DEMYSTIFYING DYNAMICS:

How to sell Business Applications

WESTCOAST CLOUD

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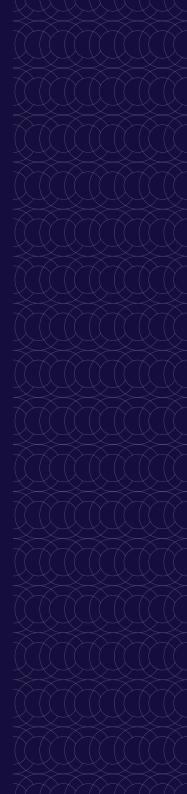
We know what it takes to turn Dynamics applications into additional revenue. In fact, we've helped resellers of all shapes and sizes to make Dynamics solutions a key part of their cloud offering.

So what is Dynamics?
Is it a customer relationship management (CRM) tool?
Or is it an enterprise resource planning (ERP) tool?

The simple answer is that it's both and so much more.

Dynamics is essentially a family of cloud-based business applications. These apps combine the elements of traditional CRM, ERP, Marketing, E-commerce and HR solutions, as well as AI-enhanced productivity tools, all of which can be integrated into existing Microsoft infrastructure.
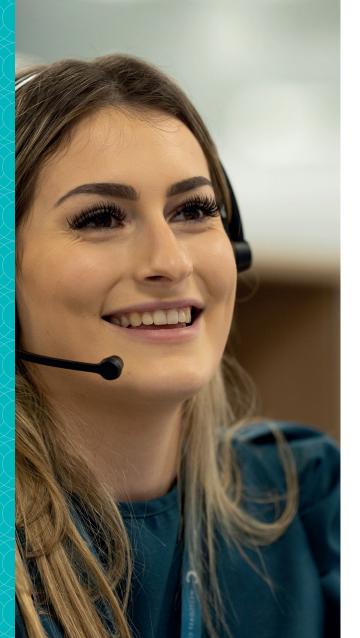
01
CUSTOMER ENGAGEMENT

SALES

Businesses use Dynamics 365 Sales to manage their leads and opportunities.

Using data and insights, it intelligently connects sales teams to customers via their preferred channel and automates key processes along the customer journey to enable selling at scale.

It can also analyse email engagement, process orders, manage product catalogues and help teams to make better decisions based on data and trends.

ASK YOUR CUSTOMERS THESE QUESTIONS TO SEE IF THEY'D BENEFIT FROM DYNAMICS 365 SALES:

- How does your sales team nurture leads to orders and keep a track of accounts and contacts?

- What systems are you currently using?

- What are the pain points of those systems? Costs, integration, scalability or reporting?

CUSTOMER SERVICE

Finding and keeping clients is often the hardest part of running a business. But not with Dynamics 365 Customer Service.

It helps organisations to easily track customer issues, record interactions, and route cases to the right channels.

Businesses can also use it to create and track service levels, to manage performance and productivity, and schedule services.

ASK YOUR CUSTOMERS THESE QUESTIONS TO SEE IF THEY'D BENEFIT FROM DYNAMICS 365 CUSTOMER SERVICE:

- Do you have a user-friendly system to track customer issues through cases, record all interactions, share information via a knowledge base and manage conversations across multiple channels?

- Can your advisors access real-time, accurate information and easily collaborate with other departments?

FIELD SERVICE

Dynamics 365 Field Service uses data insights and connected experiences to help businesses offer proactive, rather than reactive, services.

It includes:

- Work order and inventory management
- Universal Resource Scheduling
- Connected Field Service
- Field Service Mobile

ASK YOUR CUSTOMERS THESE QUESTIONS TO SEE IF THEY'D BENEFIT FROM DYNAMICS 365 FIELD SERVICE:

- Do your field team have a system that delivers onsite service to customer locations, by combining workflow automation, scheduling algorithms, and mobility to set up mobile workers for success?

- What systems are you currently using?

- What are the pain points of those systems? Costs, integration, scalability or reporting?

