

# Microsoft® Dynamics Oil and Gas Telesales Guide

This telesales guide provides an overview of the information you will need to drive demand for Microsoft Dynamics ERP or CRM solutions with customers in the oil and gas vertical.

## BACKGROUND INFORMATION

### Vertical Overview

The oil and gas industry consists of over 10,000 companies with combined annual revenue of \$700 billion. Oil and gas discovery and production companies find, produce, and then sell crude oil and natural gas to refineries that produce and sell gasoline, diesel fuel, propane, and processed natural gas to wholesale distributors.

### Target Audience

Potential prospects are companies that:

- ▶ Use legacy applications, fragmented systems, and disparate data sources
- ▶ Place importance on real-time visibility but do not have the capability to aggregate or access it
- ▶ Find much of their pertinent customer information resides with an aging workforce rather than in databases
- ▶ Do not have the capabilities to gather and analyze real-time customer information
- ▶ Experience difficulty in providing a single-customer view for multiple employees in multiple locations

Prospects may not know the value that an ERP or CRM solution can provide their organization. Their mind set could be any of the following:

- ▶ Are unaware of ERP or CRM software
- ▶ Don't recognize ERP or CRM software as the way to meet their needs
- ▶ Perceive ERP or CRM solutions as "only for the big companies" and too complex or expensive
- ▶ Conclude that upgrading their current accounting, bookkeeping, or customer-relationship software will suffice
- ▶ Are actively searching for their first ERP or CRM solution

### Target Contact

Inside the prospect's business, talk directly to the technology-influencing business decision maker (TI-BDM). While this could be virtually any senior individual in the company, the following are the most likely to be interested in ERP or CRM solutions:

For ERP solutions:

- ▶ CFO / VP of Finance
- ▶ CIO

For CRM solutions:

- ▶ VP of Sales / VP of Marketing

# Microsoft® Dynamics Oil and Gas Telesales Guide

ROLE-SPECIFIC CHALLENGES AND QUESTIONS TO ASK			
Role	Most Relevant Solution(s)	Challenges	Probing Questions
CFO / VP of Finance	ERP	<ul style="list-style-type: none"> <li>• Making lease-or-buy decisions on drilling equipment, refineries, plants, distribution channels, and more</li> <li>• Raising capital for drilling, refineries, and plants</li> <li>• Financial-management systems need to be relatively easy to implement and use</li> <li>• Ensuring crude-oil supplies are sufficient</li> <li>• Acquiring long-term supplier contracts</li> <li>• Protecting against cost and price changes in the derivatives markets</li> </ul>	<ul style="list-style-type: none"> <li>• How do you make lease-or-buy decisions on drilling equipment, refineries, plants, or distribution channels? From where do you get data to support such decisions?</li> <li>• Are your financial management systems easy to implement and use? Why or why not?</li> <li>• How do you plan for fluctuations in demand? How do those fluctuations affect your quality?</li> <li>• How has your supplier-to-vendor integration affected quality?</li> <li>• What proportion of your supplier contracts is longer than three years? How do you go about acquiring more? Are there other ways to lock in pricing?</li> <li>• How do you protect against cost and price changes in the derivatives markets?</li> </ul>
CIO	ERP	<ul style="list-style-type: none"> <li>• Providing visibility into the business for management team</li> <li>• Ensuring that the firm has adequate systems and technologies</li> <li>• Designing, implementing, and maintaining the network and equipment to enable 24-hour monitoring of each site</li> <li>• Evaluating process-control systems</li> <li>• Improving market-trading capabilities</li> </ul>	<ul style="list-style-type: none"> <li>• Are you able to provide visibility into the business for the management team? Why or why not?</li> <li>• What have you done to ensure that your company has adequate systems, technologies, and access to data?</li> <li>• Have you been able to monitor your unattended sites? How?</li> <li>• How do you evaluate process-control systems?</li> </ul>

