



# Activate Digital Selling

[www.ec.co.za](http://www.ec.co.za)

# 1 | Introduction

## **Who is Enterprisecloud?**

## Who are we?

We are a jovial bunch of techies, from experienced Solution Architects, to functional consultants to UX designers to Software Developers. Our purpose is to improve productivity, streamline processes and boost your ROI. We partner with the world's leading software vendors to in the realms of Customer Relationship Management (CRM), Customer Engagement Management (CEM), Marketing Automation and low-code/no-code tech; and Work collaboratively with our customers to establish a solution roadmap that will unlock value for all stakeholders along every step of their digital transformation journey.

We began the business in 2011, and have performed over 200 successful software implementations in some of the country's leading brands across diverse industries like: Financial Services, Banking, Professional Services, Business Services, Distribution, Manufacturing, Media, Technology and Higher Education.

# 2 | Activate Digital Selling **B2b Sales Management**

# Why the need to Activate Digital Selling?

Most sales organisations we have experienced have a very reactive approach to customers – only responding to their immediate needs, and ending up in a bid war with other competitors. This causes inaccurate forecasts, lengthy deal cycles, and low closure rates.

Couple that with the changing sales landscape – and ‘Houston, we have a problem.’”

Sales has been pushed to be more and sometimes completely digital and social. Our solutions will help you move your sales cycle into the digital world, in order to make sure your business continues, no matter what global challenge is happening.

Our solution helps your sellers and sales leaders to focus in on becoming strategic partners with your customers, challenging them to think differently about their business, and showing how you can play a unique role in creating and driving long-term sustainable value for that customer.

The approach fundamentally shifts the power back to the sales organisation as you drive focussed, informed and tailored solutions to solve your customers’ hardest problems, and produce more profitable and sustainable customer relationships for your business in the long term.

# What you could do

## **Account Insight and Engagement**

We leverage the powerful capabilities of Dynamics 365 to provide a central view of customer engagement across people, channels and departments, and ensure all interaction and engagement history are centrally stored. To provide powerful insight about the customer, we embed Power BI dashboards that bring back-office ERP and Line-of-Business data and CRM data into a single canvas specific to that account, empowering users with information they can use to drive targeted conversations with the customer.

## **Account Planning**

We have customised CRM to include Account Planning functionality, where sellers need to gather and input strategic data, and tailor out an approach to each customer, including: client strategy; SWOT analysis; actions and objectives; targets; key people and resources; key dates; and competitive behaviour.

## **Social Selling**

Many business decision makers have said that they would ignore a cold call and rather look for the information they need online. This makes LinkedIn a valuable tools these days, with direct access to over 660 million working professionals across the globe.

## **Relationship Matrix**

We have built a custom interface that allows sellers to explore the corporate network of contacts that are loaded in the CRM and unlock massive potential. Inside your company lies a myriad of social and professional networks just waiting to be unlocked, and right now, [probably] nobody is doing anything about it. That's why we built the Relationship Explorer.

It's a tool that works hard to surface these complex social and professional connections in a simple, insightful and usable way, so that your people can leverage warm and easily accessible relationships to build new connections with prospective, and existing clients. It also provides a central view on whether you have deep-enough and wide-enough connections in your customers, and the relative strength of those relationships, which fore-warns you about where possible weaknesses are, and where customers may already have one foot out the door.

## **Whitespace**

Whitespace is a custom-built, intelligent reporting tool that combines ERP and CRM data per customer to provide Sellers and Sales Leaders with actionable insight about the wallet share they have in an account, and where the cross- and up-sell opportunity exists.

## **Opportunity Management**

Once an opportunity has been identified, the seller then uses the Opportunity Management functionality of Dynamics 365 to drive the deal forward towards closure. Here, we customise the system to your unique sales process, and ensure that your sellers are following a proven, structured approach to selling, and focussing their attention in the right areas.

