# MAKE YOUR CRM WORK HARDER

Practical Ways to Increase Sales
Productivity with Dynamics 365 Sales

**TrellisPoint**

# CHAPTERS

# SESSION OBJECTIVES

Discover quick, actionable tips to help sales teams automate routine tasks using Dynamics 365 Sales.

Learn effective approaches for simplifying Lead Management, Opportunity Tracking, and Sales Forecasting.

Explore real-world scenarios demonstrating increased sales productivity and shorter deal cycles through Dynamics 365 configuration enhancements.

**CHAPTER 2**

# THE CRM PRODUCTIVITY CHALLENGE

# CRM PRODUCTIVITY CHALLENGES

## LACK OF DATA QUALITY & TRUST

Poor data undermines visibility, forecasting, customer experience, and trust in metrics.

## LACK OF USER ADOPTION

Having tools/processes is not enough; people need to use them. When CRM is seen as extra admin work it leads to low engagement and inconsistent usage.

## LACK OF PROCESS CONSISTENCY

When teams follow different workflows, pipeline management is unpredictable, processes are disjointed, trust in the data is lacking.

## LACK OF SYSTEM INTEGRATION

Too many disconnected tools and poor user experience that creates causes friction and wasted effort. THIS WILL KILL ADOPTION.

## LACK OF CHANGE READINESS & ENABLEMENT

Insufficient training, communication, and cultural alignment ALSO BLOCK ADOPTION

## LACK OF CROSS-TEAM ALIGNMENT

If Sales, Marketing, Operations, Product teams, and Leadership are misaligned, using different processes and systems..... THEN ALL THE TEAMS WILL SUFFER!

# CRM PRODUCTIVITY CHALLENGES & IMPACTS BY ROLE

| ROLE | CHALLENGES | IMPACTS |
|---|---|---|
| **SALESPEOPLE / REPS** | • Poor data quality (duplicate/stale)<br>• Low adoption; CRM seen as admin burden<br>• Excessive manual entry<br>• Inadequate training/support<br>• Misaligned workflows | • Reduced selling time<br>• Fragmented customer info<br>• Lower forecast accuracy<br>• Frustration & resistance to CRM |
| **SALES OPERATIONS** | • Difficulty securing leadership buy-in<br>• Data governance and system silos<br>• Forecast accuracy challenges<br>• Tool sprawl & disconnected tech<br>• Balancing service vs strategic projects | • Weak ROI demonstration<br>• Inconsistent reporting & KPIs<br>• Manual work drains capacity<br>• Limited scalability as org grows |
| **SALES LEADERSHIP / MANAGERS** | • Lack of visibility into pipeline/rep activity<br>• Inconsistent process adoption<br>• Limited capacity for coaching<br>• Long deal cycles, low win rates<br>• Conflicting performance priorities | • Poor decision-making visibility<br>• Unpredictable team performance<br>• Coaching reactive vs proactive<br>• Pressure to do more with less |
| **EXECUTIVE LEADERSHIP / C-SUITE** | • Hard to prove ROI of CRM spend<br>• Misalignment with broader strategy<br>• Change management barriers<br>• Tech risks: integration, scalability, compliance<br>• Change fatigue, lack of continuous improvement | • Investment skepticism<br>• Missed strategic opportunities<br>• Persistent silos limit growth<br>• Rising technical debt & compliance risk<br>• Gains erode over time without adoption |

# CRM REALITY CHECK

**75%** of organizations have a CRM system in place (Forrester, 2023)[1]

**70%** of sellers' time is spent on administrative and other non-selling duties[2]

**64%** of employees don't have enough time or energy to do their job[3]

# EVERY CRM IS DIFFERENT

So when you are discussing CRM with people, there is a wide range of possibilities about what these systems are doing for individual companies. No 2 systems are alike, and some are much better than others!

Just because a company has Dynamics 365 or Salesforce or HubSpot CRM does not mean that system is making them any better.

Some CRMs work for the company. Others make the company work for it.

