

# Digital Transformation in Sales: Evolving the Art of Customer Engagement

## Microsoft Dynamics 365 for Sales

Empowering sellers to drive personal engagement with their customers

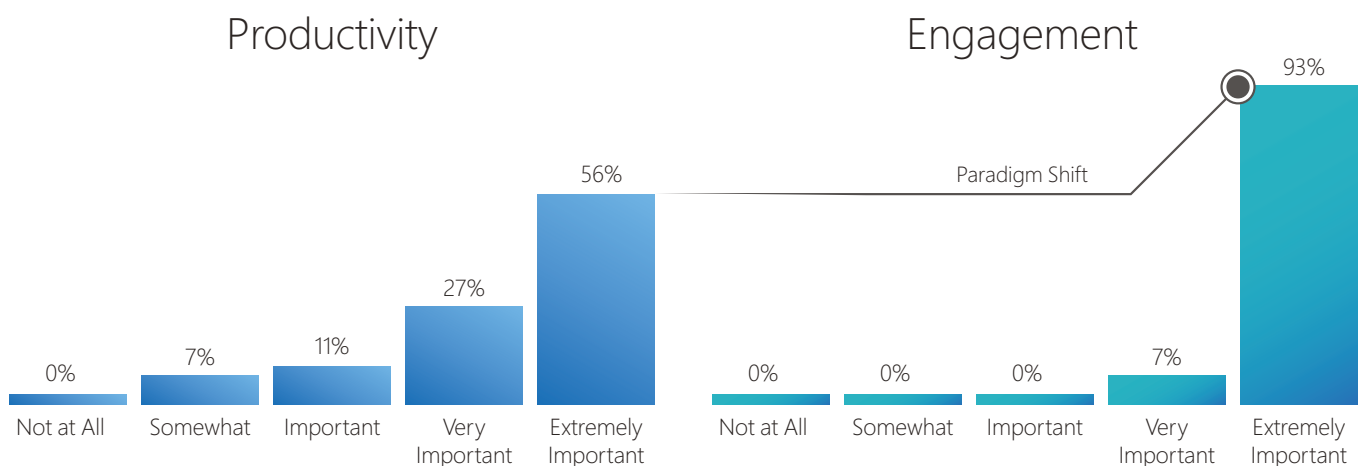


*The realignment of, or new investment in, technology and business models to more effectively engage digital customers at every touchpoint in the customer experience lifecycle.*

- Altimeter Group

For sales organizations, customer engagement is about more than touchpoints—it’s about everything that happens in between personal and digital encounters. Customer engagement requires an organization-wide commitment to creating meaningful connections, building relationships, and nurturing those relationships to establish trust and keep your brand top-of-mind.

Customer engagement drives every interaction, every process, and every decision—and it’s the key to driving sales. In fact, Microsoft recently talked to 48 sales leaders about this very issue to learn how they use sales technology in their organization and how they think about the future of sales transformation<sup>1</sup>. Leaders across multiple industries ranked customer engagement the #1 driving force behind sales versus tactical drivers like automation and productivity.



Considering this paradigm shift, top-performing sales organizations are prioritizing digital transformation to unlock greater revenue growth. They understand the vital role technology plays in customer engagement, and they seek technologies that continually help them evolve their customer engagement capabilities.

<sup>1</sup> Study of business-to-business sales executives in the U.S., conducted by phone in a detailed 1 hour live interview. The survey was commissioned by Microsoft in 2Q16, and included approximately 50 sales leaders from over 13 industries. Companies in survey ranged in size from approximately \$20M in revenues to over \$1B in revenues.

