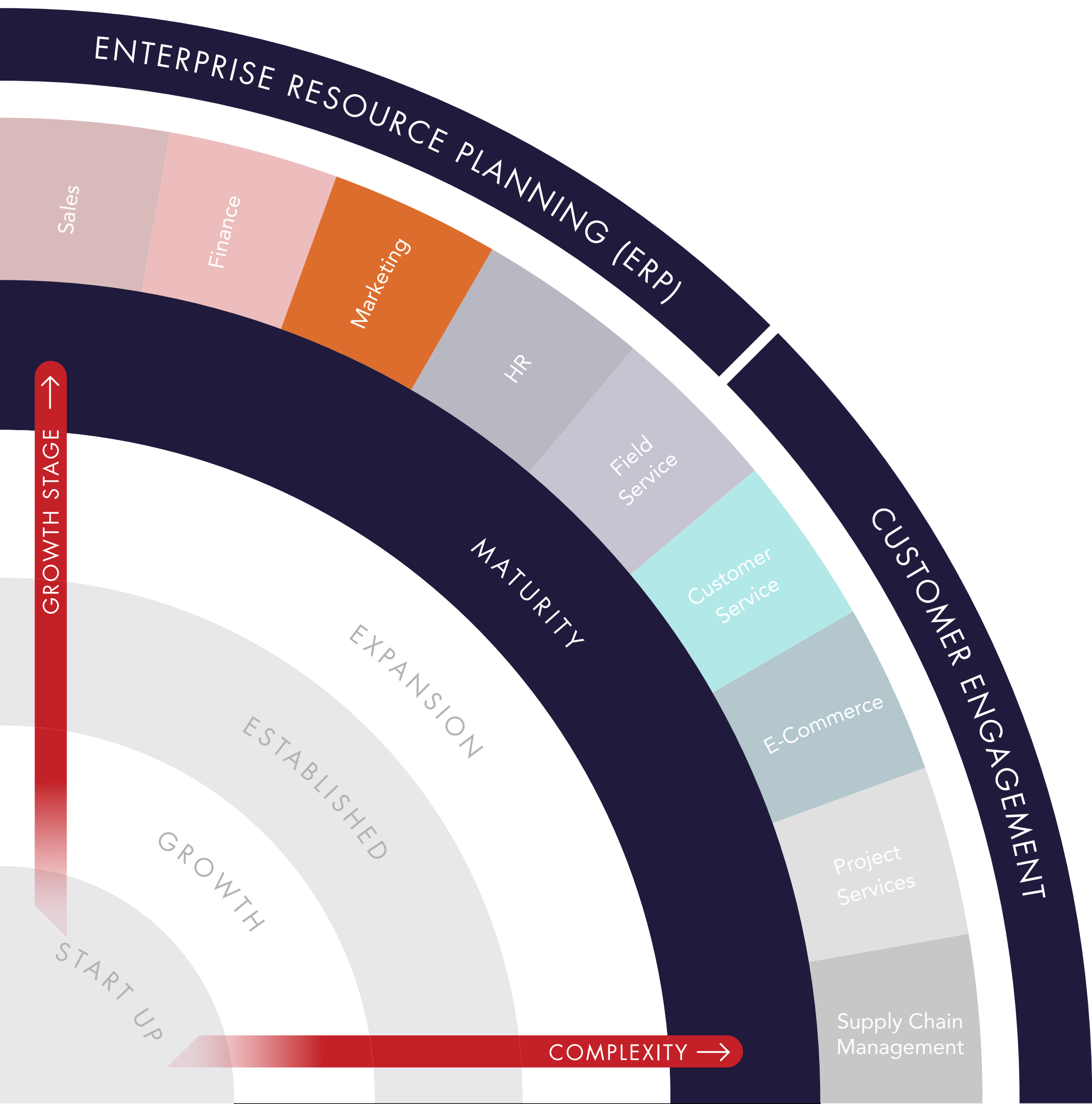
- 1** Finance
Inefficiencies and unnecessarily high operational costs across the business
- 2** Finance
Disparate systems are difficult to integrate, particularly during M&A
- 6** Finance
The challenge of exploiting new technologies such as AI and IoT

DYNAMICS CAPABILITIES

Credit management
Treasury
Accounts receivable
Accounts payable
Budgeting
Cost management
Fixed assets
Payroll tax
External compliance certification

SKU_s

Dynamics 365 for Finance



MARKETING: MATURITY



PAIN POINTS

- 1

Marketing
Inefficiencies and unnecessarily high operational costs across the business
- 2

Marketing
Disparate systems are difficult to integrate, particularly during M&A
- 6

Marketing
The challenge of exploiting new technologies such as AI and IoT

CHALLENGES

One of the biggest challenges for marketing departments is getting accurate, up-to-date data and making sense of how to use it effectively. They may have a large customer database that doesn't yield any useful insights from, or too few staff to consistently communicate with their network.

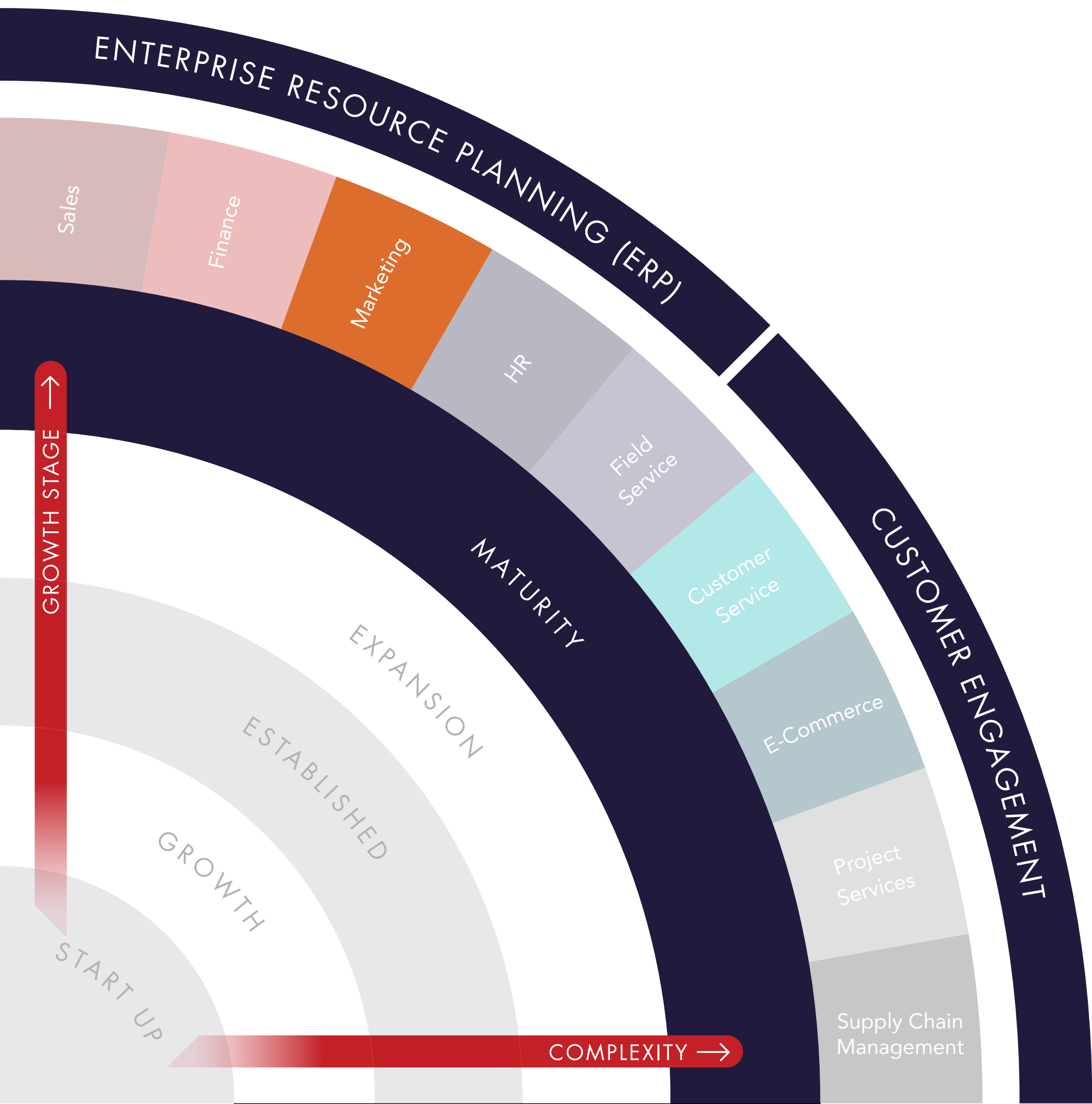
This makes it difficult to send timely information to the right customers, hampering cross-sell and upsell efforts, and opening the door for competitors. For those customers they do communicate with, marketers without a platform like Dynamics may struggle to monitor email open rates or link customer touchpoints to sales data. It's very hard to track results or understand whether they are adding value.

BENEFITS OF DYNAMICS

Dynamics for Marketing helps teams plan and deliver campaigns; increase customer demand for their products and services; create, track and nurture leads; and personalise communications for prospects and customers across channels.

It helps marketers align with their sales teams and create a single view of the prospect, delivering a seamless customer experience.

And by targeting the right customers and optimising marketing resources, it can ultimately help marketers improve the ROI of their activities.



MARKETING: MATURITY



PAIN POINTS

- 1

Marketing
Inefficiencies and unnecessarily high operational costs across the business
- 2

Marketing
Disparate systems are difficult to integrate, particularly during M&A
- 6

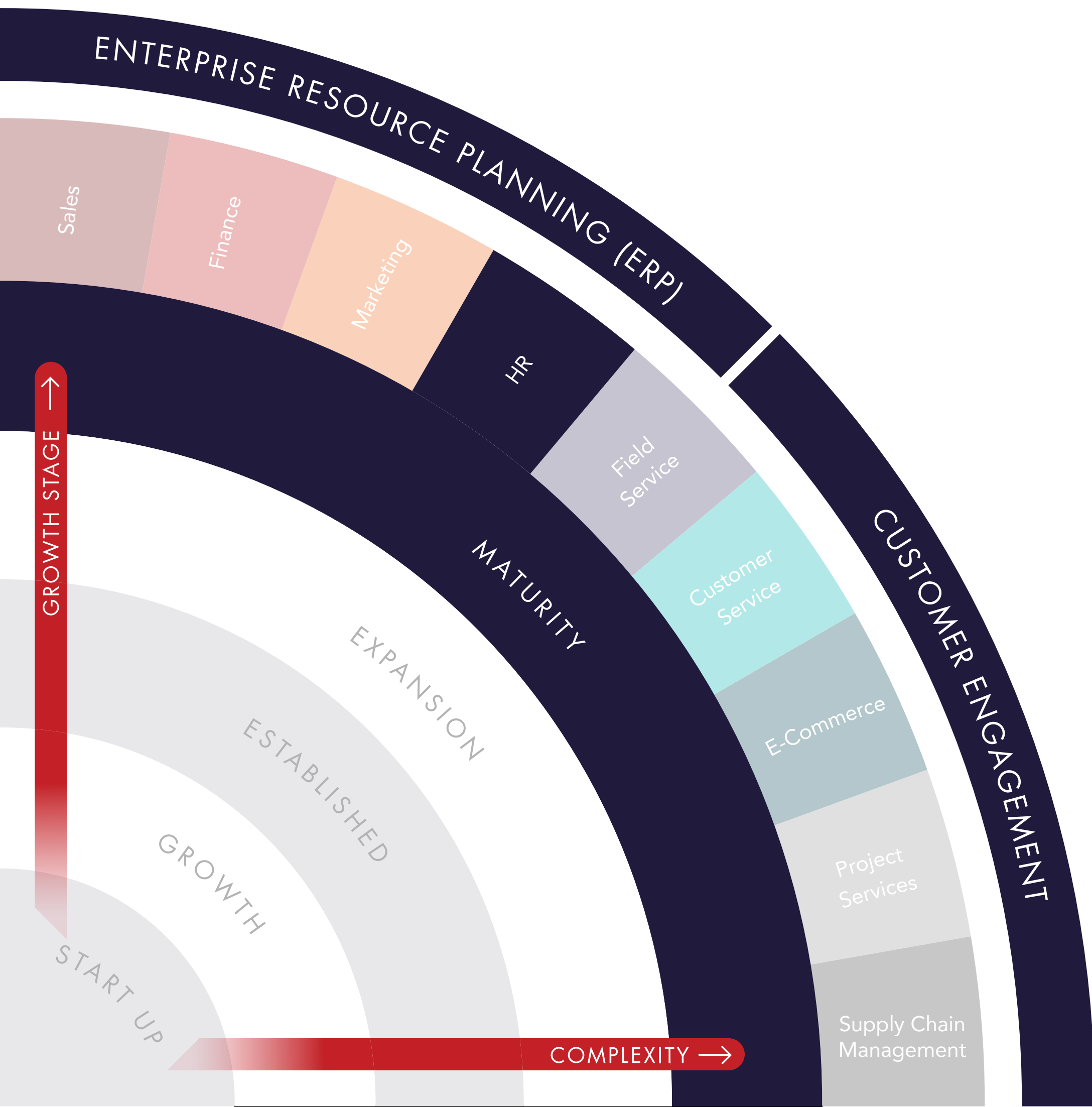
Marketing
The challenge of exploiting new technologies such as AI and IoT

DYNAMICS CAPABILITIES

Email marketing
Lead scoring
Market segmentation
Customer journeys
Event management
Connector for LinkedIn
Lead generation forms

SKU_s

Dynamics 365 Marketing
Dynamics 365 Customer Insight
Power Apps



HR: MATURITY



PAIN POINTS

- 1** **HR**
Inefficiencies and unnecessarily high operational costs across the business
- 2** **HR**
Disparate systems are difficult to integrate, particularly during M&A
- 6** **HR**
The challenge of exploiting new technologies such as AI and IoT

CHALLENGES

As a business grows, its HR processes and systems become increasingly complex. HR managers need to report on employees' wellbeing, learning and development, absences, annual leave, and much more.