MARKETING

**Dynamics 365 Marketing is all about elevating customer experiences.
It helps businesses to create engaging, personalised journeys, and to create happy, loyal customers.**

Organisations use it to:

- Create digital content to support marketing initiatives

- Nurture leads with interactive customer journeys

- Engage prospects on LinkedIn

- Share information across teams

- Get to know and prioritise their leads

- Organise and publicise events

- Analyse their marketing ROI

- Set up, deliver, and analyse training courses

ASK YOUR CUSTOMERS THESE QUESTIONS TO SEE IF THEY'D BENEFIT FROM DYNAMICS 365 MARKETING:

- Do you have a marketing automation app that turns prospects into business relationships?

- What systems are you currently using?

- Are you getting up-to-date, accurate data on your customers?

PROJECT OPERATIONS

Dynamics 365 Project Operations connects everything going on across the organisation on one platform.

Your customers can use it to manage projects, deals, time and expenses, and resources.
It can also help them to maximise profitability by streamlining project financials, and by allowing for more accurate reporting.

ASK YOUR CUSTOMERS THESE QUESTIONS TO SEE IF THEY'D BENEFIT FROM DYNAMICS 365 PROJECT OPERATIONS:

- What do you use to connect sales, resourcing, project management and finance teams to win more deals, accelerate project delivery and maximise profits?

02
ENTERPRISE RESOURCES PLANNING

FINANCE

Dynamics 365 Finance gives businesses the agility they need to stay ahead of changes in their market.

From financial planning and forecasting to analytics, Finance helps to keep your customers in control of their money and able to manage their funds accurately.

ASK YOUR CUSTOMERS THESE QUESTIONS TO SEE IF THEY'D BENEFIT FROM DYNAMICS 365 FINANCE:

- What systems are you currently using?
- Are you manually integrating multiple databases?
- Are you getting everything you need from reports?

SUPPLY CHAIN MANAGEMENT

Dynamics 365 Supply Chain Management gives businesses the power to build adaptable supply chains that automatically react to challenges using real-time visibility, agile planning, and business continuity.

Your customers can also use it to:

- Reduce inventory
- Lower costs
- Improve time-to-market

ASK YOUR CUSTOMERS THESE QUESTIONS TO SEE IF THEY'D BENEFIT FROM DYNAMICS 365 SUPPLY CHAIN MANAGEMENT:

- Do you have end-to-end visibility of your supply chain and warehousing operations?
- What systems are you currently using?
- What are the pain points of those systems? Costs, integration, scalability or reporting?

BUSINESS CENTRAL

Dynamics 365 Business Central connects teams and operations across the entire organisation on one single platform. It combines Sales, Customer Service, Finance and Supply Chain Management into one solution.

Your clients can use it to:

- Improve customer experiences
- Improve supply chain visibility and increase control over purchasing processes
- Grow revenue
- Manage budgets
- Monitor projects in real time
- Speed up financial closing
- Create accurate reports
- Ensure compliance
- Streamline operations to deliver products and services on time and under budget

ASK YOUR CUSTOMERS THESE QUESTIONS TO SEE IF THEY'D BENEFIT FROM BUSINESS CENTRAL:

- How many different systems do you use for Sales, Customer Service, Finance and Supply Chain?
- What systems are you currently using?
- What are the pain points of those systems? Costs, integration, scalability or reporting?

🛒 COMMERCE

Dynamics 365 Commerce is an omnichannel application that gives businesses the power to offer unified, personalised, and seamless buying experiences.

