



# 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 personal network to **close faster with integrated LinkedIn Sales Navigator**.

The screenshot displays the Dynamics 365 Sales Hub interface. On the left, a sidebar contains navigation icons for home, clock, star, rocket, and various document and communication tools. The main area is divided into two panels. The left panel, titled 'My work list', shows a list of work items for 'Today' with a count of 8. Each item includes a contact name, title, company, and a scheduled activity with a time. The items are: Maya Robinson (Lead Buyer at Fabrikam) with a 'Demo discussion' at 11:00 AM; M J Price (Sales Manager at Proseware Inc) with an 'Intro email' at 12:20 PM; Contoso (Store Manager at Kenya Brady) with an 'Intro email' at 12:30 PM; Gerald Stephens (Office Manager at Adatum Corporat...) with a 'Prepare quote' at 1:00 PM; Fabrikam (Facility Manager at Hillary Reyes) with a 'Business Lunch' at 2:00 PM; and Mona Kane (Facility Manager at Tailwind Traders) with a 'Weekly sync' at 3:00 PM. The right panel shows a detailed view of an opportunity titled '10 Eco Espresso Machines for Fabrikam'. It includes a progress bar for 'Lead sales process' (Active for 4 days) and 'Qualify'. Below this is a 'Key details' section with fields for Title, Primary Contact (Maya Robinson), Budget Amount (\$50,000.00), Currency (US Dollar), Purchase timeframe (Immediate), Purchase process (Individual), and Forecast category (Pipeline). At the bottom, a 'Timeline' section shows a search bar and a list of events, including an email from Maya Robinson dated 7/15/2022 at 11:48 AM and another email dated 5/11/2022 at 10:00 AM.

