



# Transform the way you sell.



# Contents.

Moving to Microsoft Dynamics 365 CRM	03
STEP 1 - Identify the Most Important Outcomes	04
STEP 2 - Get Immersed in the Technology & Process	06
STEP 3 - Get Live Fast	08
Case Study - BDO: Binder Di iker Otte	09
Case Study - Global Chemical Manufacturer	11

# Thinking of Moving to Microsoft Dynamics 365 CRM for Sales?

**If so, congratulations – you're on the right track to transform the way you sell. As a world-class CRM system, Dynamics 365 provides sales teams with the all the tools they need to improve visibility or the sales process, create a healthier pipeline, and commercialise opportunities faster.**

**At this point, however, you may still have concerns about how easily you can make this happen.**

There's a good chance you'll have seen some of the many alarming statistics out there about the number of CRM projects that fail, for example.

Perhaps you even have first-hand experience of a CRM project that fell short of expectations, or turned into a long and drawn-out affair that lost sight of its original purpose. This may have been because of scope creep, or because that purpose wasn't well enough understood or defined in the first place.

Getting tangible outcomes from CRM for sales shouldn't be such a challenge. It also shouldn't take so long to complete that it no longer reflects the needs of the business. But in order for a CRM project to deliver value fast, you need the right methodology – including a razor-sharp focus on the

business outcomes that'll have the most rapid and significant impact on your sales process.

**We should know – we've done it successfully over 1,000 times.**

So what's the secret? In this guide, we'll share some of our insights on CRM success for large sales organisations, and explore why the right methodology is essential in order for rapid ROI to be possible.

Read on to find out how you can transform the way you sell with Microsoft Dynamics 365 CRM – and how you can ensure you see the difference in as little as 13 weeks.



# STEP 1:

## Identify the Most Important Outcomes

**For example: Would your sales team benefit more from improved visibility of demand in the market, or from having more time to spend on their relationships with existing prospects and customers? Is accurate forecasting the single biggest must-have for management decision-making, or is reporting on project profitability more important?**

**Focusing on a small handful of outcomes, rather than attempting to boil the ocean, is of vital importance to CRM success for several reasons:**

- 1** It helps keep the project focused so that a rapid rollout is possible, rather than necessitating a 12 or 18-month marathon
- 2** It provides a business justification for the project, such as a quantifiable reduction in lead response time or an increased win rate
- 3** It provides metrics for short and long term success

So how do you decide what business outcomes should you focus on first? What we've found over time is that, while every business is different, most want their CRM to solve the same basic problems.

In fact, if we compile a list of all the business outcomes our customers have ever wanted to deliver with Microsoft Dynamics 365 CRM, it only comes to about ten items. The trick is to focus on the top three or four that will create the biggest impact on your business.

Which of the below are the three biggest challenges for your sales team today? And what would it mean for your business if you could address them in the next three months?

Deciding on the most important outcomes for your sales CRM project isn't easy. You need to listen to different voices within the business (and your Dynamics 365 partner), consider cost to benefit ratios, and allow yourself to be challenged. However, once you're there the rest of the CRM project start to fall into place.

### Business Outcomes

 <p>Improve interactions with prospects, customers &amp; partners</p>	 <p>Improve forecasting accuracy &amp; revenue visibility</p>	 <p>Better support for management decision-making</p>	 <p>Improve Bid Win Ratio</p>	 <p>Improve Account Management + Revenue from Existing Customers with 360 view, x sell + upsell</p>
 <p>Deliver more profitable projects with the right resource on time and budget</p>	 <p>Maximize time spent in relationship and understand company relationships</p>	 <p>Improve customer service &amp; responsiveness</p>	 <p>Increase leads &amp; build pipeline</p>	 <p>Improve overall operational efficiency</p>

## STEP 2: Get Immersed in the Technology and Process

**Next, in order to roll out a CRM that delivers value fast, you need to ensure your team has the right mindset and readiness for change, as well as a realistic understanding of the business outcomes the project is expected to deliver.**

**That's why the second step in our methodology focuses heavily on getting under the skin of our customers' business, challenging their preconceptions about CRM and driving adoption.**

Here's one simple concept we believe all successful companies understand about CRM:

Lasting success has more to do with how you think about CRM than the technology you use or the money you spend.

