

IBM
**Strategy
Consulting**

IBM Connected Sales & Marketing with Dynamics 365

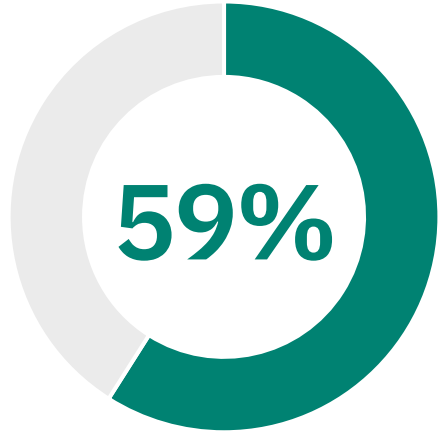
Build competitive advantage



A hand is shown holding a smartphone. The phone's screen displays a dark interface with various data points, including a line graph with an upward arrow, a bar chart, and several numerical values such as 44467, 157170, 1098, 875957, 32458, and 342098. The background of the entire image is a dark blue gradient with a complex network of white lines and nodes, overlaid with semi-transparent icons of airplanes, a padlock, and a person. The text 'Market Insights' is centered in a large, white, sans-serif font.

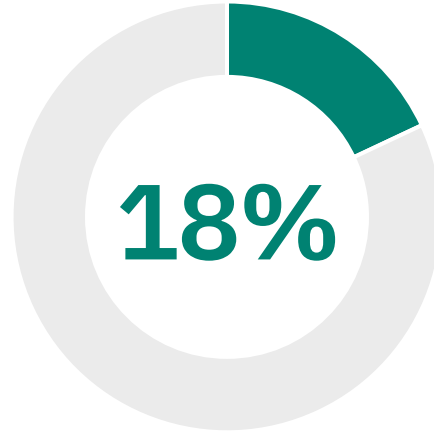
Market Insights

Without the right tools, sellers struggle to meet customer expectations



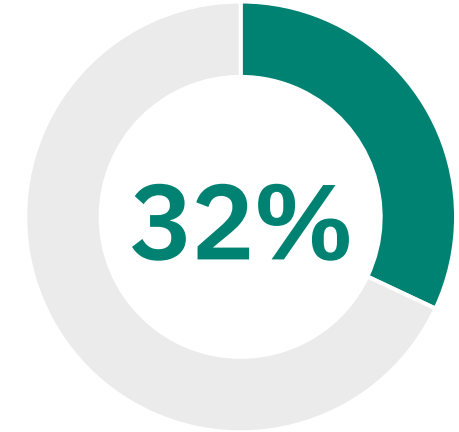
59% of sellers say they have too many sales tools.

 [Accenture](#)



Only **18%** of salespeople are considered trusted advisors.

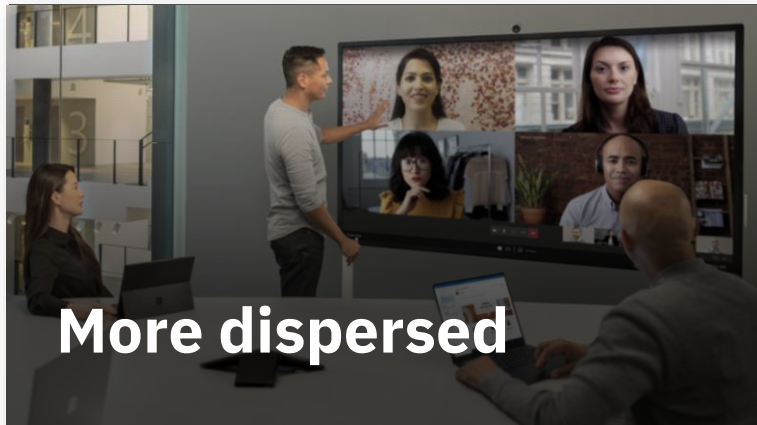
 [HBR, 2017](#)



On average, sellers only spend **32%** of their time selling.

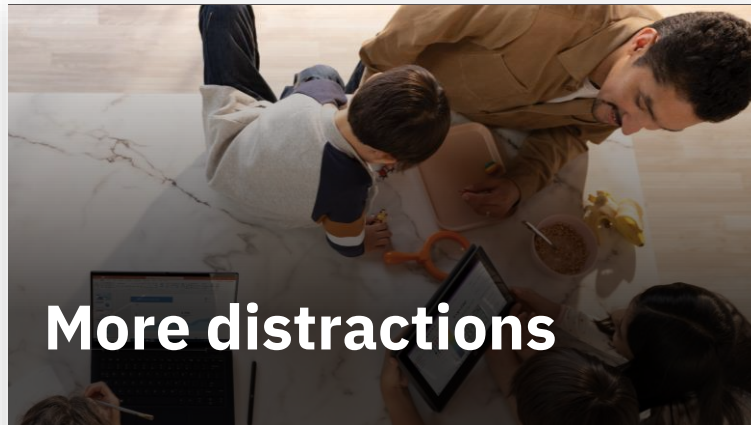
 [CSO Insights](#)

More roadblocks to selling



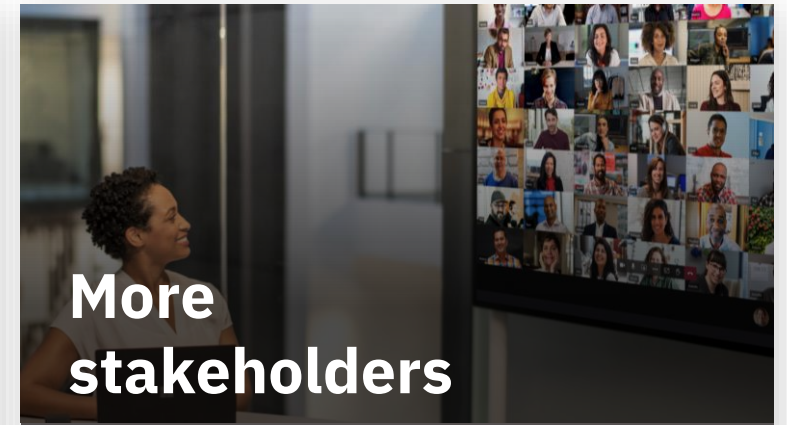
More dispersed

50% of business travel will disappear in post-pandemic world ¹



More distractions

78% of employees report being distracted and needing help to focus ²



More stakeholders

75% of buying involved people from a wide variety of roles, teams, and locations ³

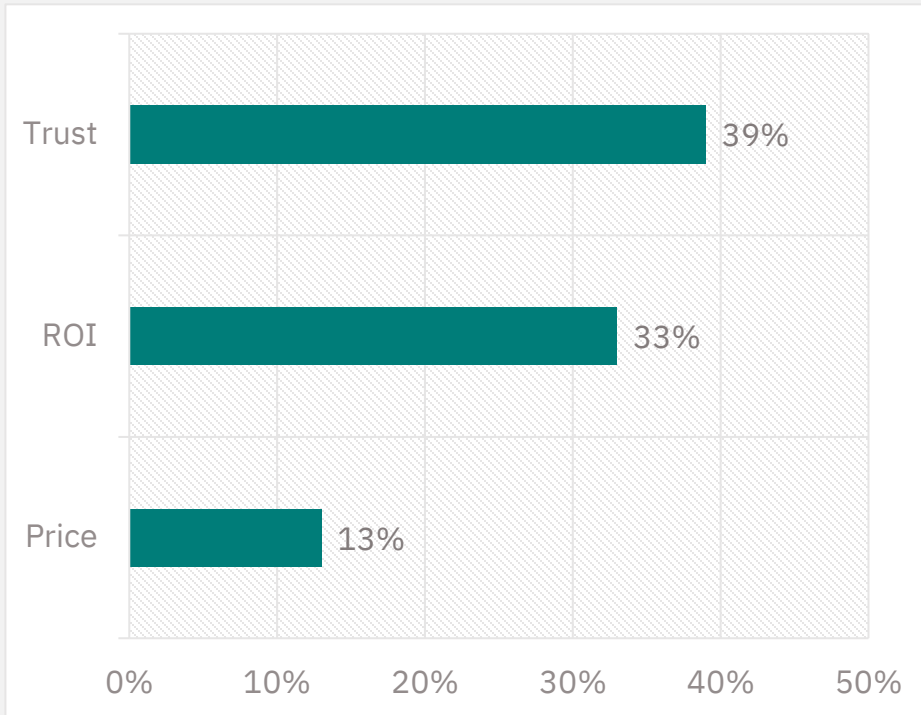
 [Bill Gates](#)

 [Willis Towers Watson](#)

 [Gartner](#)

B2B sales accelerate with trust and strong relationships

Trust is the #1 reason for closing deals.¹



¹ [LinkedIn](#), 2017

² [Miller Heiman Group](#), 2018

What do buyers want from sellers?²

1. **Understand** my business. Know me.

2. **Demonstrate** excellent communication skills.

3. **Care** about my post-sale experience.

4. **Give** me insights and perspective.

Customers expect exceptional service

Customer service expectations have never been higher which has led to increased pressure on contact centers

Even in the best of times, customers are ready to abandon a brand after only 3 unsatisfactory support interactions.

3%

80%

Expect personalized customer experience

Will sever a relationship with a business due to poor customer service

58%

22%

Among Millennials, 22 percent said just one bad interaction is sufficient impetus to leave.

