



Delight your customers and boost productivity with Microsoft Dynamics CRM Online and Office 365



As your organization grows, it can be challenging to balance investing in technology with competing business needs like expanding product offerings, broadening your geographic footprint, hiring new employees, or growing your customer support services. As a result, you might have outdated or time-consuming manual processes that are affecting not only your sales-people, but your customers too.

You may recognize some of these all-too-common scenarios: Your sales team is spending more time on paperwork than with customers. A deal is delayed because critical information is stuck back at the office. Teams aren't effectively working together to close deals, and customers are being left in the dark. Business-critical information is being kept in too many places, and it's hard to find when it's needed. You're hurting your customer relationships by not being able to answer questions right away.

Better insights, better performance— it's in the cloud

Small and midsize businesses are increasingly moving to cloud-based productivity and business solutions to give employees the tools to meet these challenges and improve performance. These cloud productivity tools can help you drive sales, deepen customer relationships, and stay productive anywhere.

For your sales teams, this means being able to capture knowledge and customer history to turn transactions into relationships and grow a loyal customer base. For you, it means increased business insight that leads to better decisions about how and where to grow the company.

45%
of SMBs say
their employees
get more done
in the same
time thanks to
cloud and mobile
technologies.

—Boston Consulting Group survey
of 400 SMBs in 26 countries



Cloud-powered tools to win and keep customers

In a mobile-first, cloud-first era, Microsoft delivers compelling and effective business solutions for companies of all sizes, putting comprehensive tools within the reach and budget of small and midsize businesses.

- Office 365 enables individual productivity, effective communications, and team collaboration.
- Microsoft Dynamics CRM Online offers a mobile solution to organize contacts, nurture leads, drive sales, and amaze customers.

Office 365 productivity tools combined with Dynamics CRM Online deliver a mobile solution that is affordable and easy to use, with the power to support the ambitions of your growing business. And because it's in the Microsoft Cloud, you can trust that it's highly available and up-to-date, with top-level security.

Know your customers better, know your business better

Microsoft Dynamics CRM Online is an easy-to-use, mobile-ready business solution that helps small and midsize businesses accelerate sales and nurture existing customers. It delivers familiar tools that work hand-in-hand with Office 365 to increase productivity and collaboration across your organization.



Deepen customer knowledge

Delight your customers and enhance your relationships by creating personalized experiences that lead to repeat business and referrals. And use market and customer insights to identify and close your best new business opportunities.



Improve employee productivity

Empower your team to work from home, on the road, or at a customer site, on any device, with powerful mobile tools that bring the office anywhere. And enhance efficiency and team collaboration with built-in workflows and templates that can help streamline business processes.



Gain business insight

Get visibility into your business to help drive growth, then use personalized dashboards and reports to quickly turn those insights into decisions that benefit the business. And easily share common customer details and interaction information with the whole team to improve customer experiences.