These companies see Microsoft Dynamics 365 CRM not as software to simply install and maintain like Word or Excel, but somewhere the business is going. They think of CRM as a strategy or business outcome engine, and they have a game plan for a successful rollout. We like to call them high-performing organisations (HPOs).

Below are three components you'll find in every HPO.

### CRM Adoption Step 1: Organisational Structure

#### 01

##### Executive Leadership

An executive must be directly responsible for the initiative – this is often the CEO or owner. Tasks include formulating the CRM strategy and targeted business outcomes, communicating this to the business, measuring adoption and collecting feedback.

There is a direct, positive correlation between executive engagement and long term success.

#### 02

##### Core Team

A team of Subject Matter Experts representing various parts of the business. All members are 'power users' with a deep knowledge of CRM functionality, and act as a key driver of communication and adoption across the business.

Because the core team understands how CRM works, they can communicate effectively with the CRM administrators to enhance the system, and show the executive leadership other areas in the business that could benefit from the CRM with little effort.

#### 03

##### CRM Administrators

A team with a deep understanding of the CRM's native configuration capabilities and its integration with anything external. Custom developments are often seen as a last resort, as many admins have spent time struggling to maintain or upgrade over-developed solutions.

## CRM Adoption Step 2: A Training Plan

When it comes to CRM adoption, you must have a solid training plan. In many cases, this will be the first time employees have experienced the platform. Even the smallest training mistakes, like not following a set process, can mean you end up with bad data.

### 01

#### Persona Training

The way you train your manager should be different than the way that you train your users. Do you provide training specific to an individual's role, position, and level in an organisation?

### 02

#### Experience Level Training

When you train at go-live, there's a certain amount of information that's important to you. But beyond that, you still need to receive the appropriate level of training. You also want to think about the experience levels that you want to train new hires to.

### 03

#### Reinforcement/Motivational Training

The CEO needs to address the organisation to explain why the change is happening, and what the target outcomes are, and the fact that CRM is not optional. This is what makes the initiative real. Training analytics are also needed to validate user understanding.

## CRM Adoption Step 3: Cadence of Accountability

HPOs know that if they don't set aside time to meet and focus on their CRM initiative, it will get lost in the whirlwind of everyday business activities. So what kind of meetings are they having?

### 01

#### Tactical Meetings

The CRM admins and the core team meet at least monthly, sometimes more frequently. These meetings feature a few key topics including overall user adoption and organisational performance. Then they drill into the tactics, technical issues and user feedback.

### 02

#### Strategic Meetings

The leadership or executive team will meet less frequently, usually once or twice a year. This meeting is specifically about the CRM initiative, and focuses on communication and business outcomes, as well as CRM-related investments and upcoming projects.

## STEP 3: Get Live Fast

**Once you've decided to focus on a small handful of the most important business outcomes, and put an organisational structure and training plan in place to support this, a CRM project ceases to be a long and drawn-out affair.**

**In fact, most projects that use our methodology reach go-live just 13 to 16 weeks after their initial workshop sessions.**

However, there's another important thing all successful companies understand about CRM – go-live is the start of the journey, not the end.

Getting ROI from your sales CRM project in 13 weeks is great, but organisations evolve and change over time. For this reason, it's necessary to continually review and

optimise CRM to ensure it delivers value in the medium and longer term – measuring and monitoring whether those outcomes are still met and what the business needs most.

That's why we join our customers for recurring tactical and strategic meetings post-rollout. We ensure they recognise go-live as the start of their journey, and help them maintain CRM success in the long term and identify opportunities to improve.