**Just a rolodex? A simple contact database?**

**Does it store more essential data and have some basic process guidance?**

**Does it have some automation capabilities to streamline operations?**

**Is the system data-driven and strategic?**

**Is it so optimized that it is driving organization wide strategy and integrated with AI to drive success?**

**CHAPTER 3**

# CRM CAPABILITY & MATURITY MODEL

# CRM CAPABILITY & MATURITY MODEL

**STAGE 5** — **OPTIMIZED / STRATEGIC**
- Full Integration
- CRM Drives Organization-Wide Strategy
- AI-Driven Sales Cycle Optimization
- 360 Degree Customer View
- Continuous Improvement Culture

**STAGE 4** — **DATA-DRIVEN / PREDICTIVE**
- CRM used as a digital rolodex
- Basic Account & Contact data entered manually
- Adoption is Inconsistent
- No Standardization

**STAGE 3** — **MANAGED & AUTOMATED**
- Trusted CRM Data Drives Forecasting and Decisions
- Pipeline Health, and Cross-Team Insights are used for Decision Making

**STAGE 2** — **DEFINED PROCESSES**
- Standard Pipeline Stages
- Standard Dashboards
- Consistent Lead, Account, Contact and Opportunity Tracking Across Team

**STAGE 1** — **AD HOC / INITIAL**
- CRM used as a digital rolodex
- Basic Account & Contact data entered manually
- Adoption is Inconsistent
- No Standardization

CHAPTER 3

# PRACTICAL WAYS TO INCREASE SALES PRODUCTIVITY

# MAKE YOUR CRM WORK HARDER

There are a lot of things that will make your CRM system sing for your company. A lot of those things will be dependent upon your specific needs and business processes and you can use the capabilities of Dynamics 365 and the Power Platform to configure your system appropriately.

**Automate & Streamline Seller Work**

**Standardize & Simplify Sales Process**

**Drive Predictable, Data-Driven Forecasts**

# WAYS D365 AUTOMATES SELLER WORK

| FEATURE | BENEFIT | USE CASE |
|---------|---------|----------|
| **SALES ACCELERATOR & SEQUENCES** *REQUIRES SALES PREMIUM* | Prioritize daily activities automatically | Reduce time planning next steps |
| **COPILOT FOR SALES** *SOME CAPABILITY WITH SALES ENTERPRISE* | Summarize communications, meetings, and suggest next actions | Save admin time, improve response speed |
| **POWER AUTOMATE FLOWS** | Trigger actions across apps | Auto-assign tasks, send alerts, follow-ups |
| **OUTLOOK & TEAMS INTEGRATION** | Capture CRM data in context | Fewer clicks, better adoption |

# FROM MANUAL CHAOS TO GUIDED SELLING

Let me introduce you to our overly-busy account executive. Every Monday morning, She starts her day buried in sticky notes and email reminders. She scrolls through Outlook, trying to remember who she promised to follow up with last week. It takes her nearly an hour just to figure out what needs her attention.

This is what we see in so many organizations — the CRM is there, but it's passive. It stores information, but it doesn't guide the seller.

**NOW LET'S LOOK AT HOW HER MONDAY LOOKS AFTER AUTOMATION.**

**1** **PRIORITIZED WORKLIST**

**2** **AUTO-GENERATED FOLLOW-UPS**

**3** **AUTOMATED TASK CREATION AND SEQUENCING**

**RESULT**
**MORE TIME SELLING, LESS ADMIN TIME**

# HOW DYNAMICS 365 SALES KEEPS SELLERS FOCUSED

Dynamics 365 Sales helps sellers stay organized and proactive by automatically surfacing their highest-value tasks and recommended next steps. Instead of searching for what to do, they can move through their day with clarity and momentum.

