



Introducing Microsoft Dynamics 365 Sales

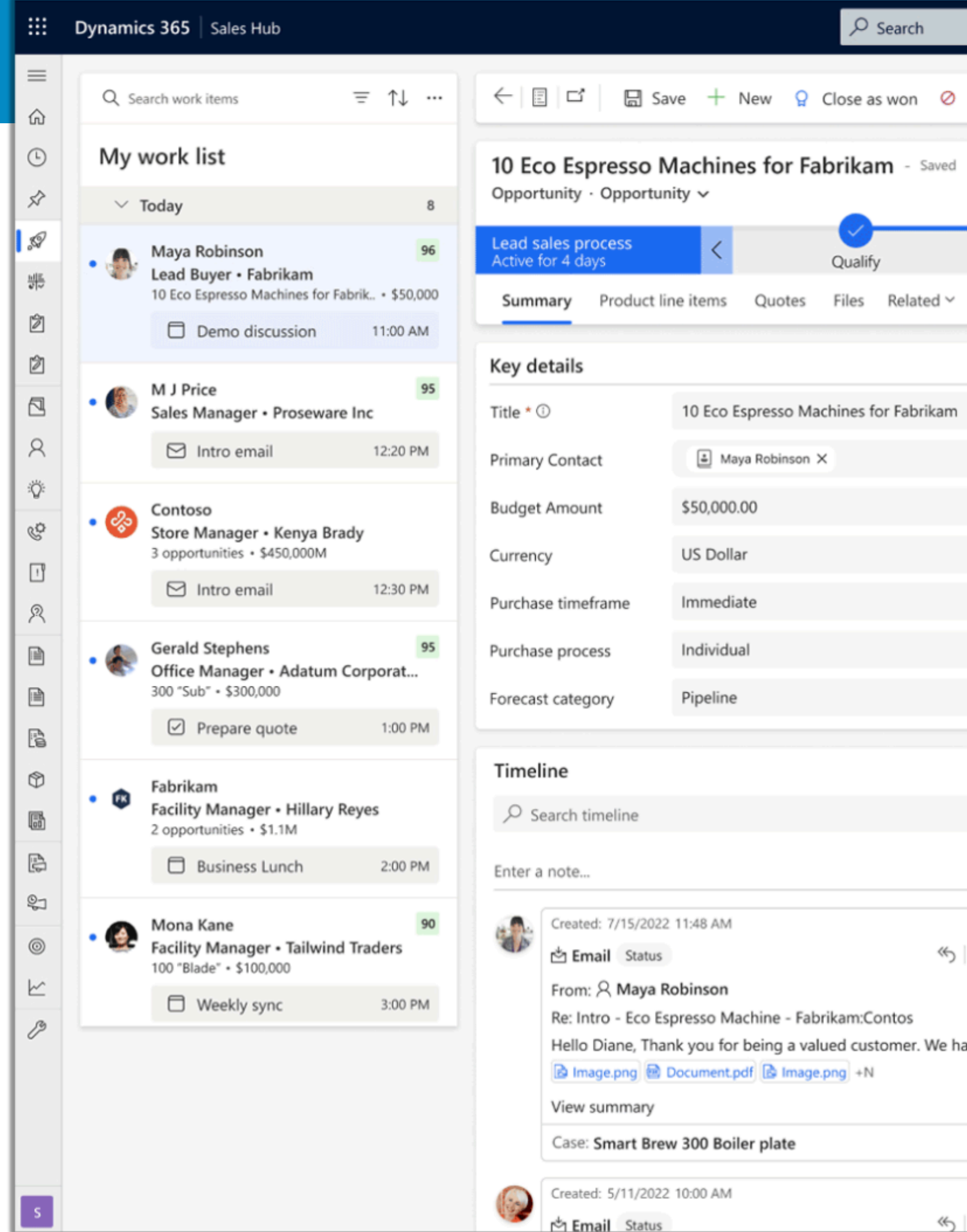
Microsoft Partner

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Dynamics 365 Sales – Summary

- **Sell smarter** with complete relationship information and contextual insights.
- Accomplish more by **automating repetitive sales tasks**.
- **Reduce time spent switching between apps** with native Outlook and Teams integration.
- **Free up more time for selling** using Microsoft Copilot productivity features, including automated email drafts and auto-generated summaries for inbound emails, active opportunities and Teams meetings.
- See a **real-time view of your pipeline** to focus efforts effectively.
- Use your professional network to **close faster with integrated LinkedIn Sales Navigator**.