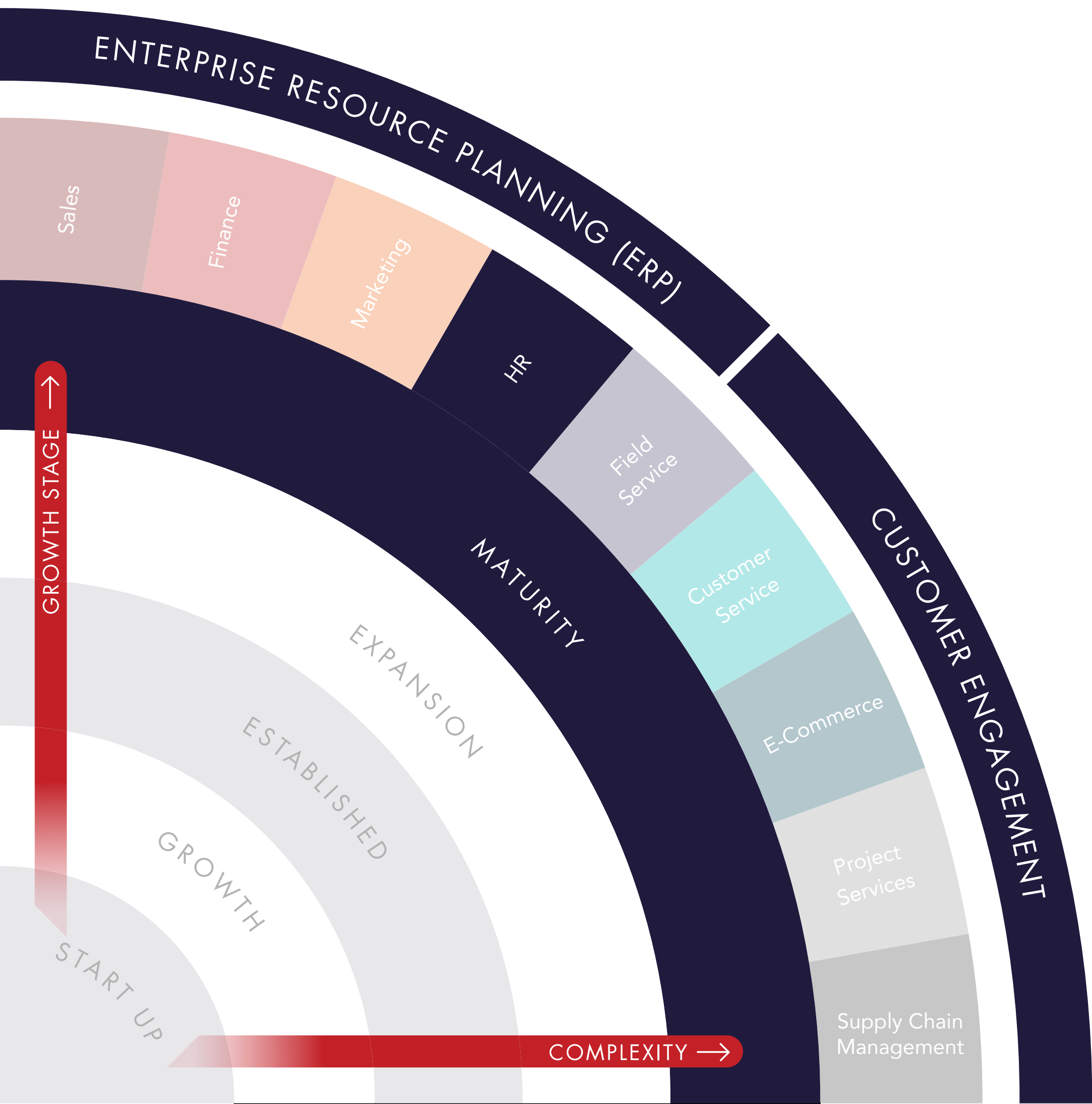
That's on top of trying to make recruitment and onboarding more efficient, centralising core HR processes, and giving managers the tools and training they need to manage their team members.

BENEFITS OF DYNAMICS

Dynamics helps deliver an HR solution that takes better care of your people, so they in turn can take better care of your business. It enables HR self-service for employees, provides a platform for training and certification, ensures security, privacy and compliance, and empowers managers to address concerns effectively.

At the same time, Dynamics can support HR teams to simplify reporting with rich dashboards, helping leaders make informed decisions. By identifying and engaging the right candidates, businesses can feel confident that they're bringing in the right people to support future growth.

NEXT: VIEW CAPABILITIES



HR: MATURITY



PAIN POINTS

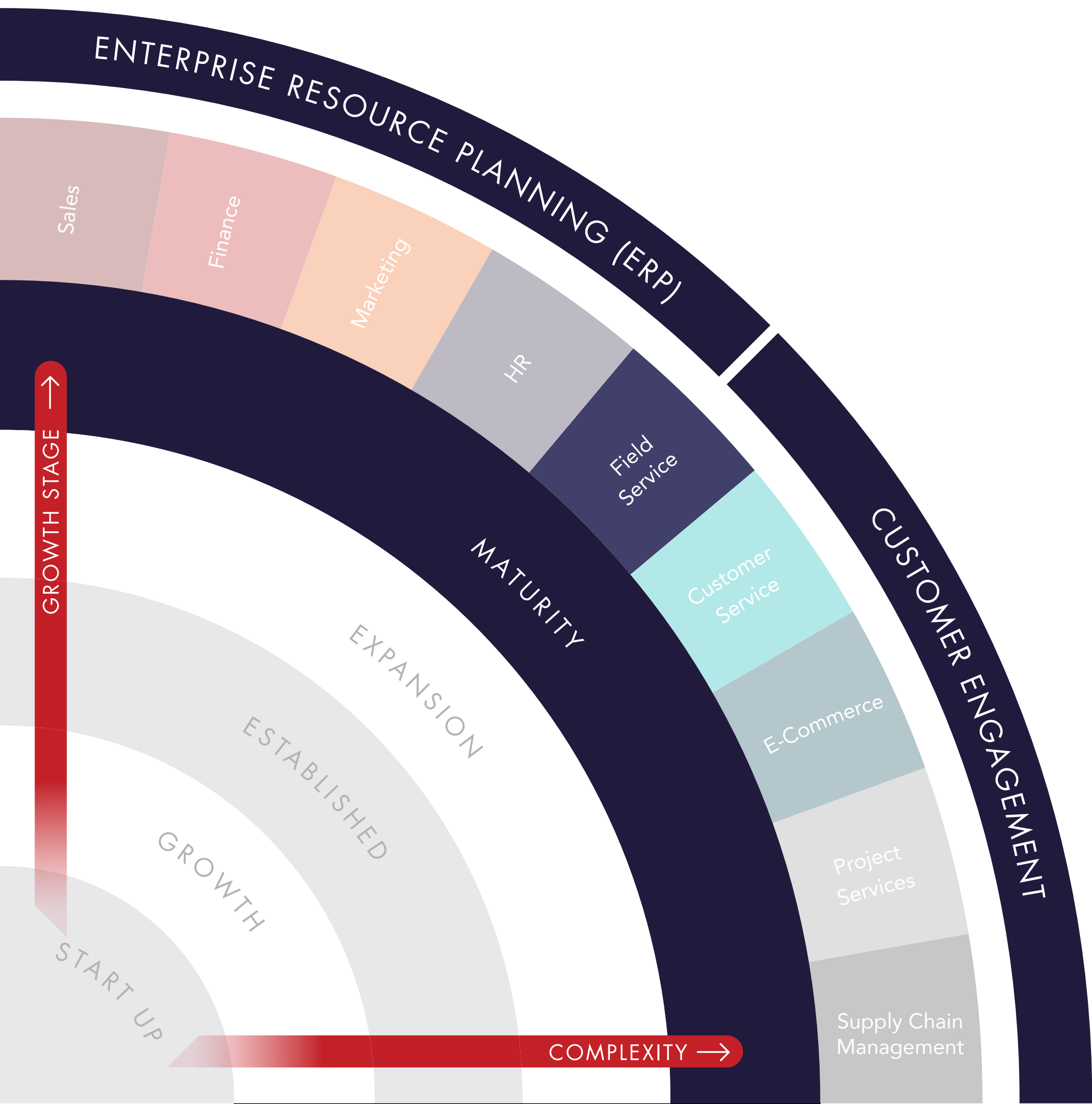
- 1 **HR**
Inefficiencies and unnecessarily high operational costs across the business
- 2 **HR**
Disparate systems are difficult to integrate, particularly during M&A
- 6 **HR**
The challenge of exploiting new technologies such as AI and IoT

DYNAMICS CAPABILITIES

People management
Compensation management
Compliance
Leave and absence
Benefits
Learning and development
Employee development
Employee self-service
Hiring and offer management

SKU_s

Dynamics 365 Human Resources



FIELD SERVICE: MATURITY



PAIN POINTS

- 1 Field Service**
Inefficiencies and unnecessarily high operational costs across the business
- 2 Field Service**
Disparate systems are difficult to integrate, particularly during M&A
- 6 Field Service**
The challenge of exploiting new technologies such as AI and IoT

CHALLENGES

When you're out solving customer issues in the field, you need the information and the flexibility to come up with solutions on the fly. Many teams don't have access to the right tools to support technicians, or effective customer insight collection systems, and that makes it very difficult to prioritise faults or offer a triage service. Agents are forced to be reactive, rather than proactively finding fixes in advance.

Without accurate, real-time data, co-ordinators can also struggle to schedule field agents with the right skillsets at the right times, and customers don't always receive appropriate levels of communication throughout the process. All of this can have a negative impact on customer experiences.

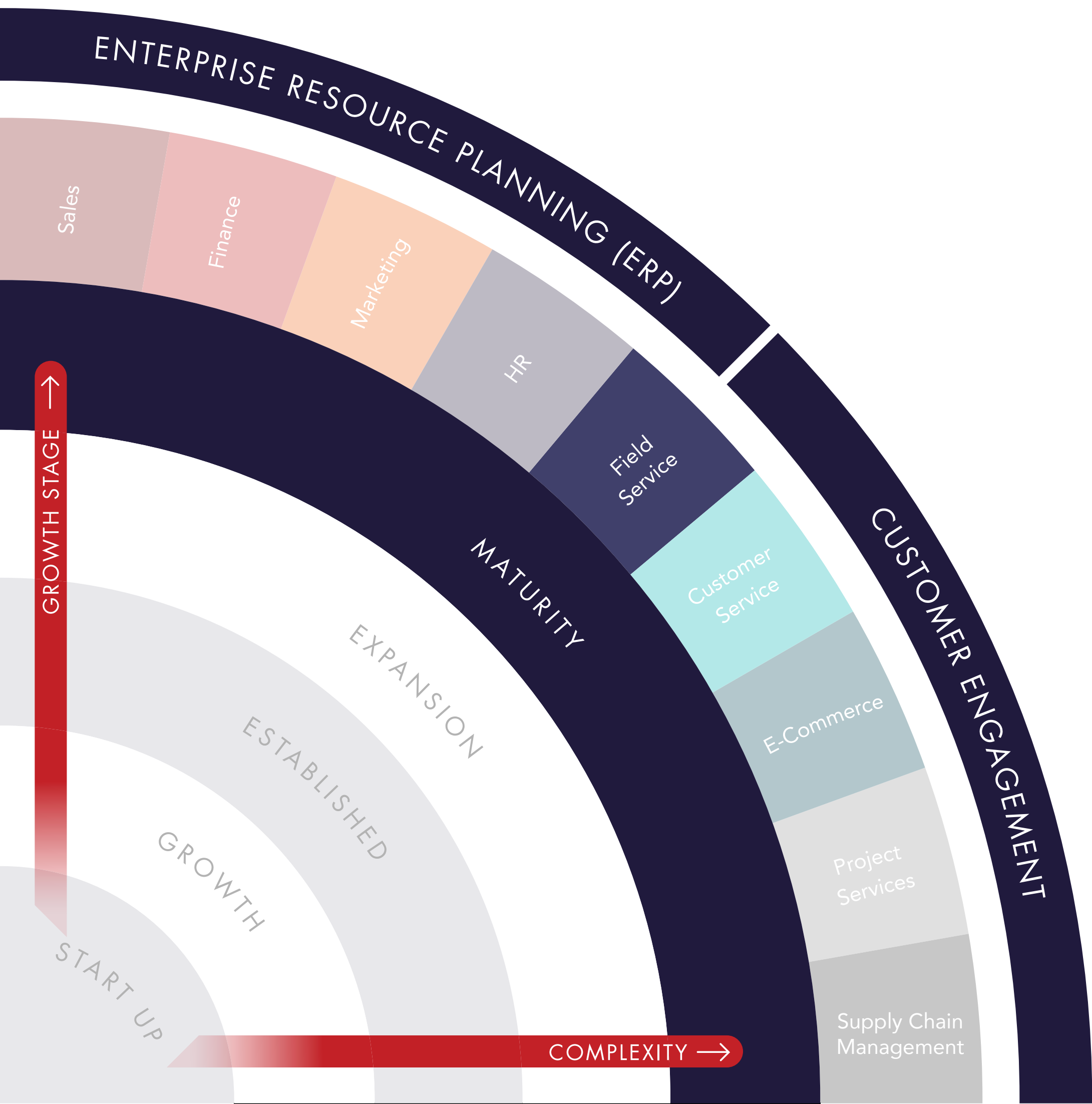
BENEFITS OF DYNAMICS

With effective information management through Dynamics, field service teams can get the right person to the right place at the right time with the right skills and equipment. That's thanks to effective scheduling processes and powerful analytics, making it easier to predict, detect and resolve issues in advance.

Rather than finger-in-the-air prioritisation, it's much easier for technicians and coordinators to prioritise and be proactive, so that customer issues are fixed first time. Which all leads to happier customers and more efficient operations.

NEXT: VIEW CAPABILITIES

< 1/2



FIELD SERVICE: MATURITY



PAIN POINTS

- 1 Field Service**
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- 2 Field Service**
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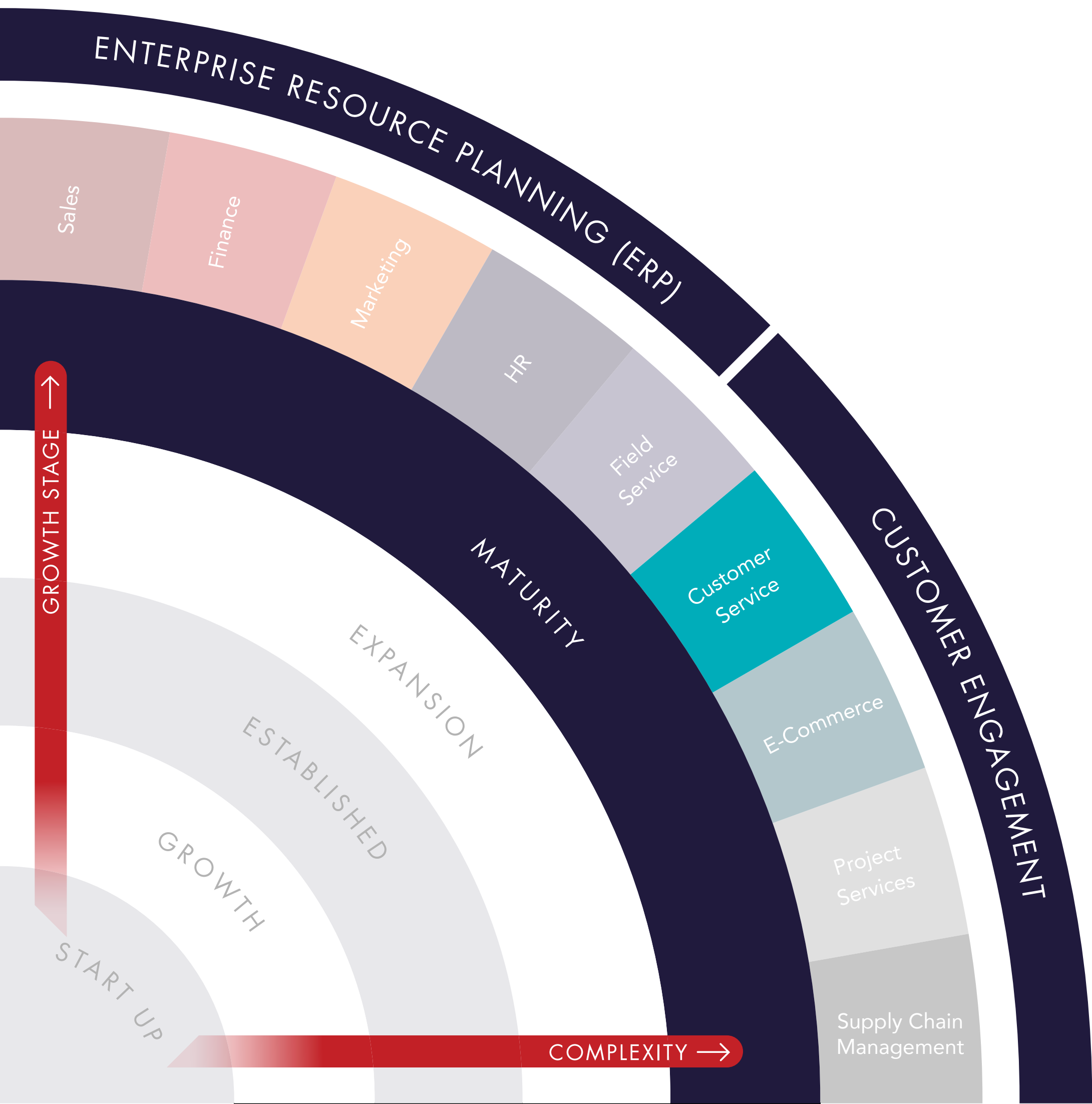
DYNAMICS CAPABILITIES

Work orders
Service agreements
Schedule and dispatch
Schedule board
Inventory management
Mobile productivity
Connected devices

SKU_s

Dynamics 365 Field Service
Dynamics 365 Remote Assistant
Power Apps





CUSTOMER SERVICE: MATURITY



PAIN POINTS

- 1** Customer Service
Inefficiencies and unnecessarily high operational costs across the business
- 2** Customer Service
Disparate systems are difficult to integrate, particularly during M&A
- 6** Customer Service
The challenge of exploiting new technologies such as AI and IoT

CHALLENGES

To meet high customer expectations, businesses are now under pressure to deliver omnichannel customer service. But for many, it's impossible to track when a customer has previously interacted with the company, even if they spoke to a different agent just minutes before.