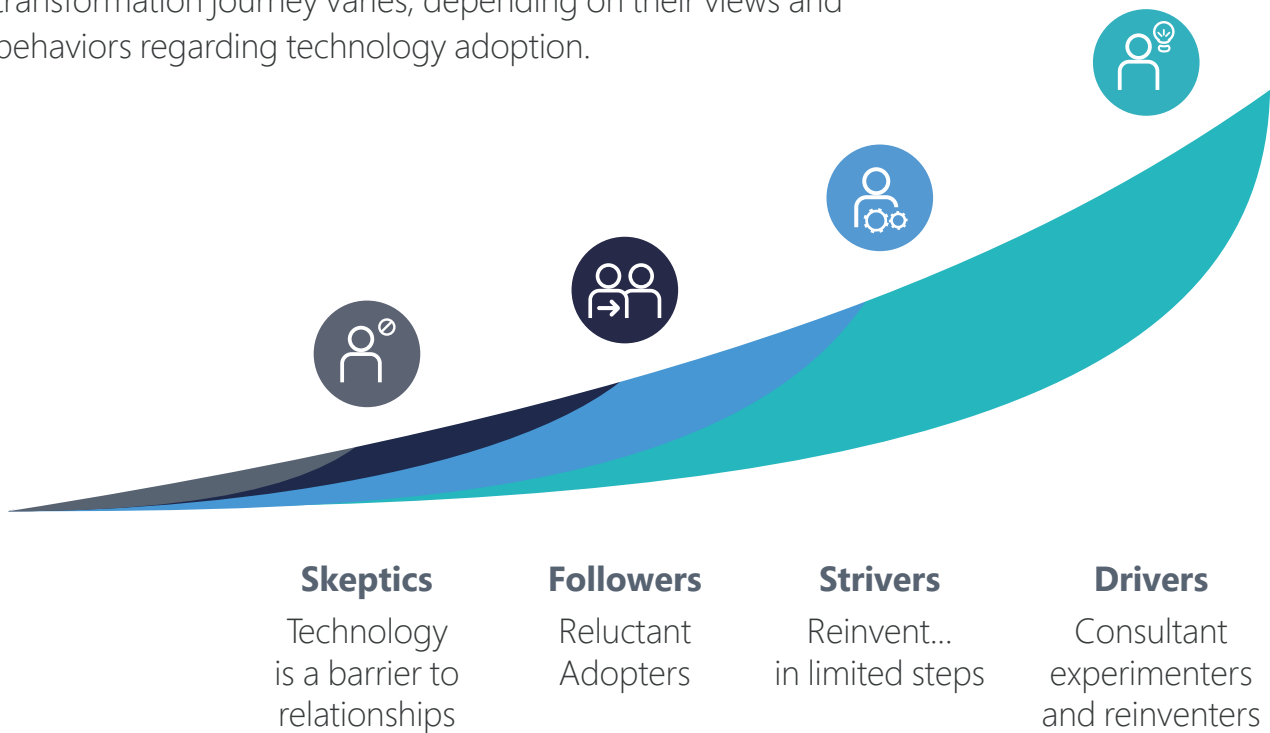
Often referred to as Strivers and Drivers, these organizations use technology not at the expense of relationship building, but as a key additive, complementing the human side of customer engagement.

Innovative sales teams use technology in ways that help them foster strong relationships and drive authentic customer engagement. Most notably, they're taking advantage of data analysis and prescriptive insights that inform customer trends and help create tailored customer experiences.

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## Navigating the Digital Transformation Journey

Most sales organizations are adopting technology to some degree to drive customer engagement. Where they are in their digital transformation journey varies, depending on their views and behaviors regarding technology adoption.





### **Skeptics**

Organizations that have yet to begin a digital transformation journey are embracing technological tools that — while may seem rudimentary — are invaluable to their sales teams.

For instance, mobile phones are crucial in allowing sales reps in the field to connect with their customers from virtually anywhere via calls, texts, and emails.

Sales leaders in this stage of transformation, however, are hesitant to increase their adoption of technology that creates opportunities to drive deeper customer engagement. Their hesitation often stems from cultural approaches to sales—for instance, believing that technology cannot meaningfully enhance traditional customer engagement touchpoints, like face-to-face interactions.



### **Followers**

As organizations begin to evolve on their digital transformation journey, they look for technologies that will allow for deeper engagements. They start to see the benefits of moving beyond introductory tools and adopting technologies like customer relationship management (CRM) tools to increase productivity, reimagining the capabilities of their sales teams.

While sales leaders in this stage believe in productivity tools to help their teams close deals, they hesitate to adopt further technologies, often due to frustration.

A key struggle is internal adoption and maximum utilization of the tools available to their sales teams, and a lack of investment and support from senior management to continually drive the organization forward on the digital transformation journey.