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ROLE-SPECIFIC CHALLENGES AND QUESTIONS TO ASK			
Role	Most Relevant Solution(s)	Challenges	Probing Questions
VP of Sales / VP of Marketing	CRM	<ul style="list-style-type: none"> <li>• Attracting long-term customers</li> <li>• Forecasting demand more accurately</li> <li>• Selling on the spot market to take advantage of higher prices</li> <li>• Expanding the market area and direct selling</li> <li>• Improving delivery logistics which translates into better customer service</li> <li>• Implementing CRM systems and methodologies</li> <li>• Increasing sales of non-traditional products</li> <li>• Improving customer retention</li> </ul>	<ul style="list-style-type: none"> <li>• What have you done to attract long-term customers? Has it worked? What do you do when contracts are approaching expiration?</li> <li>• Are you able to forecast demand accurately? What have you done to improve this?</li> <li>• How involved are you in selling on the spot market? Has this helped you take advantage of higher prices? How? Do you have systems in place to assist you?</li> <li>• What other geographical markets are you looking at? How would you sell to these markets? What customers in those markets have you looked at? Have you considered direct selling?</li> <li>• How have you improved your delivery logistics?</li> <li>• What have you done to improve customer service?</li> <li>• Does your sales force have adequate access to customer data? How easy is it for them to acquire and analyze the data?</li> <li>• Have you implemented a CRM system? Has that worked out well?</li> <li>• What products and services outside of traditional oil and gas have you considered? Have you launched any of these products? How have customers responded? Have their responses been recorded and are these responses accessible?</li> <li>• What have you done to improve customer retention? Do you have any systems in place to assist you? Have you been successful?</li> </ul>

## ERP

### MICROSOFT DYNAMICS VALUE PROPOSITION

#### Key Message

If you only have 60 seconds to deliver your sales pitch, this is it:

The Microsoft Dynamics business management solution is designed for organizations like yours in the oil and gas vertical to enable you to:

- ▶ **Extend your business** – Enables you to manage your end-to-end billing and cost-control processes within one system.
- ▶ **Adapt to specific business needs** – Avoid the cost of customization with a financial solution that can be deployed right out of the box.
- ▶ **Support international financial management** – Supports multiple foreign currencies and languages.
- ▶ **Build a competitive advantage** – Integrates daily financial operations into a single view.

#### Sense of Urgency

Many prospects may prefer to “stay the course” with their current systems rather than endure the changes involved in a software upgrade. The sense of urgency is around this point:

**Your current accounting software may be limiting your company’s ability to meet its business goals. Upgrade now to achieve your business potential.**

### EVIDENCE

#### Summary

Using Microsoft Dynamics AX, Petro-Canada eliminates redundancies and cuts administration time.

<http://www.microsoft.com/casestudies/casestudy.aspx?casestudyid=4000000825>

### TARGET NEEDS, PAIN POINTS, AND MICROSOFT DYNAMICS BENEFITS

Good candidates for an upgrade to a Microsoft Dynamics ERP solution may bring up any of the following needs or pain points. Microsoft Dynamics addresses those issues with these related benefits.

#### Needs

- ▶ **Inadequate systems and processes** – Legacy applications, fragmented systems, and disparate data sources are common, making it difficult to extract and trust data.
- ▶ **Clouded visibility** – Real-time visibility and accuracy are of paramount importance to deal with demand fluctuations and supply chain disruptions, but are often non-existent.

#### Pain Points in the Vertical

- ▶ Legacy applications, fragmented systems, and disparate data sources are common.
- ▶ Real-time visibility is important but is often non-existent.

#### Benefits of Microsoft Dynamics ERP Solutions

- ▶ **Greater visibility into the organization** – More timely access and more accurate business data. Optimize resources while improving on-time and on-budget delivery.
- ▶ **Extends with your business** – Build on standard accounting functionality. Manage your billing- and cost-control process in one system.
- ▶ **Supports international financial management** – Supports multiple foreign currencies and languages. Meets international accounting and reporting standards.

## CRM

### MICROSOFT DYNAMICS VALUE PROPOSITION

#### Key Message

If you only have 60 seconds to deliver your sales pitch, this is it:

**The Microsoft Dynamics business management solution is designed for organizations like yours in the oil and gas industry to enable you to:**

- ▶ **Facilitate collaboration** – Provides information sharing and collaboration among team members.
- ▶ **Develop profitable customer relationships** – Improves responsiveness to customers with constantly updated repositories of customer information.

#### Sense of Urgency

Many prospects may prefer to “stay the course” with their current systems rather than endure the changes involved in a software upgrade. The sense of urgency is around this point:

**Your current customer-relationship-management software may be limiting your company’s ability to meet your customers’ expectations and your business goals. Upgrade now to achieve your business potential.**

### EVIDENCE

#### Summary

Chemicals distributor enhances customer service and sales with Microsoft Dynamics CRM.