Equip your teams with familiar, powerful tools

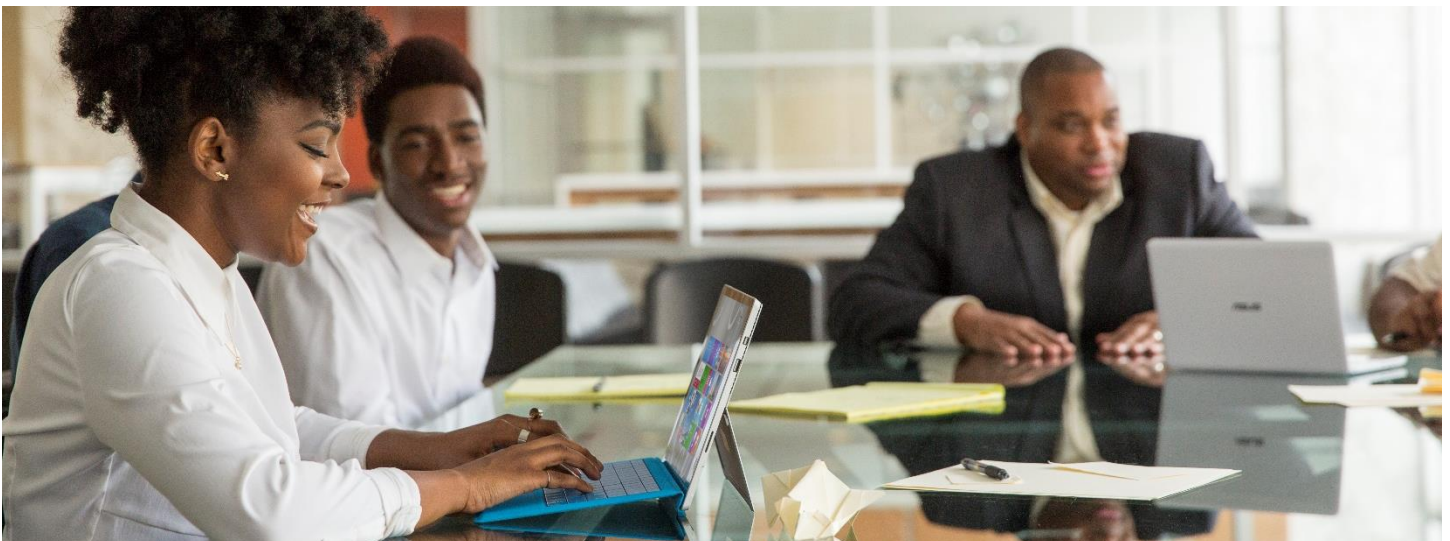
Available anywhere, on your mobile device, both Dynamics CRM Online and the Office 365 suite of products deliver powerful capabilities that boost your team's productivity, so you can focus on delighting your customers and driving your business forward.

Microsoft Dynamics CRM Online

- Comprehensive contact and opportunity management
- Organized sales processes to guide your sales team
- Visibility into sales pipeline with real-time sales forecasts and pipeline reports
- Full view of customer data, including sales, service, and contact history
- Streamlined service case management to improve customer engagements and speed response time
- Personalized communications to drive performance of marketing programs

Office 365

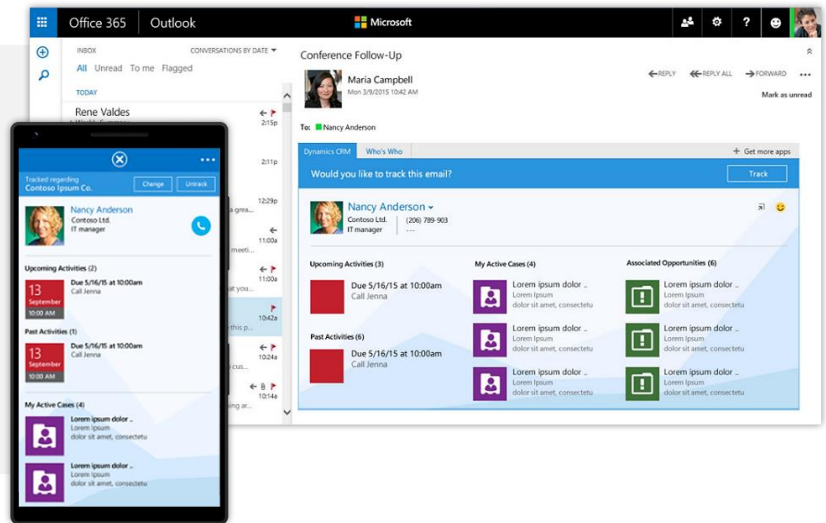
- Robust email, contacts, meeting, and task management through Outlook
- Powerful document design, creation, editing, and sharing with Word
- Immersive data tracking, reporting, and visualization in Excel
- Flexible note taking and idea sharing across teams using OneNote
- Presence-aware communications with instant messaging, video and audio conferencing, and screen sharing via Skype for Business
- Centralized document management, portal development, and collaboration platform with SharePoint