> Prioritizes daily tasks across opportunities, emails, and follow-ups

> Provides a guided worklist so sellers instantly know where to focus

> Suggests next actions and drafts personalized outreach automatically

> Logs activities and queues up the next step to keep momentum going
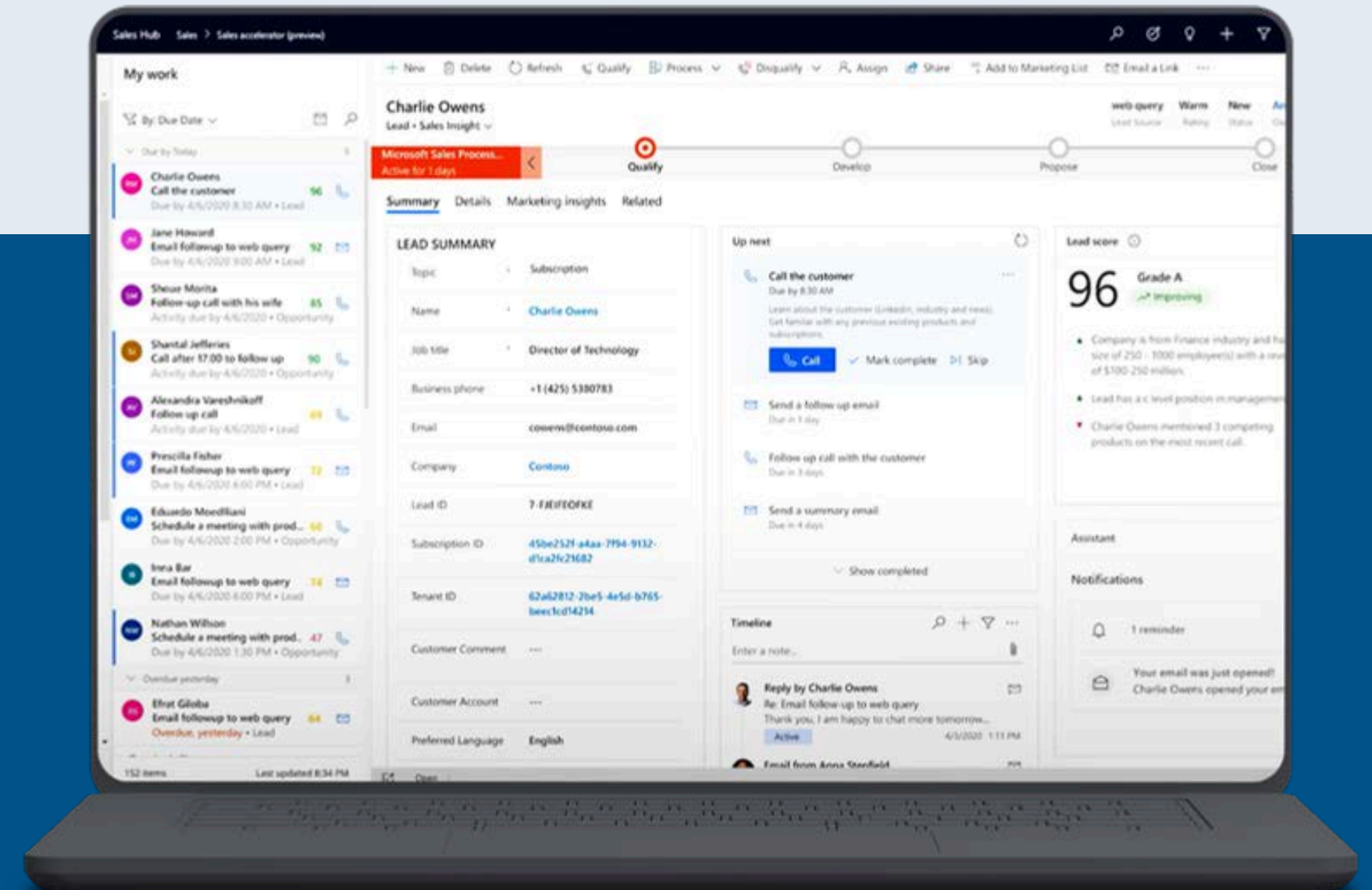
# STANDARDIZE & SIMPLIFY LEAD & OPP MGMT

| FEATURE | BENEFIT | USE CASE |
|---|---|---|
| **BUSINESS PROCESS FLOWS** | Standardize opportunity stages | Improve consistency & forecasting accuracy |
| **LEAD ROUTING RULES** *REQUIRES SALES PREMIUM* | Auto-assign leads to the right rep | Reduce lag time, eliminate confusion |
| **QUICK CREATE / EDITABLE GRIDS** | Simplify data entry | Encourage adoption |
| **OUTLOOK & TEAMS CRM PANES** | Update or qualify directly from Outlook / Teams | Streamline daily workflow |

# BRINGING ORDER TO LEAD ASSIGNMENT

Here we meet another member of the sales team — someone responsible for handling the steady flow of inbound leads coming from multiple sources. His day often starts in a maze of spreadsheets, emails, and handoffs, trying to figure out who should own which lead. With so many inputs, it's easy for leads to fall through the cracks or for two people to start working the same prospect.