Dynamics 365 | Sales Hub

Search work items

My work list

Today 8

Maya Robinson
Lead Buyer • Fabrikam
10 Eco Espresso Machines for Fabrikam • \$50,000
Demo discussion 11:00 AM

M J Price
Sales Manager • Proseware Inc
Intro email 12:20 PM

Contoso
Store Manager • Kenya Brady
3 opportunities • \$450,000M
Intro email 12:30 PM

Gerald Stephens
Office Manager • Adatum Corporat...
300 "Sub" • \$300,000
Prepare quote 1:00 PM

Fabrikam
Facility Manager • Hillary Reyes
2 opportunities • \$1.1M
Business Lunch 2:00 PM

Mona Kane
Facility Manager • Tailwind Traders
100 "Blade" • \$100,000
Weekly sync 3:00 PM

10 Eco Espresso Machines for Fabrikam - Saved
Opportunity • Opportunity

Lead sales process
Active for 4 days

Summary Product line items Quotes Files Related

Key details

Title 10 Eco Espresso Machines for Fabrikam

Primary Contact Maya Robinson

Budget Amount \$50,000.00

Currency US Dollar

Purchase timeframe Immediate

Purchase process Individual

Forecast category Pipeline

Timeline

Search timeline

Enter a note...

Created: 7/15/2022 11:48 AM

Email Status

From: Maya Robinson

Re: Intro - Eco Espresso Machine - Fabrikam:Contos

Hello Diane, Thank you for being a valued customer. We ha

Image.png Document.pdf Image.png +N

View summary

Case: Smart Brew 300 Boiler plate

Created: 5/11/2022 10:00 AM

Email Status

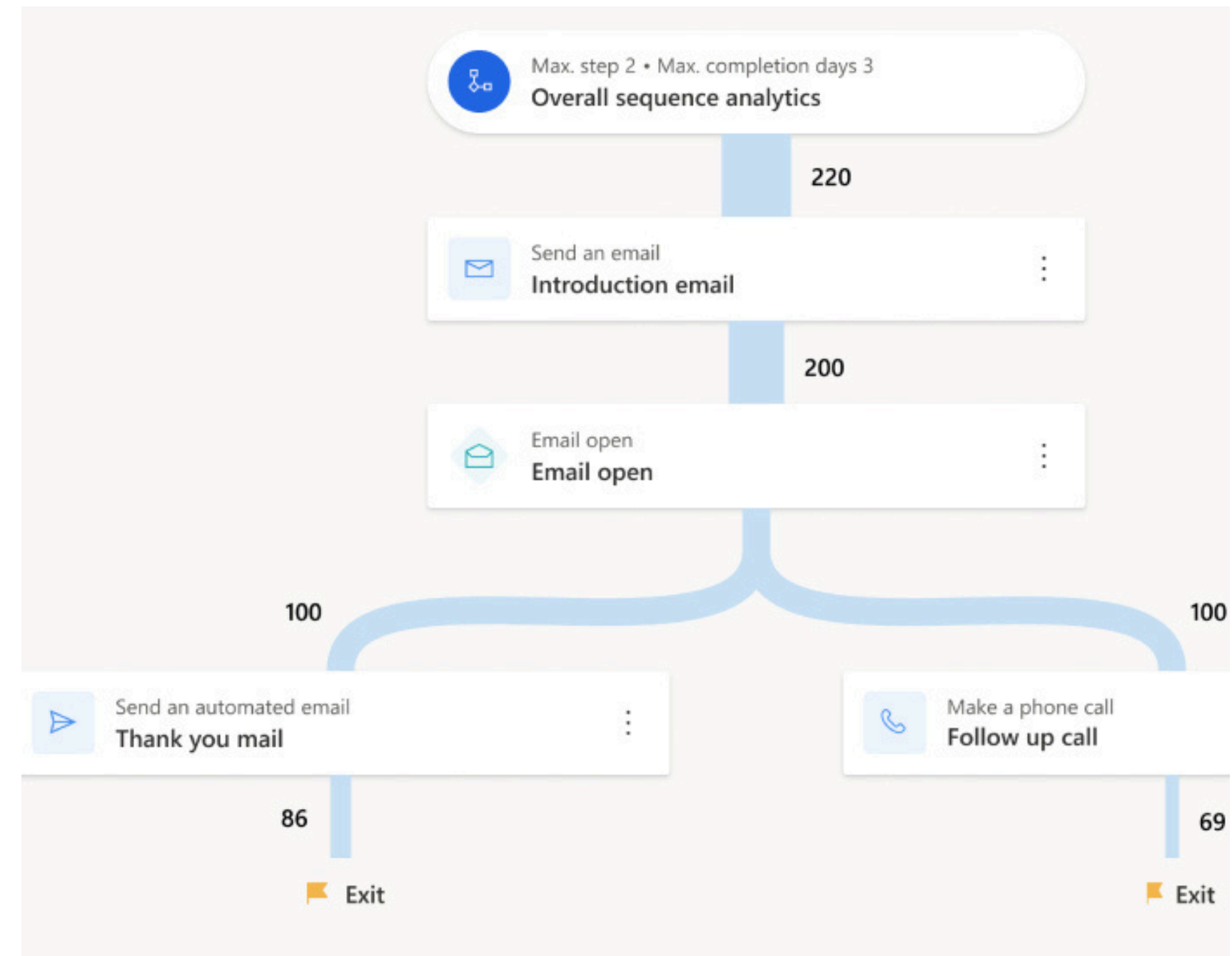
Simplify Sales Processes

Centralise your customer data with Dynamics 365 Sales for a 360-degree view to help you close deals faster.

Consolidate all prospect and pipeline information into a flexible CRM app that will scale as your business grows.

Standardise your processes around a unified system to increase seller productivity and collaboration.

With a complete picture of every relationship from one reliable source of truth, your team can seize more opportunities to exceed targets confidently and efficiently.