The gap between how buyers **buy**, and sellers **sell** is at critical mass

77%

of Sales organizations are not adapting their sales processes to their customers' evolving needs

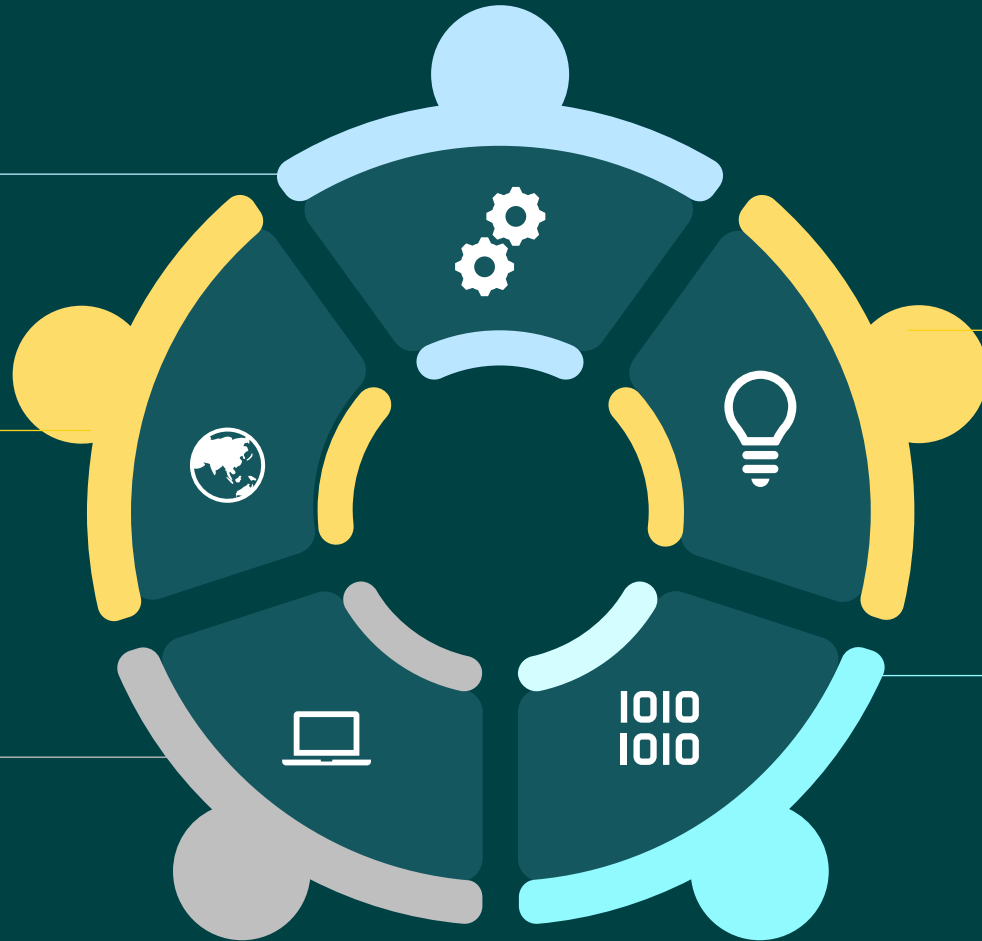


Common challenges in Sales Process

Buying journey is more **complex and unpredictable**, and sellers have limited visibility

Stakeholders and decision-makers are **scattered across different functions** and geographies

New generation of **digital-native buyers** that value convenience and speed

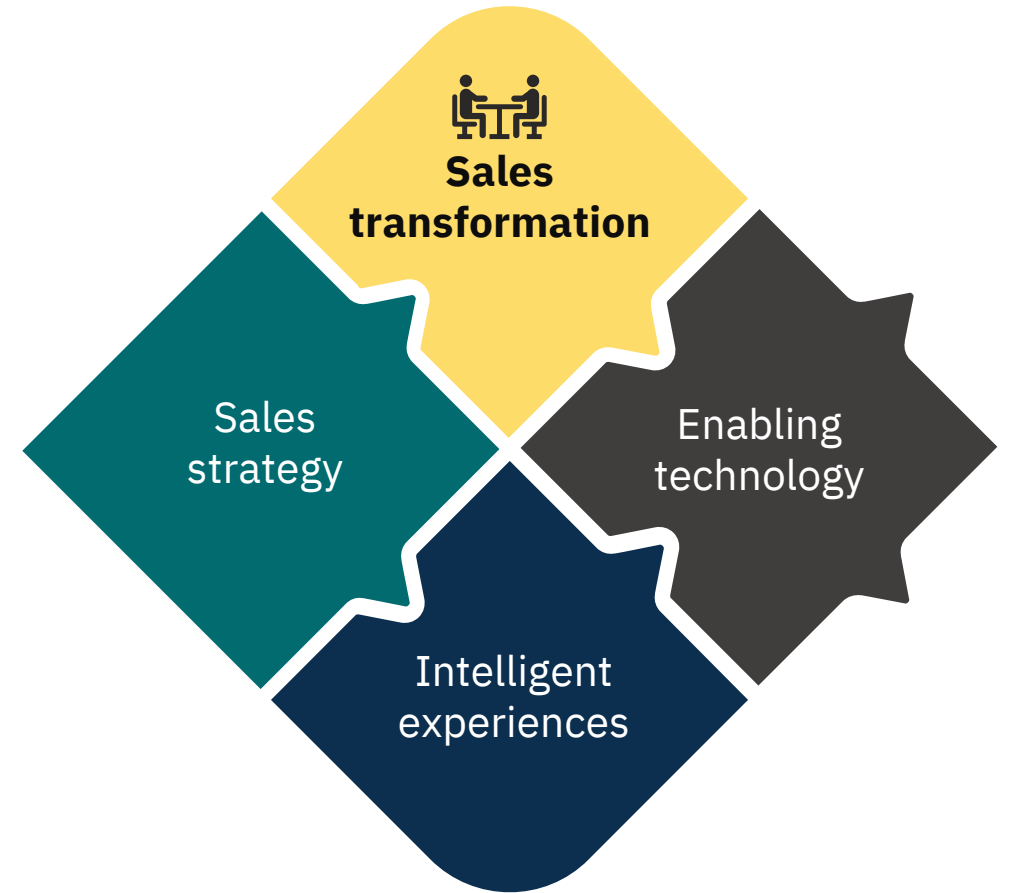


Traditional buying has been upended by COVID-19

Customer data is scattered across systems, making it challenging to switch to digital selling

Transforming strategy into a launchpad for top line growth with **experience-led sales**

Successful organizations are growing top line revenue, retaining talent, and outperforming their competition by radically evolving their strategy and processes to enable agility, scalability and intelligence to embrace a rapidly changing market.

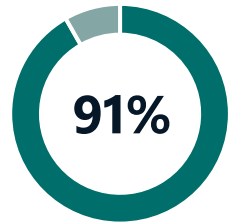


- Imagine a world where your Sales Reps had tools that provided so much value, they **actually used** them in their daily workflow
- Imagine a world where you had **real-time data** to turn your Monday forecast calls into **deal strategy** discussions instead of status updates on who to chase down
- Imagine having customers who reached out to you because they felt **loyalty to your brand** and viewed your sales reps as resources to solve business problems
- Imagine you invested in tools that enabled you to do **more with less**, reducing the strain of hitting your numbers with less sales staff

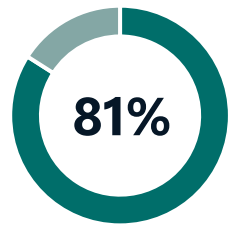
This is the **Business of Sales Transformation**



Customer expectations are growing

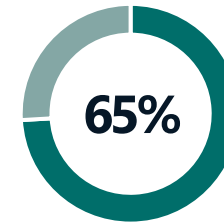


91% of consumers are more likely to shop with brands who recognize, remember, and provide relevant offers and recommendations. ¹

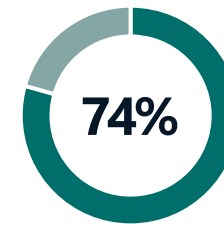


81% of buyers want brands to get to know them and understand when to approach them and when not to. ²

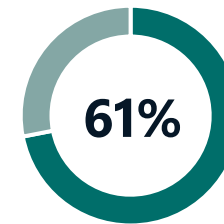
Today's experiences are falling short



65% of consumers are frustrated by inconsistent experiences across channels. ³



74% of customers are frustrated by the irrelevant content they are exposed to on websites. Up to 40% of them will leave. ⁴



61% of customers stopped doing business with at least one company last year because of poor customer experience. ⁵

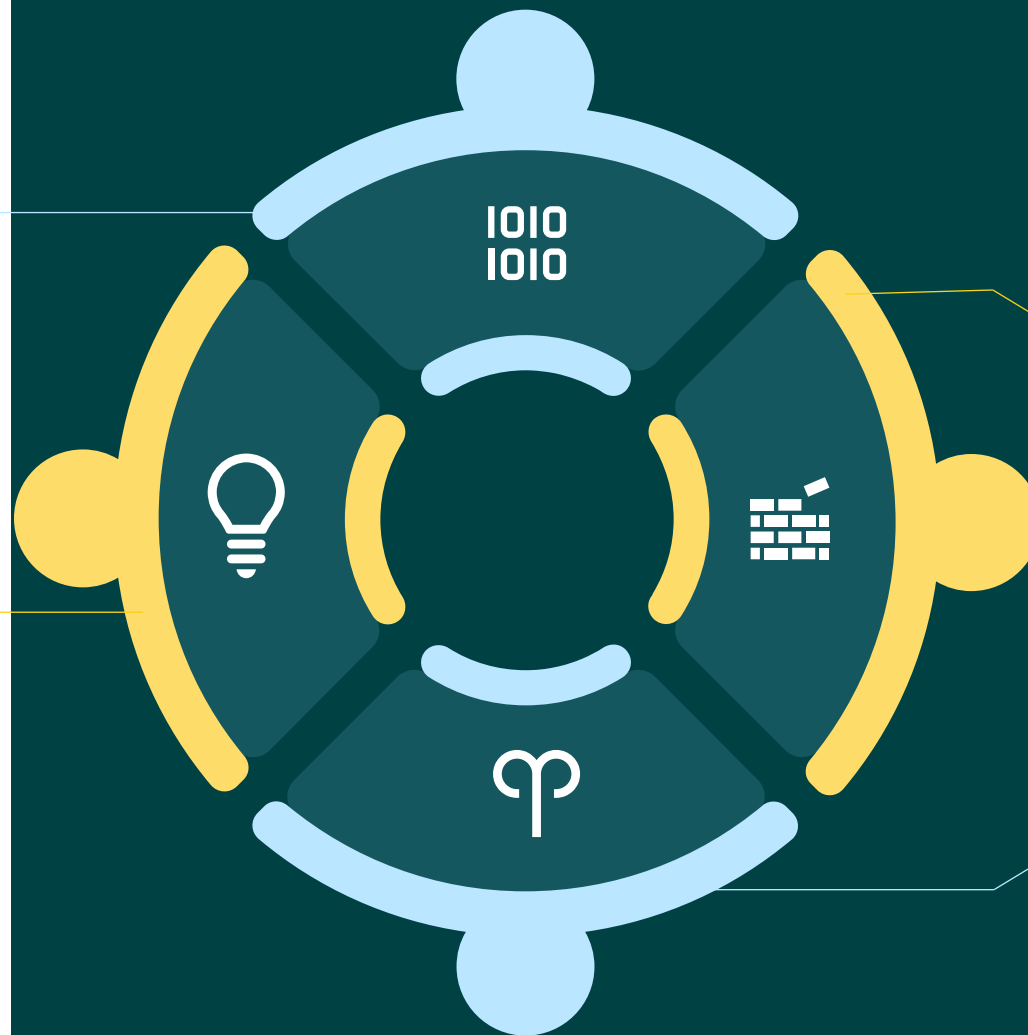
¹ Accenture ² Accenture ³ McKinsey ⁴ Accenture ⁵ Accenture

