



# Deliver better customer experiences using an AI-powered CRM

A Microsoft Dynamics 365 Sales overview



# Introduction

Customers expect highly personalized experiences.

46%

of customers will buy more when given a highly personalized experience.<sup>1</sup>

55%

of consumers value a knowledgeable staff that understands customer needs and broader market conditions that affect their decisions.<sup>1</sup>

1. "Top Customer Experience Trends in 2024," Forbes, 2024
2. "Enterprise Marketers Leading with Strategy in 2024," Content Marketing Institute, 2024
3. "2023 May Market Study: Generative AI & Chatbots," Customer Contact Week Digital, 2023
4. "70+ Sales Enablement Statistics To Blow Your Mind In 2024," G2, 2024

However, today's sales and marketing organizations are not equipped to meet these needs due to disparate systems and siloed data.

61%

of enterprise marketers feel challenged with creating the right content for their audience.<sup>2</sup>

71%

of agents spend too much time looking up answers to customers' questions.<sup>3</sup>

440

Sales reps spend an average of 440 hours annually trying to find the right content to share with their prospects and customers.<sup>4</sup>

# The future of sales and marketing will be enhanced by an AI-powered CRM

For businesses to meet their customers' demands, they need a solution that enables them to create highly personalized views of their customer data in a single solution for marketing, sales, and customer service teams. As an experienced CRM partner, Storm Technology has worked with businesses like yours to deepen customer relationships and close more deals with Dynamics 365 Sales.

Dynamics 365 Sales unites data across sales, marketing, and customer service to enable your teams to deliver personalized customer experiences and improve win rates. With embedded Microsoft Copilot capabilities and native integration with Microsoft 365 apps, data analysts, marketers, and sellers can use Dynamics 365 and Copilot to:



**Get customer data AI-ready.**



**Use AI to bring you closer to your customers.**



**Turn customers into advocates.**

# Get customer data AI-ready

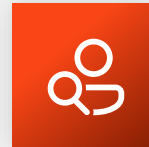
Understand customers with AI-powered lead and opportunity prioritization and automated signals to better prepare sellers.



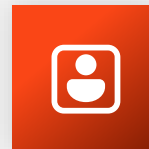
Bring together transactional, demographic, and behavioral data in real-time to **create up-to-date customer profiles**.



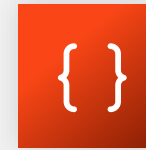
Push data from real-time sources to **gain insights into customer activities** to power in-the-moment personalization.



Resolve customer identities by **using AI-powered identity management to gather complete data** for unknown customers.



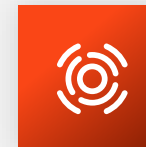
**Build richer customer profiles** with first- and third-party signals such as Microsoft proprietary audience intelligence.



Use natural language prompts to **query your customer data** with Copilot in Customer Insights.



**Discover new audience segments with AI-driven recommendations** or define your own segments for more precise targeting.



**Get highly qualified leads with priority rankings** from Dynamics 365 Customer Insights based on marketing activities and customer information.\*



**View AI-based scoring models and a prioritized work list** based on real-time scoring for lead and opportunity qualification.

\*With Dynamics 365 Customer Insights license



# Lenovo transforms global sales teams for AI-powered sales growth

With Dynamics 365, 70% of Lenovo's global sales would have a central and timely record of client engagement activities and be able to share sales information in real-time to offer proactive and personalized service.



We're seeing the benefit of having one standardized system and a global view to all geographies' activities. This is the foundation for Lenovo's sales digital transformation—enabling better connections and an increase in sales productivity and actionable insights.”

— Wei Bi, Business Strategy Senior Manager

[Read the full story](#)





# Let AI bring you closer to your customers

Close more deals with AI-powered recommendations on developing and prioritizing pipeline opportunities and next steps.



View Copilot-generated opportunity summaries and meeting preparation notes, including customer status, relevant news, and past meeting notes.



