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The ability for companies to create, develop and maintain customer relationships is more important than ever. Whether the customers are other businesses or consumers, whether the market is local or global, or whether the company is small or large, the challenge is the same.

Both current and potential customers are more informed, are active on more channels, and have more choice than at any previous point in history. Staying focused on your customers and providing them with the very best buying and customer experience is therefore crucial to weather the storm.

Choosing and implementing the right CRM platform is a strategic decision and an ongoing journey toward achieving the benefits that come from a targeted and effective customer focus. These include greater customer loyalty, increased revenue and cost- and resource-savings that come from fewer returns.

Fortunately, setting up the optimal CRM solution is no longer the costly and cumbersome affair that it was just a few years ago. Now you can simply buy the apps – and therefore the functionality – you need.

With **Microsoft Dynamics 365 Customer Engagement**, Microsoft provides four customer-facing apps that you can benefit from individually, but which can also be integrated, enabling a single platform with a multidisciplinary approach to customer interaction and service.

With **Dynamics 365 Sales** you can, for example, create structured sales processes to enable stronger customer relationships.

**Microsoft Dynamics 365 Customer Insights** (previously Microsoft Dynamics 365 Marketing) can segment its recipients, customize specific messages and send them through the right channels at the right time.

With **Dynamics 365 Customer Service**, you can integrate your service staff into the sales and marketing process, ensuring that valuable communication they have with customers can be used to identify upsell and cross-sell opportunities and any dissatisfied customers.

For service organizations, **Dynamics 365 Field Service** equips your employees with the tools and information they need to deliver a proactive, connected service experience built on customer loyalty and trust.



Integrating Sales, Marketing and Customer Service creates a single source of information, optimizing the company's ability to systematically identify leads and follow them up with targeted sales efforts.

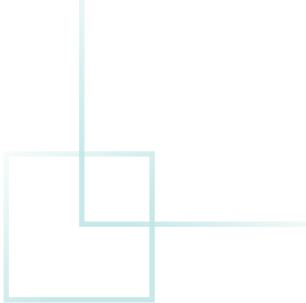
Integration with other Microsoft 365 components ensures that employees quickly get the full benefit of the functionality because they can continue work in familiar environments such as Outlook and Excel. They can collaborate across teams, work from home and on the go, and share information with applications such as Microsoft Teams and OneDrive.

At the same time, the various apps in Dynamics 365 Customer Engagement allow for integration with ERP functionality and processes as well as with Power BI. This means that all data can be collected and shared across the entire organization via clear and easy-to-use dashboards and reports.

## Microsoft Dynamics 365 Customer Engagement offers full integration

Read on to learn more about Dynamics 365 Customer Engagement solutions and why they are the optimal tool for creating customer experiences that attract and retain customers.





# Microsoft Dynamics 365 Sales

Do your salespeople have access to a coordinated overview of overall sales activities, and can they customize the processes for lead qualification, development and conversion to ensure consistent, yet flexible procedures? With Dynamics 365 Sales, your company can answer yes to that question and lay the foundation for a high-performing sales team.

### **Sales is not just about selling**

The days when salespeople only had to get the customer's signature on a quick quote are long gone.

Sales is now about capturing buyer interest as early as possible, offering the right product or service at the right time and through the customer's communication channels of choice - all while ensuring a great customer- and product-experience.

To meet all these expectations and demands, the sales team needs flexible tools that ensure that all necessary information insights and history from multiple communication channels are gathered in one place in a clear and usable form.

### **A structured overview of the entire sales process**

By allowing customers, suppliers and partners to communicate freely in open or closed groups, the Sales app adds value to all parties.

Daily insights into customers' questions, interests and emotional state also help each salesperson build those crucial positive relationships with current and potential customers.

Customized dashboards provide a quick and accurate overview of where each lead is in the sales process, actual and predicted pipeline progress, sales forecasts and sales team performance.

### True knowledge sharing

Deep integration with the rest of the Microsoft platform makes it possible to create individual sales documents directly in Word and share them in real-time via SharePoint, Microsoft 365 groups and OneDrive for Business.

It also means you can give your teams constant access to the information they need from the rest of the organization.

Last but not least, everyone will be able to receive news, social media posts, status updates, meeting information and messages - whether salespeople are in the office, home office or operating "in the field".

### Ready for social selling

Increased integration with LinkedIn provides opportunities that no other sales system can offer.

You can view LinkedIn profiles and insights as part of sales opportunity registrations, see recommended sales leads and mutual connections and get notifications when contacts change jobs.

### Smarter sales

Intelligent task automation shortens sales cycles and reduces costs, and AI-powered suggestions for 'next best actions' reduce sales closing times by focusing your sales resources on the highest priority activities.

In addition, customized interactive dashboards and reports created in Microsoft Power BI make it possible to predict trends and needs, and creating interactive, graphical visualizations directly in the sales program makes sales results clearer.