Common challenges in marketing processes

Data is dispersed across systems, **inaccessible** and typically unusable.

Complying to regulations like GDPR poses more challenges

Legacy and new technologies needed to deliver the right experience are **disconnected** – adoption and adaption to new platforms within the marketing organization still lags



Difficulty integrating a data-first approach with customer-centricity – optimization, personalization and measurement consistency across traditional and digital channels remains a huge channel.

Lack the flexibility, resilience and insight to respond proactively to market demand or change

Marketers need a new strategy



OLD

NEW

- Demand generation
- Big bang campaigns, megaphone messaging
- Gut decisions
- Tradeshows

- End to end experiences
- Agile, always on marketing
- Insight based decisions
- Engaging events with audience nurture

Technology must evolve to support new strategy



1.0 Mass communications

- Email marketing
- Ads to raise brand awareness

2.0 Campaigns

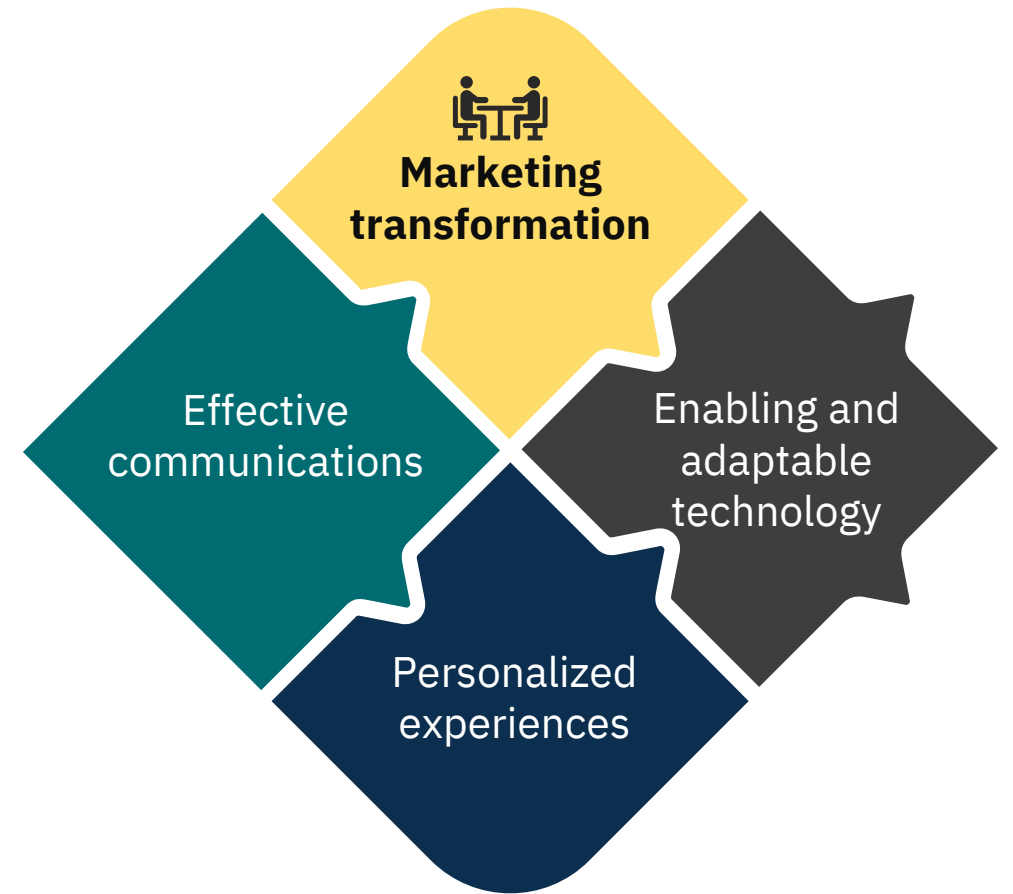
- Segment-driven campaigns
- Demand generation mindset

3.0 Customer experiences

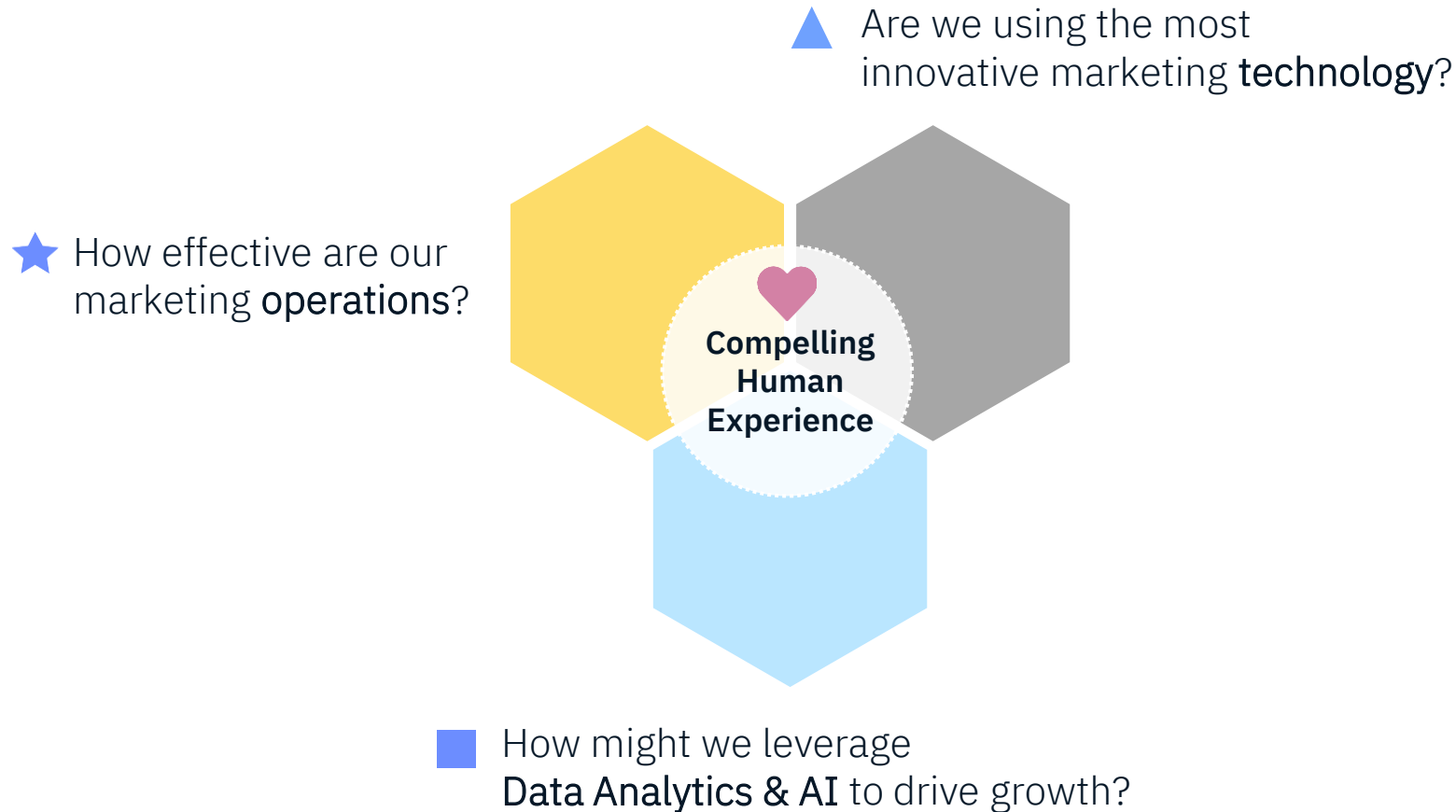
- Real-time, event-based journeys
- End to end experiences

Marketing transformation: A paradigm shift in strategy and systems

The pandemic-induced consumer behavior shifts and marketing resource constraints of 2020 and 2021 gave way to marketing ingenuity. As the drawn-out recovery continues to impact consumer attitudes and behavior, organizations are looking for ways to extend that agility and capitalize on unprecedented levels of consumer experimentation.



