

Sales and Marketing

Sales and Marketing in Microsoft Dynamics AX

BENEFITS:

- Gives you greater insight and control over your sales activities to increase sales and revenue
- Helps you ensure consistent customer service
- Helps you optimize your sales and marketing activities to control cost and increase effectiveness

Sales and Marketing in Microsoft Dynamics™ AX gathers all your business information in one place and keeps it structured and readily available, so you can get the insight to identify your customers' needs and make the best sales and marketing decisions. The solution lets you effectively share information on all aspects of your business relationships throughout your company, helping make every one of your employees a customer expert.



Sales and Marketing consists of four modules:

- Sales Force Automation
- Sales Management
- Marketing Automation
- Telemarketing

Make more sales and better sales

Know your customers and give them the products and quality service they expect—when they expect it. Sales and Marketing continuously gathers information about customer purchasing patterns, helping you identify and effectively target cross-selling and up-selling opportunities.

Your sales and marketing professionals will have instant access to relevant customer information, so they can manage relationships more effectively predict future behavior with more confidence and accuracy. You can identify and retain the customers that present the highest lifetime value for your company, as well as analyze your marketing activities in order to find new opportunities and react quickly to market changes.

Increase your marketing effectiveness

Sales and Marketing helps you identify and qualify new prospects and communicate the right message to your customers—at the right time and through their preferred channel. Quickly plan and execute personalized campaigns across all communication channels, including direct sales, call centers, e-mail, fax, and the Internet. A single campaign window consolidates all the information and functionality you need.

Learn from your customers using questionnaires; Web-based functionality lets you design, publish and process questionnaires quickly and easily. Match customer responses with existing customer and market insight, so you can get a head start on planning for future demands.

Manage statistical feedback and measure the success of marketing campaigns by creating market segmentation profiles that track responses and allow accurate follow-up. Monitor return on investment (ROI) in real-time by linking a campaign with a project, and view response rates, revenue, costs and the work put into your marketing efforts.

Satisfy customers consistently

Sales and Marketing can give you the customer insight you need to maintain customer satisfaction and increase sales successes. When customer information is updated and shared across teams and departments, employees will have the competence to make accurate, fast and personalized customer service decisions.

Sales representatives who have full insight into customer buying patterns and cost of goods can make personalized offers based on the individual needs of your customers. A complete and up-to-date overview of stocks on hand and delivery schedules, helps ensure that customers are given the right information every time.

Sales and Marketing and the Web—a perfect fit

You can automate many time-consuming data collection and customer handling routines using the Internet. By streamlining front-office processes, you can exchange information faster and less expensively than before. Because Sales and Marketing connects the front-end and back-end systems, your entire organization can effectively capture the customer information it needs over the Internet—anytime, anywhere.

Optimize sales efficiency

Sales and Marketing gives sales managers on-demand access to all relevant sales information—such as projects, invoices, order history and current revenue—without having to wait for sales representatives to make special reports. This allows more detailed, efficient pipeline management, a better control of the sales force and a stronger focus on the customer. Sales can be analyzed against budgets, and every person, organization and activity can be given a cost/benefit analysis.

You can also monitor and manage the activities of individual sales people, sales teams or the entire sales organization, or run detailed pipeline analyses of sales in the channel. You can associate revenue and expenses to every sales person or activity, at any level of detail. Break down the sales process into its components, and find out what adds to profits and what doesn't.

Make telemarketing more effective

The telemarketing functionality allows you to track opportunities and effectively execute sales and marketing campaigns. You can automatically generate call lists, dial your customers and prospects using Dynamics AX native phone integration, log call details, as well as flag unsuccessful calls for follow-up calls and generate and execute call scripts using the questionnaire functionality.

FEATURES:

Sales force automation

- Manage all aspects of business relationships, including customers, vendors, leads, partners, members, subscribers, etc.
- Provides instant overview of all financial or logistic information
- Retain customer information for new employees
- Analyze actual sales against budgets
- Evaluate a given activity with a customer against the profitability of that customer
- Give your entire organization access to customer information
- Forecast and plan future revenue
- Communicate with groups of business relations through any method

Sales management

- Monitor and manage the activities and performance of employees
- Generate graphs or reports from sales activities
- Analyze and report on sales, quotations and all other types of sales related activities
- Perform opportunity management, pipeline analysis, and measure sales revenues against sales targets
- Budget future activities based on up-to-the-minute information

Marketing automation

- Create marketing campaigns for any group of business relations dependent on any form of registered information in Microsoft Dynamics AX
- Organize your campaign administration and distribution
- Link campaigns and questionnaires, projects and Web responses
- Automatic creation of follow-up activities with synchronization to Microsoft® Outlook®
- Monitor ROI by linking the campaign to a project
- Broadcast the campaign via e-mail, Internet, fax, letter and/or call lists

Document management

- A common document repository where documents are stored and linked
- View a complete record of contacts, sales orders and quotations for all business relationships
- Track and log documents, including e-mails, SMS messages, and phone calls
- Store all collateral in one place
- Access to documents over the Internet

Telemarketing / Telesales

- Daily activities are automatically mapped out
- Calls lists are generated, telephones dial automatically, and call details are logged
- Calls that were not initially successful are identified so that a further attempts can be made
- Call scripts are generated and executed using the questionnaire functionality
- Results from questionnaires are analyzed and can form the basis for future communication with customers.

E-mail and SMS integration

- Send emails or notes to employees in the field from within Microsoft Dynamics AX
 - Urgent messages are received by your sales force almost instantly
 - Time and money can be saved on front-office communication processes
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For more information about Sales and Marketing in Microsoft Dynamics AX, visit www.microsoft.com/dynamics/ax.

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