Increasing Seller Productivity

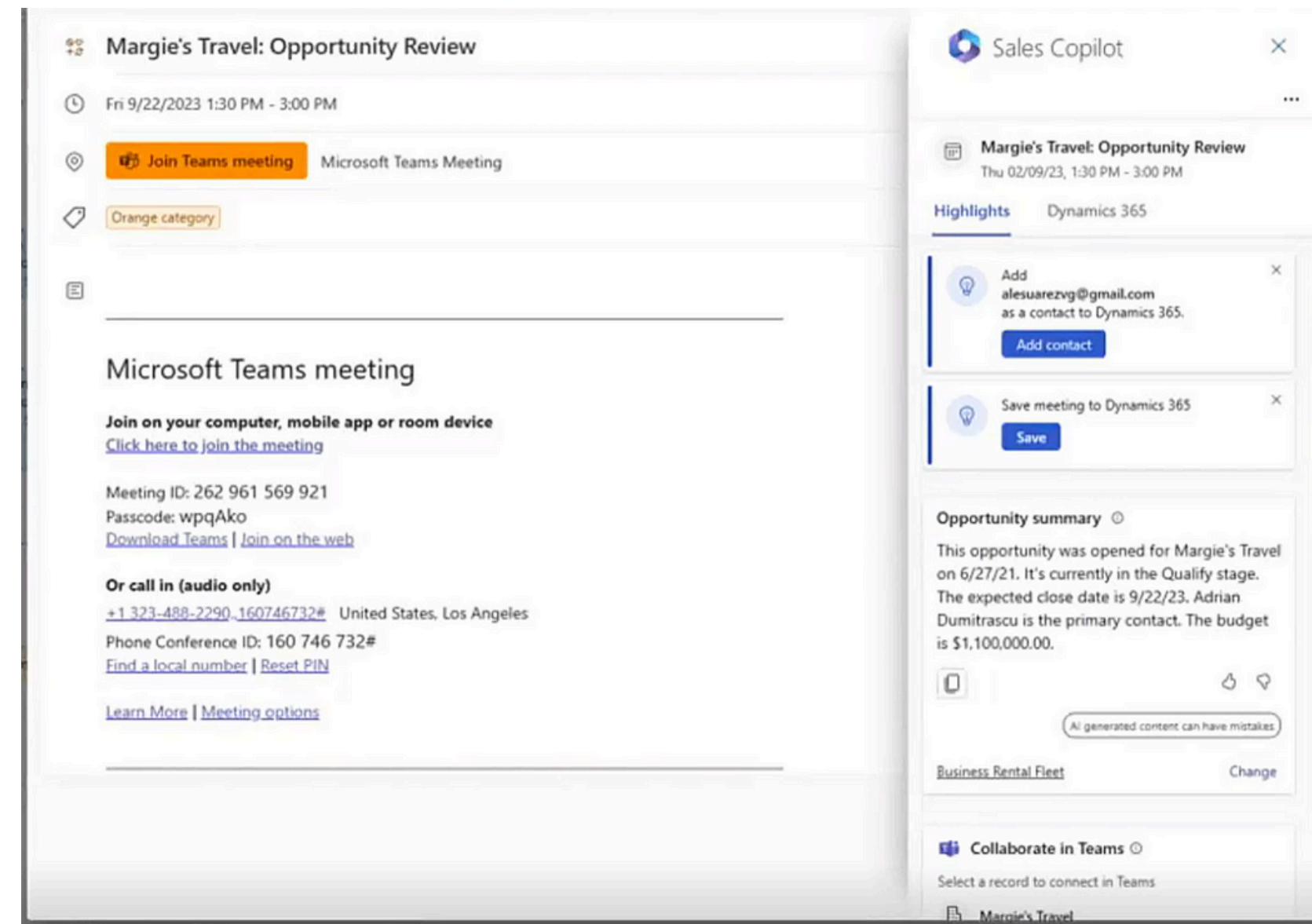
Sales teams are often overburdened with manual data entry and other repetitive, time-consuming tasks.

Dynamics 365 helps sellers reclaim time to focus on revenue-generating activities.

Inbuilt workflows and sequences based on your sales methodology keep everyone aligned and ensure consistent handling of leads and opportunities.

Microsoft Copilot for Sales provides actionable insights using CRM data to drive personalised conversations. This helps sellers stay in the flow of work by accessing and updating CRM information across Outlook and Teams.

Further productivity capabilities include automated summarisations and contextual email response drafts.