Marketing Transformation: Data-driven Orchestration



Orchestrate the core component of the modern marketing organization

- human experience
 - Personalization
 - Journey Development
 - Journey Measurement
 - Segmentation /Targeting
 - Experience Management

Improving customer experience is key plank of new strategy, and offers tangible benefits



Revenue increases of
10-20%



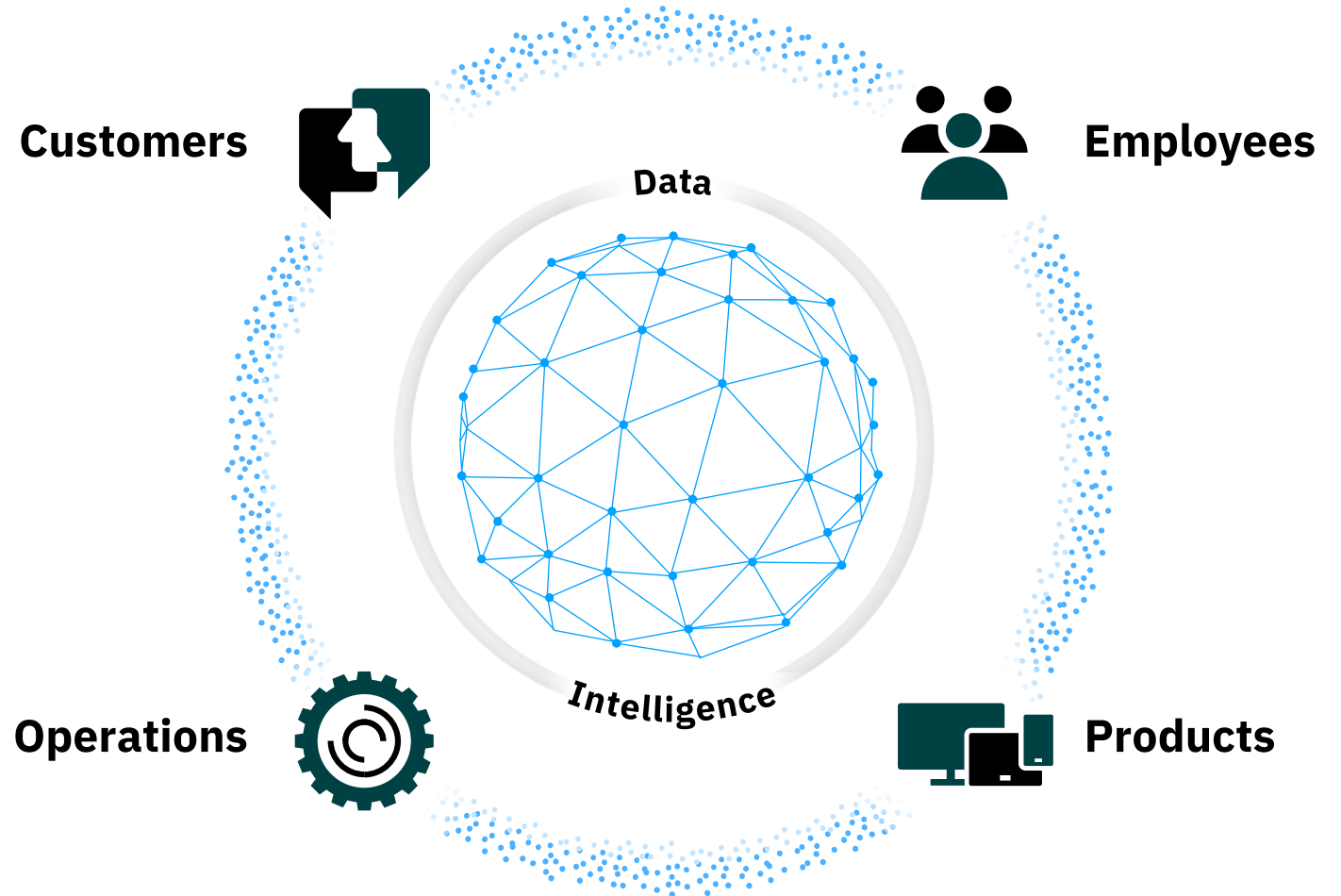
Cost reductions of
15-25%



Customer advocacy score
improvements of
20-40 points

Source: Potential improvements reported by BCG for customer journey programs

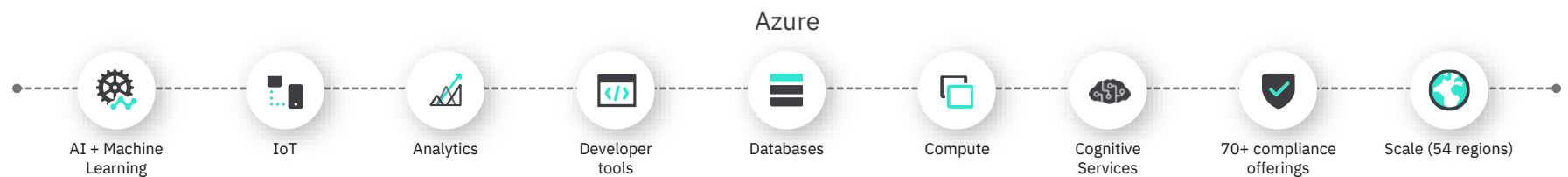
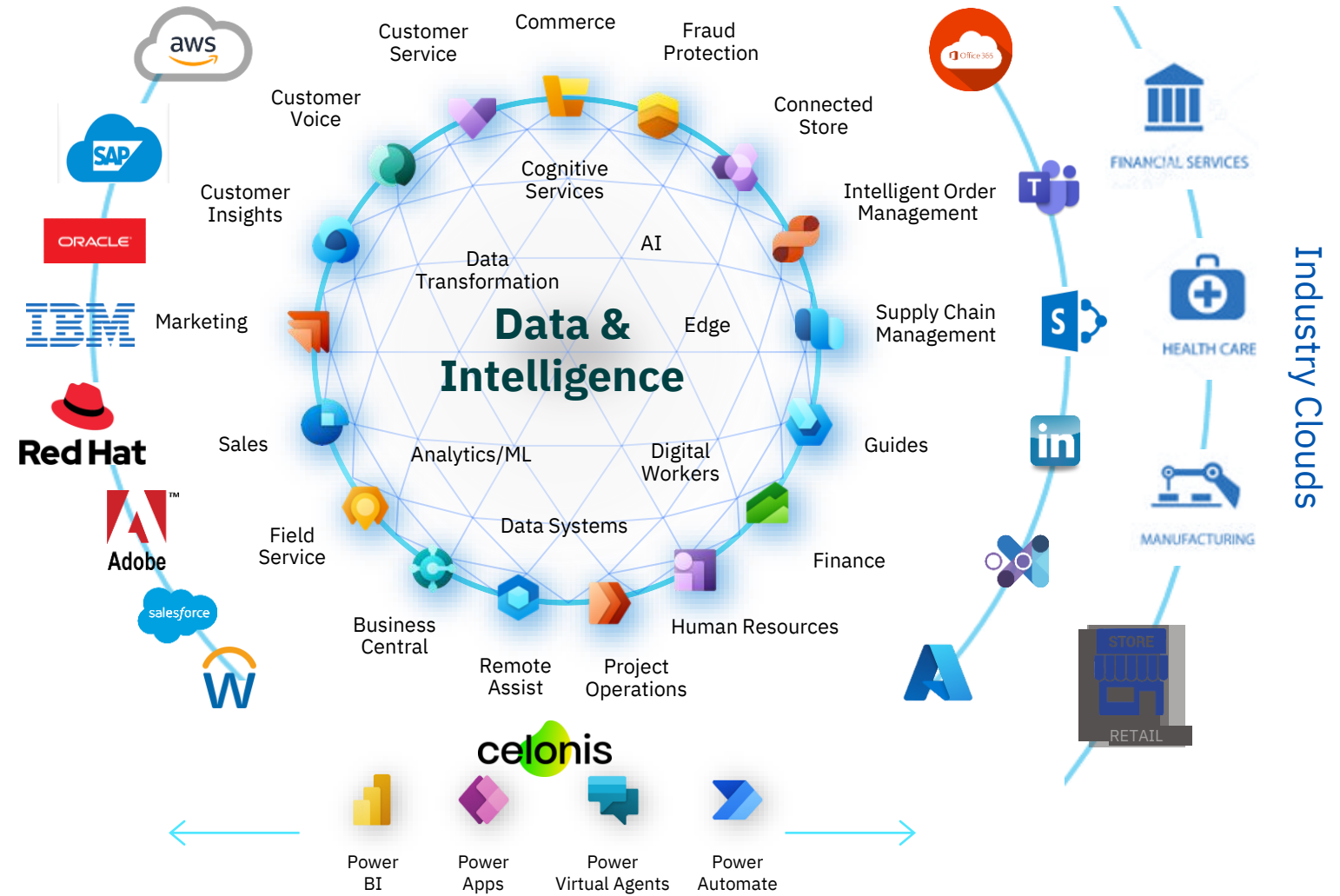
How IBM and Microsoft can help you unlock new value



Microsoft Business Applications Platform is a fully integrated solution

Powerful, flexible, and agile

- From optimizing operations, empowering your employees, or transforming your products and services, Dynamics 365 and Power Platform give you the power, flexibility, and agility to help your business thrive.



Dynamics 365 Sales

Dynamics 365 Sales is the perfect solution to help sellers gain deeper insights, access customers, and streamline sales processes when and where they need them most.



