

Connecting Sales and Marketing for Revenue Acceleration:

A CRO's Guide



Today's successful Chief Revenue Officers (CROs) know that to hit the numbers, they have to think beyond the numbers. Generating revenue quarter after quarter requires fostering a collaborative, growth-oriented culture in which every seller is empowered to achieve more. One where the customer experience is always front and center—enabled by a seller experience that is engaged, fluid, and data driven.

A connected sales and marketing solution can help you achieve your vision of a digitally enabled business, breaking down barriers between sales and marketing, unifying data across the organization, supporting a 360-degree view of customers, and delivering personalization at scale with AI-powered insights. It's also important to choose technology that is easy to integrate, implement, and use, so you can gain back time to focus on optimizing lead generation and sales processes for the business.

In this e-book, we'll look at some of the key technology capabilities to consider when evaluating sales and marketing technology. With the right foundation, you can help your team achieve its goals and to drive consistent revenue and lasting growth for your organization.

Contents

1 _____ page 4

Build 360-degree customer signals with unified data

2 _____ page 5

Increase the accuracy of revenue forecasts using AI and analytics

3 _____ page 7

Empower collaboration and connectivity with a single solution

4 _____ page 9

Deliver real-time coaching using intelligent automation

5 _____ page 10

Identify and measure return on sales investment with connected solutions

1

Build 360-degree customer signals with unified data

We know that you need to keep increasing customer satisfaction—which requires elevating the customer experience. One of the best ways to support that mission is to bring together customer data across the full range of available sources, from licensing to marketing engagements to service requests. With a full picture of customer behavior and needs, sellers can personalize all the moments that make up the buying journey, leading to higher contract value and more recurring revenue.

Take action

- **Understand your customer:** Get 360-degree enriched views of your customers with first-party and third-party data signals, enabling marketers to develop the right content and helping sellers move from cold calls to warm introductions faster.
- **Pinpoint your audience:** Define key segments such as high-value and at-risk customers for more targeted marketing and sales activities.
- **Gain predictive insights:** Unlock AI-driven recommendations using powerful out-of-the-box models to predict customer lifetime value, reduce transactional and subscription churn, and understand customer sentiment.

2

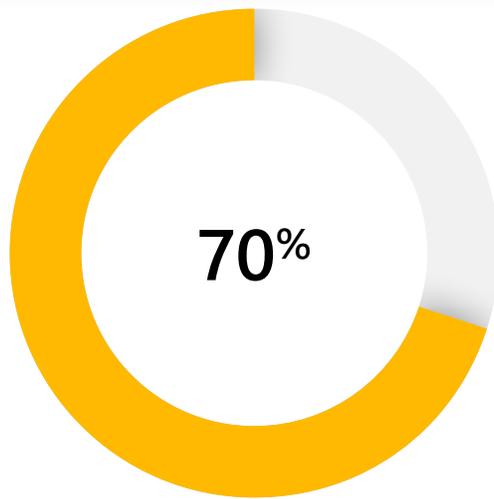
Increase the accuracy of revenue forecasts using AI and analytics

Accurate sales forecasting is a critical part of every CRO's job. By unifying data across business functions and using intelligent analytics, you can increase the quality of your forecasts. One of the most powerful ways to enhance forecast accuracy is to simplify bottom-up forecasting, which starts with detailed, low-level data and builds on that information to be able to estimate revenue. It increases the likelihood that your forecasts will fit your actual business conditions and can help you identify and respond to change sooner. Automating data collection and analysis takes the hard work out of this best practice.

Take action

- **Forecast accurately with insights:** Analyze individual and collective sales pipelines and gain a deeper understanding of successful and unsuccessful deals. Roll up forecast values throughout the organization's reporting structure, predict sales by product, or create forecasts for specific territories.
- **Take more control of revenue:** Highlight areas of focus from top to bottom of the sales funnel and project future customer behavior from historical patterns. Chart trends and examine how forecasts change between specific moments in time.
- **Keep sales on track:** Increase closure rates with custom push notifications that alert the right person at the right time. Sellers will always know when deals are at risk, when handoffs need to happen, and when disruptions or bottlenecks are affecting the customer experience.