Access suggestions for sales actions and next steps to advance the deal in sales accelerator with quick links to complete the task.



Use Copilot to get product insights like product details, new releases, and planned items pulling from knowledge-based articles in the organization and SharePoint.\*



Simplify event planning and use Microsoft Teams or other third-party webinar providers to organize engaging webinars and nurture participants post-event with targeted, personalized content.



Predict revenue and track performance against goals with forecasts and charts to accurately predict revenue using AI-driven models based on historical data and the open sales pipeline.\*\*



Get a deeper understanding of your customer journey effectiveness with real-time, cross-journey analytics to understand which are best contributing to your business goals.

\*Coming soon!

\*\*With Dynamics 365 Sales Premium license

## Zurich Insurance Group modernizes and improves flexibility across the customer journey

Using Microsoft Dynamics 365 Marketing to explore new ways to reach customers, Zurich Insurance Group has seen their lead quality increase by over 40%.



We're now getting more of the right people to attend the right events and are able to drive more effective follow-ups. This had led to a better experience and more sales."

— *Carolin Kräling, Product Owner at Zurich Switzerland*

[Read the full story](#)



# Turn customers into advocates

Deliver exceptional, personalized, and relevant customer interactions with effective testing and quick revisions.



Describe your ideal customer journey to receive a curated recommendation, achieving results faster than ever with Copilot in Customer Insights.\*

Personalize each customer's journey by choosing the right channel for each customer and delivering messages at the best time for tailored and memorable interactions.

Run A/B tests to identify the highest performing content or journey branch and measure success by tracking pre-set business goals.

Use out-of-the-box digital channels such as SMS with Infobip, LINK Mobility, Telesign, Twilio, push notifications, or email.

*\*In private preview*

*\*\*Coming soon!*

Remove surprises in the customer journey by running an AI-simulated test on their end-to-end experience using Copilot.\*\*

Get constant monitoring of your live campaigns with Teams alerts that contain specific recommendations on changes that could improve results with A/B testing.

Create sequences of sales actions for sellers based on best practices.



# Hellmann Worldwide Logistics improves lead generation and opportunity conversion

Hellmann Worldwide Logistics was able to improve new-customer lead generation by 20% and reduce customer churn by 10% when they modernized their CRM with Dynamics 365 Sales and Dynamics 365 Customer Insights.



Our customers, too, have noticed that their experience has improved. We have connected all the little dots together and now the customer can feel that our sales force is more knowledgeable and asking the right questions about their business.”

— Daniela Dunker, Head of Global Sales Operations

[Read the full story](#)



# Copilot is already providing value



Microsoft sellers have already reduced tedious work, deepened customer relationships, and increased efficiency with Copilot.

79%

of sellers indicated a reduction in administrative work.<sup>5</sup>

67%

of sellers spent more time with customers.<sup>5</sup>

90

minutes per week were saved on average.<sup>5</sup>

We also see leading consulting companies estimate that sales teams can realize significant additional benefits from generative AI.

29%

of sales time can be automated.<sup>6</sup>

+50%

jump in lead-to-sale conversion rate.<sup>7</sup>

3-15%

revenue uplift for players that invest in AI.<sup>7</sup>

2X

lift in cross-selling and up-selling rate.<sup>7</sup>

5. "What Can Copilot's Earliest Users Teach Us About Generative AI at Work?," Microsoft, 2023

6. "How Generative AI Will Supercharge Productivity," Bain & Company, 2023

7. "AI-powered marketing and sales reach new heights with generative AI," McKinsey, 2023

# Conclusion

The level of personalization that customers will expect will only continue to increase, so businesses need to invest in a solution that will support their current and future needs.

Dynamics 365 Sales with Copilot can help your team realize better customer outcomes by helping marketers, sellers, and customer service representatives to be more efficient in delivering personalized experiences across the entire customer journey.

Contact Storm Technology today to see how Dynamics 365 can help you stand out and close more deals.

[Request Callback](#)