Customer sales advisors may not have access to real-time, accurate information, or have collaboration tools in place to get quick answers from other departments.

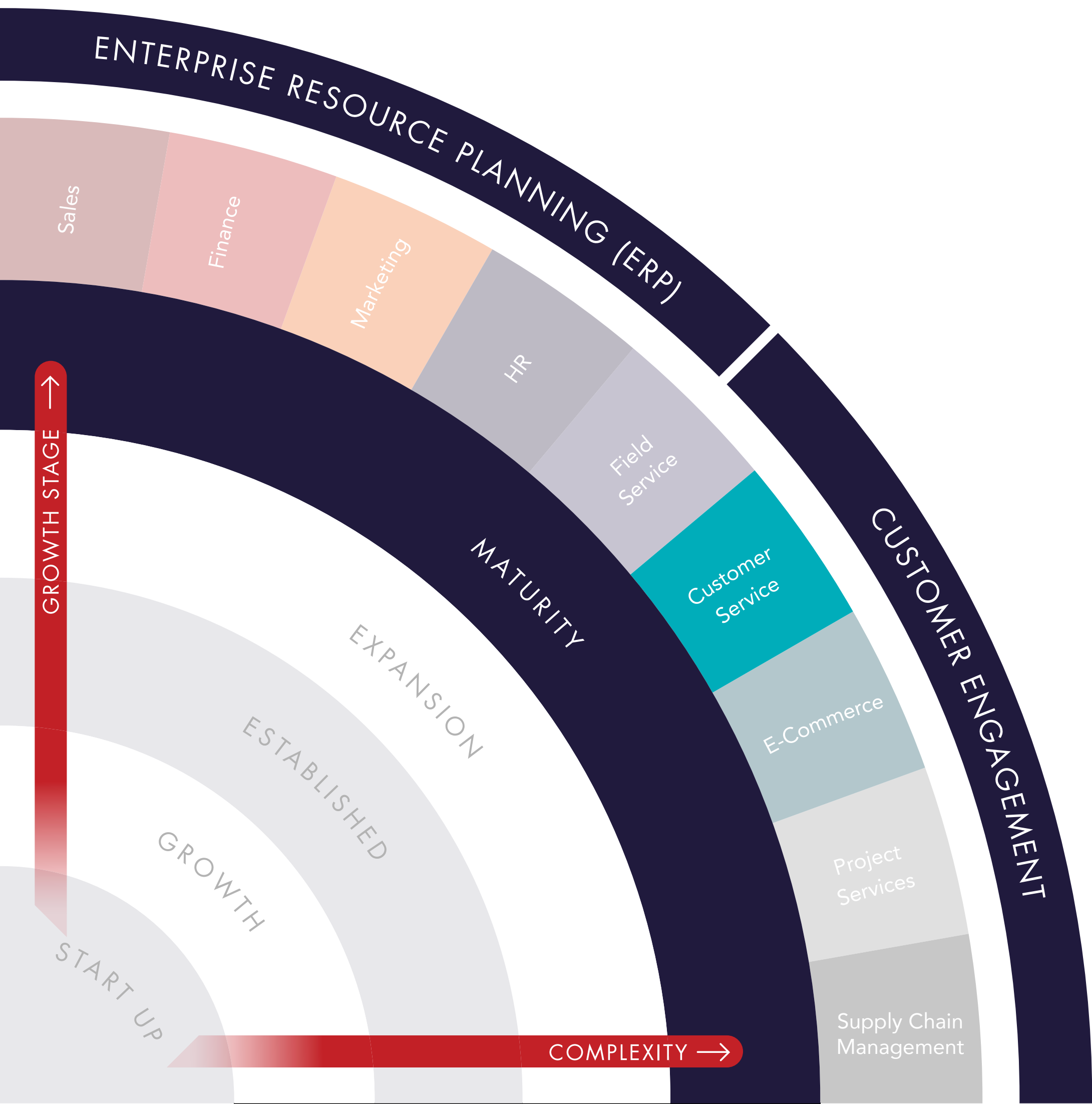
And when customer calls surge, they sometimes lack the call handling insight to resource their teams properly, or have no way to route customers through an interactive voice response (IVR).

BENEFITS OF DYNAMICS

The CRM capabilities within Dynamics, underpinned by AI, are an ideal platform to help customer service teams deliver seamless, personalised experiences. Dynamics brings all customer touchpoints into one comprehensive view, so agents are empowered to solve problems with a full picture of the situation.

NEXT: VIEW CAPABILITIES

< 1/2



CUSTOMER SERVICE: MATURITY



PAIN POINTS

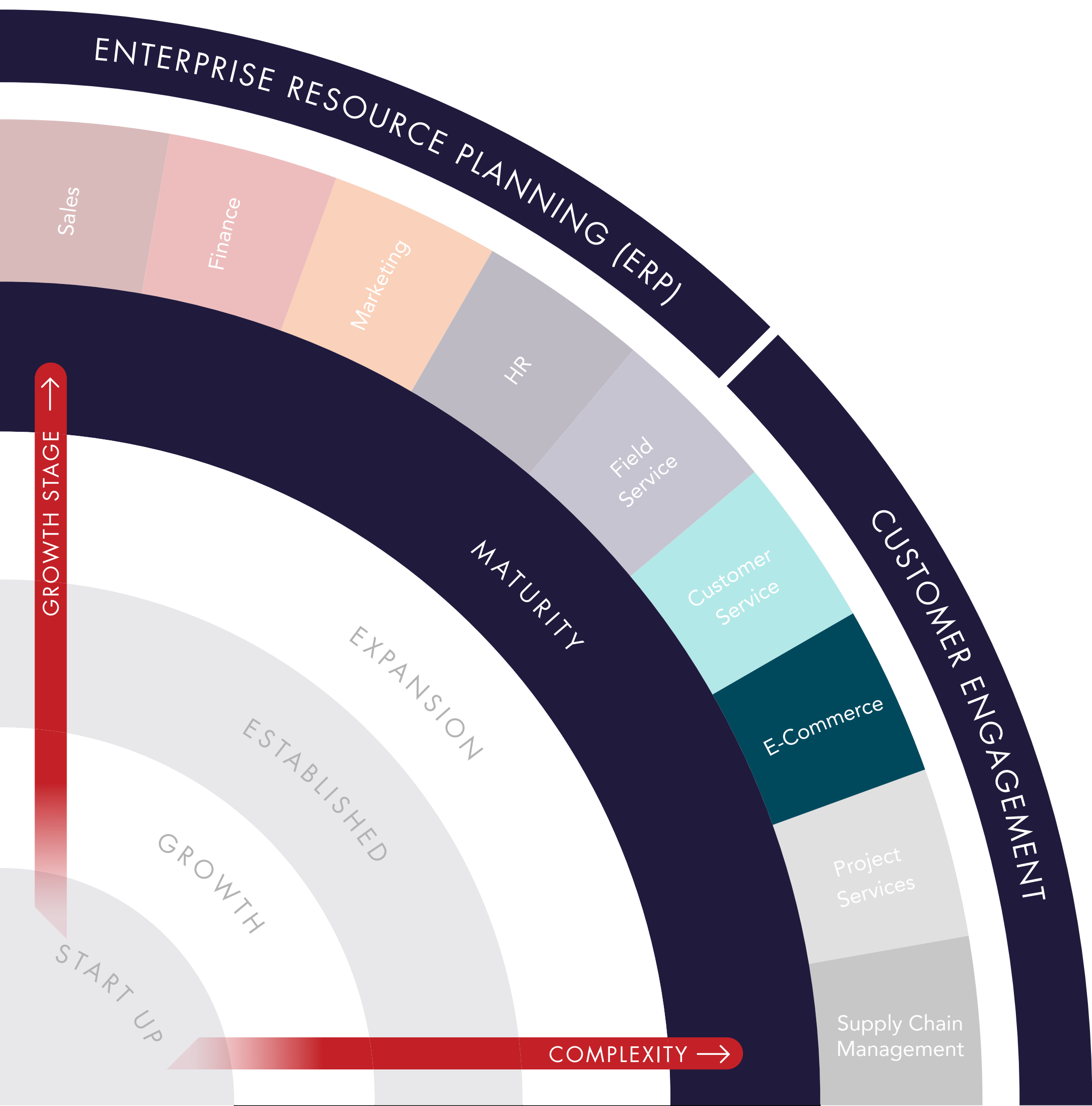
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Disparate systems are difficult to integrate, particularly during M&A
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The challenge of exploiting new technologies such as AI and IoT

DYNAMICS CAPABILITIES

Case management
SLA support
Account management
Service automation
Customer web portals
Contract management
Service analytics

SKU_s

Dynamics 365 Customer Service Enterprise
Power Apps
Power BI
Dynamics 365 Unified Service Desk



E-COMMERCE: MATURITY



PAIN POINTS

- 1** E-Commerce
Inefficiencies and unnecessarily high operational costs across the business
- 2** E-Commerce
Disparate systems are difficult to integrate, particularly during M&A
- 6** E-Commerce
The challenge of exploiting new technologies such as AI and IoT

CHALLENGES

E-commerce is a business of fine margins – every click counts. Customers need to see the same content and promotions across different channels, for example, which is hard without a single, integrated platform. Equally, it's a challenge to fulfil orders efficiently online, and to offer flexible delivery models (particularly for smaller organisations).

Businesses also struggle with data: they need to predict customer demand and report on real-time stock levels, as well as needing accurate customer data so they can personalise offers.

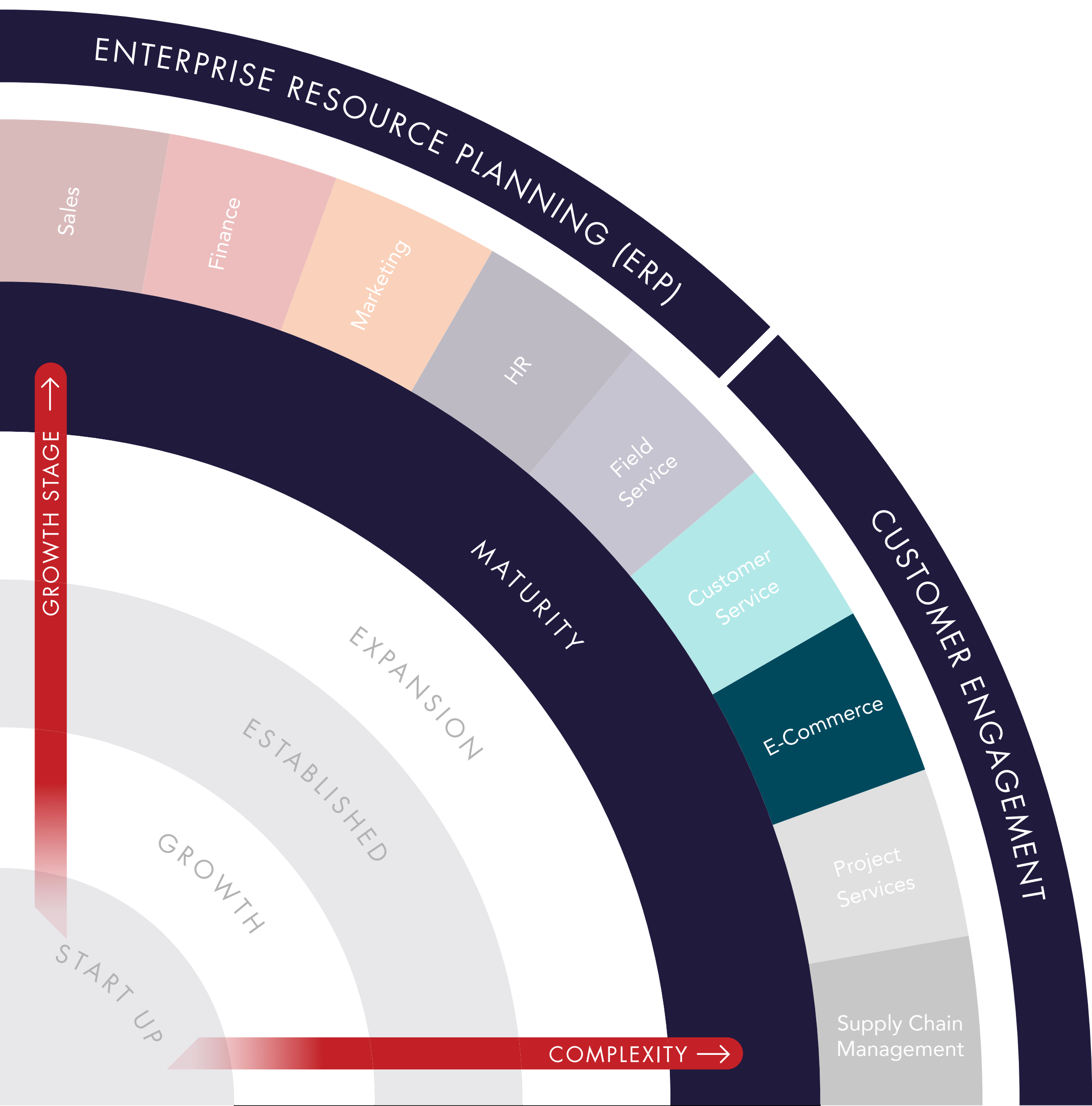
BENEFITS OF DYNAMICS

E-commerce teams can use Dynamics to create exceptional shopping experiences. The platform's built-in AI and machine learning can help to integrate and optimise back-office processes, streamlining your retail operations. It is also extremely scalable, lending itself to growing businesses or those expanding into new territories and markets.

The single view of the customer that Dynamics facilitates gives businesses the option to serve customers when, how, and where they want – on any device. E-commerce teams can view each customer on a unified platform, which brings all customer touchpoints together.