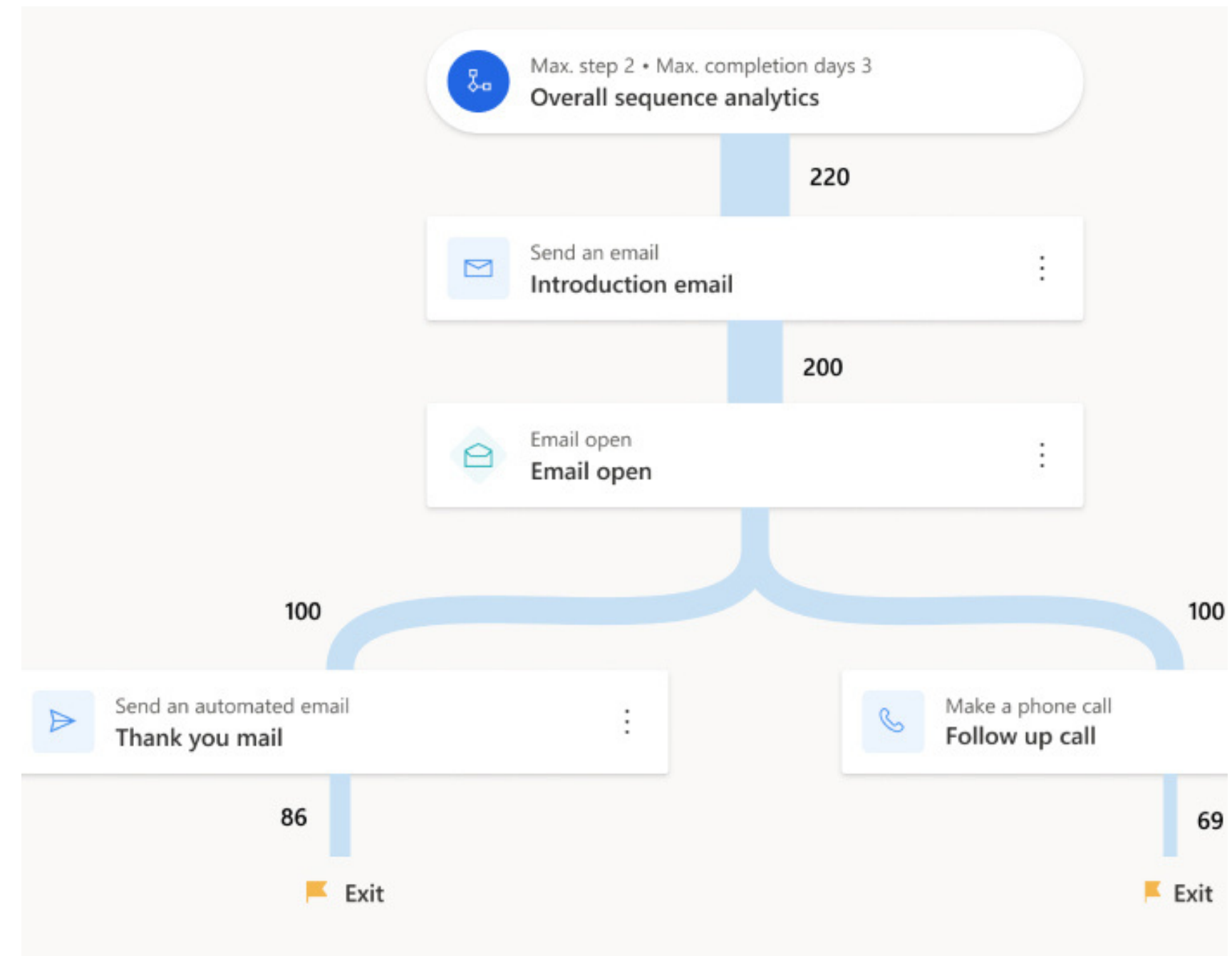
# Simplify Sales Processes

**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