“

**Go-live is the start of the journey,  
not the end.**



# Case Study:

## BDO: Binder Dijker Otte

**BDO is a global accountancy and business advisory firm, active in 154 countries with 64,500 people working out of 1,400 offices worldwide. The firm's UK arm has a staff of 3,500 and provides tax, audit and assurance, advisory, and business outsourcing of the economy.**

Its BDO Drive solution provides outsourced accountancy services "underpinned by the latest cloud technology."

### What did ANS do for them?

With BDO Drive growing fast, BDO faced challenges around how to scale the level of client service. It needed a system that would help manage the full customer lifecycle, from lead to opportunity to client, as well as improve visibility over staff and resources for better project planning.

BDO chose Dynamics 365 CRM and PSA to accomplish this. Time was of the essence, so after a six-week sales cycle, the organisation chose ANS to deliver the solution as a 12-week fixed fee project.

**"We love the ANS methodology. It's empowered us so we feel like we actually own the system. It's been agile, it's been quick, it's been responsive and we've learnt a lot about our own business processes."**








**Mark sykes | Partner  
National Head of BDO Drive UK**



**BDO now uses Dynamics 365 CRM to manage over 2,500 live accounts & 3,400 contacts.**



## What business outcomes did they focus on?

 <p>Improve interactions with prospects, customers &amp; partners</p>	 <p>Improve forecasting accuracy &amp; revenue visibility</p>	 <p>Better support for management decision-making</p>	 <p>Improve Bid Win Ratio</p>	 <p>Improve Account Management + Revenue from Existing Customers with 360 view, x sell + upsell</p>
 <p>Deliver more profitable projects with the right resource on time and budget</p>	 <p>Maximize time spent in relationship and understand company relationships</p>	 <p>Improve customer service &amp; responsiveness</p>	 <p>Increase leads &amp; build pipeline</p>	 <p>Improve overall operational efficiency</p>

## The results so far.

BDO now uses Dynamics 365 CRM to manage over 2,500 live accounts and 3,400 contacts, improving efficiency and account management capabilities with a 360 view of every client and prospect.

Since completing the project, the firm has also grown its pipeline with 157 new business opportunities valued at a total of £944,000.



# Global Chemical Manufacturer

**Our client is one of the world's largest manufacturers of high-performance polymer solutions. Based in the UK and listed on the FTSE 250, the business counts over 650 members of staff worldwide and has customers in over 30 countries, including clients in the automotive, aerospace, electronics and medical device industries.**

## What did ANS do for them?

At the time we started working together, the client was posting strong annual revenue growth. However, the sales team felt it was unable to exploit every new opportunity, as well as opportunities for revenue growth from existing clients – partly because of a legacy CRM system that was inflexible to use and costly to run.

The client initially engaged the ANS team for a scoping exercise, and was impressed with our focus on the end value of CRM – as well as our commitment to delivering that value in a short timeframe. The project was completed in 12 weeks and to budget.

## What business outcomes did they focus on?

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## The results so far.

Since introducing Microsoft Dynamics 365 CRM, the client has built a pipeline worth an unprecedented £23 million. Its sales team has also been able to increase the number of meetings booked by one fifth (19%).

The solution has helped the team close more business, too. The client has seen a 47.4% increase in its win rate year on year since the rollout, as well as a 72% increase in new business.



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### **About ANS**

ANS are the UK's leading digital and cloud experts, dedicated to helping organisations to achieve their digital ambitions in the cloud and beyond.

Specialising in cloud, AI, data analytics, IoT and Microsoft Dynamics 365 ANS works with public and commercial sector organisations to provide the intelligence and insights to enhance services, empower end-users and improve business outcomes.

Customers include: Staffordshire University, Salford City Council, ECP, Royal Brompton & Harefield NHS, Trustford and Salix Homes.

**For more information, visit [ans.co.uk](https://ans.co.uk)**