## **Reporting**

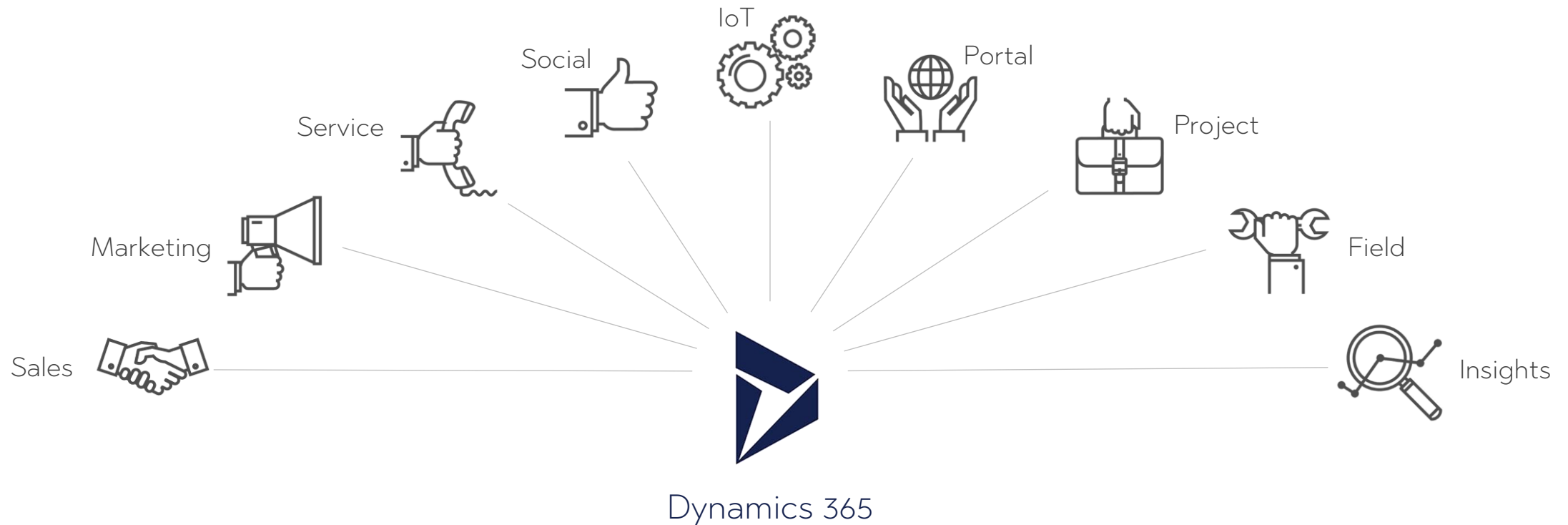
We provide customised Power BI reports for every customer which reach into the CRM data to illustrate how sellers are performing against their targets, how those efforts are boiling up into the overall company-wide pipeline and target, forecasting deal closure based on historical statistics, which sellers are executing the correct sales activities, and the overall health of your sales business.