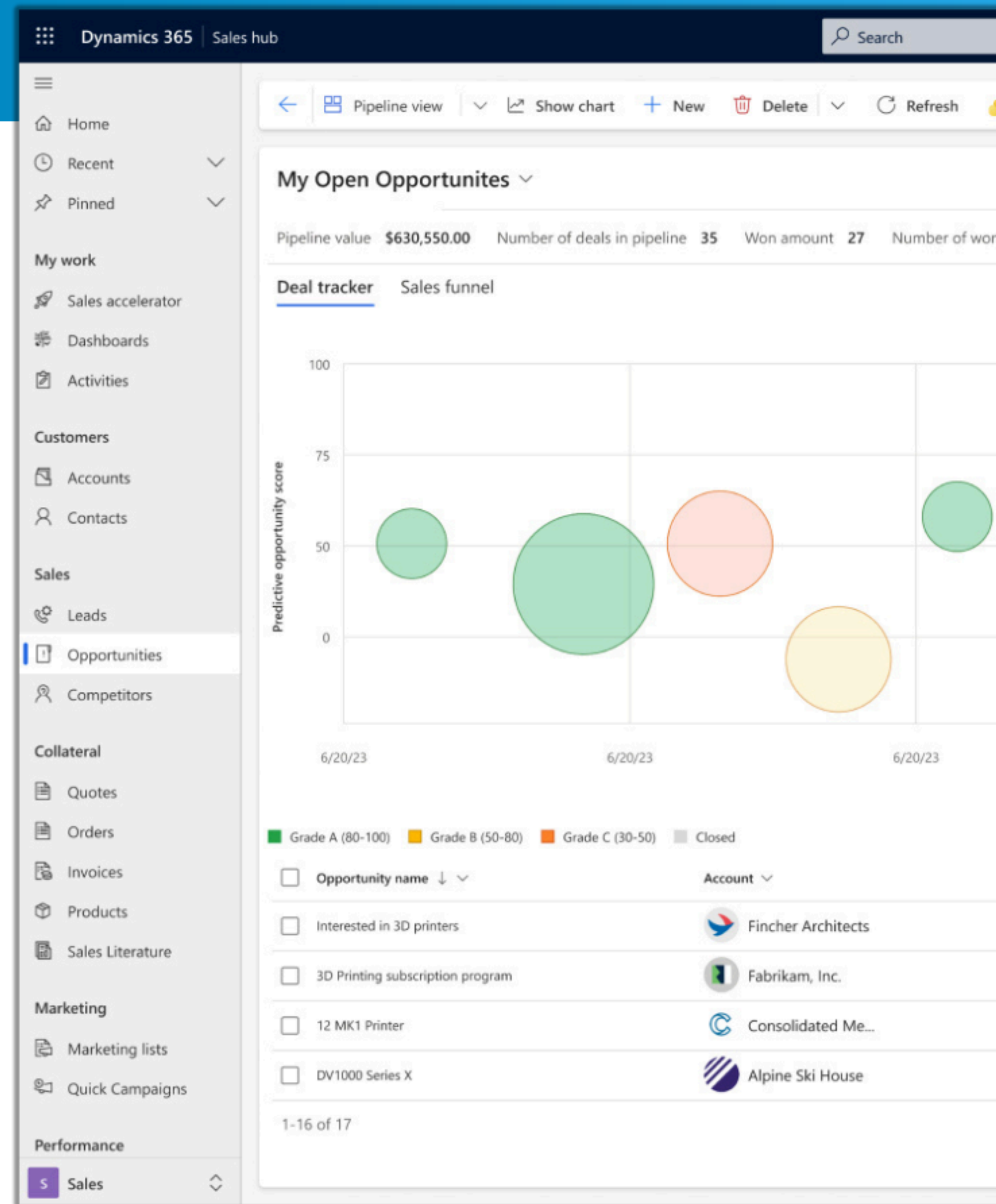
Data Driven Insights

Make informed decisions with a real-time view of your sales pipeline and projections in Dynamics 365.

Move deals across your selling stages based on your level of confidence.

Use AI models to predict future revenue based on historical performance and your current pipeline. Set realistic targets, identify risks, and modify your sales strategies using this data to drive better outcomes.