Premier yacht brokerage increases sales 70% using Dynamics 365



Since Microsoft deployed Dynamics 365 to its Digital Sales Team, the team's revenues have risen consistently for the past three years and have reduced the cost of sales by 10 percent.

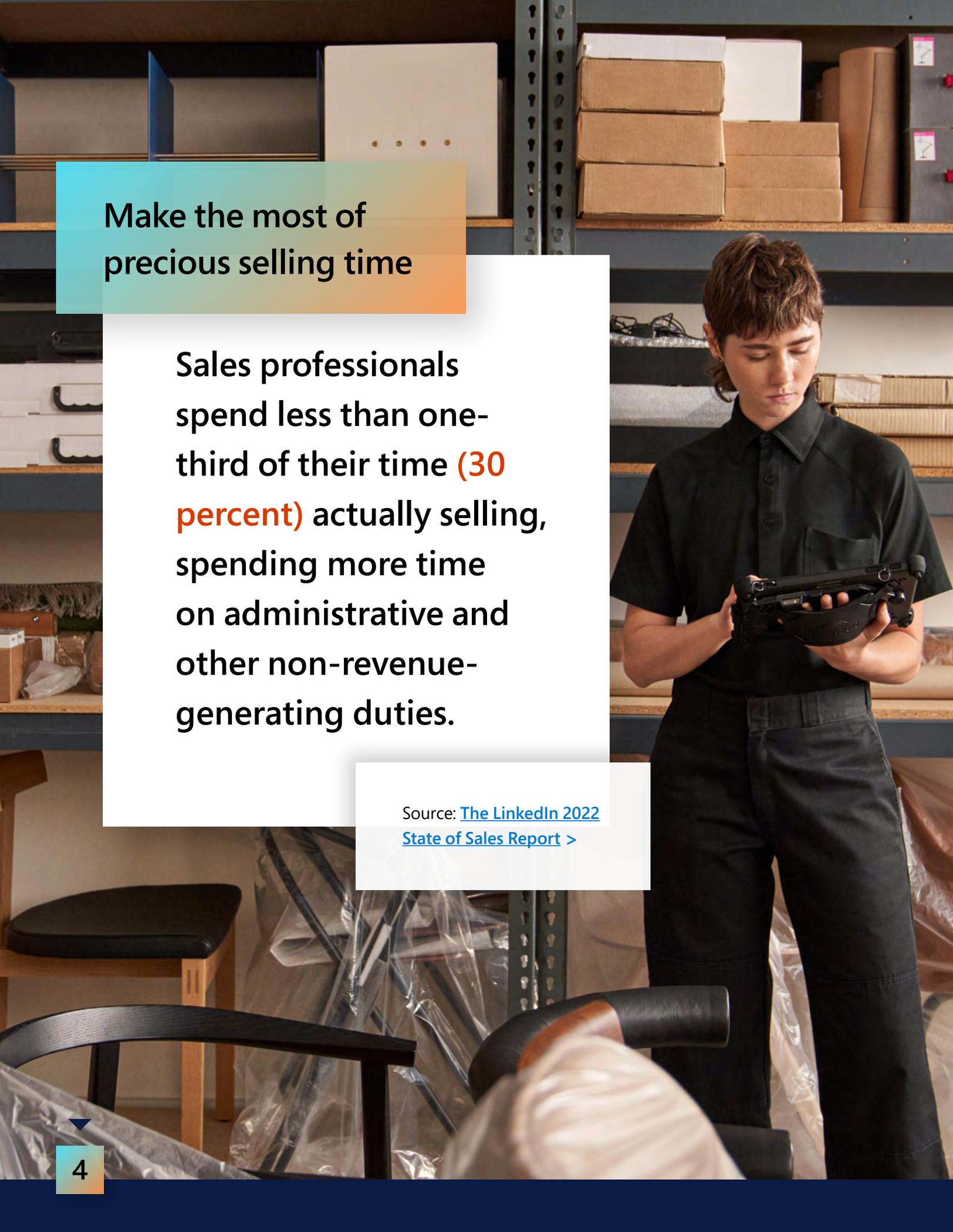
3

Empower collaboration and connectivity with a single solution

Sales reps typically spend more than two-thirds of their time on non-revenue-generating activities. With sales force automation (SFA) solutions, sellers can focus more of their time on customers and closing deals. Automated workflows and low-code apps allow your teams to quickly create their own solutions for eliminating repetitive tasks. In turn, they gain more time to build relationships as trusted consultants.