NEXT: VIEW CAPABILITIES

< 1/2



E-COMMERCE: MATURITY



PAIN POINTS

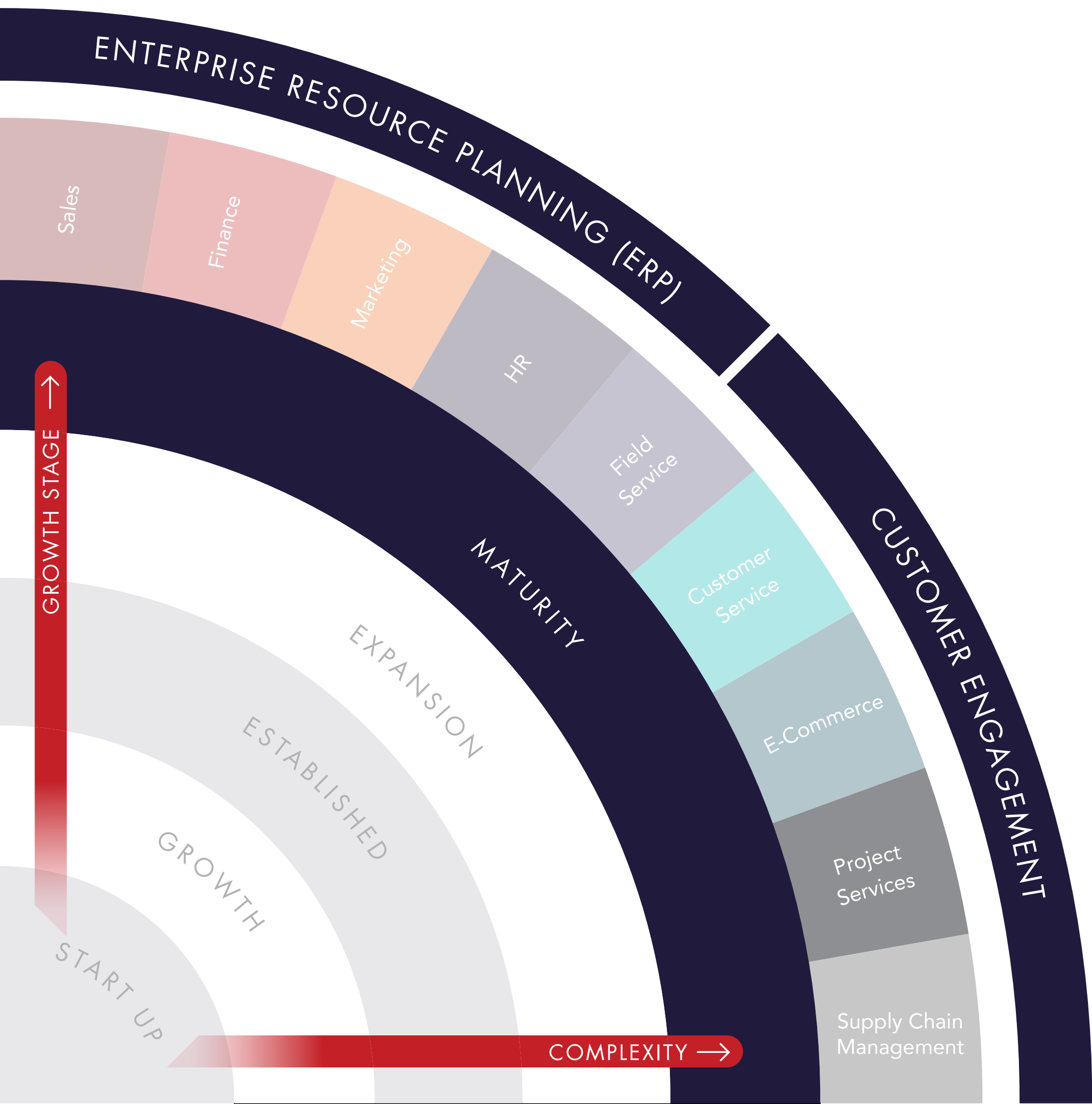
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- 2** E-Commerce
Disparate systems are difficult to integrate, particularly during M&A
- 6** E-Commerce
The challenge of exploiting new technologies such as AI and IoT

DYNAMICS CAPABILITIES

Pricing
Stores management
Shift management
Employee management
Customer loyalty
Replenishment
Product categories
Sales channel management

SKU_s

Dynamics 365 E-Commerce
Power Apps



PROJECT SERVICES: MATURITY



PAIN POINTS

- 1

Project Services
Inefficiencies and unnecessarily high operational costs across the business
- 2

Project Services
Disparate systems are difficult to integrate, particularly during M&A
- 6

Project Services
The challenge of exploiting new technologies such as AI and IoT

CHALLENGES

The bigger your organisation, the more complex your project management. But there are challenges faced by businesses of all sizes in this area – lack of effective project tools, insufficient reporting capabilities, too much time spent manually inputting data into spreadsheets.

It's difficult for project managers to schedule resources and people if they don't have the right tools, and ultimately to assess profitability without proper reporting software.

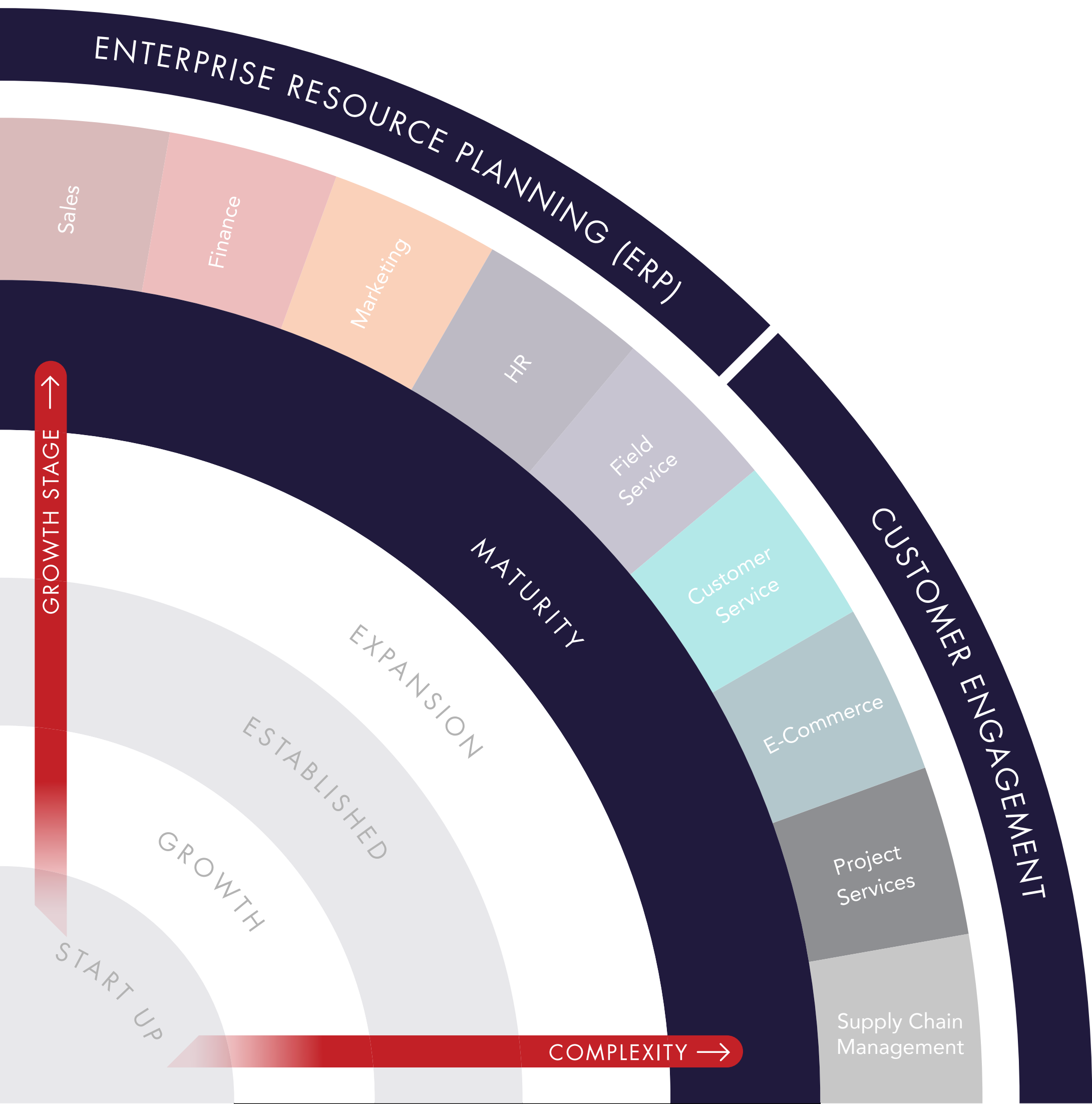
In addition to all that, project service teams also have the challenge of sharing information with customers and contractors, which can pose a security risk.

BENEFITS OF DYNAMICS

Dynamics makes it much easier for your project services teams to deliver profitable projects, on time and within budget. Managers can use Dynamics' built-in intelligence to prioritise project-based sales opportunities, to anticipate demand, and to resource properly in the future.

Dynamics also provides project professionals with the collaboration tools to succeed, which in turn boosts employee productivity and keeps utilisation high. The platform makes work more customer-centric, consistent and predictable.

NEXT: VIEW CAPABILITIES



PROJECT SERVICES: MATURITY



PAIN POINTS

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Inefficiencies and unnecessarily high operational costs across the business
- 2** Project Services
Disparate systems are difficult to integrate, particularly during M&A
- 6** Project Services
The challenge of exploiting new technologies such as AI and IoT

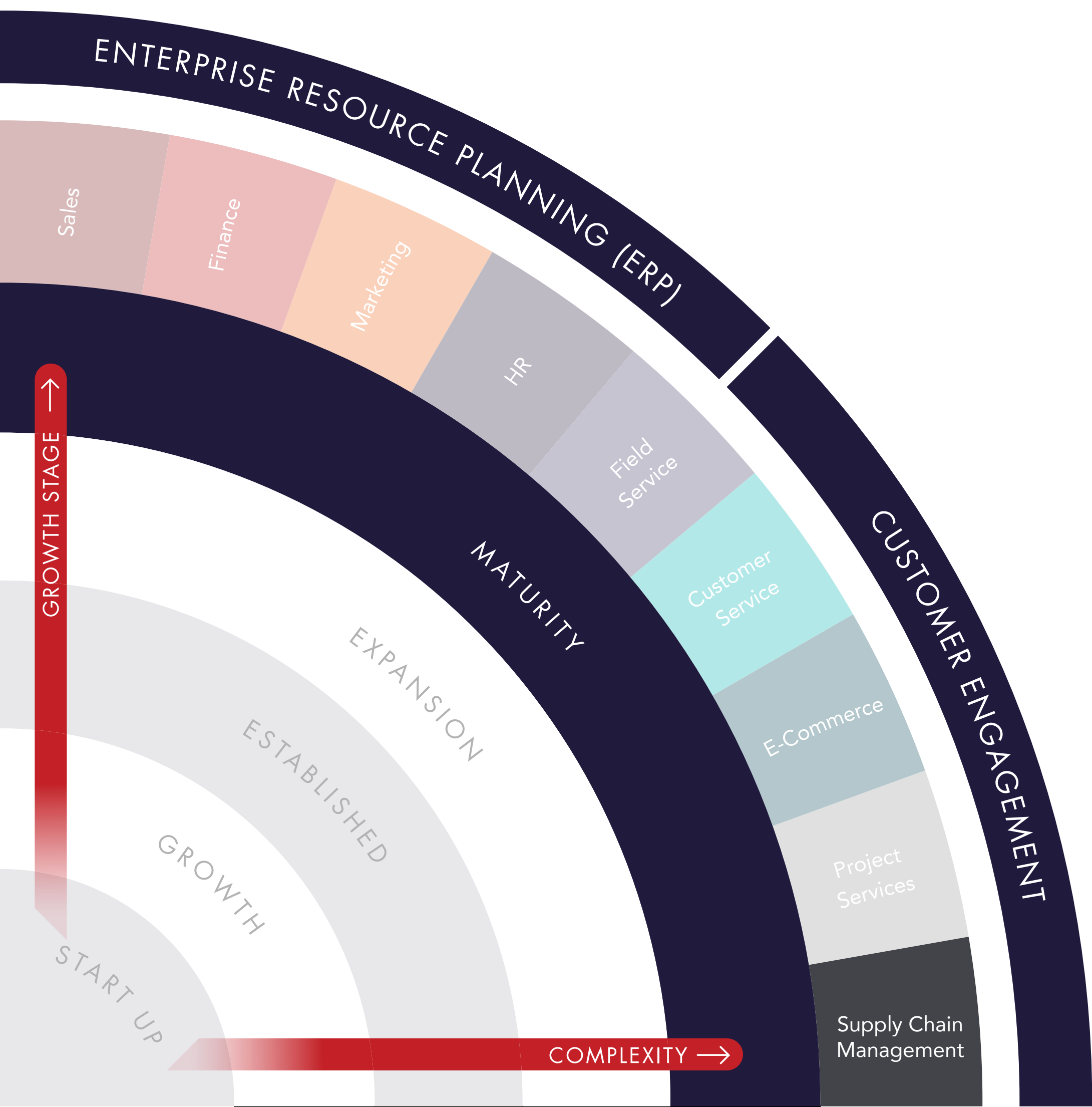
DYNAMICS CAPABILITIES

Resource management
Project contracting
Project planning
Resource scheduling
Manage work hours
Project hours
Customer billing

SKUs

Dynamics 365 Project Service Automation
Dynamics 365 Planning Services





SUPPLY CHAIN MANAGEMENT: MATURITY



PAIN POINTS

1

Supply Chain Management

Inefficiencies and unnecessarily high operational costs across the business

2

Supply Chain Management

Disparate systems are difficult to integrate, particularly during M&A

6

Supply Chain Management

The challenge of exploiting new technologies such as AI and IoT

CHALLENGES

Without real-time information, it's difficult to efficiently manage logistics and supply chain operations. Maintenance ends up being reactive rather than proactive, stock levels have to be recorded manually (an error-prone process), and customers end up being given inaccurate delivery times. Without end-to-end visibility of the supply chain and warehousing operations, improvements can only be based on intuition.

Many businesses also have disparate or disconnected procurement systems, particularly as they grow across territories. This makes it difficult to spot cost inefficiencies.