# 3 | Microsoft Dynamics 365

## **Why Dynamics?**

# Enterprisecloud & Microsoft Dynamics 365

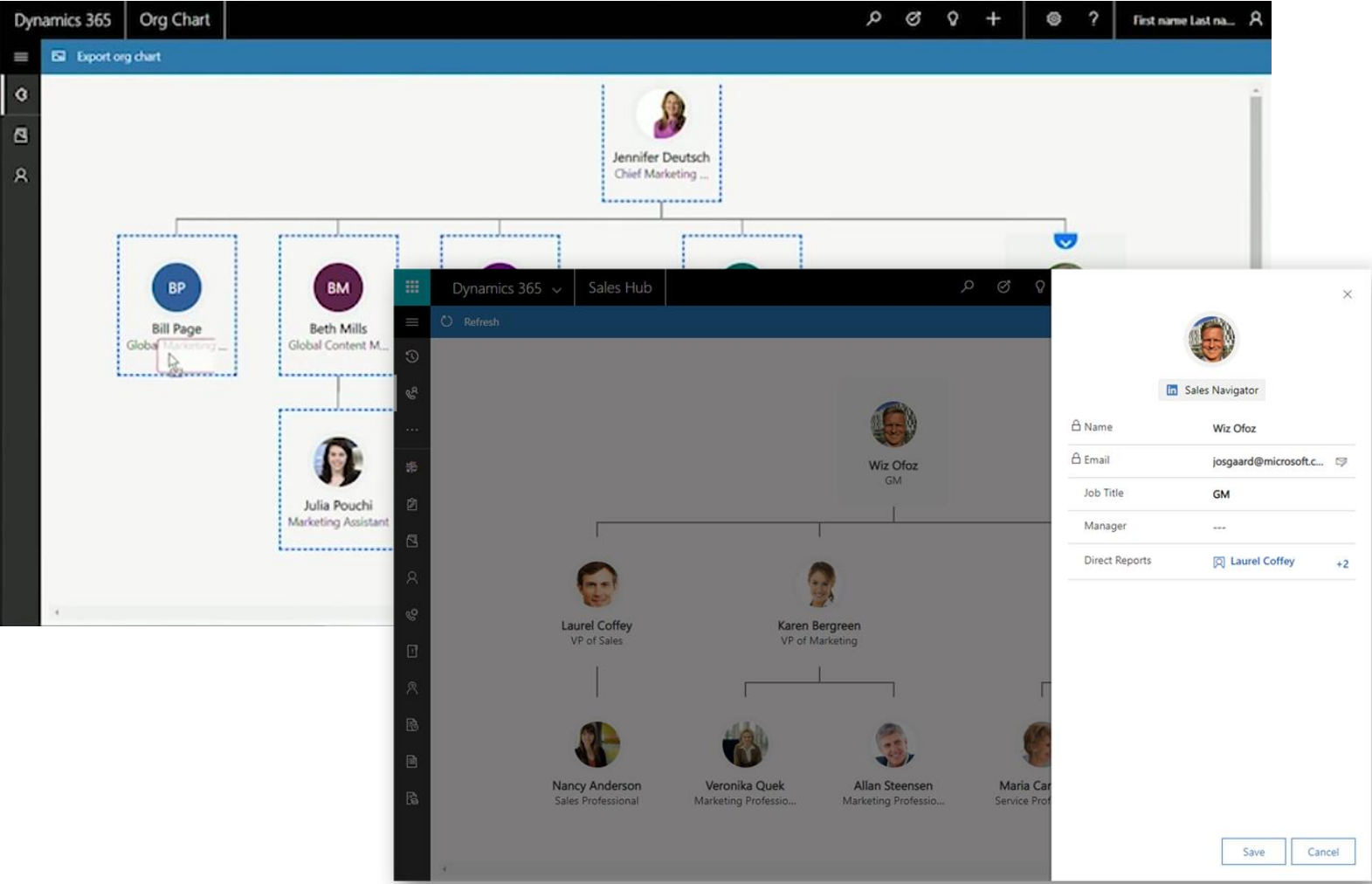
Microsoft Dynamics 365 is a suite of enterprise-grade intelligent business applications that enable your employees to get more done in less time, and provide you with actionable insight through powerful data analytics and real-time reporting. It has several modules and components that are included in the suite, growing daily.



We are a leading (and Gold Certified) Dynamics 365 Partner – think of us as the guys who are going to help you on your journey to unlocking your business' true potential, using our experience and capability to tailor the above software and modules to your specific needs and driving real value back to your stakeholders.

