

365 &

Working as one

Work smarter. Unify business
and productivity applications.



Discover more. Achieve more.

To get an edge, your business needs to make every minute count. Every time you contact a customer it needs to build trust and loyalty.

It's a tough ask if the tools you're using every day aren't pulling in the same direction. Dipping in and out of different applications slows you down, while hard-to-find data makes it tougher for teams to share ideas or see the bigger picture. This, in turn, hinders decision-making and makes it more time-consuming.



What if you had a unified set of business management tools and applications to bring you insights from finance, sales or operations, when you need it?

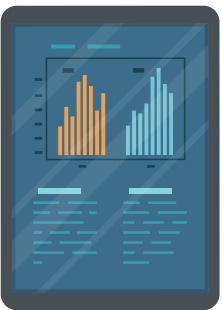
It would allow you to spend less time looking for information and more time managing your business and helping customers.



The good news is, this is possible. Today's cloud-based solutions are ready to talk to each other. What's key is that you see the need for your suite of productivity applications and your business management solution to work as one, to get the best out of both.

If you're responsible for making sure your business performs as well as it can, you may ask yourself: how do I make sure our processes, people and data are as joined up as possible? What do everyday tasks start to look like when I consider our solutions together? And what benefits can I expect to see?

We'll explore these questions in the following pages.



Greater efficiency. Better experiences.

We mentioned above that the cloud puts synchronised business solutions firmly within your reach. A common platform lets you unify relationships, processes and data and all through the applications you use on a daily basis. From this position, your teams can drive efficiency and serve customers effectively.

Suddenly, making information available is the default, not another overhead. Update a document, report, or project in one location, and it will sync and update in another. With cloud compute power, it's also easier to adopt new features or technology, such as business analytics or artificial intelligence. These solutions turn your data into meaningful insights to make better, more informed, faster decisions.

Below, we'll look at the two main advantages that you get from making your productivity and business applications work as one:

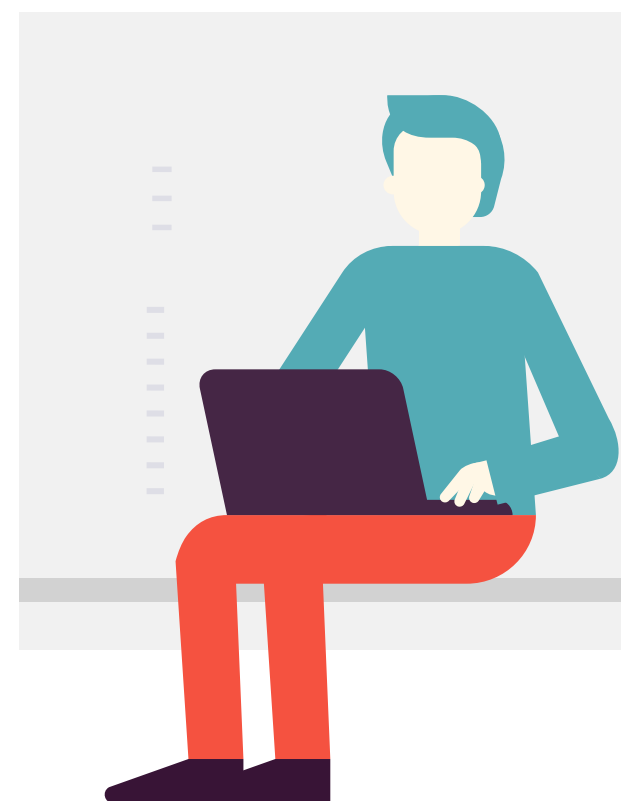
- **Productivity** through better collaboration
- **Data insights** that drive better decision-making



Work together. Work faster.

One of the key contributions that your solutions can make to your business is to help you work even better together. When your business applications feed into your everyday productivity applications, and vice versa, it brings people together and helps you to be more productive. This makes your routine tasks happen that much more smoothly.

For example, let's say that you have a new sales opportunity. People from across your business need to work together to build a presentation to capitalise on the opportunity. So, they use your collaboration workspace to plan and co-author the sales deck. Without leaving this workspace, they can also pull in relevant customer or financial information with ease. Everyone is looking at the most up-to-date version and it draws on insights from your business data. The result? The team put together a personalised presentation that resonates with the customer.



Working as one

No switching from one application to another. No comparing and consolidating feedback. The team saves time and effort because everyone is using unified business and productivity applications and solutions to work as one.