Your clients can use it to:

- Build and run a scalable digital commerce solution
- Take full advantage of both traditional and emerging channels
- Build loyalty and exceed customer expectations
- Offer a flexible and intelligent omnichannel experience
- Streamline operations using AI in the cloud

ASK YOUR CUSTOMERS THESE QUESTIONS TO SEE IF THEY'D BENEFIT FROM DYNAMICS 365 COMMERCE:

- Do you have an omnichannel solution that unifies back-office, in-store, call centre, online and digital experiences?
- What systems are you currently using?
- What are the pain points of those systems? Costs, integration, scalability or reporting?
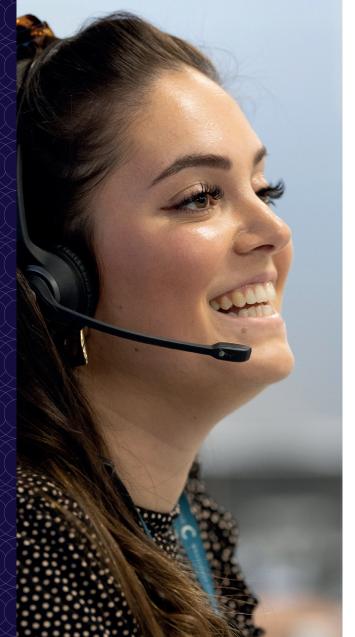
🪪 HR

Dynamics 365 Human Resources helps to create workplaces where people and business thrive. Offering three key features – HR, Attract and Onboard – that your customers can use to:

- Manage organisational structures
- Manage employee profiles, pay and benefits
- Specify worker competencies
- Track performance and progress
- Set up, deliver, and analyse training courses

ASK YOUR CUSTOMERS THESE QUESTIONS TO SEE IF THEY'D BENEFIT FROM DYNAMICS 365 HUMAN RESOURCES:

- Do you have multiple disparate systems to manage wellbeing, learning and development, absences, annual leave, recruitment and onboarding?
- What systems are you currently using?
- What are the pain points of those systems? Costs, integration, scalability or reporting?

POWER APPS

Power Apps gives your customers the ability to create customised apps for their businesses, without having to write any code. Apps built using Power Apps can completely transform a business's manual operational processes.

Use Power Apps to:

- Build highly customised task—and role-based canvas apps with data from one or multiple sources

- Generate immersive model-driven apps, starting from your data model and business processes

- Consume fully accessible apps across web and mobile, embedded or standalone, on any device

POWER VIRTUAL AGENTS

Power Virtual Agents allows every business to offer engaging online experiences, with easy-to-create conversational bots.

Your clients don't need to be data scientists, and they don't need to know how to code.

These virtual agents can take charge of hundreds of processes and systems right out of the box, or they can be used to power completely customised workflows.

Businesses can easily monitor and improve their virtual agents using conversational metrics, dashboards and AI-driven insights.

POWER AUTOMATE

As its name suggests, Dynamics Power Automate allows organisations to easily create automated workflows between their legacy, on-premises and cloud-based applications and services.

It offers your clients everything from simple automations to advanced scenarios with branches, loops, and more. Trigger actions, grant approvals, and get notifications anywhere.

POWER BI

Power BI is all about giving your clients a greater level of Business Intelligence. It connects all of their data and offers them a consolidated view of their operations across the business.

Build smart apps, deliver ad-hoc analysis, and create live dashboards and interactive reports that are easy to consume on the web and across mobile devices.

ASK YOUR CUSTOMERS THESE QUESTIONS TO SEE IF THEY'D BENEFIT FROM THE POWER PLATFORM:

Power Apps
- What time-consuming manual tasks exist in the business?

Power Virtual Agents
- What virtual interactions do you have with your customers?

Power BI
- How do you display Management information?

Power Automate
- Where are you utilising Excel in the business?

WHAT'S NEXT?

That was our whistlestop tour on how to sell Business Applications. Naturally, there's more to Dynamics than what we've managed to squeeze in here.

So, if you would like a deeper dive, download our Dynamics Sales Tool. It will help you match specific customer pain points with the appropriate Business Application and give you the confidence to include Dynamics in more customer conversations.

It's also jam-packed with stats and useful information about business opportunities, Microsoft differentiators, go-to-market plans, and plenty more besides.

GET IN TOUCH

Our dedicated Dynamics team is here if you have any questions or require further support with selling Business Applications.

They are Dynamics experts, and they will be more than happy to expand on the information in this booklet.

Please get in touch, and they will help you on your way to driving more revenue from Business Applications.

Email: dynamics@westcoastcloud.co.uk

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