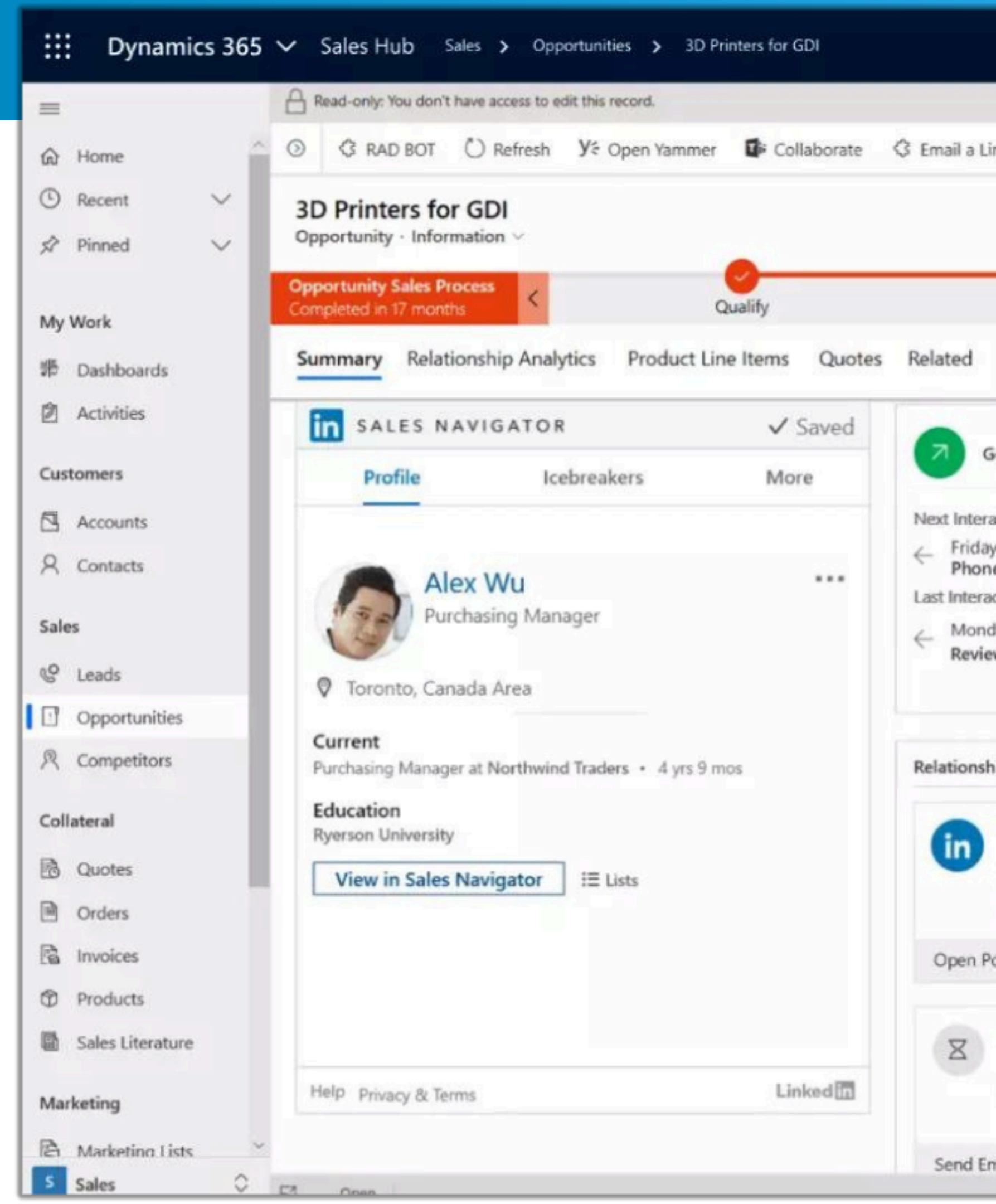
Dynamics 365 includes an AI-powered scoring model that provides an indication of how likely a lead will convert. With these insights, sales teams can effectively focus efforts and take proactive action to achieve their goals.



Sales Navigator Integration

Integrate LinkedIn Sales Navigator with Dynamics 365 Sales to close faster using your professional network.

- Sync LinkedIn profiles with leads and contacts in Dynamics for insights and personalised connections.
- Use LinkedIn profiles within Dynamics 365 to understand shared connections, interests and experiences.
- Identify each buying committee member with live org chart integration with Dynamics 365.
- Send InMail messages and connection requests directly from Dynamics 365 and track each interaction.