Take action

- **Reduce busywork:** Automate data capture and maintenance, freeing sellers to spend more time with customers.
- **Improve collaboration:** Opens lines of communication across departments with automatic synchronization among sales, marketing, customer insights, and collaboration tools.
- **Align teams toward a single purpose:** Communicate goals and priorities across teams using a common dashboard to share an overview of the business pipeline.

A woman with short brown hair, wearing a black short-sleeved button-down shirt and black trousers, is standing in a warehouse or storage area. She is looking down at a black handheld device she is holding with both hands. The background shows metal shelving units filled with cardboard boxes and other items. The lighting is bright and even.

Make the most of
precious selling time

Sales professionals spend less than one-third of their time **(30 percent)** actually selling, spending more time on administrative and other non-revenue-generating duties.

Source: [The LinkedIn 2022 State of Sales Report](#) >

4

Deliver real-time coaching using intelligent automation

As a successful CRO, you understand the importance of coaching to empower sellers and improve performance. When you have data on your side, you can measure and improve the effectiveness of your coaching program. AI can analyze seller interactions with customers and link specific behaviors to sales success. Using this information, you can provide objective feedback that boosts seller confidence and drives revenue.

Take action

- **Stay engaged with sellers:** Customize forecasts to track sales performance against quotas and proactively coach sellers.
- **Synthesize customer sentiment:** Get in-the-moment insight about customer emotion, competitor mentions, sentiment, and priorities in calls to enable guided selling, via conversation intelligence.
- **Share the right coaching at the right time:** Provide timely, opportune coaching by understanding which sellers need help and what's driving sales performance.