### Four benefits

- A more structured sales process provides better opportunities to systematically identify sales potential and build customer relationships.
- Extensive integration with the rest of the Microsoft platform helps ensure that all knowledge and information is available and unified in one place.
- The integration with LinkedIn, among other platforms, provides unique opportunities to realize a social selling strategy.
- Smart automation and AI-based recommendations add efficiency and reduce sales closing times, and customized dashboards and intuitive visualizations enable insights into the current and predicted status.



# Microsoft Dynamics 365 Customer Insights

Opportunities to follow customers – and customize your marketing engagement – from their first visit to the company website or social media throughout the sales funnel and until a contract is signed, make Dynamics 365 Customer Insights a great tool for lead generation, loyalty building and increased sales.

## **Make your marketing personal, relevant and engaging**

Mass broadcast marketing is a thing of the past. Win customers and build emotional connections faster by creating real-time, personalized customer experiences that span physical and digital channels and extend holistically across traditional marketing, sales and service barriers.

## **Effective campaign management**

With intuitive dashboards, marketers have a full overview of all campaigns and flows and can monitor their impact. This allows managers and executives to constantly monitor MROI (Marketing Return on Investment) and gain valuable insight into the pipeline and planning of resources and production.

## **Brand new segmentation options**

The ability to use static and dynamic lists of potential customers ensures that all audiences and leads are available and that information is up-to-date.

You can then create detailed segmentation based on complex targeting criteria using the segment builder tool and natural language, designing specific communications and end-to-end customer journeys for each segment to increase engagement and loyalty.



### Drag, drop and communicate

You'll be able to design vastly different customer journeys based on recipient needs with intuitive visualizations of campaign flows.

Once journeys are defined, automated marketing processes take over, freeing marketing personnel to spend their time creating new creative solutions. And with built-in intelligence and analytics tools, you can optimize and personalize customer journeys in real-time, based on AI-powered recommendations for content, channels and customer segmentation.

### Integration with Sales and LinkedIn

Dynamics 365 Customer Insights works seamlessly with the other customer engagement apps on one shared data platform, creating one place with up-to-date and accurate information about customers and leads.

It enables integrated processes, so that sales activities such as follow-ups are coordinated with marketing activities, and personalized marketing activities are built on the customer's specific activities and purchase history.

Your company gets a comprehensive, 360-degree view of every customer and lead and their interaction with campaigns, sales and services.

Automated lead scoring rules based on customer behavior forward hot prospects directly to your sales team for follow-up.

If your target audience is typical LinkedIn users, the integrated lead tool can import leads directly from LinkedIn into the marketing app.

### Customer surveys and events

As an extra feature, your company can easily and simply organize and promote physical events.

You can also create online customer surveys, which the app then helps you analyze. This creates a better data foundation and thus a more meaningful customer relationship.

#### Five benefits

- Efficient campaign management ensures a constant overview of all campaigns and their marketing return on investment.
- Integrated and easy-to-use segmentation creates the basis for much more targeted campaigns.
- Campaigns are designed and executed more quickly via intuitive drag-and-drop functionality.
- More attendees are attracted to events and potential customers receive a personalized service that they remember.
- Integration with Sales, Customer Service and a shared data platform ensures single source of information and optimal integration between marketing and other customer-facing functions.



Discovery



Nurturing



Qualify

A great tool for lead generation  
and increased sales



# Microsoft Dynamics 365 Customer Service

To deliver fast and efficient service requires insight into customer needs and preferences. With a holistic view of customer profiles and support history in one single dashboard, your service teams can understand customer issues in real-time and use historical context to deliver personalized, connected support experiences across voice, chat, text and popular Social Media platforms. And that creates customer-satisfaction, trust and loyalty.

## **Offer self-service support**

Sometimes customers do just fine on their own. Virtual agents powered by artificial intelligence have all the information and context they need to proactively solve common problems without involving people.

Additionally, giving customers curated access to rich knowledge base portals will help them find solutions themselves - freeing up time for your staff to handle more complex support issues.

## **Get the most out of your employees' skills**

When only live support will do, virtual agents use intelligent case management to escalate customer requests to the most suitable service agent for the job.

Your employees can prioritize specific types of customers and service requests based on their own preferences and experience, and see clear visualizations of the number and types of tasks in their queue.



### **Make positive customer meetings possible**

When your employees start a live customer interaction, they can view information about the customer's recent conversations, support cases and current solutions and services in a single dashboard.

While interacting with the customer, they can chat with colleagues, experts and managers, see real-time translation and sentiment analysis and get suggestions for relevant resources using artificial intelligence to enable fast and efficient case resolution.

### **Optimize your service operations**

Customer service managers have a comprehensive overview of current and historical activities. They can use built-in artificial intelligence to identify and analyze trends and uncover opportunities for improvement across, for example, support topics, agents, customer types and products.

They can then link their insights directly to key business KPIs to see how customer service activities deliver value to the entire organization.

More than anything else, customer support is what determines customers' positive or negative perceptions of a brand or company.

