Drive Seamless Sales Operations with Dynamics 365 CRM
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Purpose of Today’s Session

• Business Needs for the Connector
• Learn why Smartsheet customers are excited about the connector
• See the connector in action!
Senior Director,
Professional Services

Adam Smith
Manual and Repetitive

Microsoft Dynamics 365

Static Reporting

Manual Data Management
Smartsheet for Microsoft Dynamics 365

- Use Gantt view to track and manage projects
- Dynamics Connector
- Calendar view to see upcoming tasks
- Card view to manage Agile development
- Use Gantt view to track and manage projects
Sales to Implementation
Handoff
Smartsheet Form → Triage in Grid
Collaborate within the Organization

Implementation

Executive Rollup

Escalations

Sales Leadership Views
Customer Insights

HP INC

CREATING TECHNOLOGY THAT MAKES LIFE BETTER FOR EVERYONE, EVERYWHERE
Laurie Stack

Chief of Staff, HP 3D Printing Business

- Laurie is responsible for 3DP staff organizational and operational excellence
- Laurie also drives process improvement programs across 3DP
- Laurie has used Smartsheet for 5 years
PRODUCTIVITY TRANSFORMATION

IMPROVING WORK EXECUTION (time savings)

30%
60%
80-90%

SIX KEYS TO TRANSFORMATION

- Product capabilities
- Pain Point
- Proof of Concept
- Process Design
- Tool/Data Interfaces
- Standards and policy

UNLOCK

ACCELERATE
SALES OPS TRACKING & MGMT

What’s prioritized?

- Volume Sale
- Value Sale
- Verticals
- Channel Model vs. Direct
- Sales Prgs / Mgrs
- New Bus Programs

Core Systems (CRM) ~80%

Outside / Downstream from the Core

- Opportunity Reviews
- Must Win Deals
- Installations
- Application Data
- Offline Editing
- 1x1 Calls
- Data Mgr / Reactive Siloed knowledge

What's prioritized?

1x1 Calls

Must Win Deals

Installations

Application Data

Opportunity Reviews

Offline Editing

1x1 Calls

Data Mgr / Reactive Siloed knowledge
DYNAMICS CONNECTOR

Must Win Deals
- Track Special 1x Activities
- One set of data
- Update Requests
- Notifications

Installations
- Online multi-user checklist
- New opps → categorized → plan resources
- Visualization through Calendar View & PowerBI
- E2E view of Customer
EXTENDING THE VALUE OF CRM
Microsoft Partnership

- Smartsheet is a Managed Microsoft Partner
- Joint engineering hackathon to initiate the project
- Ongoing engineering support during development
Microsoft Dynamics 365
Customer Engagement

- Sales
- Project Service Automation
- Customer Service
- Field Service
Smartsheet for Dynamics 365 Capabilities

• No Code Solution
• Bi-directional workflows between Smartsheet and Dynamics 365
• One-way workflows between Smartsheet and Dynamics 365
• Near real-time data synchronization
• Data synchronization respects data access permissions
Smartsheet for Microsoft Dynamics Demo
Challenges

- Data Silos
- Manual Repetitive Steps
- Unstructured Work Processes
Benefits of Connector

- Enhanced Visibility
- Make better decisions faster
- Collaborate for greater productivity
- Increased adoption of Microsoft Dynamics across cross-functional teams
BEFORE CONNECTOR

• Lack of visibility between:
  – Sales <-> Services
  – Services <-> Customers

• Low visibility for Sales Leadership

• Email Overload! Status Meeting Overload!

WITH CONNECTOR

• Seamless handoff between Sales and Implementation Teams

• Collaboration with cross functional teams

• Ability to manage unstructured work processes around structured CRM data
Use Cases

• Automate the handoff of closed deals from sales to customer fulfilment teams
• Pipeline Management
• Intake of Cases, Leads through Smartsheet Forms
• Implement custom processes for sales teams
Don’t forget to:

• Share your feedback in our survey in the ENGAGE app
• Stop by the Enterprise Solutions booth on the first floor
• Visit the Innovation Center for hands-on learning, support, services, swag, and more