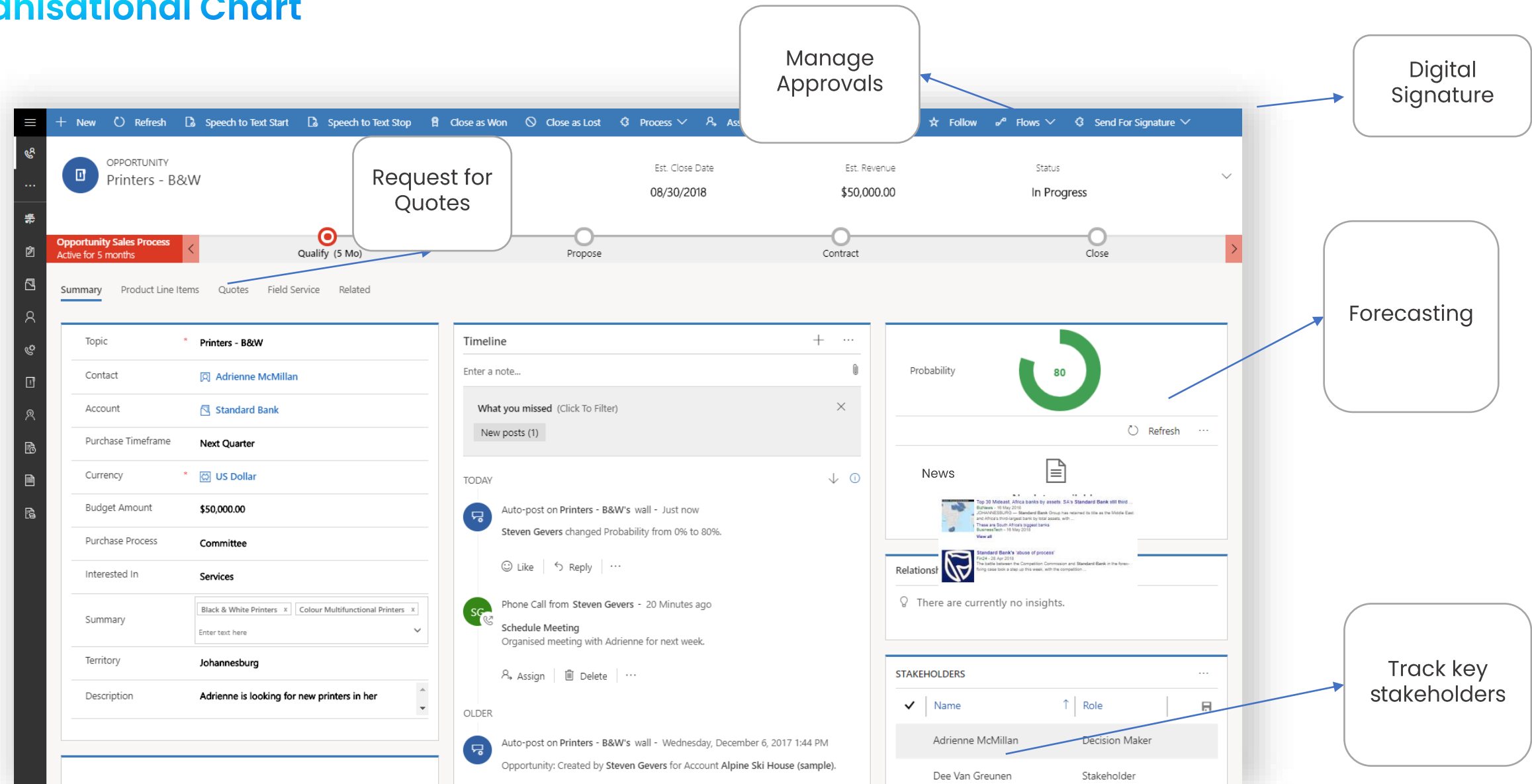


# Organisational Chart



Easily build out relationships between contacts with ability to enhance information with LinkedIn data.

# Organisational Chart



# LinkedIn Integration

Dynamics 365

Sales

Contacts > Mark Russinovich >

SANDBOX

NEW

DEACTIVATE

CONNECT

ADD TO MARKETING LIST

ASSIGN

EMAIL A LINK

DELETE

FORM

PROCESS

CONTACT : CONTACT RELATIONSHIP

Mark Russinovich

Owner

Abbie Moss

LINKEDIN MEMBER PROFILE

in

SALES NAVIGATOR

Mark Russinovich · 2nd

Chief Technical Officer, Microsoft Azure at Microsoft

+1 current position

3 years 2 months in current role

Greater Seattle Area · Computer Software

View Profile

Save as Lead

\*\*\*

Icebreakers

Get introduced

Related leads

Highlights

1 shared connection

Jamie White

Recent activity

Mentioned in the news

Why Azure Availability Zones

blogs.msdn.microsoft.com

1w

Mentioned in the news

Veritas Delivers Full Spectrum of 360 Data Management Capabilities on Microsoft Azure