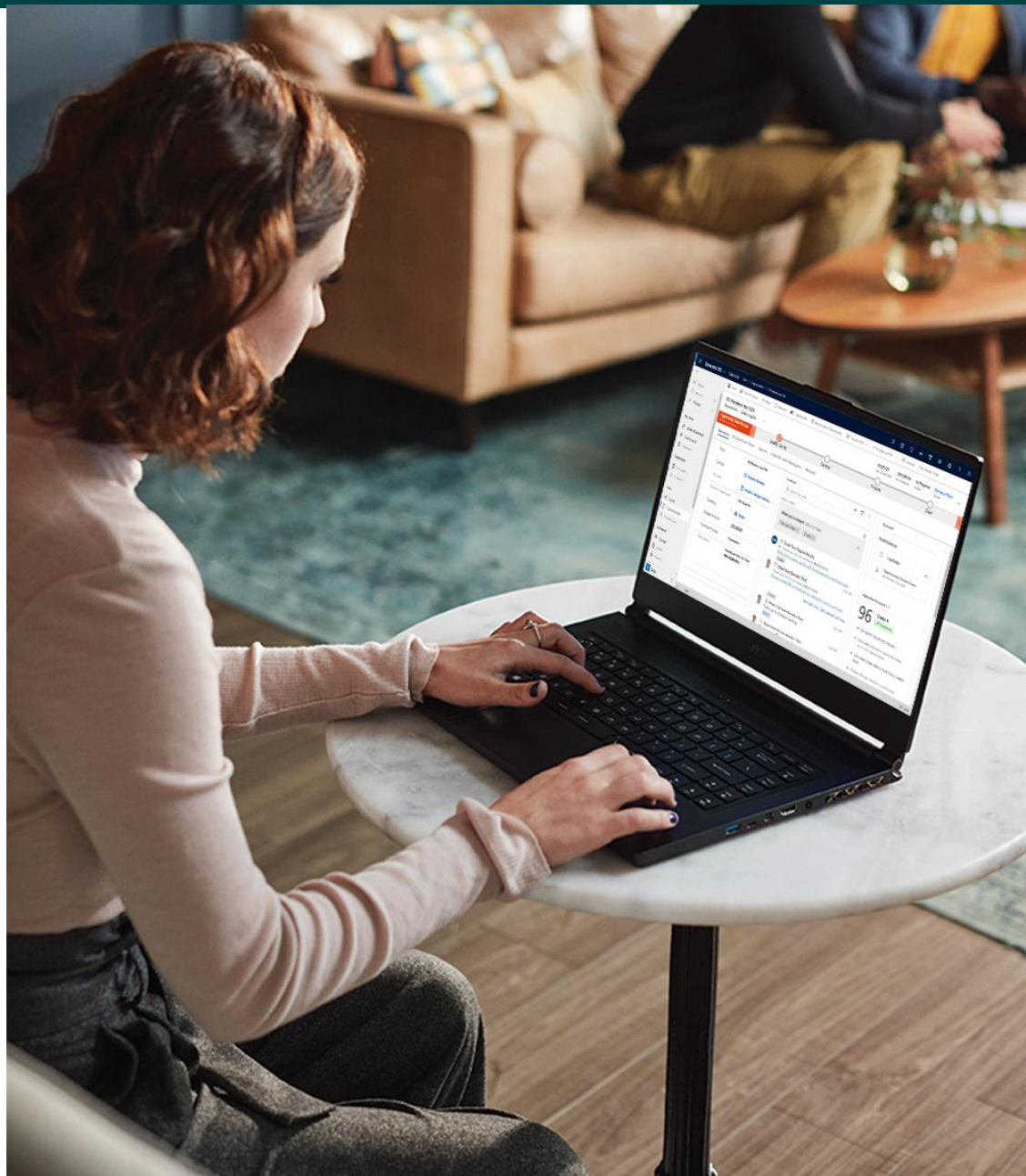
Make smarter decisions backed by data.



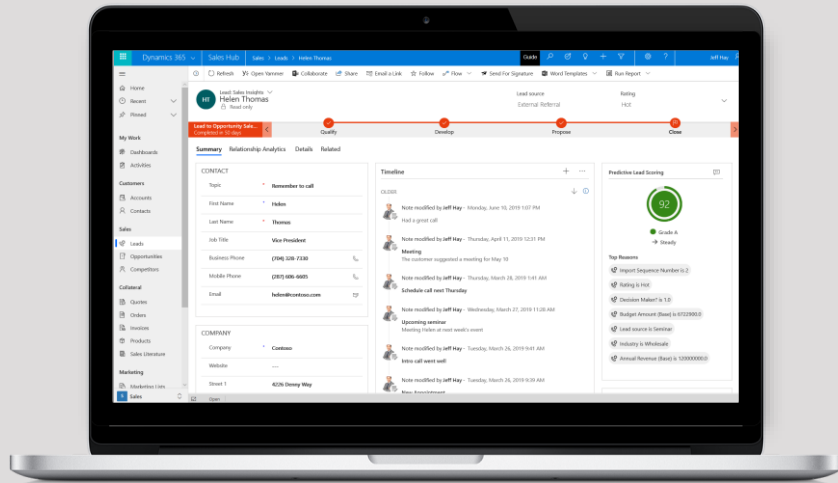
Free up time for selling.



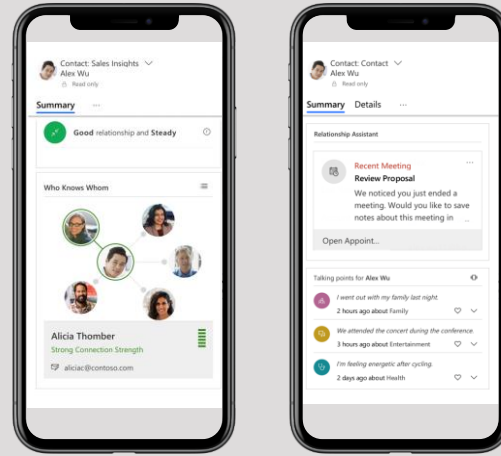
Get up and running quickly.



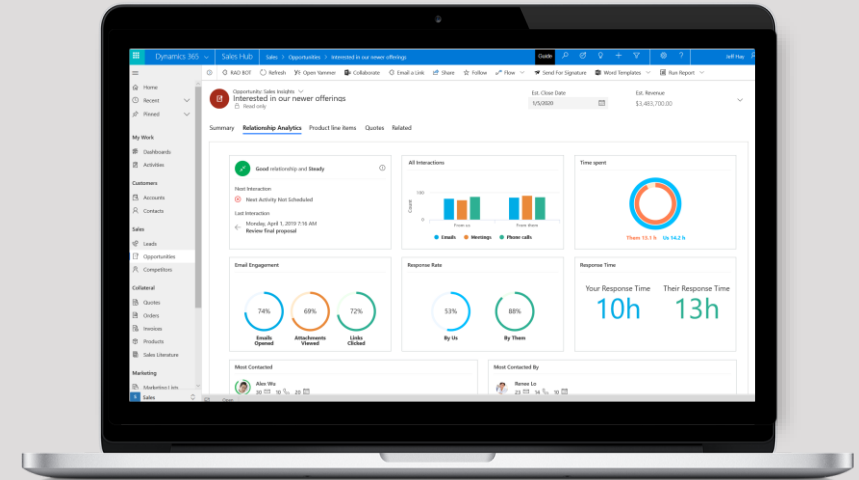
Make smarter decisions backed by data



Identify and connect with the right buyers.

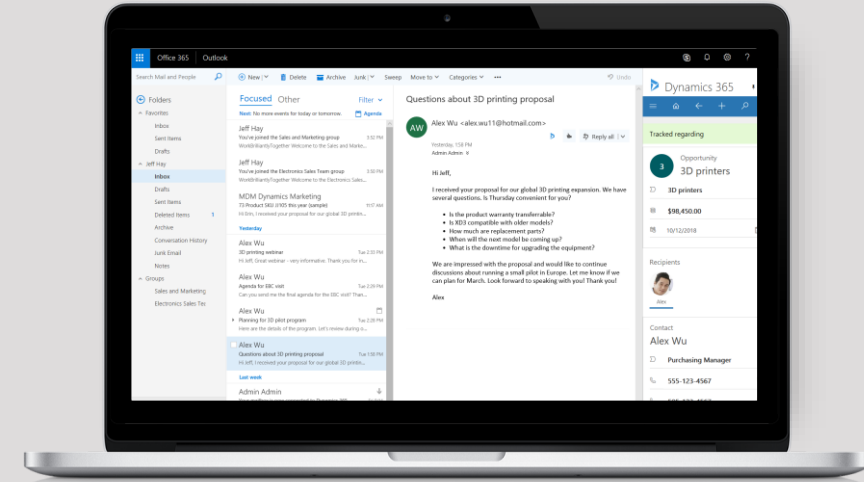
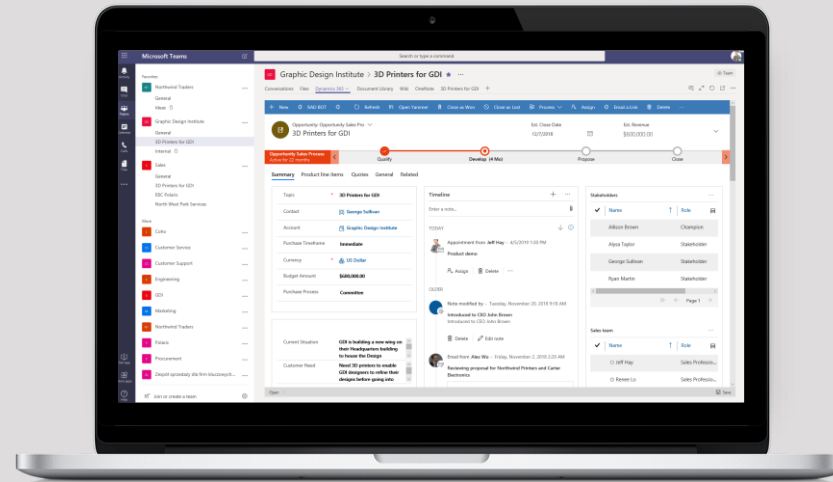
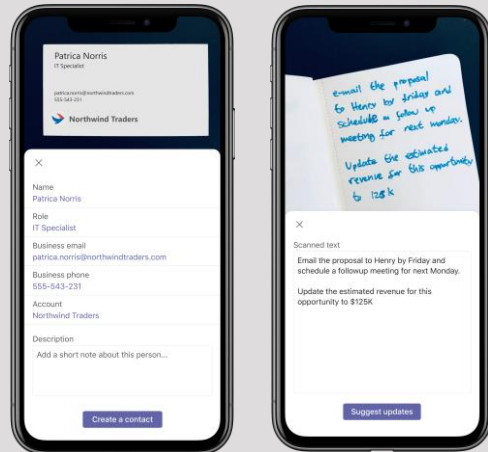


Personalize engagement.