**TO ADDRESS THIS, WE'RE SHOWING A STREAMLINED LEAD-TO-OPPORTUNITY PROCESS THAT BRINGS CLARITY AND CONSISTENCY TO HIS WORKFLOW:**
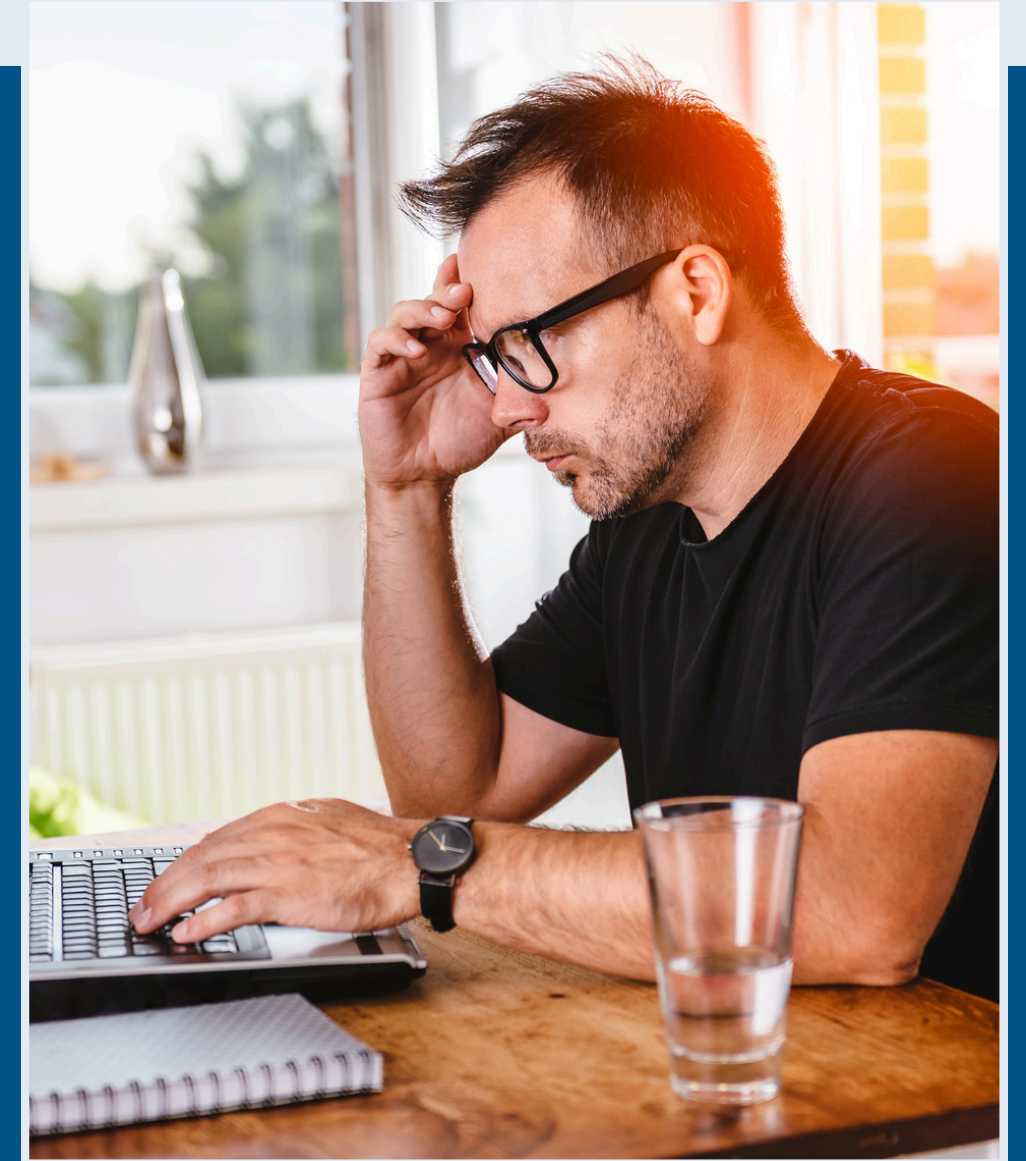
**1** **STREAMLINE LEAD ENTRY**