finanznachrichten.de

4w

Mentioned in the news

Microsoft Azure Stack Changes the Game in Hybrid Cloud Computing

eweek.com

2w

Mentioned in the news

Microsoft CEO Satya Nadella to highlight Orlando conference

orlandosentinel.com

4w

Mentioned in the news

Azure Content Spotlight - Azure confidential computing

blogs.msdn.microsoft.com

3w

Mentioned in the news

Azure confidential computing: Microsoft boosts security for cloud data | ZDNet

zdnet.com

4w

Active

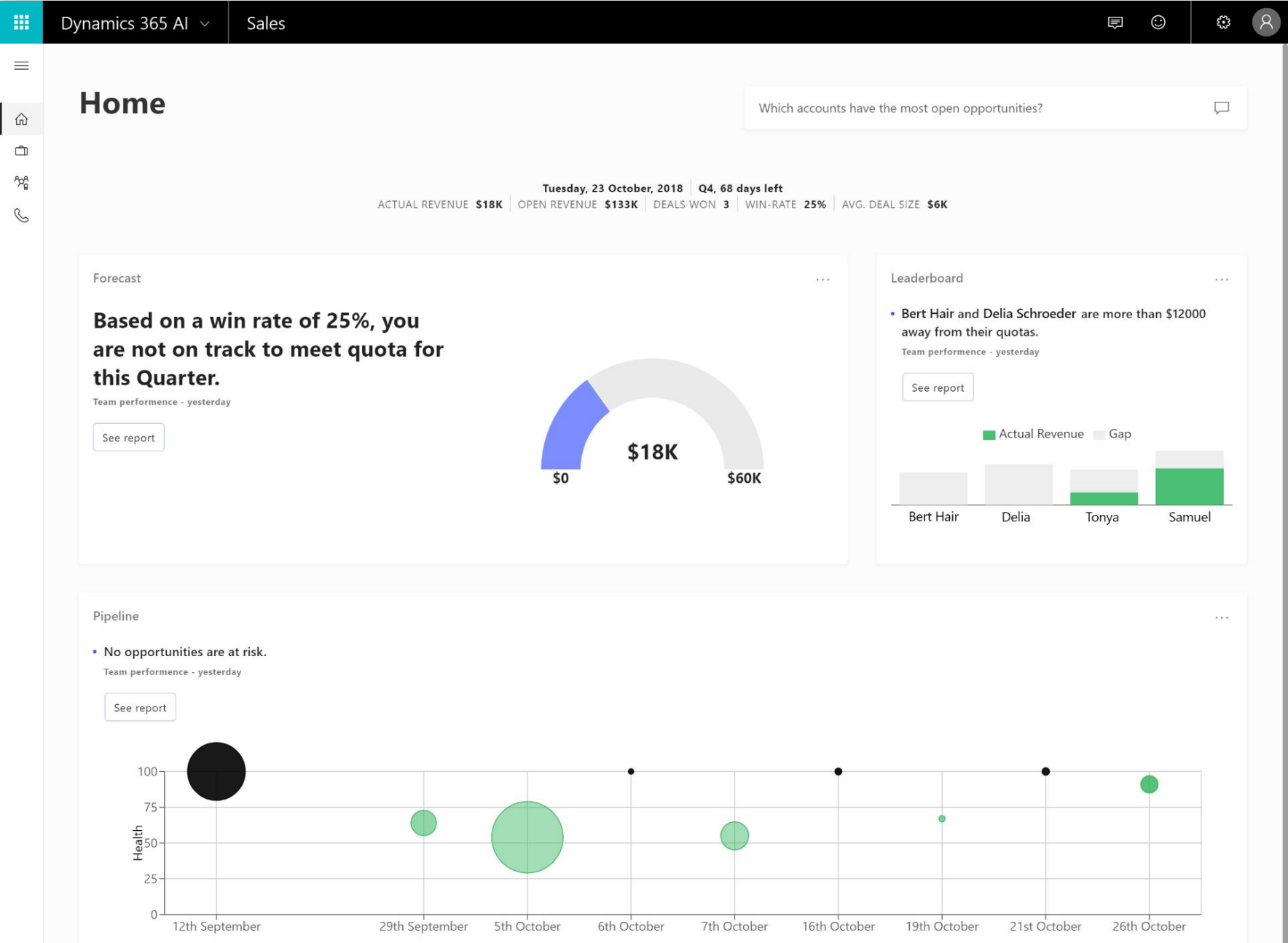
Augment data with the rich insights available in LinkedIn.

Enterprisecloud

# AI for Sales

The screenshot displays the Enterprisecloud interface for a contact named Bert Hair. The top navigation bar includes various actions like New, Deactivate, Connect, Assign, Email a Link, Delete, Create Invitation, Refresh, Open Yammer, Process, Share, Follow, Flow, and Send For Signature. The contact's name, Bert Hair, is shown at the top left, and the owner, Samuel Barba, is at the top right. The main content area is divided into three sections: Summary, Details, and Partner Details. The Summary section is active and shows a LinkedIn Sales Navigator sign-in prompt. The Details section is divided into two panes. The left pane, titled 'Relationship Assistant', shows 'There are currently no insights.' The right pane, titled 'Talking points for Bert Hair', is highlighted with an orange border and contains the following text: 'I went out with my family last night.' and '1 year ago about Family'. Below the text are several icons for social media and sharing. The bottom section, titled 'Timeline', shows a list of activities, including a phone call from Bert Hair on Monday, September 24, 2018, at 8:51 PM, and a call with Bert Hair at 9:20:12 AM, taken some test notes. The bottom right pane also shows a LinkedIn Sales Navigator sign-in prompt.

AI driven talking points based on previous meetings, notes and emails.