## Strivers

Organizations who reach this point in their digital transformation journey are committed to evolving their customer engagement capabilities. This is where organizations start to see a cultural shift in the way they view and approach technology, with sales leaders prioritizing digital transformation as an organization-wide initiative—garnering support from the top-down.

Additionally, these sales leaders empower their teams by listening to what they need, and then investing in intelligent technologies that automate core productivity tasks and streamline collaboration, all in an effort to sell more. These include CRM tools and solutions that improve day-to-day operations for automation and reporting.

Strivers are characterized by their willingness to adopt tried and true technologies proven to drive customer engagement, but they lack rapid innovation and experimentation.

*Drivers constantly experiment with advanced technologies and seek every opportunity to engage customers and gain a competitive advantage.*



## **Drivers**

Sales organizations in this stage know there is no definitive end to the digital transformation journey. Drivers constantly experiment with advanced technologies and seek every opportunity to engage customers and gain a competitive advantage. Even when technology fails them, they continue to invest and experiment.

Like Strivers, Drivers take a hands-on approach to technology adoption, ensuring that it's initiated from the top-down. And like Strivers, they also empower their sales teams through tools that help them effectively engage customers and be more effective in their day-to-day operations.

What sets drivers apart is their adoption of advanced frameworks and analytics tools that provide those deep, prescriptive insights we know allow sales teams to engage more effectively and deliver tailored experiences to their customers.

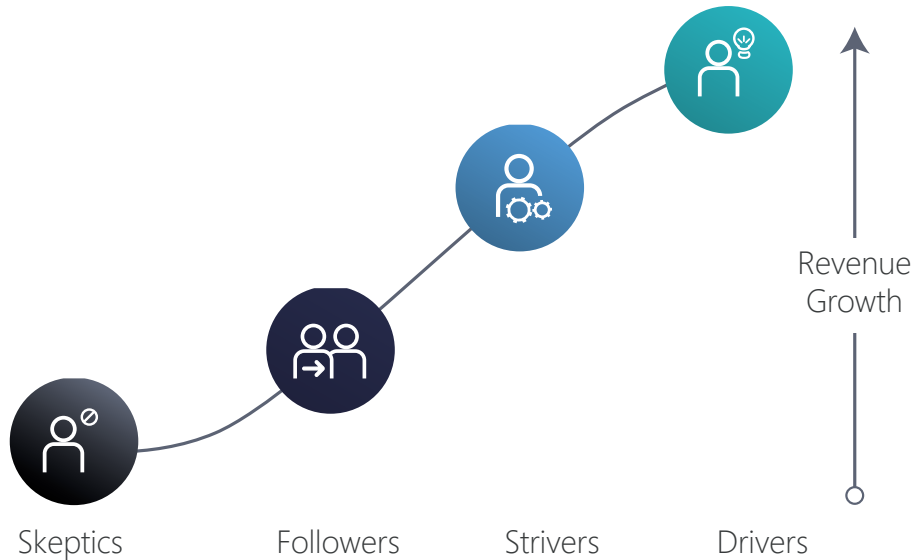
Drivers of digital transformation are evolving the art of customer engagement, using technology to complement what they're already doing to effectively engage customers and drive sales.

## **Digital Transformation in Action**

[See how a global software company is using a modern cloud solution to drive digital transformation.](#)

# Digital transformation and revenue growth

It turns out that there may be a direct correlation between digital transformation and revenue growth. You'll see in the following graph that organizations from the May 2016 Microsoft survey identifying as **technology Drivers** enjoyed a **50% increase in revenue growth**:



On the other hand, organizations reluctant to evolve on their digital transformation journey—whether that be due to cultural barriers, issues with internal technology adoption, lack of support from senior management, or other reasons—missed out on opportunities for revenue growth.

## It Starts With You

Digitally transforming your sales organization is an evergreen journey. It's an ongoing process that needs to become part of your organization's culture, and it requires commitment and initiation from sales leaders like you.

You have the power to influence change. When your reps have tools that can help them be even more effective in engaging customers, driving sales, and growing revenue, the benefits of digital transformation will be clear—to them, to you, and to the entire organization.

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To see how Microsoft Dynamics 365 for Sales, part of the next generation of business applications from Microsoft, can help your organization successfully navigate transformation, visit: [www.microsoft.com/en-us/dynamics365/sales](http://www.microsoft.com/en-us/dynamics365/sales)