**2** **AUTO-ASSIGN LEADS TO RIGHT REPS**

**3** **PROVIDE PRESCRIPTIVE SALES STAGES AND PROCESS**

**RESULT**
**INCREASE SPEED, CREATE CLARITY**

# FROM LEAD TO OPPORTUNITY IN ONE GUIDED FLOW

Dynamics 365 Sales removes the manual, error-prone steps of managing inbound leads. Instead of sorting through lists or debating ownership, the system evaluates each lead instantly and assigns it to the right seller based on simple, transparent rules.

> Unassigned leads become a thing of the past with automatic routing based on territory, product line, or workload

> New leads created through Quick Create are assigned instantly and appear in the seller's "My Active Leads" view

> A guided Business Process Flow ensures every seller follows the same qualification steps

> One-click conversion turns qualified leads into opportunities with all data carried forward

> Creates consistent, accurate pipeline visibility for managers and faster response times for sellers
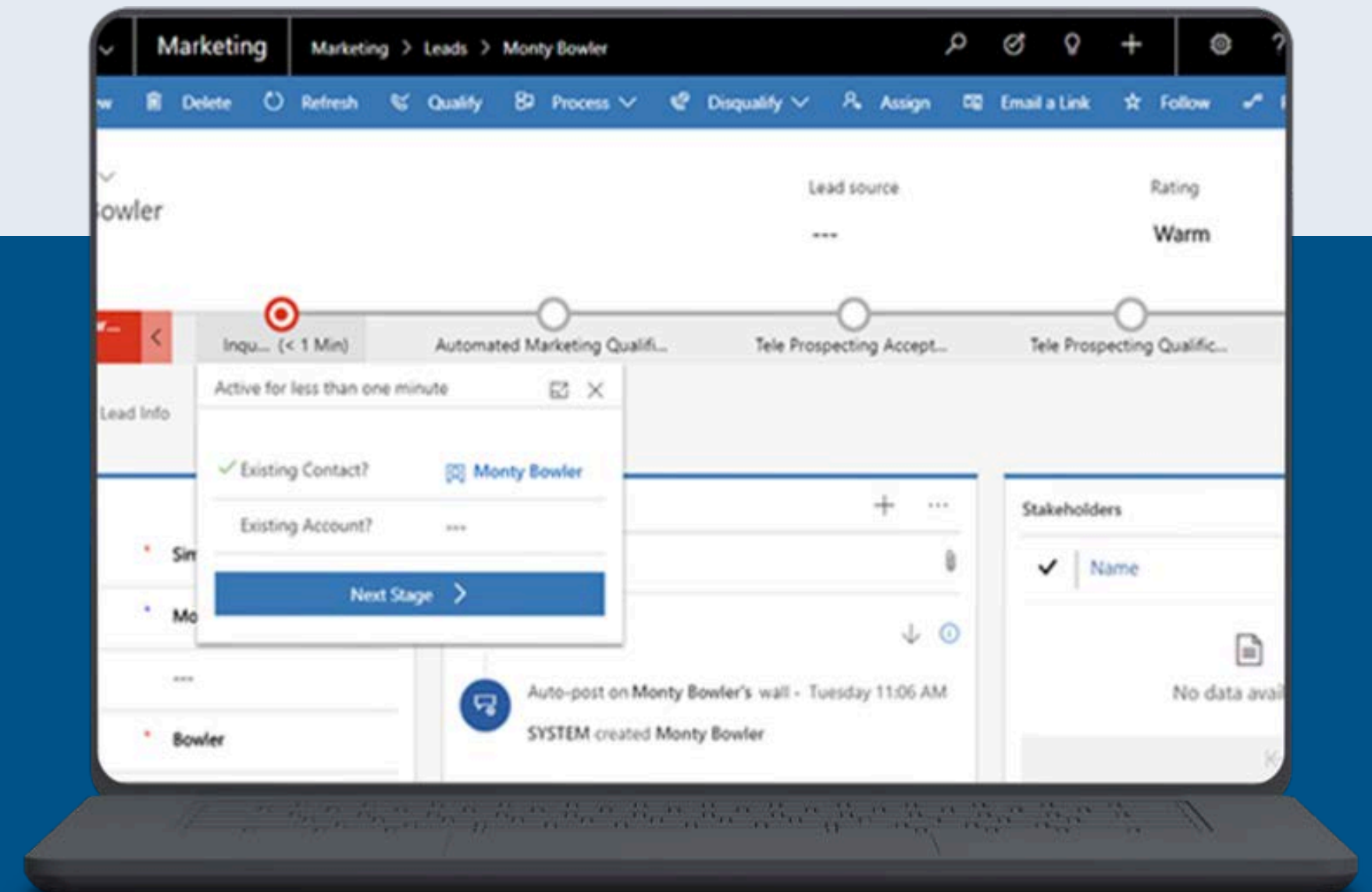
# DRIVE PREDICTABLE DATA-DRIVEN FORECASTS