Focus on top opportunities to increase win rates.

Free up time for selling

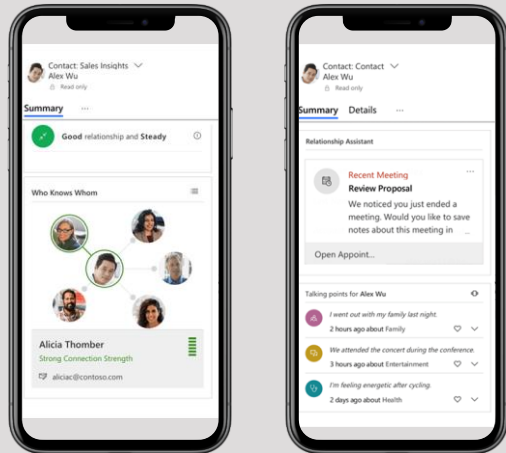


Leverage familiar tools and complete tasks from Outlook.

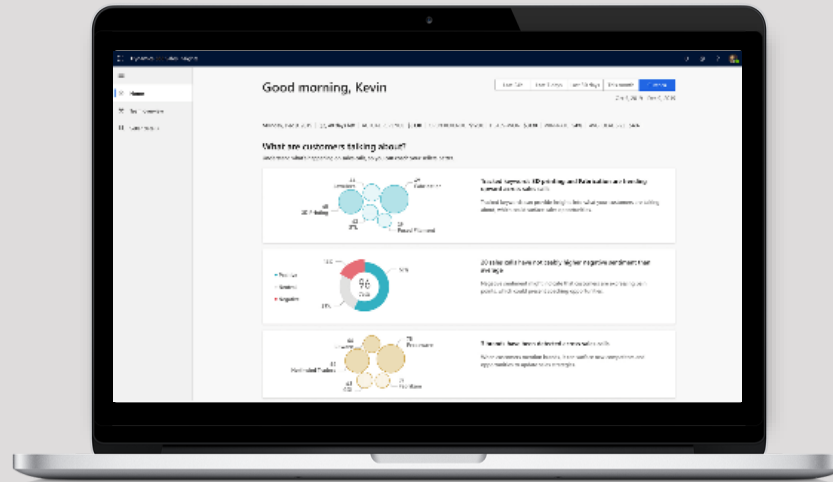
Guide sellers with prescriptive actions and workflows.

Empower a mobile workforce.

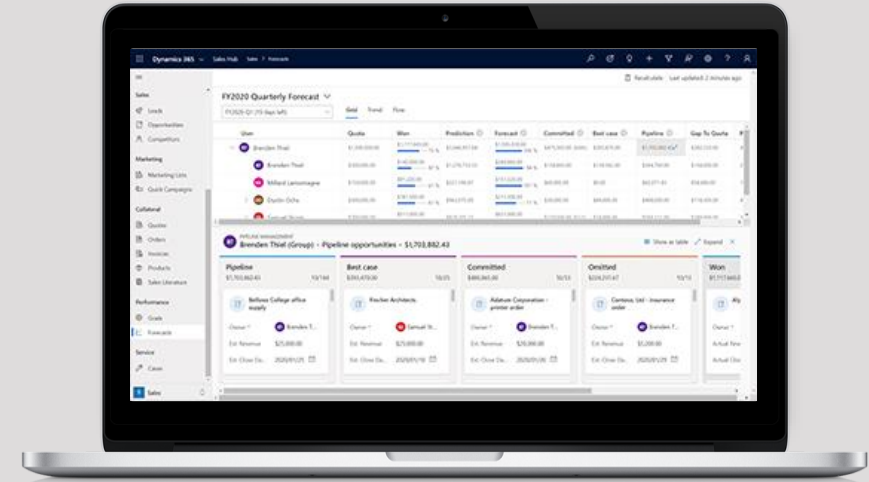
Get up and running quickly



Quick and easy setup that's easy to maintain.

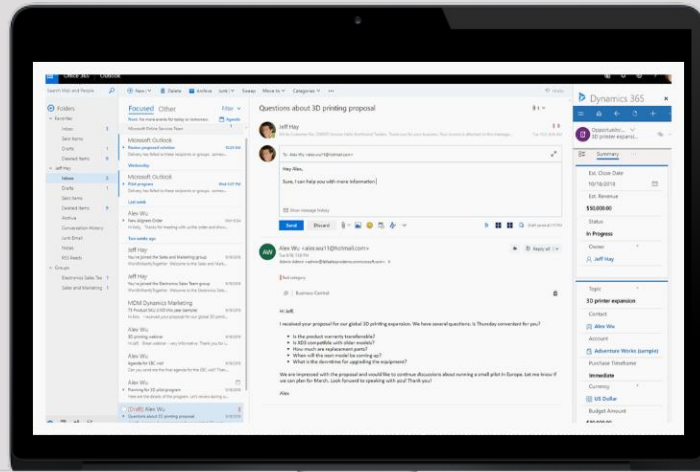


Seamless, integrated tools that work the way your sellers do.

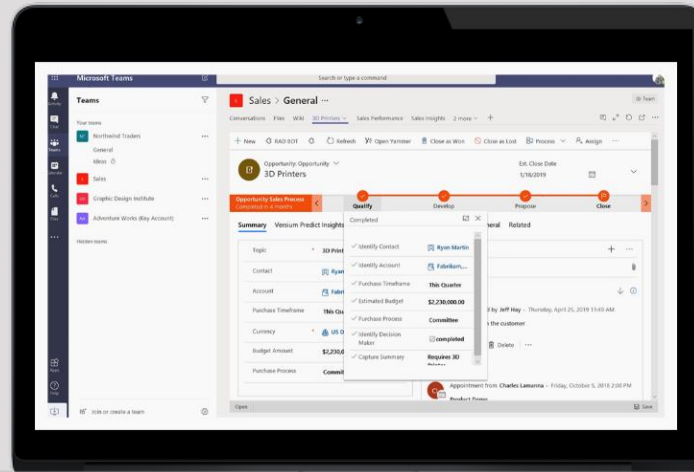


Flexible and extensible platform to easily adapt your solution.

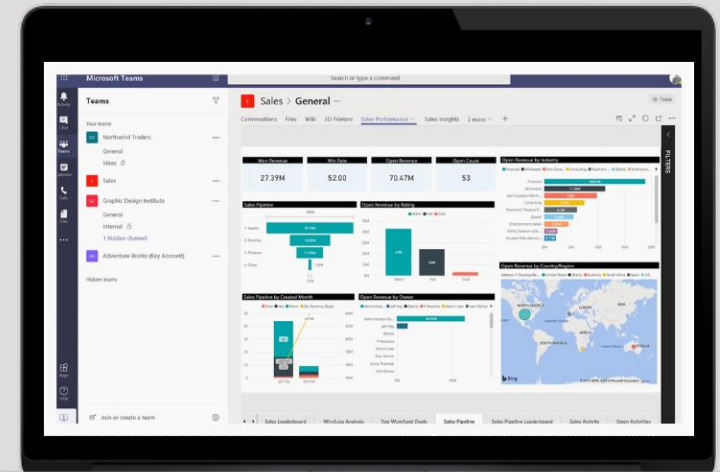
Dynamics 365 Sales integrates with Microsoft 365



Tailor interactions to customers.

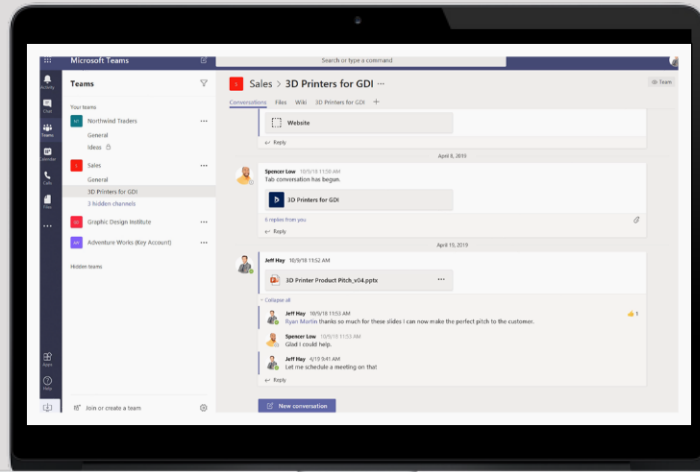


Share guidance for optimal outcomes.

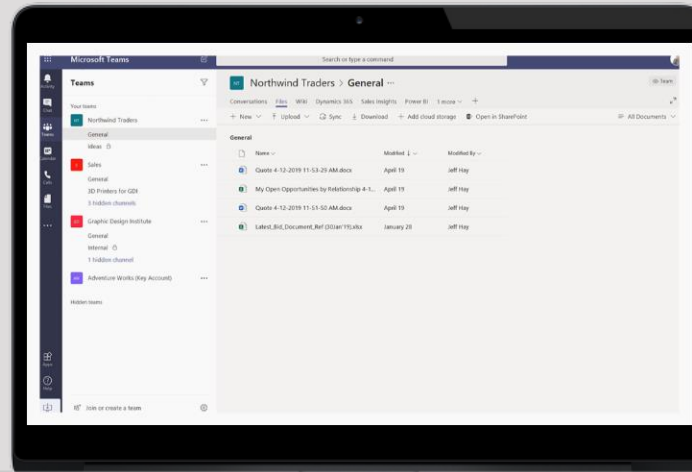


Increase performance with actionable insights.

