

Microsoft Dynamics CRM Online




Guidance for selling to SMB customers

Overview: Making CRM easy and accessible for small and midsize businesses

Most businesses today know that delivering a great customer experience is essential to winning sales and differentiating themselves against their competition. This is where CRM comes in, but a lot of smaller businesses see CRM as too complex for their needs. Microsoft Dynamics CRM offers the perfect solution because it can adapt to specific business needs, with the flexibility to deliver only the part of the solution that is right for the customer at a given time. In many cases, the best strategy is to focus on the basics and start small—for example delivering capabilities around a specific area like opportunity management, and then moving on to more advanced scenarios later.

Conversation guidance

Start by identifying a key customer need or pain point, and then focus the conversation around the benefits Dynamics CRM can deliver in that area. Use the high-level pitch guidance below in conjunction with the [Dynamics CRM for SMB pitch deck](#) to help you drive a successful customer conversation.

<i>Area of focus</i>	 Opportunity Management	 Mobile Productivity	 Business Insight
<i>Customer need</i>	All customer-facing employees need easy access to consistent, detailed customer information and past interactions.	An increasingly mobile workforce demands tools that make it seamless to work anywhere—at the office, home, or the road.	Business leaders need visibility into organizational performance to make better-informed decisions quickly.
<i>High-level pitch</i>	Make it easy for everyone in your company to get the information they need to deliver great customer experiences.	Empower your sales and service teams to do their best work from virtually anywhere on any device.	Get visibility into your organization to make informed decisions and grow your business.
<i>Supporting capabilities</i>	<ul style="list-style-type: none">• Access complete, consistent information from a single, centralized source of the truth.• Make staying in touch with customers a seamless part of employees' day-to-day activities.	<ul style="list-style-type: none">• Let employees connect with customer information wherever they are, on whatever device.• Boost productivity and free up more time to spend with customers by streamlining processes and automating tasks.	<ul style="list-style-type: none">• Stay on target with real-time visibility into your business using live dashboards and interactive reports.• Uncover new opportunities and get deeper insights by making it easy to visualize information.

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Dynamics CRM Online + Office 365: A major advantage for SMB customers

When it comes to making CRM simple and easy for SMB customers, one of the biggest advantages is its ability to work seamlessly with the familiar tools in Office 365, such as Outlook and Skype for Business. For customers with Office, focus on scenarios that show how CRM can become a regular part of their existing workflows—for example, schedule a customer meeting in Outlook from within the CRM window—or click on Skype for Business to instantly connect with customers anywhere.

Key talking points:

- Get CRM that works seamlessly with familiar tools, like Outlook and Excel
- Make things like managing opportunities and connecting with customers a natural part of employees' regular work activities
- Rely on an affordable enterprise-class cloud infrastructure from Microsoft



Resources designed to help you succeed

Dynamics CRM Online materials		ModernBiz "Connect with Customers" materials	
Materials to help you market and sell Dynamics CRM Online to SMBs		Materials designed to engage customers in conversations around solutions that incorporate multiple Microsoft products and technologies	
Pitch Deck Win sales with PowerPoint material designed to help you address key customer challenges http://aka.ms/CRMsmbPitchDeck	Demand Gen Email Templates For Dynamics CRM prospects with Office 365: http://aka.ms/CRMsmbEmail1 For Dynamics CRM prospects without Office 365: http://aka.ms/CRMsmbEmail2	Email Template: http://aka.ms/Yljlpo Copy Blocks: http://aka.ms/K068u3 Pitch Deck: http://aka.ms/C098iz	Web Syndication Kit: http://aka.ms/sd3byq Telesales Script: http://aka.ms/ebx1g8 Social Media Messaging: http://aka.ms/Csgld
Brochure Provide a one-pager focused on business value for SMBs as a leave-behind or via email http://aka.ms/CRMsmbCustBrochure	Copy Blocks Access customer-ready copy for use online and in your marketing materials http://aka.ms/CRMsmbCopyBlocks	Partner Resources Resources to help Microsoft partners with their digital marketing and sales efforts Smart Partner Marketing: http://SmartPartnerMarketing.Microsoft.com ModernBiz campaign site: http://aka.ms/modernbiz Cloud SureStep: http://aka.ms/cloudsurestep	