| FEATURE | BENEFIT | USE CASE |
|---|---|---|
| **FORECASTING WORKSPACE**<br>*REQUIRES SALES PREMIUM* | **Real-time rollups by team or rep** | **Accurate visibility and accountability** |
| **PREDICTIVE SCORING (AI)**<br>*REQUIRES SALES PREMIUM* | **Highlight deals most likely to win** | **Focus effort where it matters** |
| **SALES INSIGHTS DASHBOARDS / COPILOT RECOMMENDATIONS**<br>*REQUIRES SALES PREMIUM* | **AI-driven recommendations** | **Coach reps, identify next best action** |

# THE FORECAST THAT FINALLY MATCHES REALITY

Here we meet one of our Sales Managers — someone who spends a huge part of each week chasing down accurate pipeline updates. To prepare for leadership reviews, he sifts through spreadsheets, emails, and Teams messages, trying to stitch together a reliable picture of what's really in the pipeline.

Every seller has their own way of tracking deals, so close dates slide, probabilities vary, and deal values change from one conversation to the next. By the time everything is reconciled, the information is already outdated — making it difficult to answer the one question leadership always asks: "How confident are we in this forecast?"

**MODERNIZING WITH DYNAMICS 365 SALES REPLACES THIS MANUAL, SUBJECTIVE PROCESS WITH REAL-TIME INTELLIGENCE AND BUILT-IN CONSISTENCY:**

**1** **REAL-TIME, SYSTEM-GENERATED ROLLUPS**

**2** **PREDICTIVE SCORING HIGHLIGHTS RISKS AND FOCUS AREAS**

**RESULT**
**FROM GUESSING TO GUIDING**

# FORECASTING WITH REAL-TIME INSIGHT

Dynamics 365 Sales brings all pipeline data into a single, real-time Forecast workspace. Instead of piecing together updates from different reps and systems, managers can instantly see where the team stands and why.

> Real-time forecast rollups give managers an always-current view of team and individual performance

> Drill-down views reveal exactly which opportunities make up each seller's committed pipeline

> Predictive scoring surfaces deal health, highlighting which opportunities are strong and which may be at risk

> AI-driven insights explain the score — including activity history, engagement signals, and deal progression