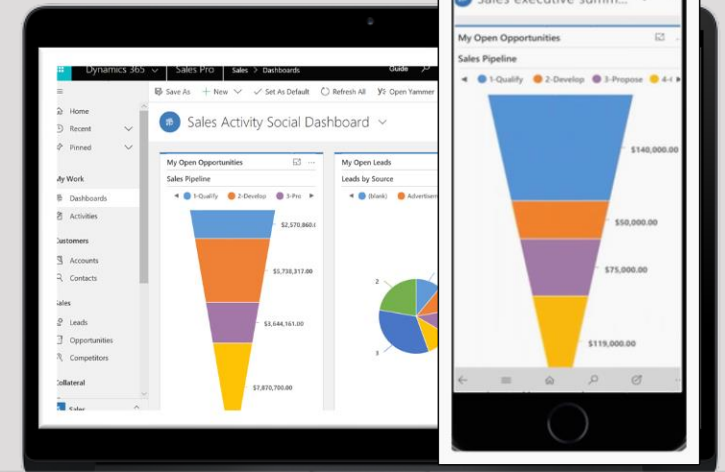
Dynamics 365 Sales integrates with Microsoft 365



Collaborate on deals in a modern workspace.



Easily create, edit, and share sales documents.



Work on the go with mobile applications.

Dynamics 365 Marketing

Dynamics 365 Marketing can help you elevate customer experiences across the entire customer journey and improve business growth.



1. Engage customers in real-time



2. Win customers and earn loyalty faster



3. Personalize customer experiences with AI



4. Build customer trust with a unified, adaptable platform

Engage customers in real-time



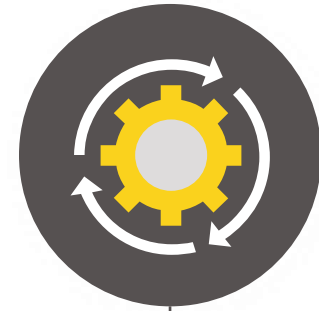
Orchestrate real-time
customer led journeys



Design customer-led
experiences



Create impactful
content



Deliver seamless
experiences across digital
and physical channels

Win customers and earn loyalty faster



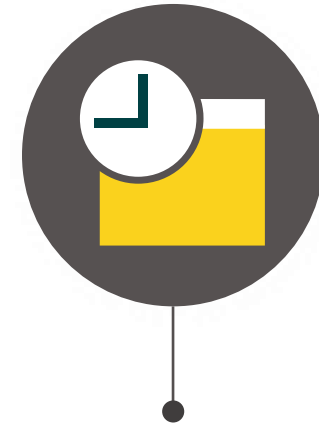
Design end to end
journeys



Improve customer
communications



Nurture leads
and accounts



Turn event, meeting, and
webinar attendees
into loyal customers

Personalize customer experiences with AI



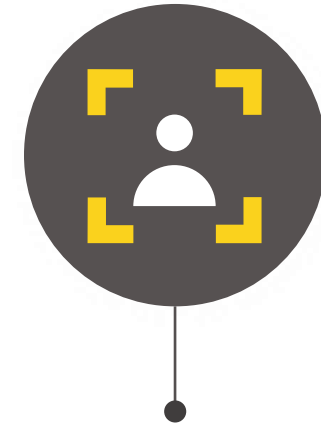
Create engaging content assisted by AI



Experiment to increase engagement



Improve marketing effectiveness

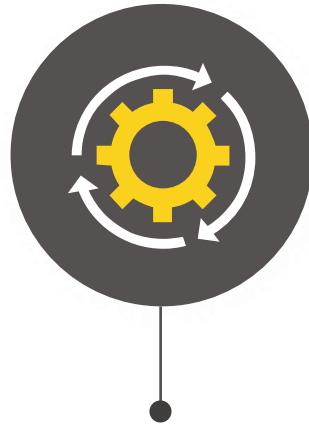


Act on a 360-degree understanding of the customer

Build customer trust with a unified, adaptable platform



Unify and share customer data more securely



Easily customize and extend to meet your business needs



Comply with Regulations such as GDPR and HIPAA



Run business unit level marketing and promote content re-use



IBM Differentiators driving Connected Sales & Marketing

IBM D365 Packaged Solutions & Accelerators for Connected Sales & Marketing

With our unparalleled understanding of Microsoft technologies and deep industry experience and expertise, we have developed **best-in-class industry solutions & accelerators** (based on Dynamics 365) for transforming customer experience. They help enable the organizations to achieve their business goals, **drive operational efficiency, revitalize customer experience** and **enhance collaboration** among teams.



Jumpstart to implementation thereby reducing time to market by 4-6 weeks



Reduced risk due to proven data models



Enhanced employee productivity



Engaging customer experiences

Industry Solutions



IBM
Banking Solution



IBM
Insurance Solution



IBM
Automotive Solution



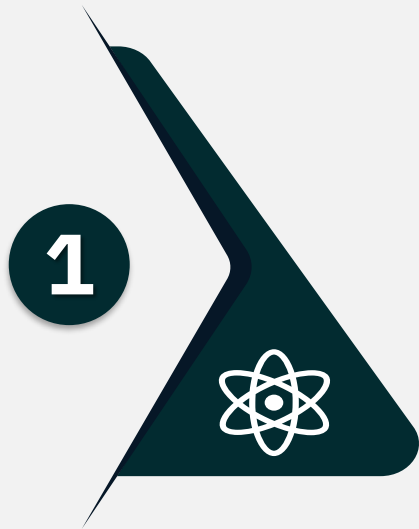
IBM Retail toolkit
(CPG Store Assist)

Dynamics 365 Toolkit for CX (Cross Industry)

Transforming customer experiences in Banking with IBM accelerators

IBM Banking Solution provides a powerful platform for digital transformation programme of a Banking Client. It is a tailored solution based on Microsoft Dynamics 365 designed for the banking industry that helps in providing digitally astute banking experience.

Key Capabilities



Empower employees with a unified customer profile to help them understand and anticipate customer needs thereby helping them to be a trusted advisor

Provide actionable insights to the employees to help them to have engaging conversations with the customers



Productivity tools to automate manual processes and free up valuable time of employees

Streamline customer onboarding processes with capabilities like appointment scheduling, digital application and e-signature

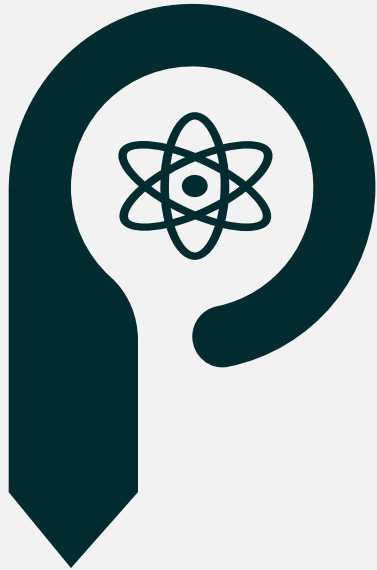


Personalized recommendations to enable employees cross-sell

Transforming customer experiences in Insurance with IBM accelerators

IBM Insurance Solution helps to deliver industry-leading experiences to the insurance policyholders and improve operational efficiency. It provides a robust toolkit designed to shorten the software development lifecycle and provides the capability to the Insurance Carriers to speed up along the path to customer centricity

Key Capabilities



Provides a comprehensive view policyholder and policies to equip the agents with the all the necessary information at a single page.

Personalized recommendations to enable agents cross-sell

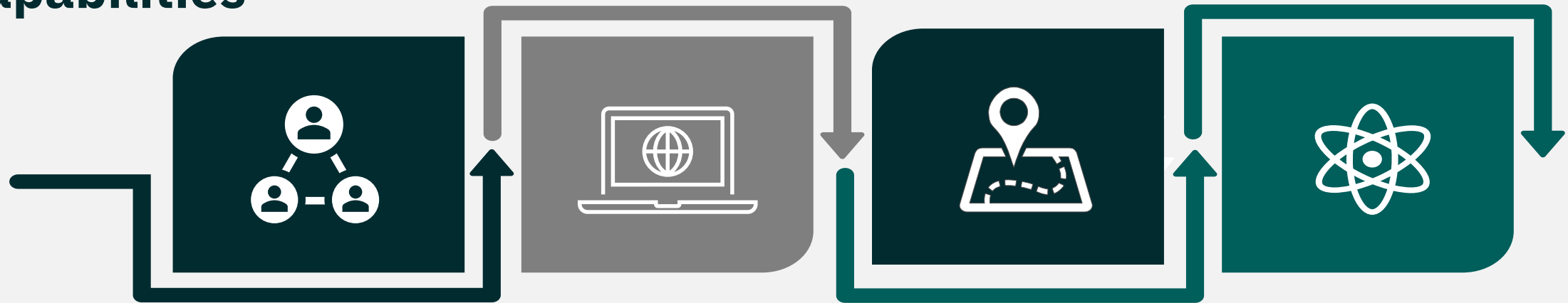


Insightful notifications for the agents to serve the policyholders effectively to minimize churn.

Transforming customer experiences in Automotive with IBM accelerators

IBM Dynamics 365 template for Automotive provides a platform to connect the dealer process with the OEM through a connected lead, sales and customer service processes served by customer and vehicle master data. It enables a consistent customer journey and an improved level of customer service.