# Resource Scheduling

Dynamics 365Universal Resource SchedulingUniversal Resource Scheduling > Schedule Board

Hourly view

Initial public view

Hours | View

7/13/2018 - 7/26/2018

Book | Actions | Sort

Friday - 7/13/2018

7:00 AM8:00 AM9:00 AM10:00 AM11:00 AM12:00 PM1:00 PM2:00 PM3:00 PM4:00 PM5:00 PM6:00 PM

Search resources...

Norbert Sandberg

7:00 4%

Additional Capacity

Orville Eagle

2:01 1%

Pamela Golden

0:00 0%

People Pool

1 Resource

Reba Potts

0:00 0%

Reed Hermann

0:00 0%

Requirement - 00093

Duration: 2 hrs

Work Order - MRI Sanitation

Duration: 2 hrs

Requirement - 00088

Duration: 3 hrs

Work Order - Replace Weather Head

Duration: 2 hrs 1 min

Centralised scheduler for salespeople, trucks, service agents or anything really.

1 - 83 of 83

Open Requirements | Unscheduled Work Orders | All Requirements | Groups

Name

From Dat

To Date

Duration

Proposed Dura

Fulfilled Durati

Remaining Duration

Priority

Territory

Time From Promised

Time To Promised

Status

Created On

Facility single test

2 hrs

0 min

0 min

2 hrs

Active

07/11/2018 10:28 AM

2 hrs

0 min

0 min

2 hrs

Active

07/11/2018 10:19 AM

Test 2 FP

2 hrs

0 min

0 min

2 hrs

Active

07/06/2018 7:45 AM

Test 1 FP

07/10/2018

07/11/2018

2 hrs

0 min

0 min

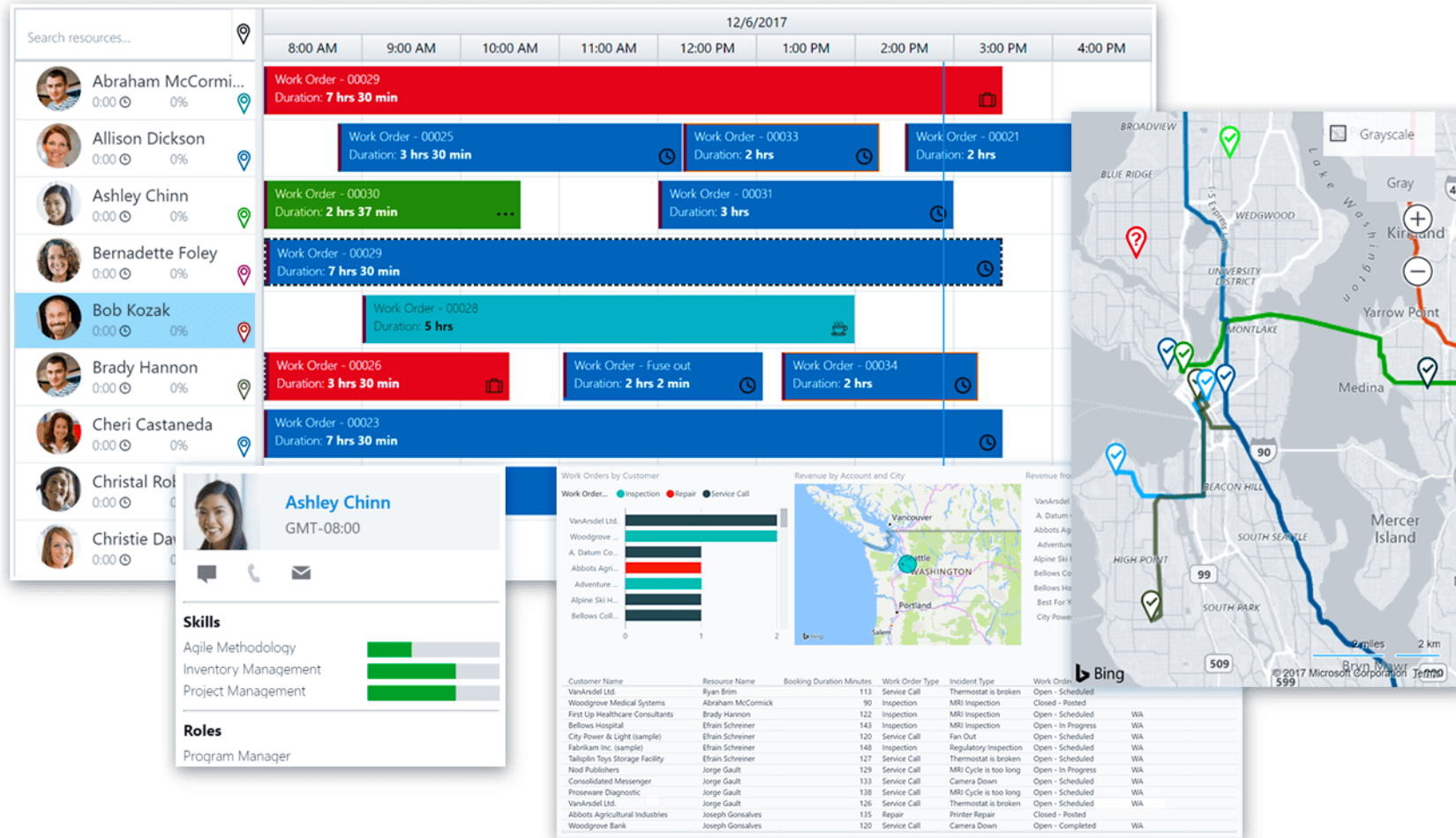
2 hrs

Active

07/05/2018 5:27 PM

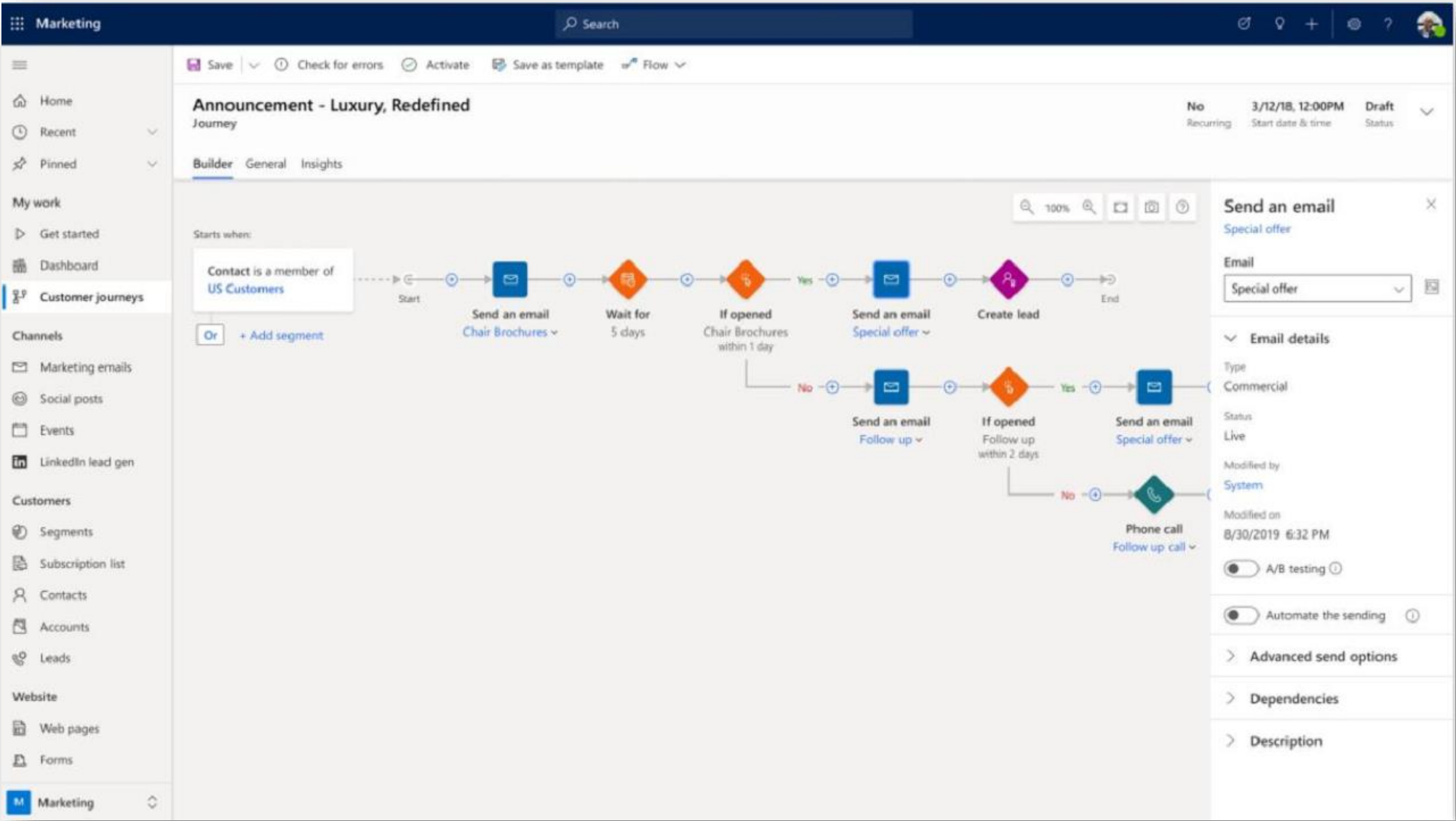
Record 1 - 50 of 56

# Field Selling



Track salespeople based on location and visits that have been scheduled.

# Marketing



Customise automated journeys and set up marketing efforts with data that is segmented and targeted.