Our Custom Dynamics 365 Sales Solutions Include:



**Lead
Management**



**Opportunity
Management**



**Pipeline
Visibility**



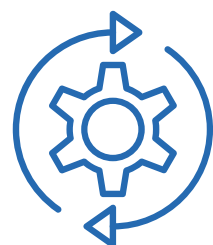
**Sales
Forecasting**



**Account
Management**



**Contact
Management**



**Sales Workflow
Automation**



**Quote
Generation**



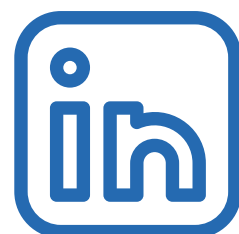
**Creditsafe
Integration**



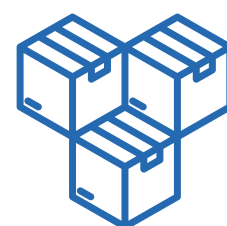
**Performance
Analytics**



**Mobile Sales
App**



**LinkedIn Sales
Navigator Integration**



**Product
Management**



**Microsoft Teams
Integration**



**AI-Powered
Recommendations**

Connected Solutions

Microsoft Dynamics 365 Sales is a quick-to-implement, easy-to-use solution that will adapt flexibly to your organisation and support its growth ambitions.

For a fully unified solution, Dynamics 365 Sales natively connects with other Microsoft Business Apps to align sales with service, marketing and more teams.



Dynamics 365 Sales

Enabling sellers to increase efficiency by minimising manual processes and unlocking data insights.



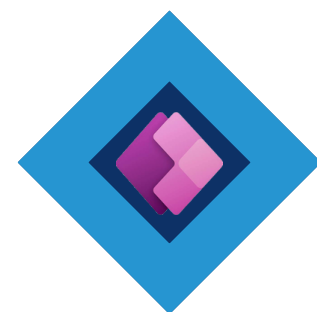
Dynamics 365 Customer Service

Empowering teams to consistently deliver personalised service.



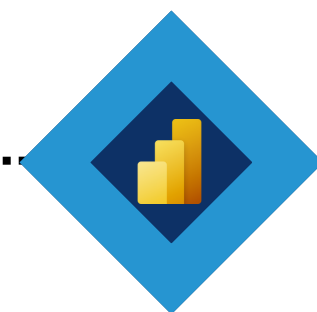
Dynamics 365 Customer Insights

Engage customers with timely, personalised content delivered through the right channels.



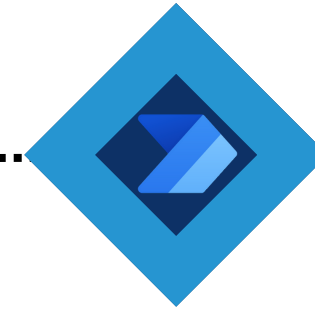
Power Apps

Turn ideas into solutions with low-code custom apps that solve your business challenges.



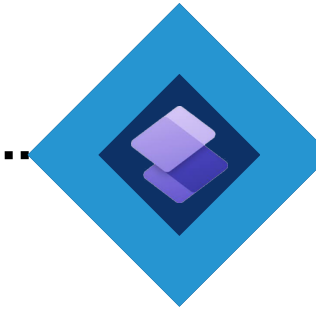
Power BI

Visualise your data in new ways to uncover insights that will drive quicker, better-informed decisions.



Power Automate

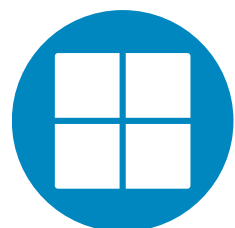
Streamline repetitive tasks with automated workflows that boost productivity.



Power Pages

Quickly deploy process-driven portals delivering vital information and services to your customers.

About ServerSys



We are a leading **UK Tier-1 Microsoft Cloud Solutions Provider** and a Dynamics 365 and Power Platform Partner.



We offer **web portal and CRM development, consultancy, support and training** to financial services organisations and companies across many sectors.



We have been **in operation for over 25 years** and take pride in our **96% client retention rate**.



Our **self-service portals** reduce costs, **enhance communication** and improve client onboarding.



We enable organisations to streamline processes and connect their data with Dynamics 365 to provide a **single source of accurate data**.

We build collaborative partnerships with organisations including:





ServerSys

Speak to us today

Let ServerSys help you strengthen relationships, boost productivity and accelerate revenue growth with Dynamics 365 Sales.

Contact us today to discuss your requirements.

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