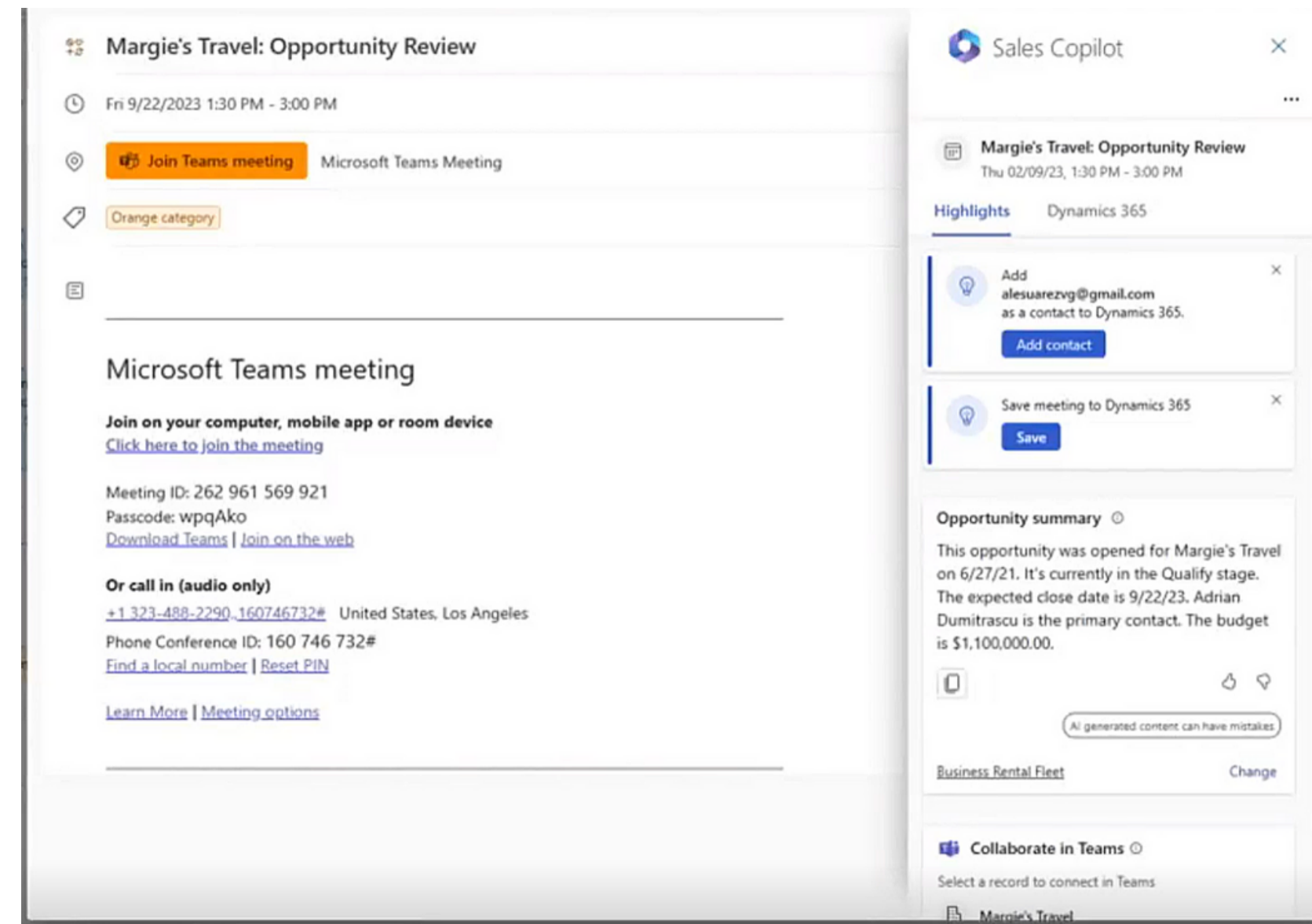
**Sales teams are often overburdened with manual data entry and other repetitive, time-consuming tasks.**