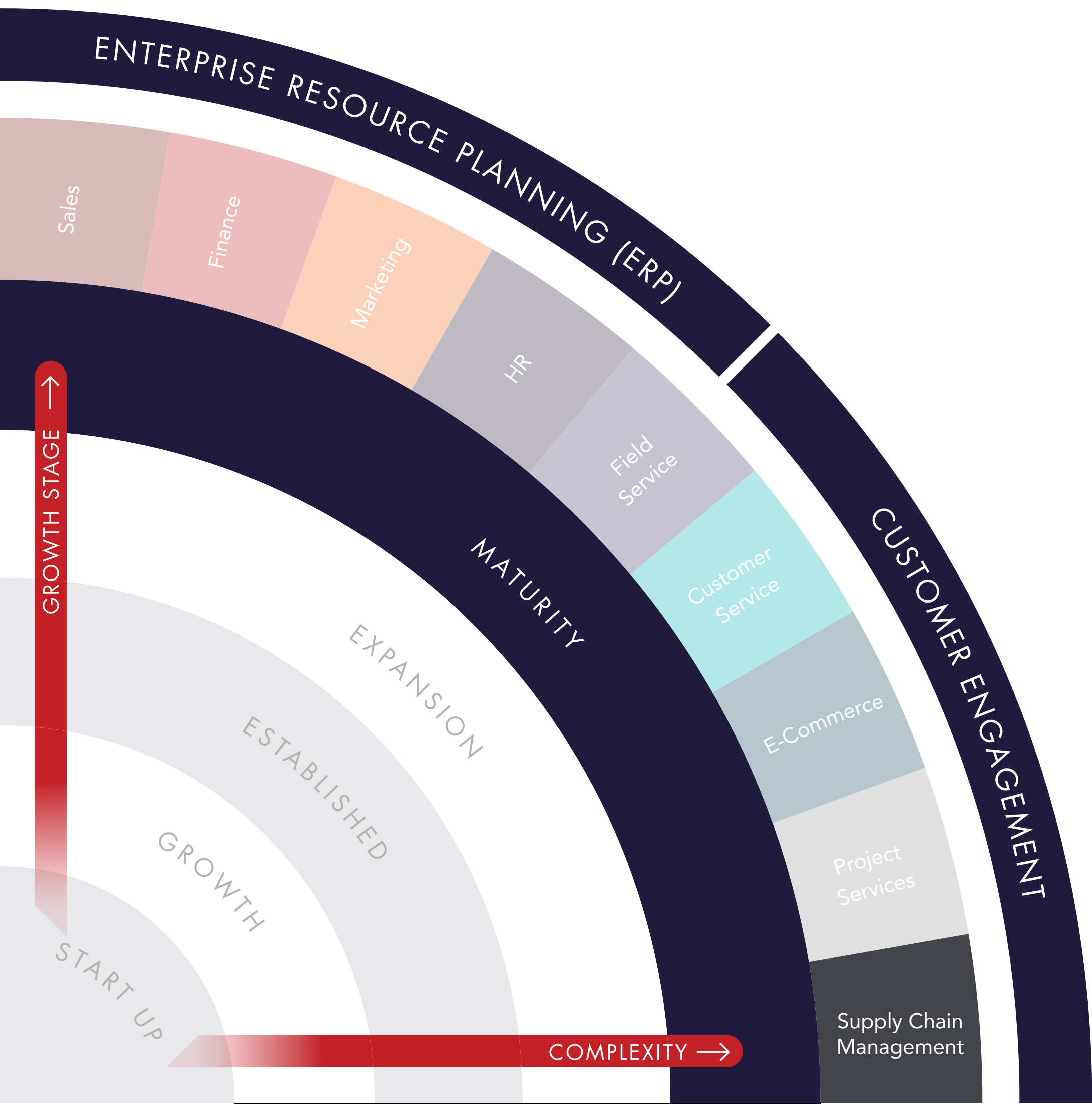
BENEFITS OF DYNAMICS

With machine-learning-enhanced warehouse management through Dynamics, your clients can accurately report and forecast stock levels, helping them to move from a reactive to proactive supply chain operation. Dynamics also integrates IoT devices, so they can fix issues in advance to prevent downtime and extend the life of equipment.

And with powerful automation and analytics tools, the platform can also optimise planning and improve the fulfilment, material sourcing, and logistics of supply chains.

NEXT: VIEW CAPABILITIES

< 1/2



SUPPLY CHAIN MANAGEMENT: MATURITY



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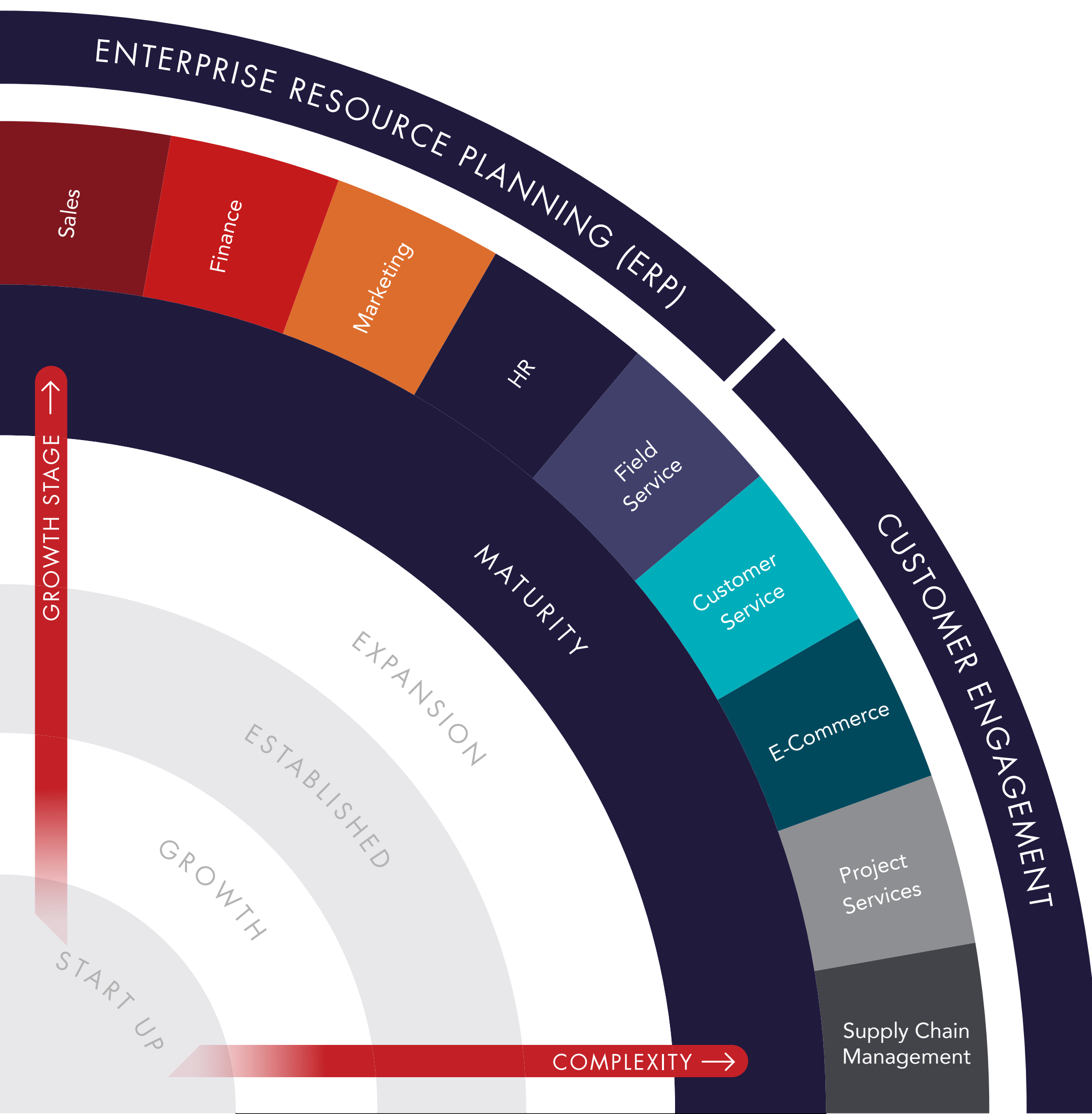
DYNAMICS CAPABILITIES

Asset management
Inventory management
Production central
Procurement and sourcing
Transportation
Warehouse management
Fleet management

SKU_s

Dynamics 365 Supply Chain Management

This Pain Point affects all functions of the business – it requires significant strategic digital transformation, not a quick fix. Dynamics is part of the solution, but we'd encourage you to contact us for a deeper discussion about how best to address the challenges with your customer. In the meantime, you can click on each function to explore how Dynamics can meet their specific needs.



MATURITY

Large, mature businesses face a different set of challenges to those of newer competitors in their markets. For one thing, they often have a plethora of disparate, legacy systems which are deeply entrenched in their business processes. And their business objectives – cutting costs, digital transformation, differentiation – require them to work across siloed teams and systems.

Dynamics can provide a platform for that kind of big-picture, transformative action. It helps link up or replace legacy systems, and offers the kind of innovation that is sometimes harder to realise in a slow-moving business.

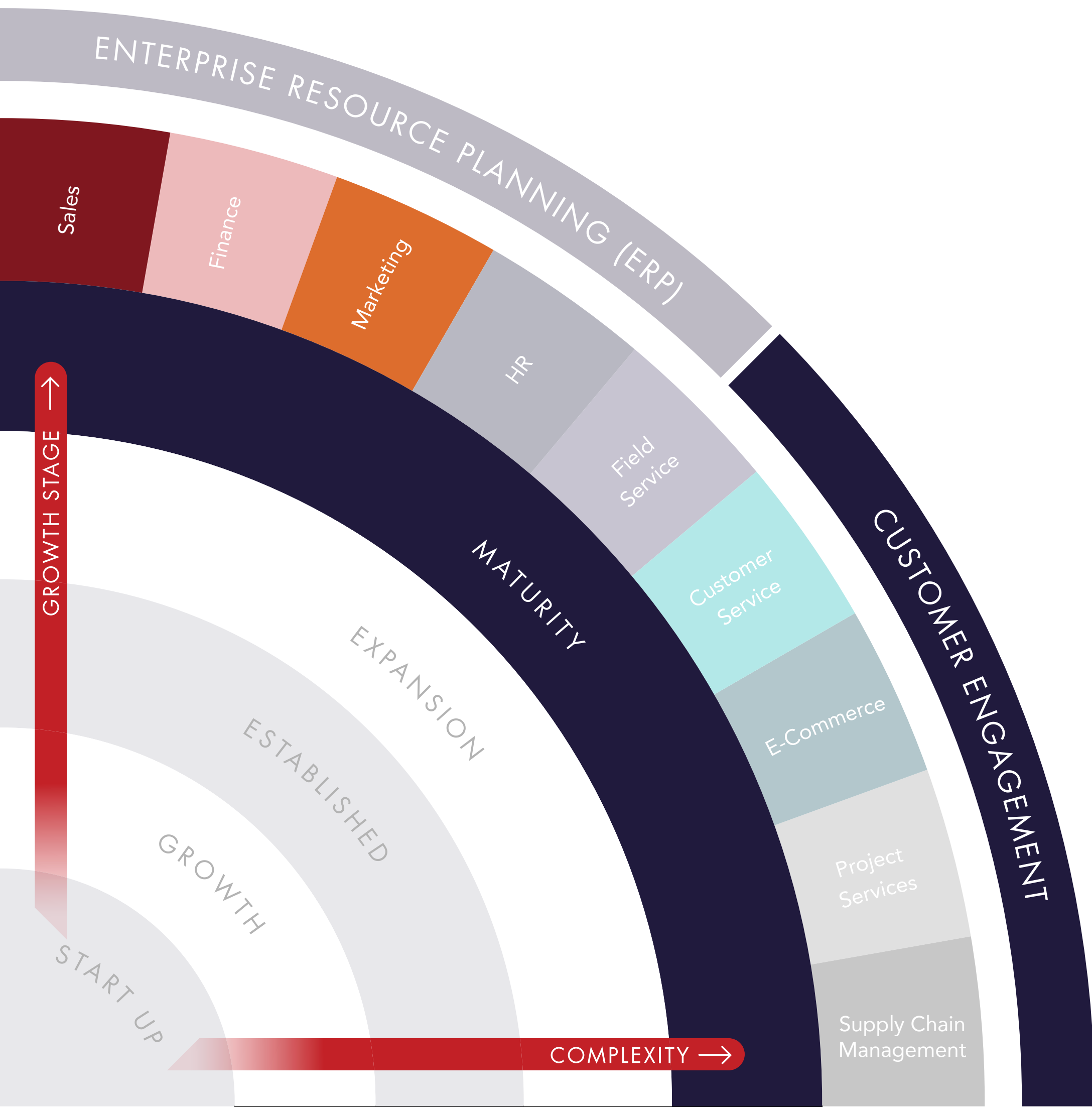
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- 5 A constant stream of new competitors in the market make it hard to maintain a differentiated customer offering
- 6 The challenge of exploiting new technologies such as AI and IoT



Click on the highlighted Functions to learn more ↓



MATURITY

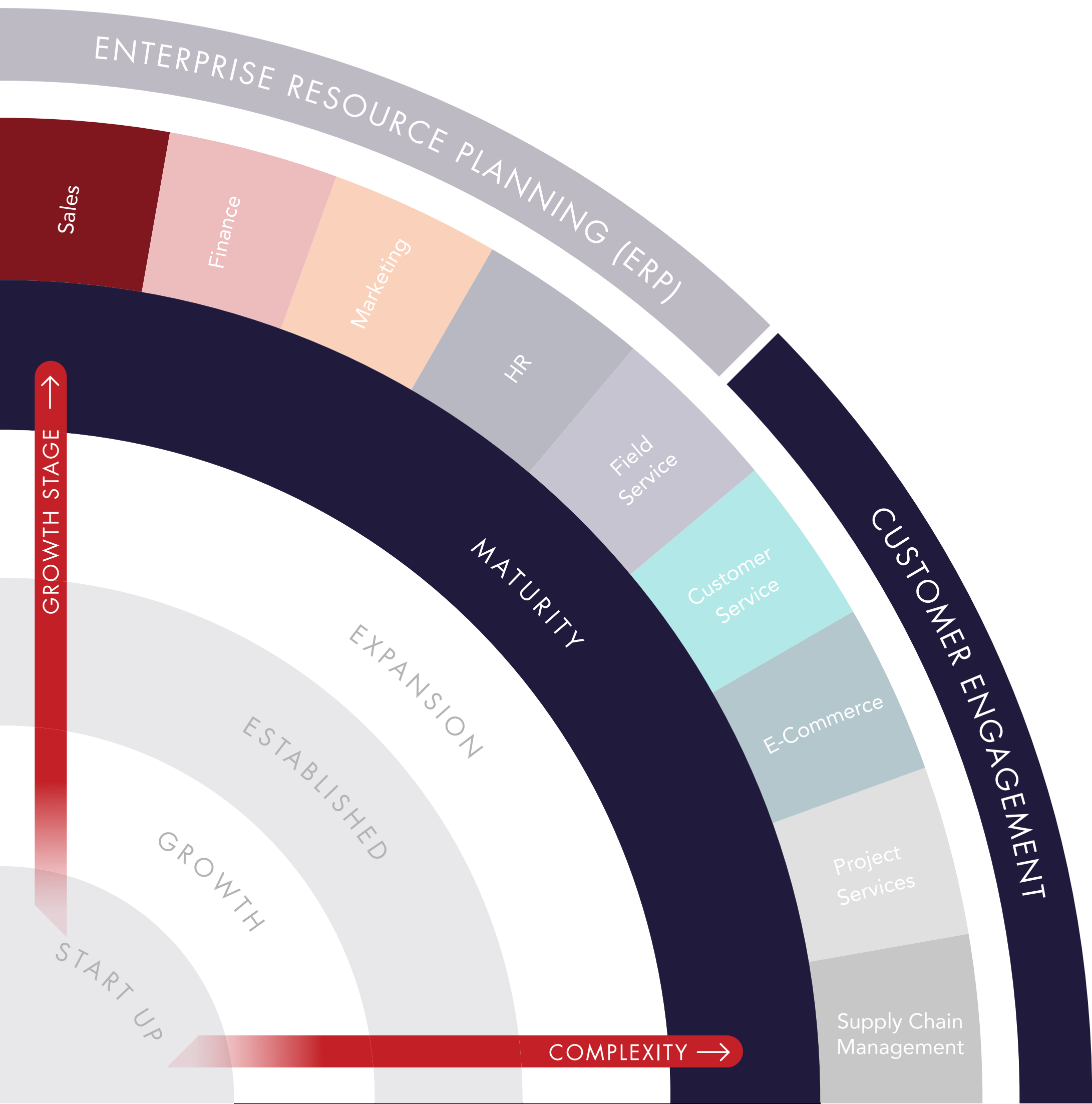
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SALES: MATURITY



PAIN POINTS

3

Sales

Lack of understanding about where to focus efforts, in order to attract new customers and nurture existing accounts

5

Sales

A constant stream of new competitors in the market makes it hard to maintain a differentiated customer offering

CHALLENGES

Whether managing a small number of high-value opportunities, or hundreds of smaller leads, salespeople rely on accurate data to succeed. They need to track ongoing opportunities and have a clear overview of all the customers they're currently working with – as well as how those customers are interacting with colleagues in other parts of the business.