Key Capabilities



Extensible framework to collate leads from multiple channels and route it automatically to appropriate dealer for further processing

Dealer Portal for enabling the dealers to view the leads routed to them and capture responses thereby increasing lead conversion rates

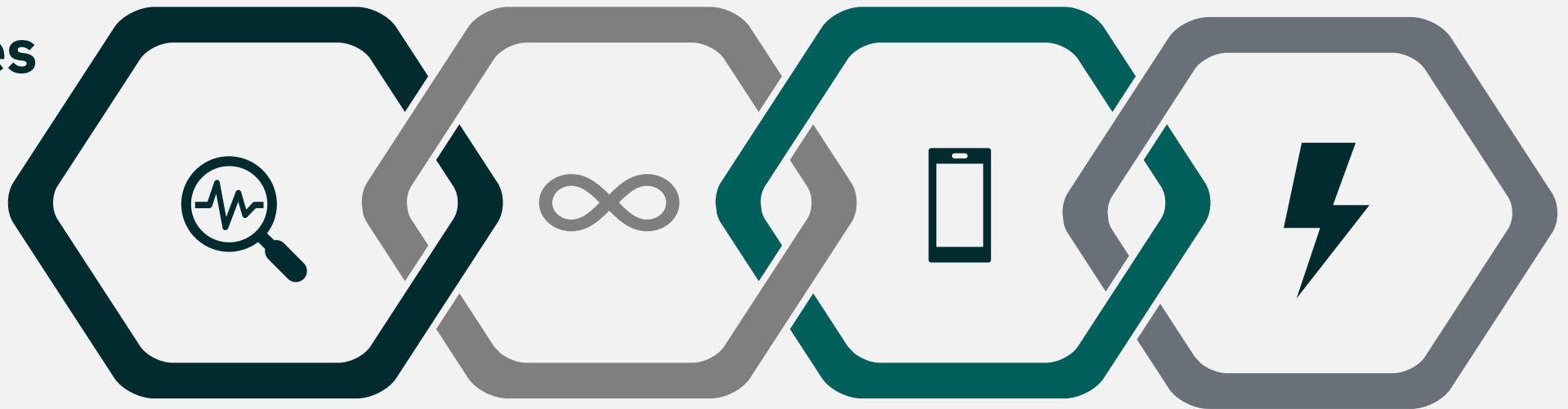
Helps the OEMs to listen to customers, engage them at every touch point, and provide a seamless journey through every stage of the customer life cycle

Empower OEMs with a 360-degree view of customer and vehicle to help them provide connected and personal experience to the customers

Transforming customer experiences in CPG with IBM accelerators

IBM Retail Toolkit – CPG Store Assist provides a platform that can help enable consumer goods companies drive revenue growth and maximize ROI through improved retail execution capabilities. It provides the sales managers and field representatives with the necessary tools, data and technology needed to make smart decisions, drive better promotion execution, streamline order management and build stronger relationships with the retail partners and drive sales.

Key Capabilities



Enable the sales managers to define appropriate KPIs for store visit

Optimize store visits scheduling to minimize travel times of field agents

Enable Field Agents with an App to streamline tasks (Order Placement, Inventory Count, Promotion Check, etc) during store visit

Enable the agents to share real-time business insights and opportunities with the executive team

Sales transformation **drives ROI and sustainable growth**

We drive client results with a laser focus on the strategy, activated by best of breed human centered design, technology and analytics that delivers:

- Improved forecasting, matching the **right seller to the right buyer** at the right time
- Increased **engagement** between customers and sellers **across the business** lifecycle
- Enabling sellers to perform **meaningful collaboration** in a remote-first workforce
- Alignment across the business, shifting Sales from **reactive to proactive** engagement

22%

increase in Net Promoter Score

30%

increase in sales with increased average transaction values

25%

Increased Pipeline Efficiency

122%

Increased Sales Forecasting

Marketing transformation enable **engaging experiences to drive growth**

We enable the client to create a multi-disciplinary set of business and digital capabilities to build high value services that transform end to end marketing processes to reflect the needs of Customers and Employees.

- Enable marketers to be **creative, empathetic to the human experience**, and develop a deep understanding of their consumers – and get their job done.
- **Create and enhance digital touchpoints** and seamlessly support the partnership between humans and technology
- Create and integrate a more **efficient marketing process for the enterprise that increases the return on every marketing dollar spent.**

25%

increase in conversion

20%

increase in CSAT





Next Steps...

Our accelerated approach enables rapid **Sales & Marketing transformation**

We combine the pervasive end-to-end nature of our delivery methods with the ability to scale in all places; people, skills, research, platforms, solutions, all while imparting culture on clients that lasts beyond the individual engagement.

Sales & Marketing Transformation

IBM Garage

Our primary way that clients co-create, co-execute and cooperate with IBM's teams. This enables a consistent and visible interaction with the user-centric, multidisciplinary squads

Dynamic Delivery

IBM's deep offshore and nearshore capability provide dynamic delivery models equipped to deliver value, speed, and quality at a scale that is unmatched.

Unique Industry Expertise

With our deep industry experience and expertise, we have developed best-in-class industry solutions to help clients achieve business goals, get useful insights across all organization departments & drive operational efficiency

The co-creation journey to **Connected Sales & Marketing** can begin anywhere...

Strategize



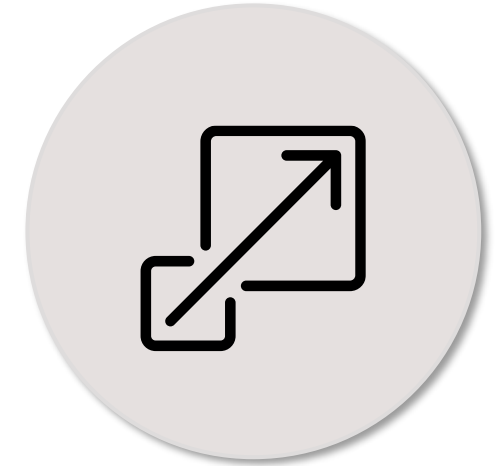
Envision the future

Solve



Test and measure to
get it right

Scale



Activate finance and operations
transformation

...let's identify the best entry-point together

IBM Garage is a bold, comprehensive approach to innovation and transformation that quickly creates and scales new ideas that dramatically impact your business



- De-risk innovation by starting with strong business outcomes and ruthless prioritization
- Focus on what is essential to realize impactful benefits
- Fully integrated solutions created by experts; yours and ours

IBM Garage accelerates time to value

Maximize **financial return** while gaining **operational agility, intelligence, and resiliency** with a processed, technology-enabled digital transformation

Redefine how work gets done with an iterative framework that guides you from ideation, to build, to scale.



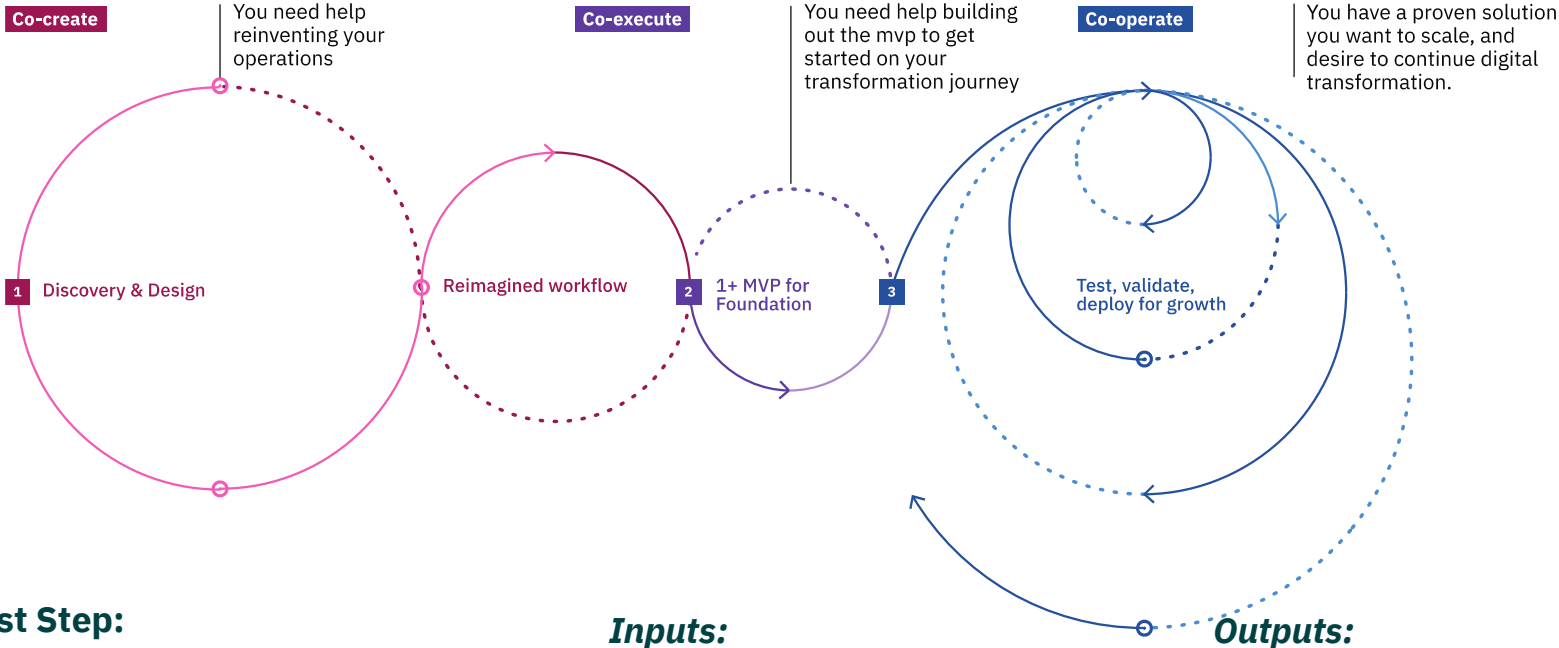
Co-create across stakeholders to define vision.



Co-execute using a fast, scalable, iterative approach



Co-operate scales your solution & team's capabilities.



First Step: IBM Garage Jumpstart

One-day Garage workshop bringing together your key stakeholders to begin envisioning your desired future state (North Star), identify current challenges against that North Star, and determine key enablers – Technology, Data, People, Process

Inputs:



Best in Class Intelligent Workflow Designs



Design & Enabler Accelerators



Industry Leading POVs

Outputs:

- North Star vision and recommendations
- High-level prioritized view of areas with highest business value
- Benchmark assessment
- Business case inputs



Engagement Model: Garage Method

Scale with Agility and Speed