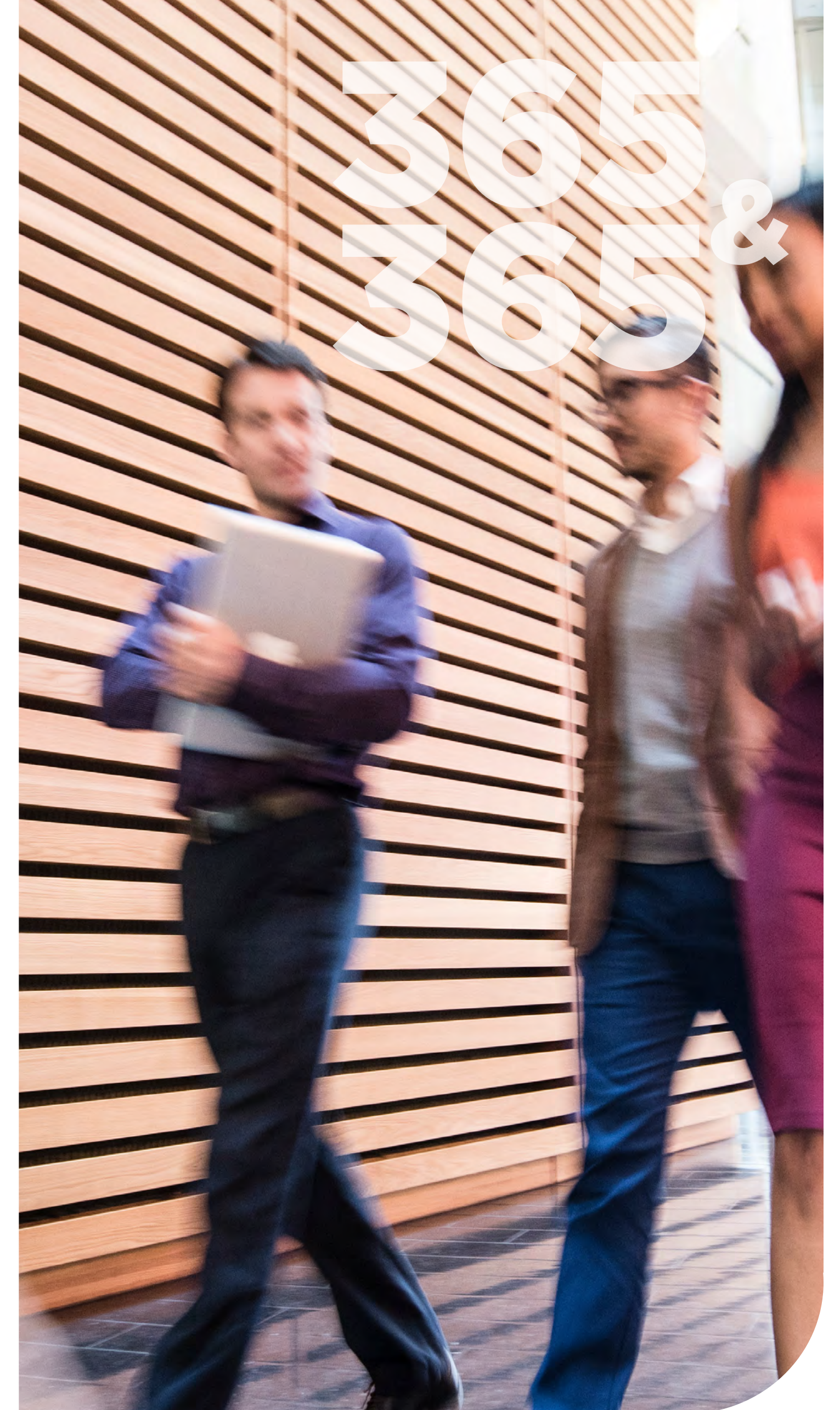
Repeat this efficiency again and again, and you can see how much time it frees up to drive additional sales or add value for your existing customers.

This example is about a specific process becoming more efficient. Behind this, though, are the principles of automating routine tasks and giving people data automatically – in the applications they're used to. This familiarity, in turn, reduces the time taken to train people on using different solutions.