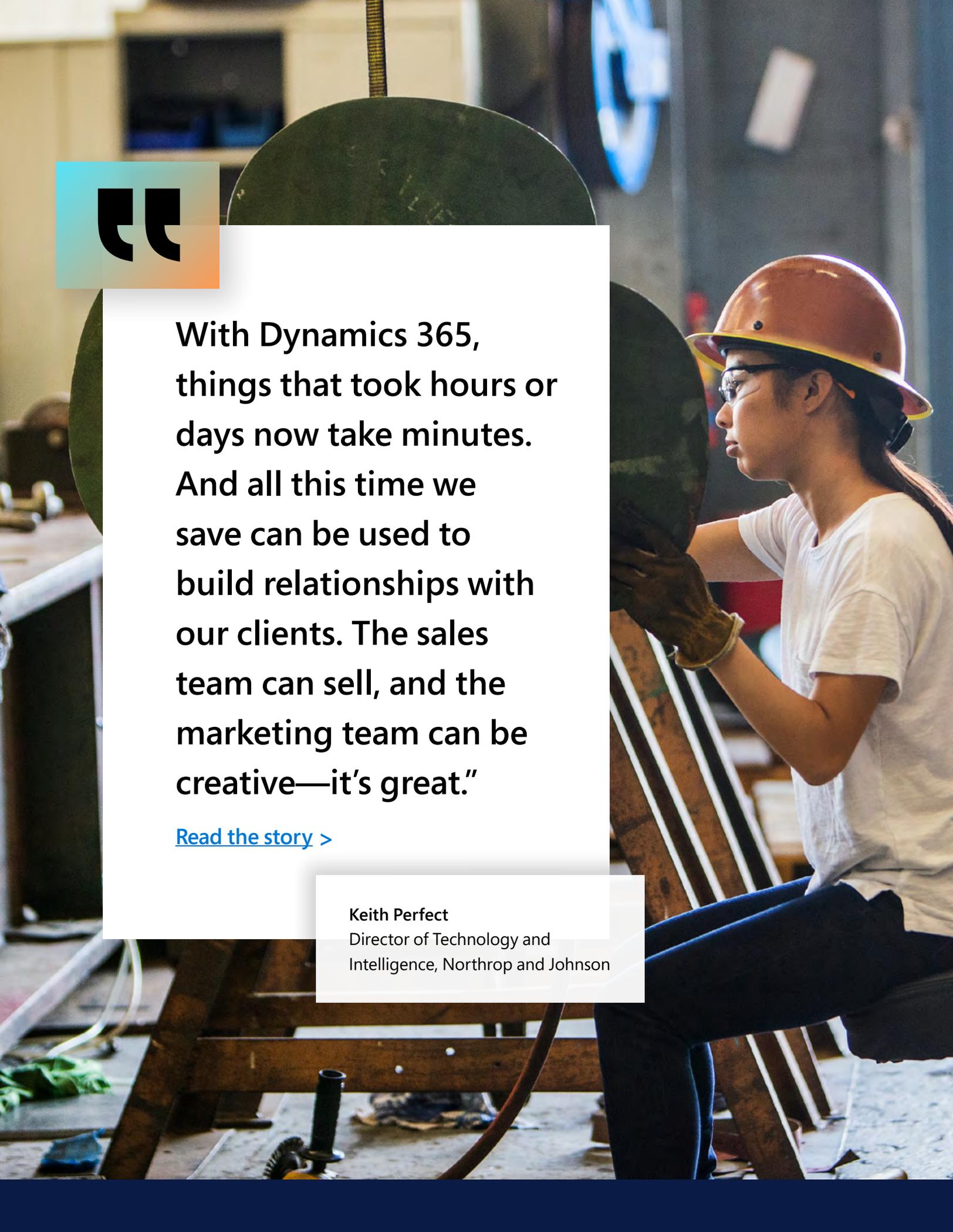
5

Identify and measure return on sales investment with connected solutions

As organizations shift to digital-first selling, breaking down barriers between sales and marketing is more important than ever. Integrating data and enabling collaboration supports a holistic view of the customer, creates a better buying and selling experience, and helps drive ROI.

Take action

- **Create comprehensive customer views:** Unify customer data across sales and marketing and enrich profiles with audience intelligence.
- **Engage customers in real time:** Design, predict, and deliver content through the right channels in the moment of interaction for unique customer journeys.
- **Win customers and earn loyalty faster:** Orchestrate customer journeys across marketing, sales, commerce, and service teams to provide a holistic customer experience.



With Dynamics 365, things that took hours or days now take minutes. And all this time we save can be used to build relationships with our clients. The sales team can sell, and the marketing team can be creative—it's great."

[Read the story >](#)

Keith Perfect
Director of Technology and
Intelligence, Northrop and Johnson

Microsoft offers a complete selling solution

Deepen customer relationships and supercharge your revenue with the intelligent, full-funnel sales and marketing solution that unifies siloed data to personalize selling with AI-powered insights, seamless collaboration, and intuitive productivity tools. With Dynamics 365 connected sales and marketing solutions, you can:

- Help your sales teams connect and collaborate, even when selling remotely, through close integration with Teams and Outlook.
- Collaborate seamlessly with Microsoft 365 while maximizing your existing investment in productivity tools and the relationship data those tools generate.
- Align sales and marketing by unifying Microsoft 365, CRM, social media, and other data to engage with buyers in meaningful ways.
- Run meetings and webinars using direct integration with Teams and Dynamics 365 Marketing.
- Deliver the next best action to support customers by effectively capturing their feedback and conducting sentiment analysis.

The Microsoft solution reduces operational costs and complexity for your IT team. Sellers can maximize efficiency thanks to familiar commands and interfaces so they can get up to speed with less training. Integration with collaboration tools that your sellers already use can help them avoid miscommunication and missed opportunities, even when working remotely. It also reduces the need to switch between disparate apps, providing a more efficient and productive workflow. Best of all, Dynamics 365 delivers more value for less money than competing SFA solutions.

Choose a smart stack to navigate the realities of modern selling

Unify your customer view and break through sales and marketing with Dynamics 365, an AI-powered solution that empowers your team to close more deals.

[Learn more about Dynamics 365](#)



©2023 Microsoft Corporation. All rights reserved. This document is provided "as-is." Information and views expressed in this document, including URL and other internet website references, may change without notice. You bear the risk of using it. This document does not provide you with any legal rights to any intellectual property in any Microsoft product. You may copy and use this document for your internal, reference purposes.