Reporting is also vital. Salespeople are sometimes unable to run reports on opportunities and share that information with management. That makes it extremely difficult to collaborate with marketing, and prevents sales teams pursuing opportunities from start to finish. Individual salespeople can also struggle to receive rewards and recognition when they can't prove their work has contributed to business outcomes.

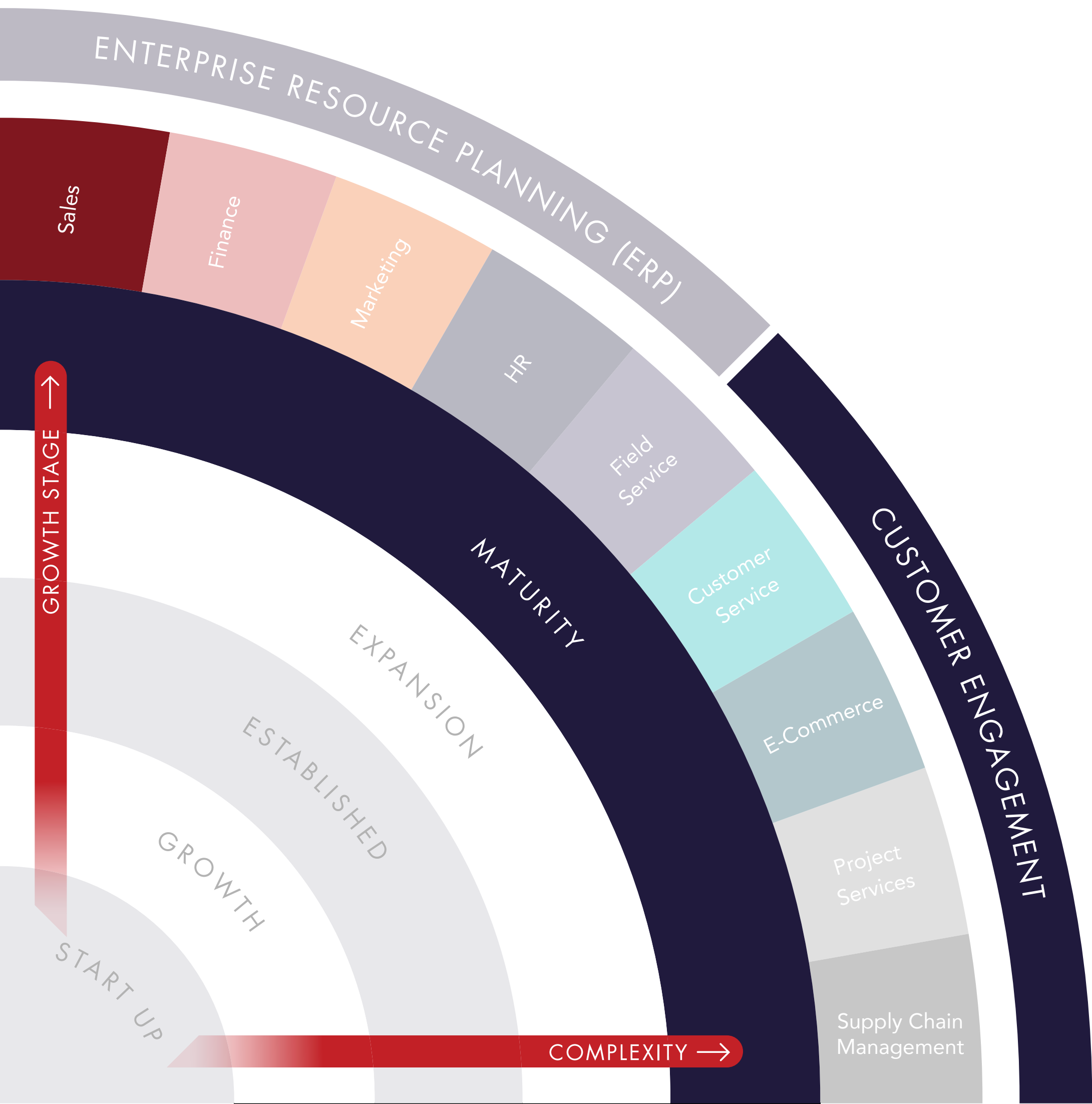
BENEFITS OF DYNAMICS

With its background in CRM, Dynamics is well set up to support sales teams to integrate with marketing and the rest of the business. The comprehensive customer views help salespeople to better understand clients' needs, engage them effectively, and drive more sales revenue.

Dynamics can incorporate information from LinkedIn Sales Navigator, marketing automation platforms, and other sources. It uses intelligent data to bring those customer insights into Office 365 software, making the sales lifecycle simple and familiar. And the underlying AI enables smarter selling, letting salespeople cross-sell and upsell more effectively by targeting the right customers at the right times.

NEXT: VIEW CAPABILITIES

< 1/2



SALES: MATURITY



PAIN POINTS

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Sales

Lack of understanding about where to focus efforts, in order to attract new customers and nurture existing accounts

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Sales

A constant stream of new competitors in the market makes it hard to maintain a differentiated customer offering

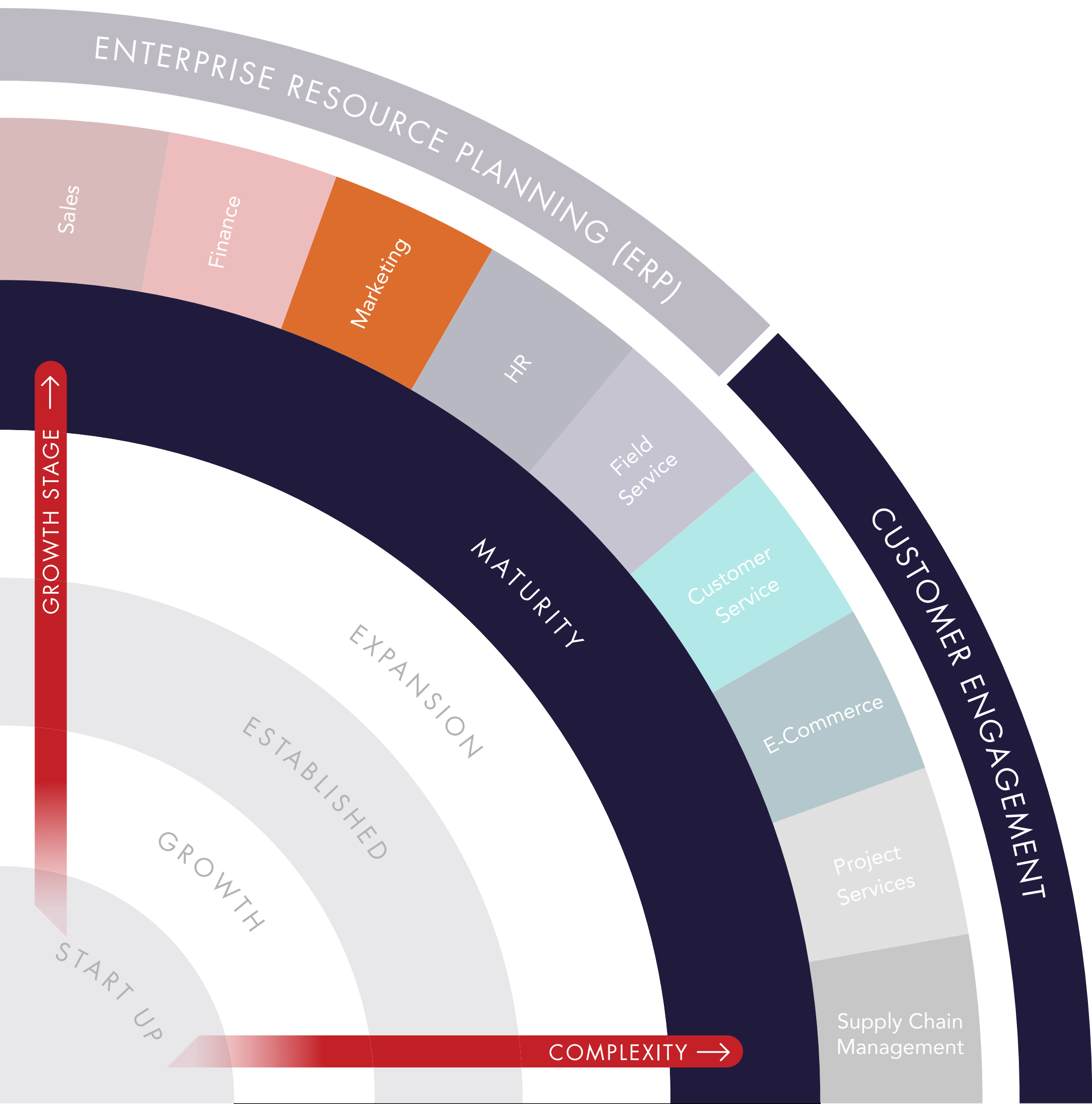
DYNAMICS CAPABILITIES

Lead management
Opportunity management
Pipeline forecasting
Sales automation
Quote management
Marketing lists
Email marketing

SKUs

Dynamics 365 Sales
Dynamics 365 Sales Insight
Dynamics 365 Product Visualise
Power BI





MARKETING: MATURITY



PAIN POINTS

- 3

Marketing
Lack of understanding about where to focus efforts, in order to attract new customers and nurture existing accounts
- 5

Marketing
A constant stream of new competitors in the market makes it hard to maintain a differentiated customer offering

CHALLENGES

One of the biggest challenges for marketing departments is getting accurate, up-to-date data and making sense of how to use it effectively. They may have a large customer database that doesn't yield any useful insights from, or too few staff to consistently communicate with their network.

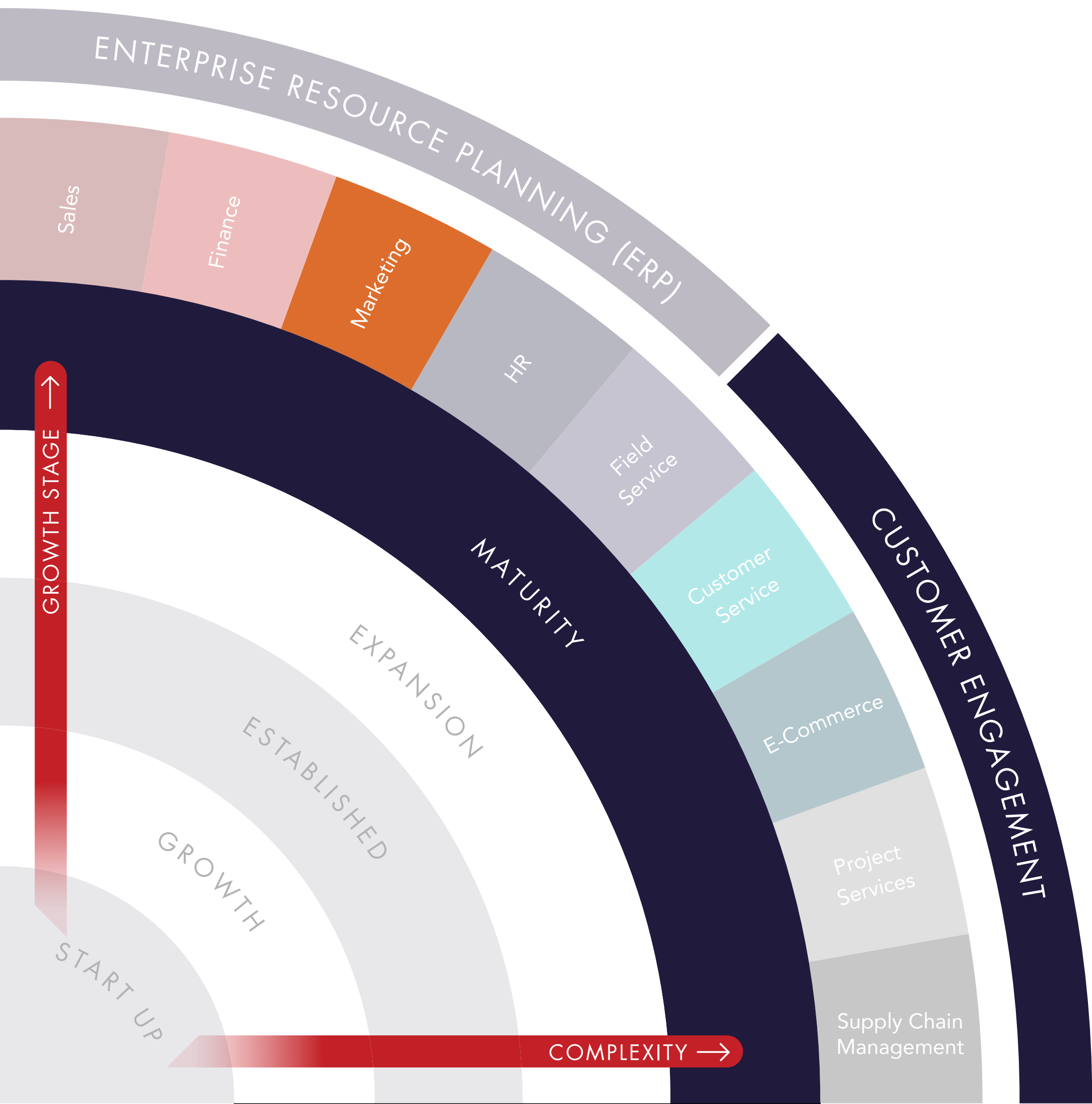
This makes it difficult to send timely information to the right customers, hampering cross-sell and upsell efforts, and opening the door for competitors. For those customers they do communicate with, marketers without a platform like Dynamics may struggle to monitor email open rates or link customer touchpoints to sales data. It's very hard to track results or understand whether they are adding value.

BENEFITS OF DYNAMICS

Dynamics for Marketing helps teams plan and deliver campaigns; increase customer demand for their products and services; create, track and nurture leads; and personalise communications for prospects and customers across channels.

It helps marketers align with their sales teams and create a single view of the prospect, delivering a seamless customer experience.

And by targeting the right customers and optimising marketing resources, it can ultimately help marketers improve the ROI of their activities.



