Forvis Mazars Now!

CRM for Distributors

Meeting the needs of a transforming industry.

360-Degree Customer Views

Strengthen your customer relationships. Unlock easy-to-access, 360-degree views of your customers with Microsoft Dynamics 365 Sales tailored for distributors. This customized CRM solution from Forvis Mazars can provide a detailed view of customer interactions, order history, and preferences. Equipped with this information, your sales team can personalize customer engagements and close deals faster.

Streamlined Sales Activities

Track sales performance, manage opportunities, and streamline the sales process with CRM for Distributors. Dynamics 365 Sales can empower your sales team with the tools they need to achieve success. With this customized version of Dynamics 365 Sales, distributors can readily:

- Monitor sales revenue goals versus actuals to stay on target.
- Capture and manage competitor share of wallet and upselling opportunities.
- Automate reporting and save hours each week with instant access to activity and opportunity pipeline reports.

Key Features

- **Sales Quota Gap Analysis**: Identify gaps between sales targets and actual performance to implement improvements.

- **Revenue Tracking**: Keep a watchful eye on sales revenue and adjust strategies in real-time.

- **Competitor Insights**: Gain a competitive edge by capturing competitor share of wallet information to bolster your upselling opportunities.

- **Detailed Customer Profiles**: Create easy-to-access, 360-degree views of your customers for enhanced relationship management.

- **KPI Monitoring**: Set and monitor key performance indicators to help your team meet its goals.

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INNER CIRCLE
FOR MICROSOFT BUSINESS APPLICATIONS

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Why Dynamics 365?

Modern applications

Modern applications that deliver new experiences and connect with a business' existing systems to allow organizations to digitally transform their way. Applications that use mixed reality, the ability to take an application that overlays on the reality in front of the user, that guides them through a business process like never before. Connect to information from social networks, mobile devices, and micro-applications to drive intelligence and inform a more effective business process.

Unified data and processes

Unified data and processes that enable business without silos. Centralized data enables disparate groups to work together effectively with a single, trusted view of processes, relationships, and data. Data connectors allow thousands of systems to bring their data to a single network.

Intelligence that delivers

Intelligence that delivers actionable insight. Data in the new world includes social, relationship, and productivity information in addition to insights generated by business systems. The right solution requires a unified approach that allows companies to automatically leverage their data to decide and act in real-time with expanded analytics, predictive algorithms, and automated AI.

An extensible environment

An extensible environment that enables change. The right solution establishes a data, communication, and application environment that makes it easy to evolve and extend existing business operations, while introducing technologies that enable users to create solutions where no solution exists and to expand data analysis.

Microsoft Dynamics 365

Transform on your terms with Microsoft Business Applications. Enable people to do their best work. Gain actionable insights. Thrive with solutions expressly built for change. Unlock next.

WWW.MICROSOFT.COM/DYNAMICS365

Key use cases

Sales
Respond to changing business requirements with a flexible platform to rapidly create new solutions and ensure old solutions are never truly finished.

Service
Understand your customers better and respond more quickly by accessing internal and external relationship data.

Finance and operations
Increase your return on investment with Microsoft's agile and efficient cloud solution.

Talent
Extend your virtual team and coordinate faster with a consolidated view of team members, activities, and responsibilities.

Marketing
Gain end-to-end visibility by connecting data from external markets, social, and legacy sources.