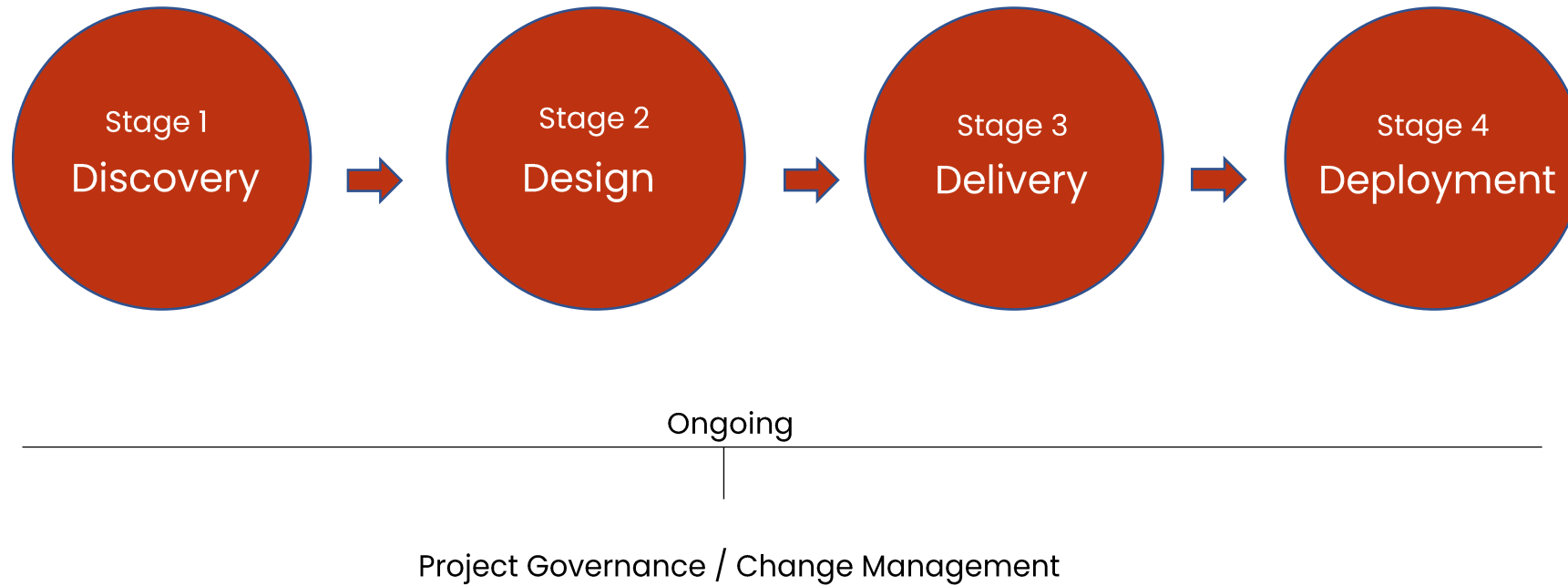


# 4 | Implementation

## **The True North Methodology**

## True North Methodology

Our methodology is what takes every project over the line. It allows for a flexible approach and rapid delivery, while ensuring good project governance and control.



# THANK YOU

If you would like a free 30 minute  
consultation to discuss this solution  
with a Solution Architect to assess  
its suitability, contact us:  
[hello@ec.co.za](mailto:hello@ec.co.za).



Confidentiality Clause: This document contains confidential information, which is proprietary to Enterprisecloud. No part of its contents may be used, copied, disclosed or conveyed to any party in any manner whatsoever without prior written permission from Enterprisecloud.