MARKETING: MATURITY



PAIN POINTS

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Marketing

Lack of understanding about where to focus efforts, in order to attract new customers and nurture existing accounts

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Marketing

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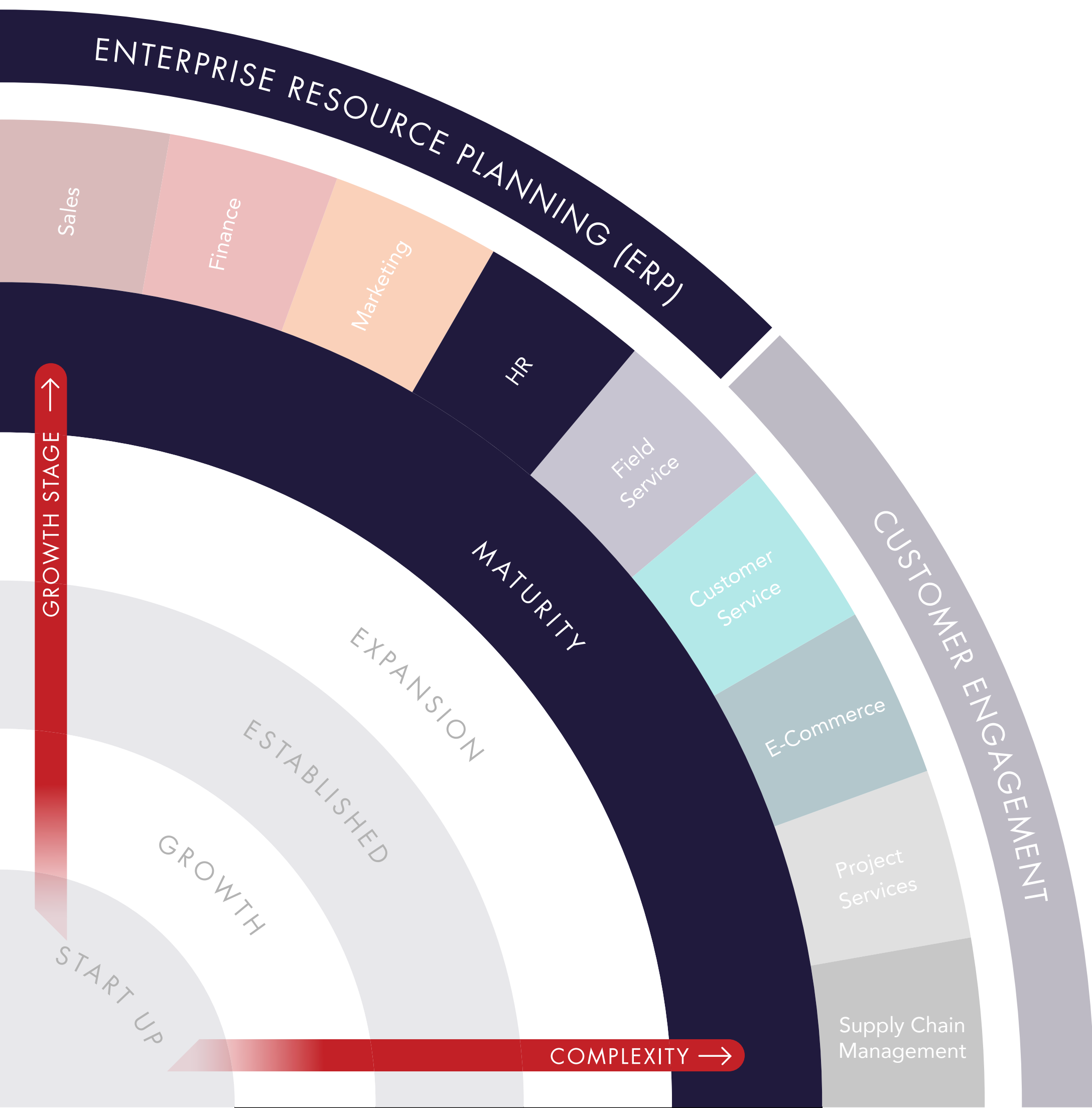
DYNAMICS CAPABILITIES

SKUs

Email marketing
Lead scoring
Market segmentation
Customer journeys
Event management
Connector for LinkedIn
Lead generation forms

Dynamics 365 Marketing
Dynamics 365 Customer Insight
Power Apps

Click on the highlighted Functions to learn more



MATURITY

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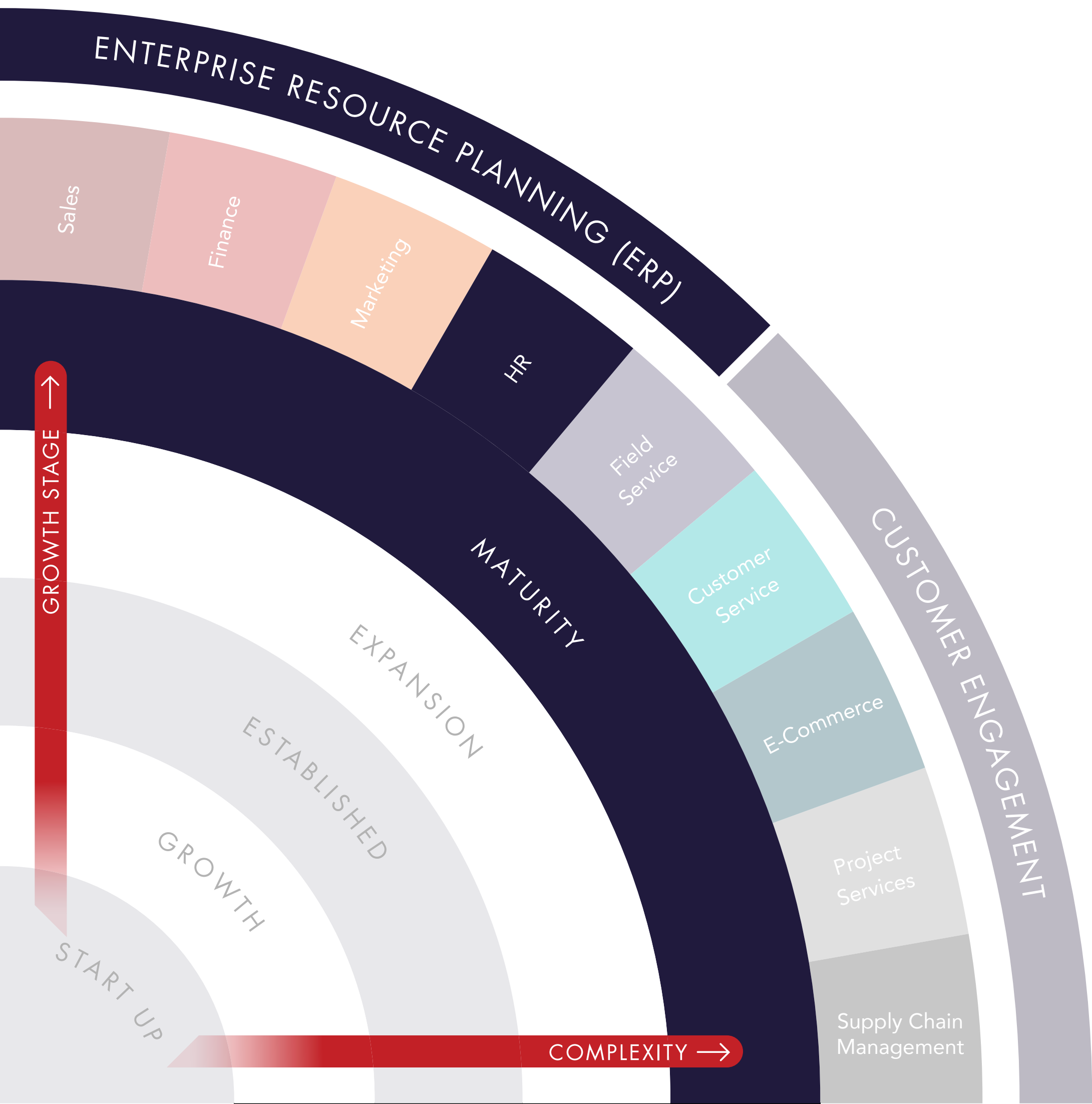
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HR: MATURITY



PAIN POINTS

- 4 HR
Difficulty adopting a working culture and development programme suited to a multi-generational business

CHALLENGES

As a business grows, its HR processes and systems become increasingly complex. HR managers need to report on employees' wellbeing, learning and development, absences, annual leave, and much more.

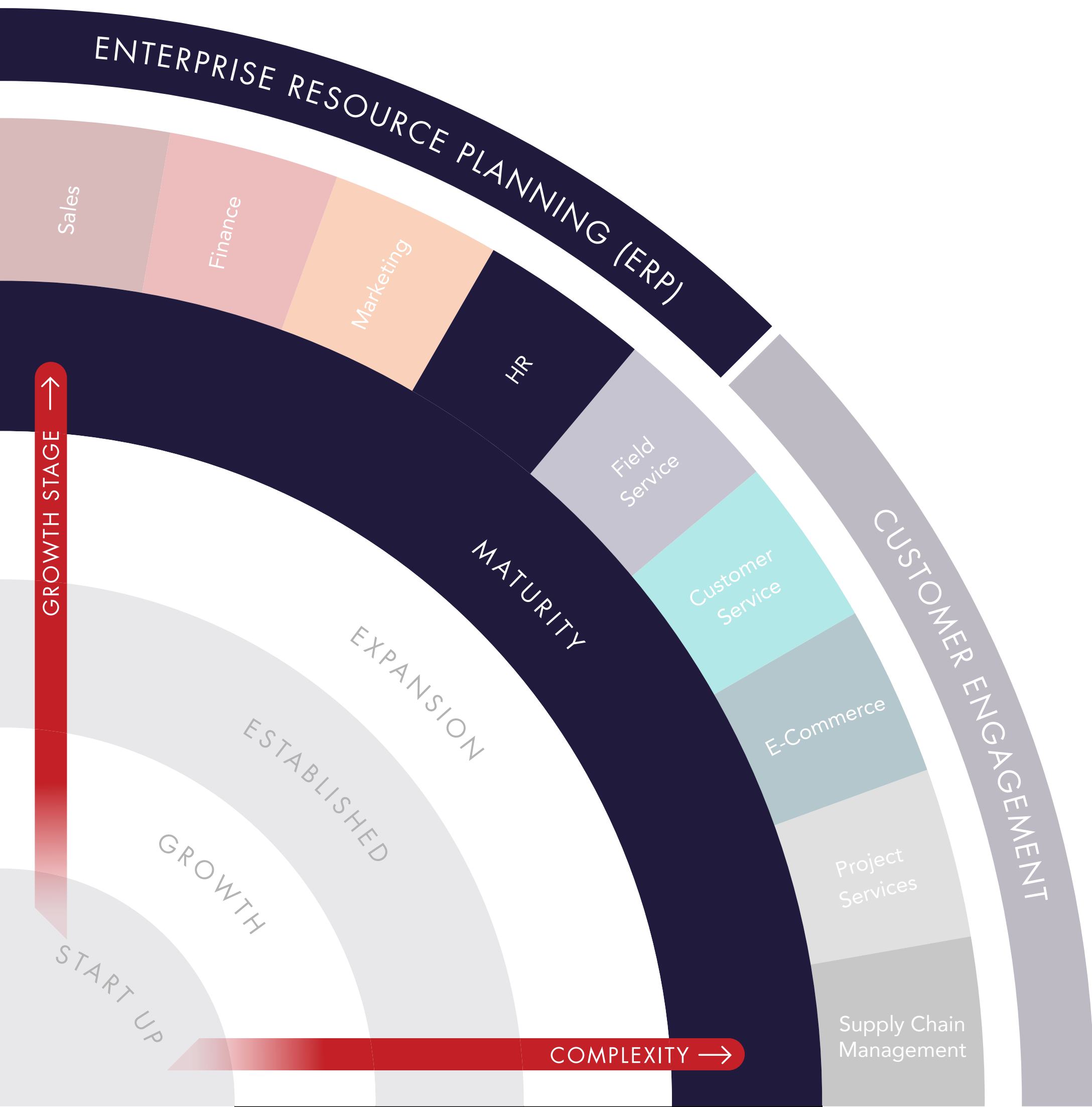
That's on top of trying to make recruitment and onboarding more efficient, centralising core HR processes, and giving managers the tools and training they need to manage their team members.

BENEFITS OF DYNAMICS

Dynamics helps deliver an HR solution that takes better care of your people, so they in turn can take better care of your business. It enables HR self-service for employees, provides a platform for training and certification, ensures security, privacy and compliance, and empowers managers to address concerns effectively.

At the same time, Dynamics can support HR teams to simplify reporting with rich dashboards, helping leaders make informed decisions. By identifying and engaging the right candidates, businesses can feel confident that they're bringing in the right people to support future growth.

NEXT: VIEW CAPABILITIES



HR: MATURITY



PAIN POINTS

- 4 HR
Difficulty adopting a working culture and development programme suited to a multi-generational business

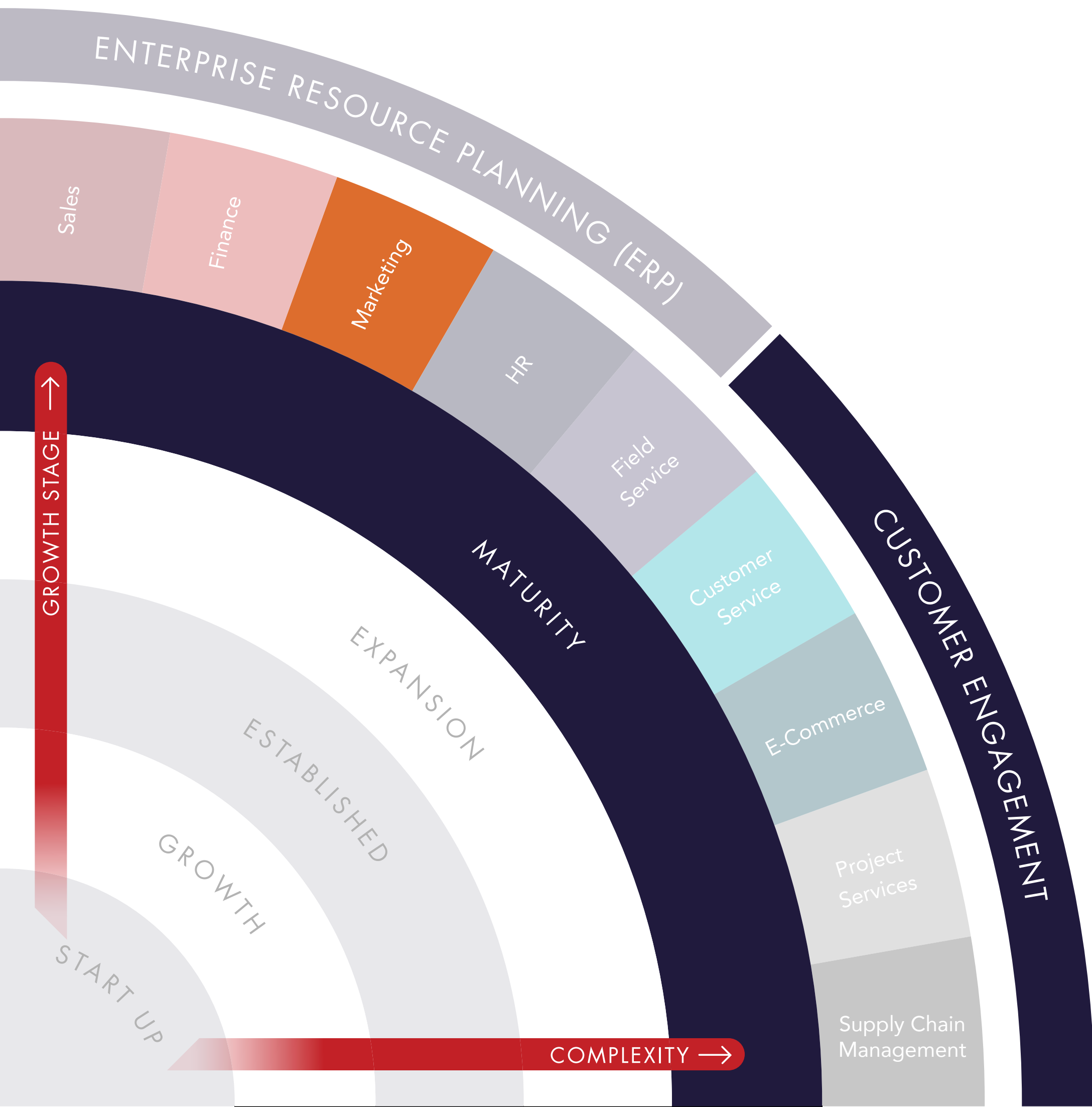
DYNAMICS CAPABILITIES

- People management
- Compensation management
- Compliance
- Leave and absence
- Benefits
- Learning and development
- Employee development
- Employee self-service
- Hiring and offer management