> Forecast reviews become faster and more accurate because everyone is working from the same, up-to-date data
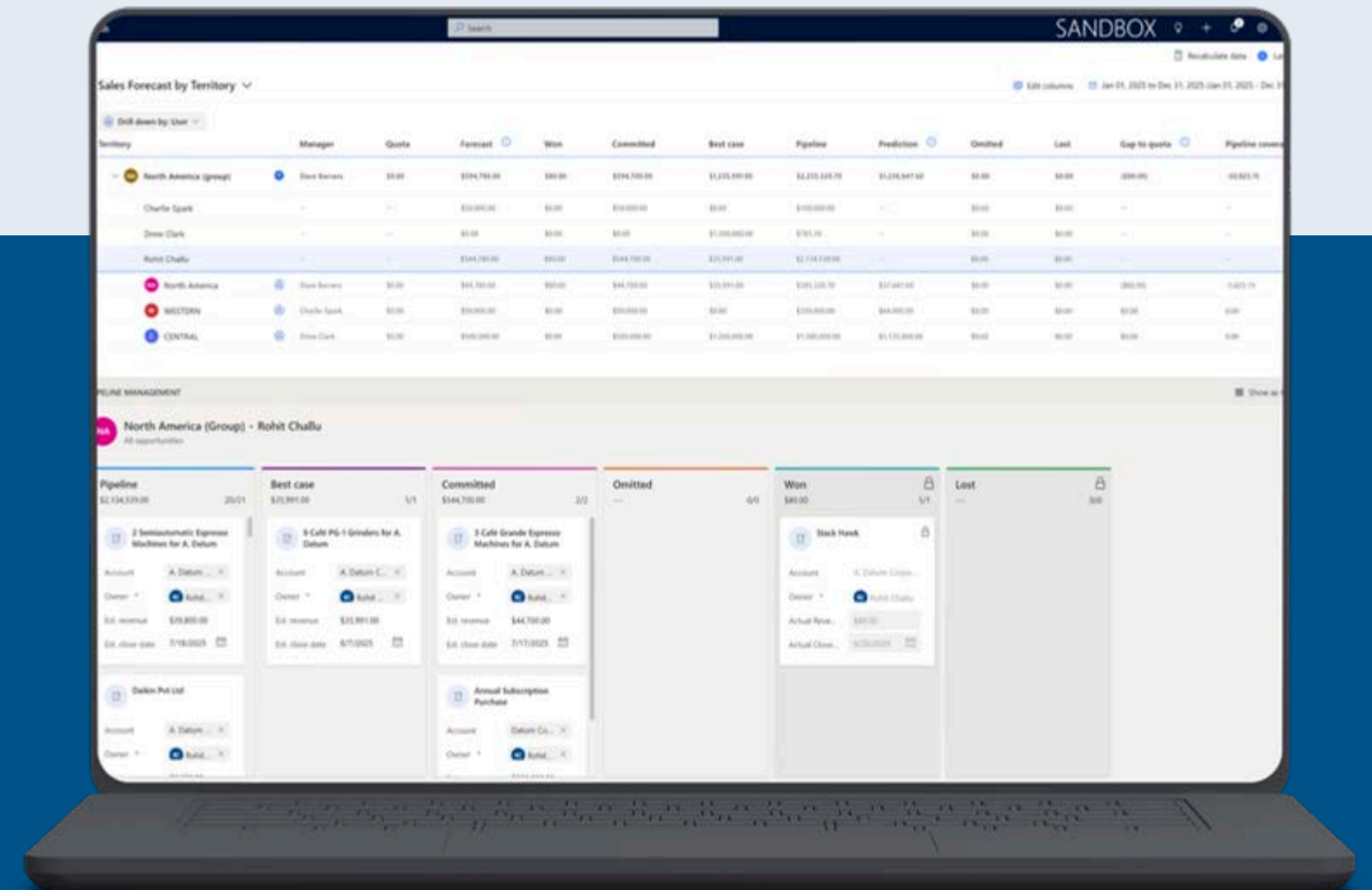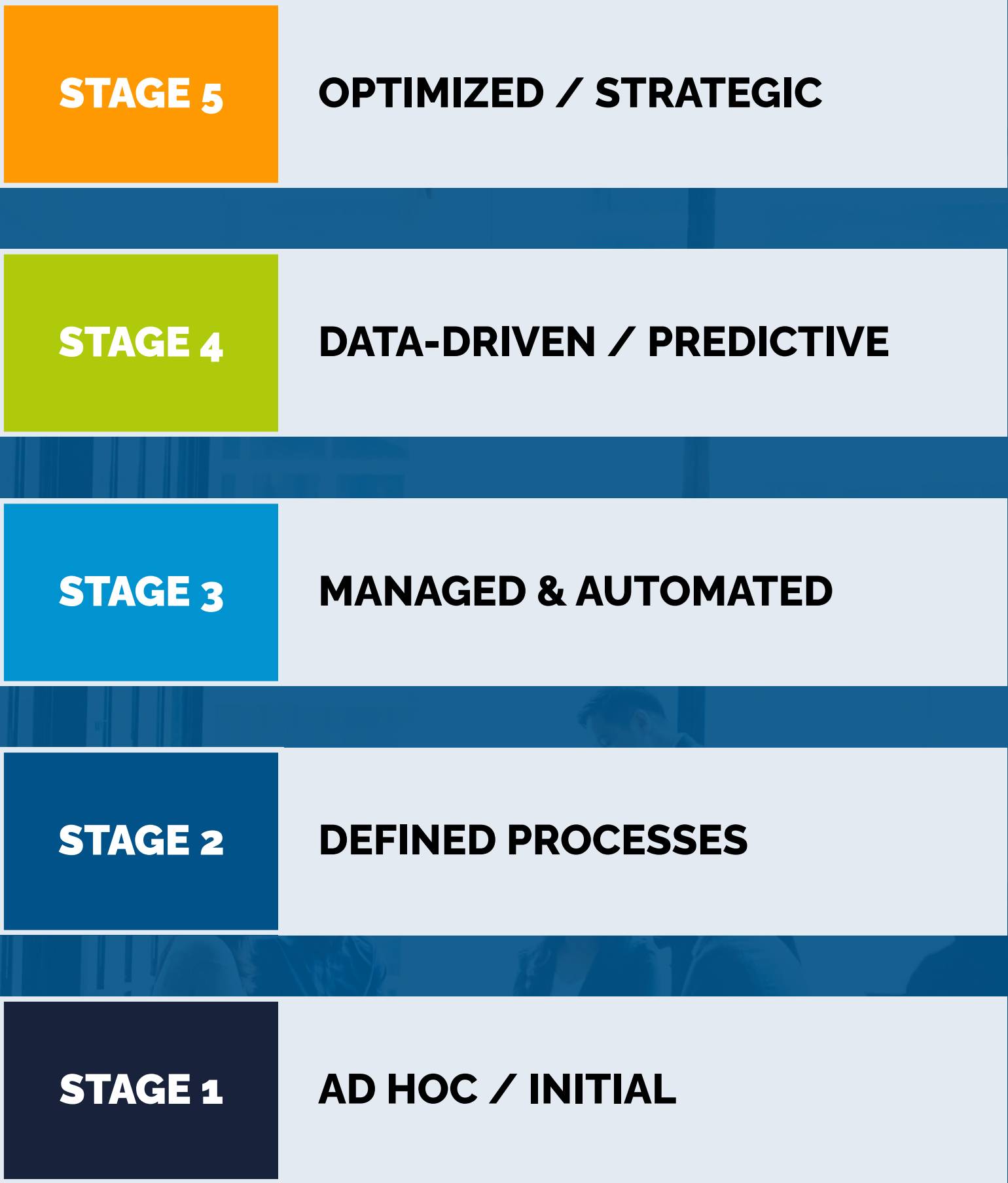
CHAPTER 3