Let's take another situation. Your company receives an email from an important customer who needs you to fulfil an order at short notice. Your sales manager checks inventory, straight from her inbox, and discovers you don't have enough stock. Still in her email, she creates and sends a purchase order to your supplier to make up the shortfall. Then, in the same interface, she creates and sends a quote to the customer.

Through compatible and intuitive applications, an urgent job is dealt with quickly and accurately.

However good your existing business and productivity applications are, if they work in silos, it falls on your employees to connect the data and insights to make decisions. This is inefficient by its very nature and it invites human error. It can also hold you back from providing great customer experiences. If your productivity and business applications work as one, then your technology helps you to be far more efficient and to serve your customers better.



Accurate data. Smarter decisions.

Insights come from having the right data, in the right place, at the right time. To unlock the potential of your data, you need it to be up-to-date and accessible – across all your applications.

Again, solutions need to work together to make this happen. Cloud technology gives you the power to process data at scale and to visualise and interrogate data from across your business applications. So, you can unlock the insights that sit within it.

Let's see how this might have an impact in practice.

One of your sales representatives has a customer on the cusp of a purchase. He wants to act quickly but needs his manager's approval before sending a contract out. With unified applications, this process is expedited. Without leaving the customer relationship management (CRM) system, the representative can customise a templated contract and alert his manager. His manager can then quickly access a spreadsheet with the latest team numbers. After examining a pivot table, she can approve the proposal. The representative follows up with the customer and the deal is done there and then – by digital signature.

The manager has what she needs to make the right call, without slowing down her employee. In short: she can make a smart decision, fast.

So, what are the principles behind this better way of working? First, it's an end-to-end view. The sales manager can peer into relevant data without leaving the application she's using. So, she can make a decision based on context.

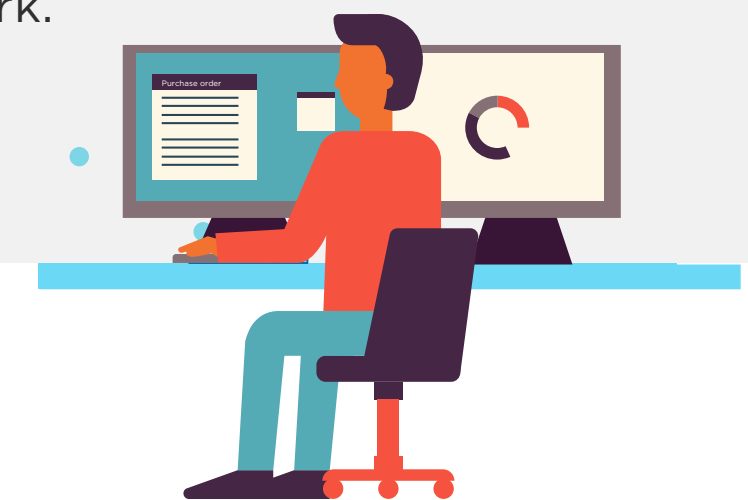
And context can be everything. Let's take another example.

Another sales representative receives an email from a customer who would like a quote on some items. The solution reads the body of the email and recognises the sender. This means the representative has access to the customer's current quotes and can easily pull up the customer record in her email. From this view, she reviews the account. She can see the customer's current quotes, ongoing orders and sales history. As she creates the quote, it auto-populates with customer and product details and line items suggested by the cognitive services built in to the solution. It all means the representative can get the job done faster.



The representative avoids duplication and improves her approach. She also enhances her productivity by drawing on accurate, up-to-date data.

In the cases above, the sales team are able to communicate better and faster with their customers. Of course, accurate data, refreshed across programs, can lead to better decisions in every aspect of your business. Whether it's a personalised offer to a customer or a shift in how you and your employees work.



Move forward as one

If you are running your business today using multiple applications and productivity tools, you may be keeping data and people apart. By treating your solutions as one ecosystem, you can optimise how your business performs. Allowing you to draw on their joint capabilities as well as their individual strengths.

Leveraging the capabilities together allows you to align your operations, financials, sales, and service. This both supports collaboration internally and with customers and generates insights. Once this happens, you'll see your processes, customer interactions and decisions all improve. So, you can unlock what's next for your business.

365 & 365

One way to make your business applications and productivity tools work together is to use both

Microsoft Office 365 and Dynamics 365.

They unite your people and processes, which helps you to drive up performance and deliver great customer experience.

To learn more, visit <https://cetastech.com/solutions/microsoft-dynamics-365/sales/>



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