

10 STEPS TO NAIL YOUR CUSTOMER MEETING

A DAY IN THE LIFE OF A SALES TEAM USING MICROSOFT DYNAMICS 365 FOR SALES

As a sales professional, you need to stay on top of opportunities before they slip through the cracks. To do this, you need to be able to answer questions like: What am I doing today? Have I dropped the ball on anything this week? Am I on track to hit my goals this month?

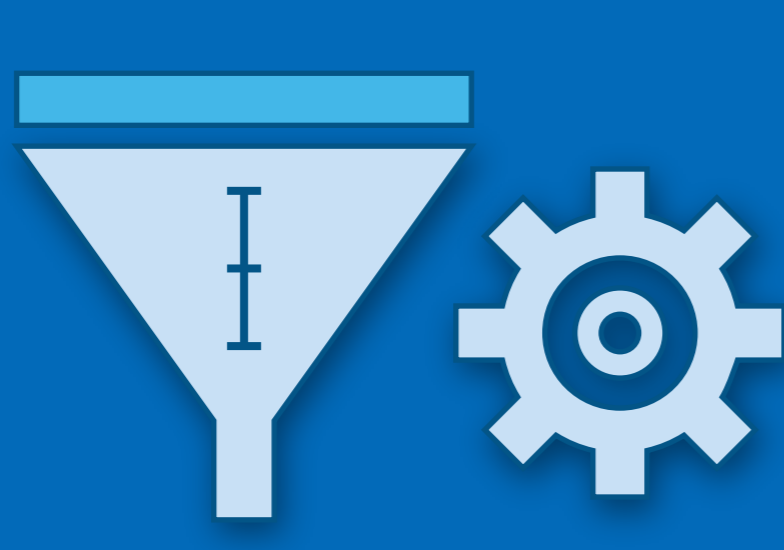
Here's how Microsoft Dynamics 365 (D365) for Sales from Fullscope, an Alithya company can help a sales pro.

PREPARING FOR A CUSTOMER MEETING

You have an important upcoming meeting with a big client. Where do you start your preparation?

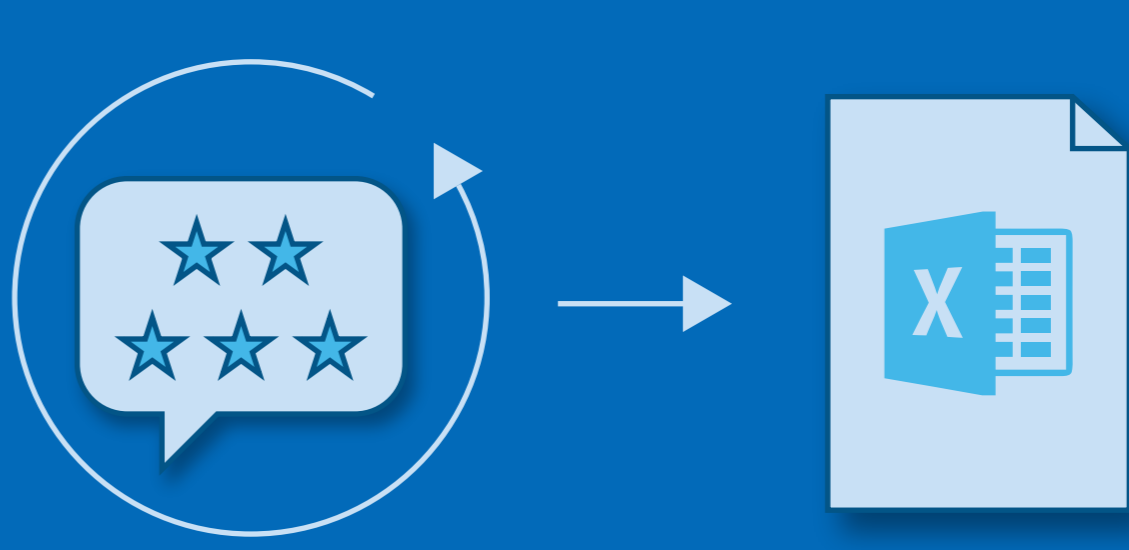
REVIEW

1 PIPELINE



Log in to D365 and review what's in the pipeline for your customer. This will provide talking points and show if you can move any opportunities down the funnel.

2 OPPORTUNITIES



Review open opportunities for the account. If you need to adjust any opportunities, open the list in Excel Online & make changes on the fly.

3 OPEN SUPPORT CASES



Review recent or active support cases for the client so you're not caught off-guard during your meeting.

4 ACTIVITY TAB



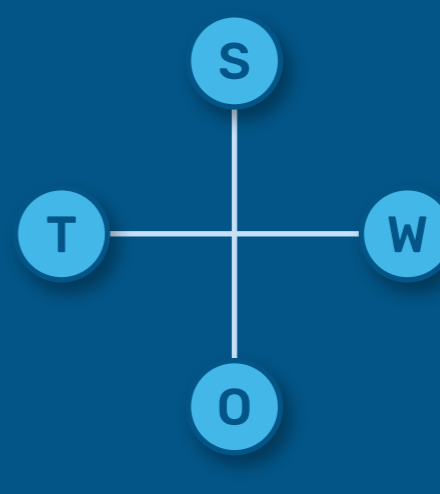
The Activity tab allows you to view unopened emails that relate to open opportunities, and respond to them directly within D365.

5 CREDIT HISTORY



D365 from Fullscope can be integrated with your ERP system, allowing you to see open balances, credit limits and more.

6 CORRECTIVE PLAN



Each of your accounts should have a corrective plan with a SWOT analysis. Review this before your meeting.

7 MEETING PREP & AGENDA



The meeting prep area in D365 allows you to fill in an agenda for your meeting and add internal attendees so they can review.

8 USE LINKEDIN SALES NAVIGATOR




Find out more about your attendees. Research related leads & save them as contacts within D365, building relationships within the customer organization.

9 CREATE A CALL SHEET



Open a call sheet within D365 and export it to Word. This summarizes the account information for your meeting.

10 UTILIZE MOBILE APPLICATIONS ON THE FLY



On the way to your meeting, log into D365 on your mobile to check for updates - and use the Voice Dictation to enter notes into D365 on your way back.

Microsoft Dynamics 365 for Sales allows you not only to perform your job, but to excel at it. Preparing for a meeting used to be a time-consuming task, and you'd still be caught off-guard by things you missed, or data you didn't have. D365 allows you to stay on top of opportunities so you can close more business.

Fullscope, an Alithya company, delivers innovative D365 solutions and services to manufacturing, professional service and equipment dealer organizations in North America and Europe. The award-winning company is one of the largest resellers of Microsoft Dynamics 365.

For more information on Microsoft Dynamics 365 for Sales, schedule a sales management assessment at

(866) 420-7624 (US)

OR

(0203) 608 1445 (UK)