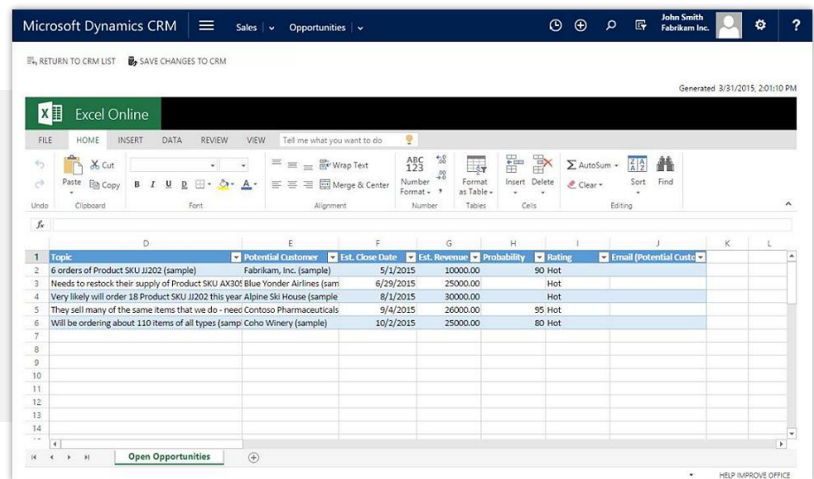
Dynamics CRM Online + Office 365 = even better together

Accelerate sales and nurture existing customers by combining Office 365 and Dynamics CRM Online. Familiar Office tools drive a new level of customer engagement when used in the context of CRM capabilities. Here are some examples:

- Use incoming emails in **Outlook** to create leads, opportunities, or support cases directly in Dynamics CRM Online. Increase your sales team's productivity with the ability to track emails, contacts, tasks, and appointments in Dynamics CRM Online from wherever they are working.

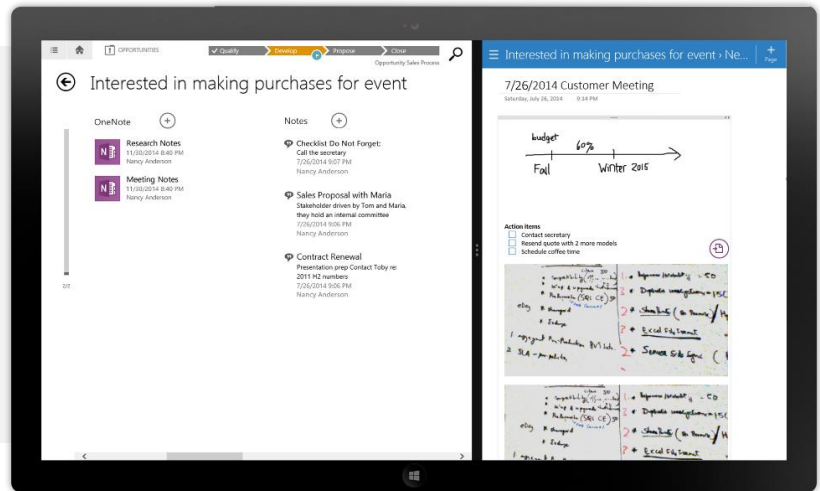


- Import, export, or share information using **Excel** without losing any formatting. Excel, available inside Dynamics CRM Online, also enables you to easily update records and analyze data.



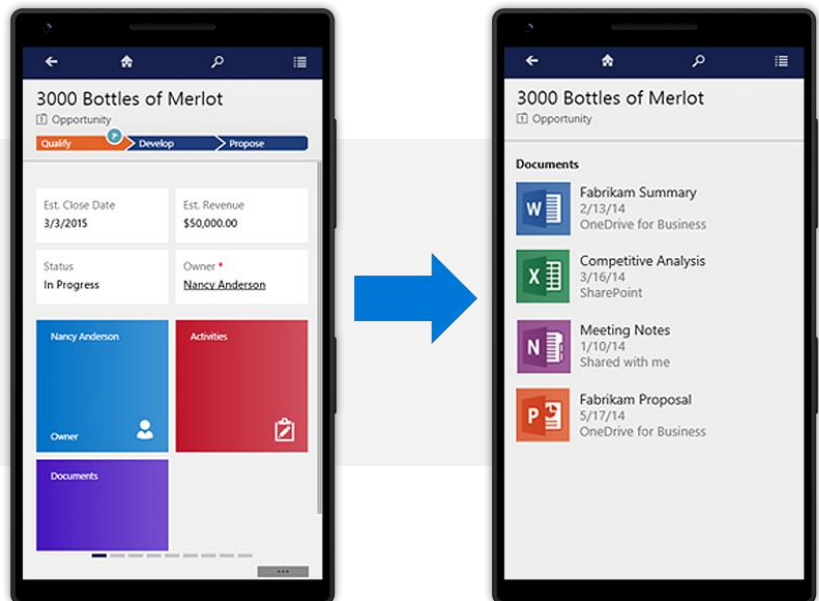
- Use **Skype for Business** to stay connected with customers and colleagues working on the same deal, collaborate with them instantly, and maximize resource utilization. You can also track Skype for Business meetings as activities in Dynamics CRM Online to provide visibility into the interactions that customers are having with your business.