SKU_s

Dynamics 365 Human Resources

Click on the highlighted Functions to learn more ↓



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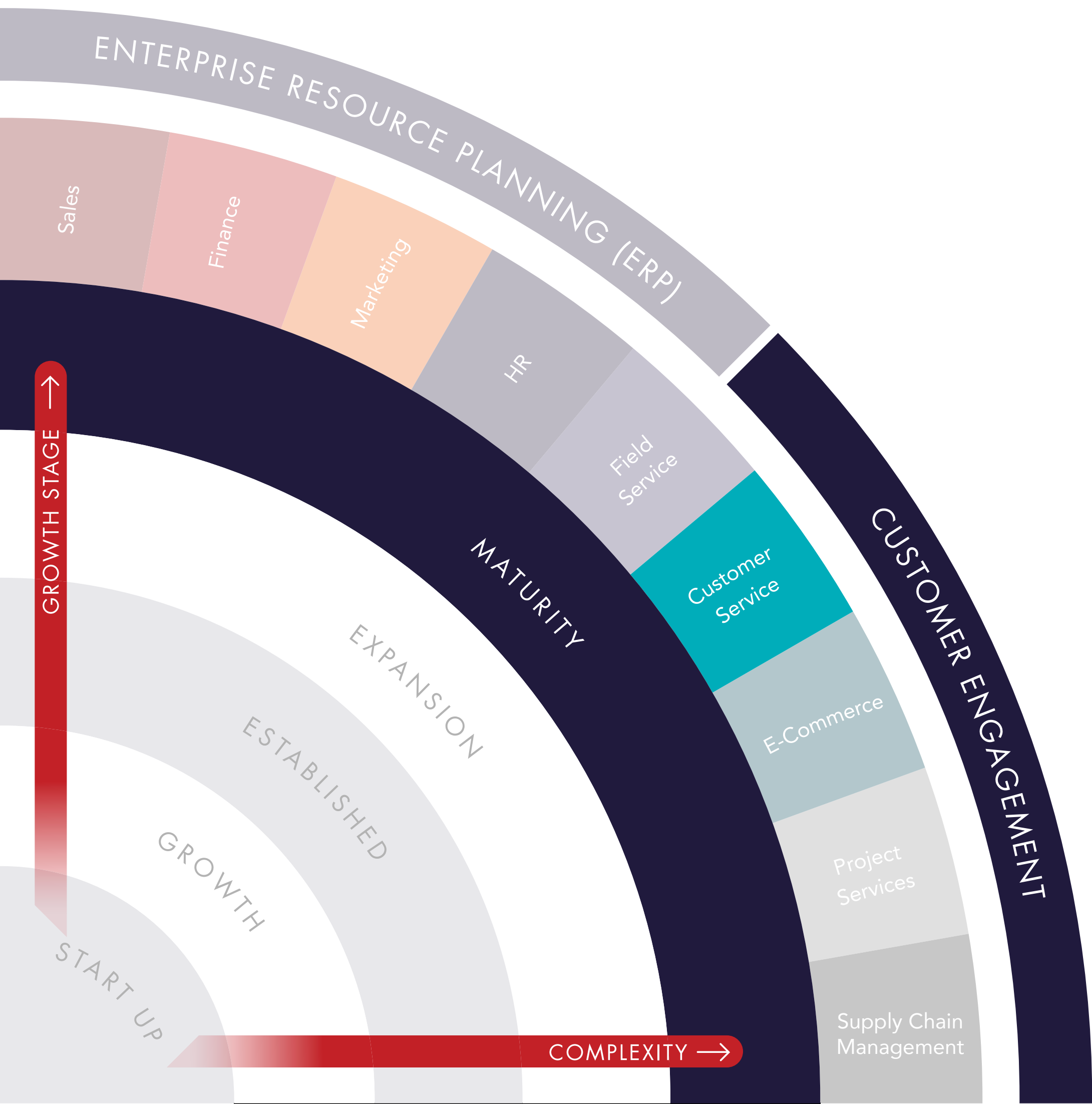
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CUSTOMER SERVICE: MATURITY



PAIN POINTS

5

Customer Service

A constant stream of new competitors in the market makes it hard to maintain a differentiated customer offering

CHALLENGES

To meet high customer expectations, businesses are now under pressure to deliver omnichannel customer service. But for many, it's impossible to track when a customer has previously interacted with the company, even if they spoke to a different agent just minutes before.

Customer sales advisors may not have access to real-time, accurate information, or have collaboration tools in place to get quick answers from other departments.

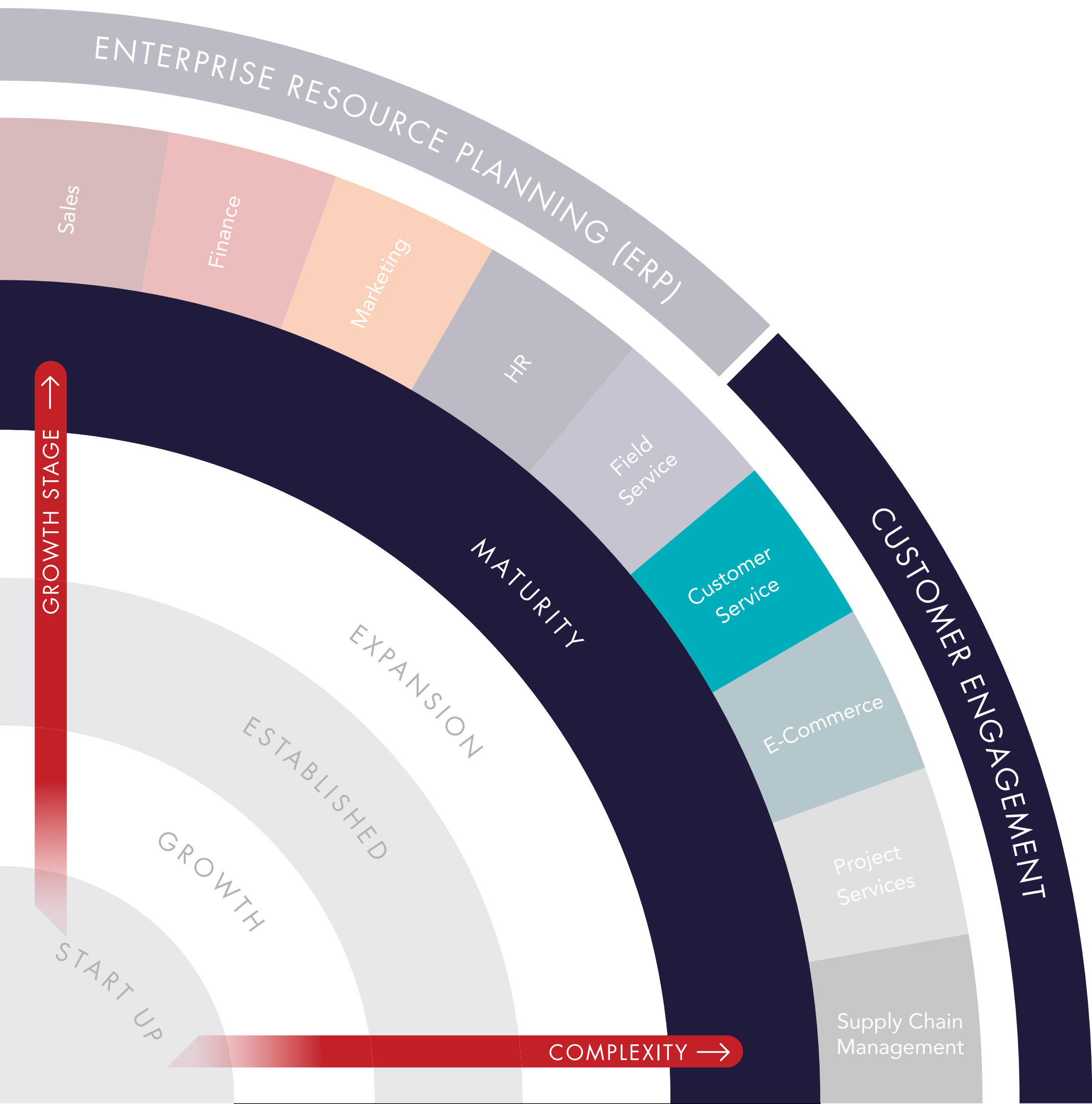
And when customer calls surge, they sometimes lack the call handling insight to resource their teams properly, or have no way to route customers through an interactive voice response (IVR).

BENEFITS OF DYNAMICS

The CRM capabilities within Dynamics, underpinned by AI, are an ideal platform to help customer service teams deliver seamless, personalised experiences. Dynamics brings all customer touchpoints into one comprehensive view, so agents are empowered to solve problems with a full picture of the situation.

NEXT: VIEW CAPABILITIES

< 1/2



CUSTOMER SERVICE: MATURITY



PAIN POINTS

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Customer Service

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DYNAMICS CAPABILITIES

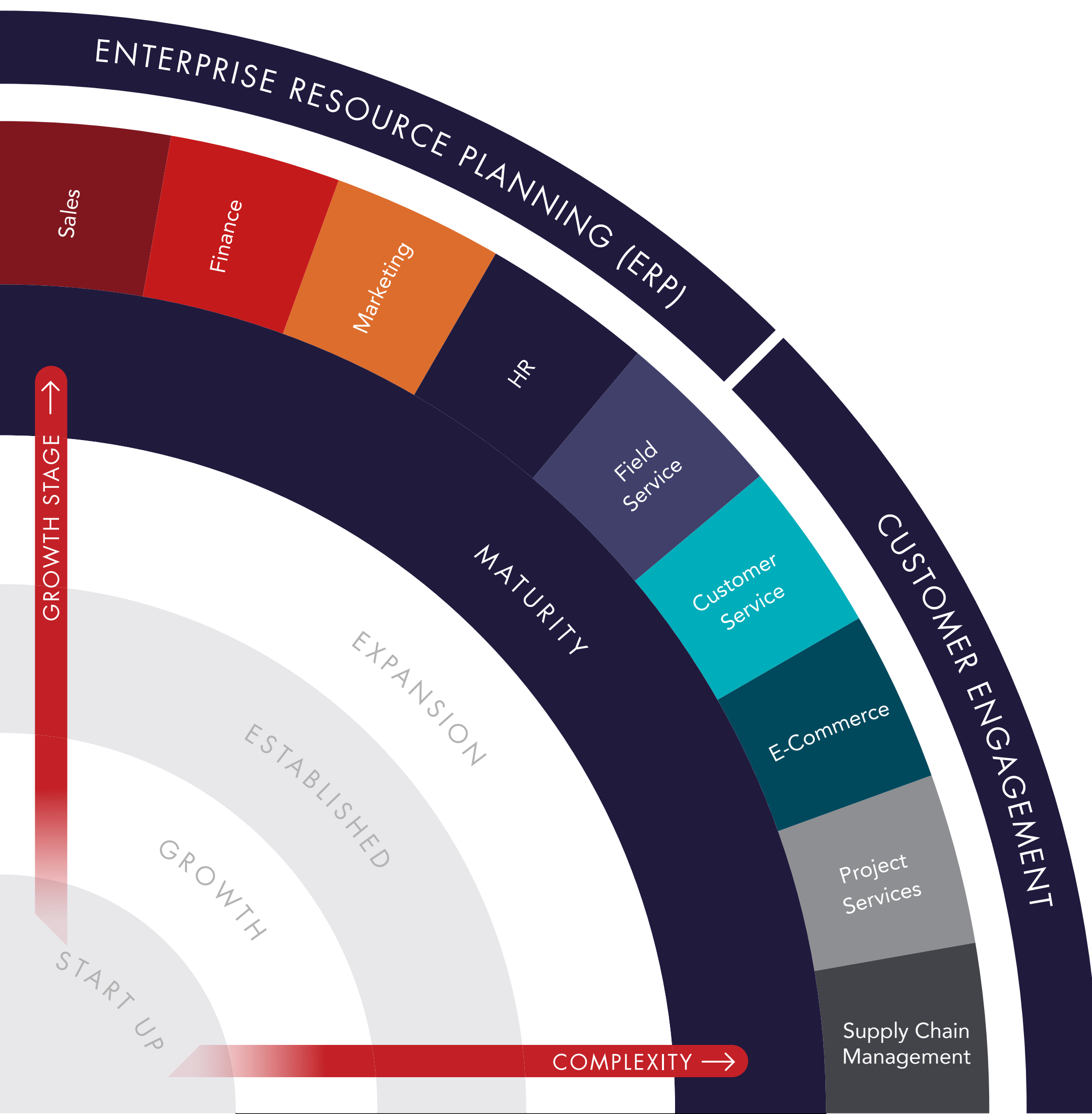
Case management
SLA support
Account management
Service automation
Customer web portals
Contract management
Service analytics

SKUs

Dynamics 365 Customer Service Enterprise
Power Apps
Power BI
Dynamics 365 Unified Service Desk



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ENTERPRISE RESOURCE PLANNING (ERP)

ERP is about efficient delivery and operations. It's everything that goes on behind the scenes in a business to make sure that they can do what their company was set up to do, as smoothly as possible. It covers the whole gamut from taking customer orders to fulfilment, including cashflow management and system integration.

That might mean using analytics to spot inefficiencies in the supply chain, or to reduce human error in finance processes. It could involve looking for patterns to improve last-mile deliveries, or identifying skill shortages in the workforce so that HR can recruit proactively.

To find out more about what SKUs are included in ERP and how it could work for your clients, get in touch with our Dynamics team.

csp@westcoastcloud.co.uk

CUSTOMER ENGAGEMENT

If your customers want to improve the experience for their users, at any point, then Dynamics Customer Engagement is a great option. The SKUs included in this suite cover every part of the customer journey – from marketing and promotions, to online retail and e-commerce, to sales and post-sale customer care. It also helps managers monitor remote workers, ensuring they are able to uphold the same levels of customer service from any device and any location.

These Dynamics SKUs might help with flexible demand-based pricing for their digital shop, or provide chatbots to answer customer enquiries quickly. They can ensure your clients have a single view of the customer across all touchpoints, so their marketing and sales teams are acting in unison. Basically, Customer Engagement is there to give customers a seamless experience, wherever they are, and every time they interact with a brand.

To find out more about Customer Engagement and how it could work for your clients, get in touch with our Dynamics team

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SELECT A BUSINESS STAGE TO RETURN TO:

[START UP >](#)

[GROWTH >](#)

[ESTABLISHED >](#)

[EXPANSION >](#)

[MATURITY >](#)

HOME