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.



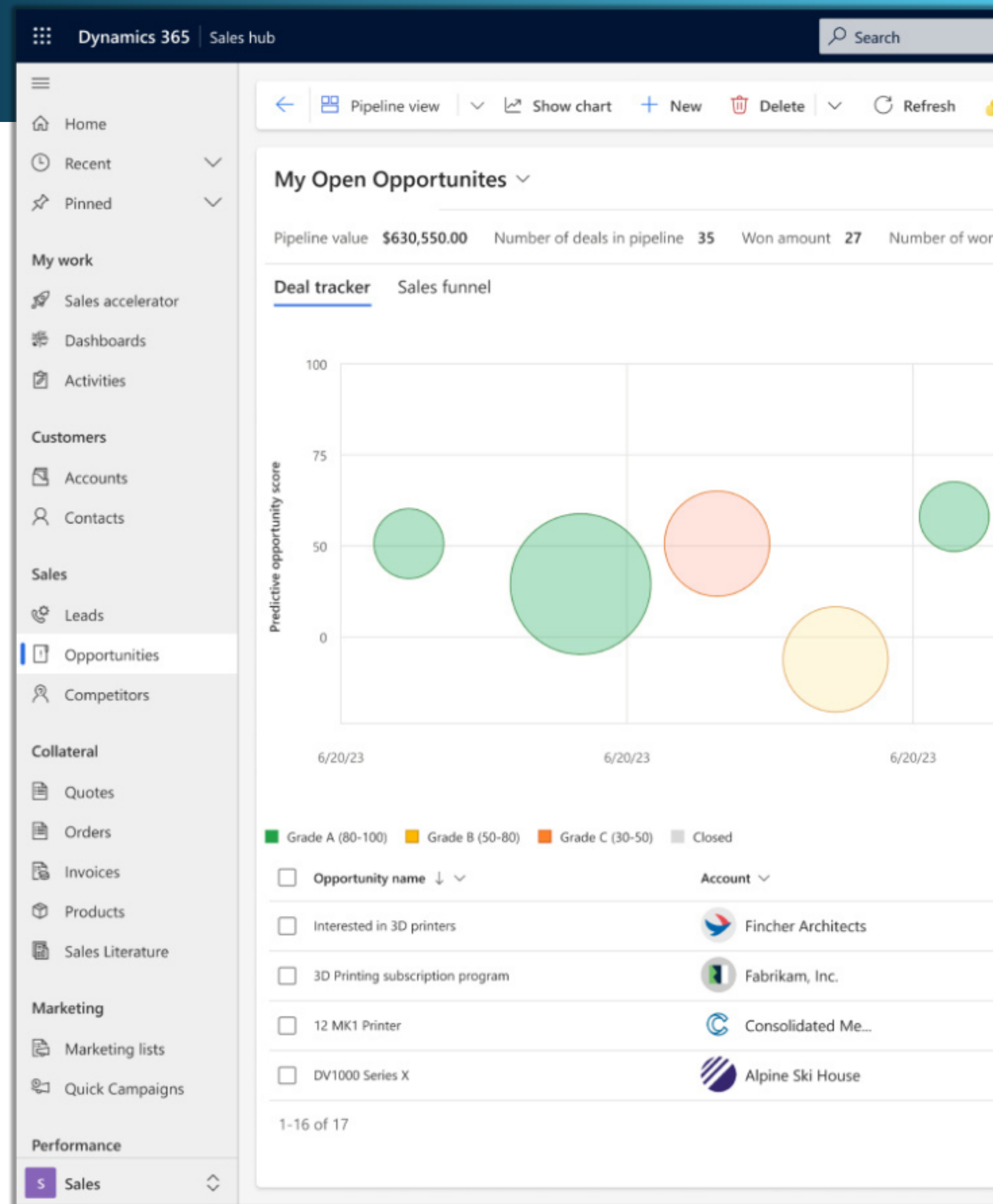
# Data Driven Insights

**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.



# Our Custom Dynamics 365 Sales Solutions Include:



**Lead  
Management**



**Opportunity  
Management**



**Pipeline  
Visibility**



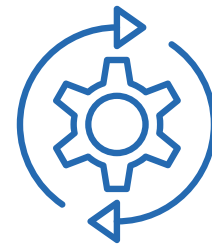
**Sales  
Forecasting**



**Account  
Management**



**Contact  
Management**



**Sales Workflow  
Automation**



**Quote  
Generation**



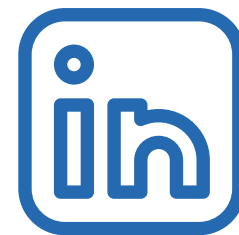
**Creditsafe  
Integration**



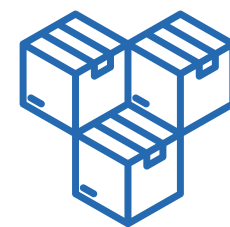
**Performance  
Analytics**



**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.



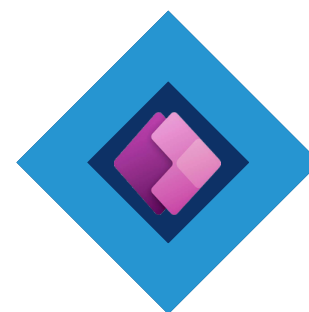
## **Dynamics 365 Customer Service**

Empowering teams to consistently deliver personalised service.



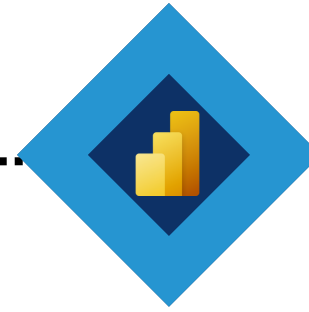
## **Dynamics 365 Customer Insights**

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



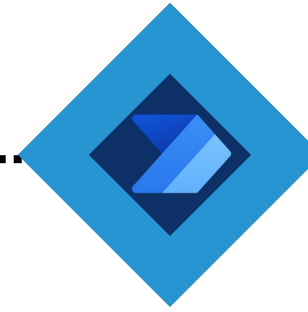
## **Power Apps**

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



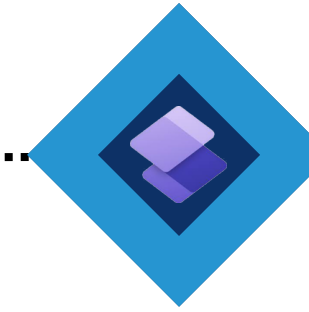
## **Power BI**

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



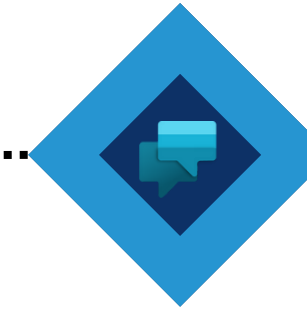
## **Power Automate**

Streamline repetitive tasks with automated workflows that boost productivity.



## **Power Pages**

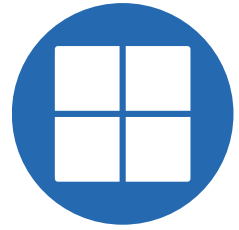
Quickly deploy process-driven portals delivering vital information and services to your customers.



## **Power Virtual Agents**

Easily build chatbots to engage conversationally with 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:







## 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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