# BUILD YOUR ROADMAP FORWARD

# CRM CAPABILITY & MATURITY MODEL

**Take a moment and think:** which maturity level best described your organization today — and what's the next realistic level you could reach by this time next year?

| STAGE 5 | OPTIMIZED / STRATEGIC |
| STAGE 4 | DATA-DRIVEN / PREDICTIVE |
| STAGE 3 | MANAGED & AUTOMATED |
| STAGE 2 | DEFINED PROCESSES |
| STAGE 1 | AD HOC / INITIAL |

# BUILD YOUR ROADMAP FORWARD

## ASSESS WHERE YOU ARE

**Where does your organization fall today?**

## DEFINE WHAT'S NEXT

**Choose one or two steps to focus on in the next 6–12 months.**

## PRIORITIZE QUICK WINS

**Identify quick automation or process improvements that drive seller productivity fast.**

# KEY TAKE-AWAYS

**AUTOMATE THE WORK, STANDARDIZE THE PATH, MEASURE THE IMPACT**

**Every minute a seller spends on admin is a minute not spent selling**

**START OOTB FOR QUICK WINS THEN CUSTOMIZE WHERE IT COUNTS**

**Focus on native capabilities first. Microsoft has already solved many common challenges**

**AIM TO STEADILY CLIMB ON THE MATURITY MODEL OVER TIME**

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