- When you are with a customer, capture quick information using **OneNote** and then attach that note directly to the customer record in Dynamics CRM Online. Having all the information in one place makes it easy to find what you need, when you need it.



- Modernize business communications easily with professional-looking documents that can be automatically populated with CRM data. **Word** templates within Dynamics CRM Online make it easy to create consistent sales orders, proposals, and other communications; and data from Dynamics CRM Online is automatically populated into templates.

- Relevant business documents such as quotes, sales orders, and price lists can be stored and shared among teams using **SharePoint** and easily accessed within Dynamics CRM Online.



Make a difference in your business by using Dynamics CRM Online with Office 365

Achieve more and get more value with the combination of powerful customer management tools and productivity solutions designed to work how and where you work.

Sales productivity on the go. Wherever they're working, your sales team can use mobile devices to check email, look up customer info from Dynamics CRM Online, connect with customers and coworkers using Skype for Business, and update CRM records using the unified experience inside Office 365.

Enhanced team collaboration. Every successful deal relies on people from different teams working together with consistent, up-to-date information. Now you can capture meeting notes using OneNote inside Dynamics CRM Online and share it with customers and vendors, and easily share documents with colleagues in common SharePoint locations.

Modern business documents. Use Word inside Dynamics CRM Online to create consistent, professional business documents such as quotes and sales orders with data auto-populated from CRM records. Use Excel inside Dynamics CRM Online to easily update records or generate reports. Or, create marketing lists from CRM leads and run an email marketing campaign using templates from Outlook.

Easy adoption. Because your employees already love and use Office 365 products like Word, Excel, and Outlook, they will find Dynamics CRM Online very familiar and easy to use—this drives speedy adoption of the solution so you can start seeing value right away.

SOLUTION IN ACTION



Productivity soars, customers applaud: Kelly Roofing and Dynamics CRM Online

Kelly Roofing is a family-owned small business, but their loyal customers often assume it is part of a nationwide chain. Thanks to Microsoft Office 365 and Dynamics CRM Online, mundane tasks are automated, and notes and schedules sync in real time—freeing up staff for customers. Since the move to the cloud, customer satisfaction is up and revenue has doubled without a staff increase—honoring their founder's motto: "Make the customer happy, and you won't have to look for work—it will come to you." [Read more](#)

Maximize opportunities to win and keep customers

Dynamics CRM Online



**Sales and marketing
intelligence**

Office 365



**Enhanced
collaboration**



**Powerful solutions
to drive sales**

The powerful combination of Microsoft Dynamics CRM Online and Office 365 helps you stay productive and prepared to take on business challenges, boost your sales effectiveness, deepen customer loyalty, and outperform the competition. See how a business solution from Microsoft can turn your day-to-day technology into a tool for meaningful customer insight, helping you make the best decisions for where your business is today and where you want to go tomorrow.

Start your free Microsoft Dynamics CRM Online trial

Guided by a Microsoft expert and customized to your individual needs



Explore these resources for additional information:

- [Learn more about Dynamics CRM Online for small and midsize business](#)
- [Learn more about Office 365 Business Premium](#)
- [Integration Guide: Microsoft Dynamics CRM Online and Office 365](#)