### Five benefits

- Engage with customers via their preferred channels and offer solutions based on 360-degree customer insights.
- Empower customers to help themselves with intelligent self-service support opportunities, including curated access to rich knowledge-base portals.
- Make full use of employee skills and knowledge with intelligent case management that escalates customer inquiries to the most suitable service employee.
- Empower your customer service team to solve cases more efficiently with real-time information sharing and AI-driven insights and recommendations.
- Optimize service operations with trend and opportunity analysis and insight into how service operations affect your company's KPIs.



# Microsoft Dynamics 365 Field Service

Transformer your Service Delivery Management from a traditional reactive maintenance model to a proactive maintenance - or even predictive - service model. Modern, data-centric technologies and intelligent automation/optimization tools will help you to keep facilities fully operational and enable your service teams and field technicians to deliver a responsive and efficient service experience that your competitors can't match.

## **On-site, on time, every time**

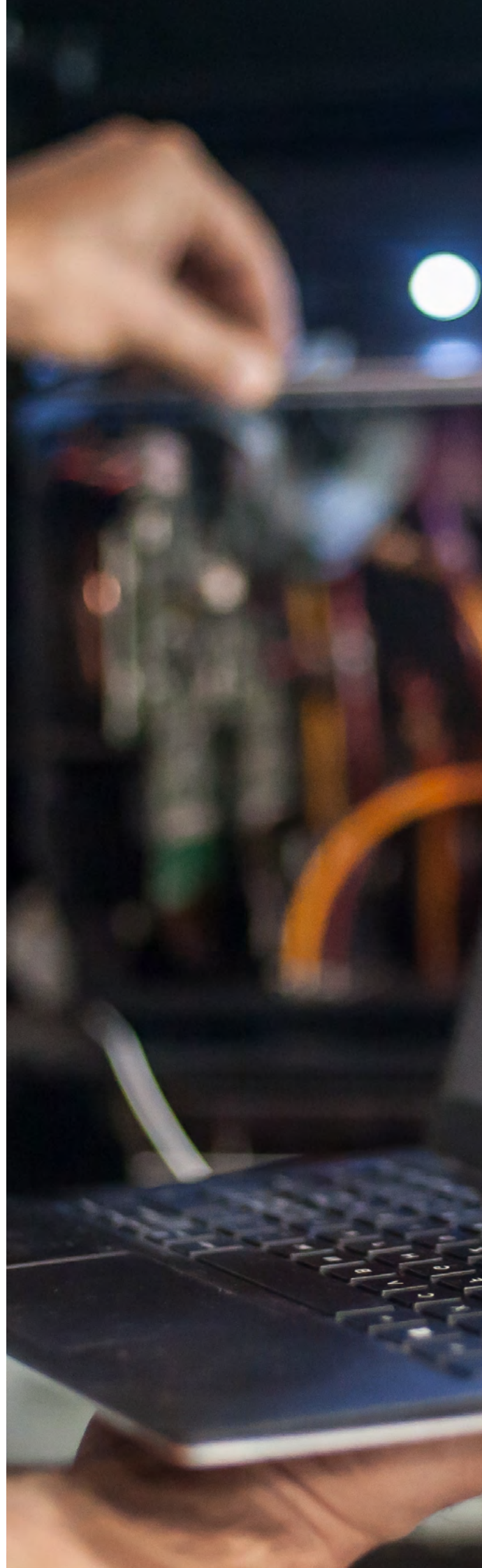
Your field technicians are the face of your company, so it's crucial that they show up to their appointments on time and have the experience and knowledge they need to get the job done quickly and efficiently.

Scheduling recommendations generated by artificial intelligence can route field service requests to the most appropriate technician. Automated scheduling optimization and route planning help minimize travel and response times and maximize resource utilization.

## **Maximize employee efficiency**

Your technicians can manage their appointments and work orders from anywhere and access maps, customer service data and equipment information on mobile devices.

Once on site, they can increase repair quality and reduce the need for follow-up visits by accessing maintenance instructions and knowledge-base content, and by using remote expert support via Dynamics 365 Remote Assist and mixed reality tools such as HoloLens.



### Solve problems before they even happen

With artificial intelligence, mixed reality and IoT technology in one integrated solution, you can replace reactive, break/fix maintenance with remote detection and proactive resolution of issues before they happen.

IoT monitoring and data analytics enable remote detection of issues that trigger automatic work order creation and case management.

In some cases, you can even resolve issues at the customer site without sending out staff.

### Help customers to help themselves

With Dynamics 365 Field Service, your customers and suppliers can take care of common service requests themselves via the Field Service app or an online portal.

For example, they can schedule a service visit, view billing details and check their service status and recent activities – saving time and resources that can be used to solve more complex problems.

### Four benefits

- Minimize travel and response times and maximize field technician utilization with intelligent case management and schedule optimization.
- Increase repair quality and reduce the need for follow-up visits with remote access to case information, knowledge base content and real-time virtual expert support.
- Solve problems before they happen with IoT monitoring and data analytics that enable automatic alerts, work order creation and case management.
- Empower customers to resolve common service requests quickly and easily online, which saves time and resources and enhances customer satisfaction.

Better customer  
experiences here  
and now

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