<http://www.microsoft.com/casestudies/casestudy.aspx?casestudyid=48474>

### TARGET NEEDS, PAIN POINTS, AND MICROSOFT DYNAMICS BENEFITS

Good candidates for an upgrade to a Microsoft Dynamics CRM solution may bring up any of the following needs or pain points. Microsoft Dynamics addresses those issues with these related benefits.

#### Needs

- ▶ **Aging workforce** – Most pertinent customer information resides in an aging workforce, rather than within databases or processes.
- ▶ **Focus on the customer** – The capabilities to gather and analyze real-time customer information do not exist, and thus companies are not able to increase sales from their customers.

#### Pain Points in the Vertical

- ▶ Most pertinent customer information resides in a rapidly aging workforce, rather than in databases.
- ▶ The capabilities to gather and analyze real-time customer information do not exist.
- ▶ It is difficult for multiple people in multiple locations to have a single customer view.

#### Benefits of Microsoft Dynamics CRM Solutions

- ▶ **Greater customer satisfaction and loyalty** – Maintain product and service quality. Provides effective customer collaboration throughout the life cycle.
- ▶ **Keep the customer front and center** – Manage all customer-facing activities from one point. Offers automated routing, notifications, approvals, and escalations. Provides Web-based access and robust security features.

# Microsoft® Dynamics Oil and Gas Telesales Script

## OPEN THE CALL

Hello, this is [Name] from Microsoft/[Partner Name].

I'm calling today to talk to you about the flexible, easy-to-use business management solutions we offer. These affordable solutions are designed to help companies in the oil and gas vertical like yours drive performance and help increase profitability.

What is your role in your organization?

Are you responsible for decisions related to Enterprise Resource Planning (ERP) (or Customer Relationship Management [CRM]) solutions?

If NO, identify the right contact

Who is responsible for decisions related to ERP (or CRM) in your company?

If YES, ask PROBING QUESTIONS to determine your prospect's interest

I am calling to discuss ways that we might be able to help you with solutions related to ERP (or CRM).

## PROBING QUESTIONS

Identify your contact's current Pains, Plans, Processes, People, and Price (that is, budget and resource) situations.

**Pains:** Based on the role of your contact, ask some of the role-specific questions provided on pages 2-3 of this telesales guide.

### Plan

- What are some of your current business priorities?
- Do you have any projects or initiatives underway to address this priority?
- What is your time frame for completing [project related to priority]?
- What are some of the ways you plan to measure success related to the priority?

### Process

- What solutions are you actively evaluating to help you meet your objectives relative to this priority?
- What (additional) solutions to address this priority are you aware of and planning to evaluate?
- Who else at your company is involved in the evaluation or decision around this priority?
- Are you currently looking at any ERP (CRM) solutions to address this priority? Which ones? Are you familiar with Microsoft Dynamics solutions?

### People

- Do you have employees with the needed capabilities to help you accomplish your objectives related to this priority?
- Are you working with any technology partners to help you implement any solutions to address this priority in this area? Who?

### Price

- Have you allocated budget for this solution?

### Check Point:

Is this prospect interested in evaluating ERP or CRM solutions from Microsoft? Is he or she a good candidate for a new solution? If so, move on to the PROVE VALUE section.

# Microsoft® Dynamics Oil and Gas Telesales Script

## PROVE VALUE - ERP

### General Microsoft Dynamics ERP Benefits for the Vertical

#### Inadequate Financial Systems and Processes

**Pain:** We have learned that oil and gas companies struggle with legacy applications, fragmented systems, and disparate data sources.

**Benefit:** Microsoft offers business-management solutions that make it easier for oil and gas companies to deal with inadequate financial systems and processes by:

1. Integrating daily financial operations into a single view to streamline disparate processes, improve performance, and help ensure accurate reporting
2. Avoiding the cost of customization with a financial solution that can be deployed right out of the box or adapted to support business processes and best practices
3. Providing oil- and gas-specific features built on standard accounting functionality, enabling you to manage your end-to-end billing and cost-control processes within one system

#### Clouded Visibility

**Pain:** We understand that oil and gas companies value real-time visibility into company performance and processes, but that this capability is essentially non-existent.

**Benefit:** Microsoft offers business-management solutions that make it easier for oil and gas companies to deal with clouded visibility by:

1. Building on a standard Microsoft platform to provide increased visibility into business process that managers can use to make decisions faster and improve productivity
2. Improving visibility for key decision makers by configuring workflow-driven approval processes, critical-path schedules, and exception-driven alerts
3. Allowing access to information in databases, with full two-way integration, so you can execute financial operations from a single corporate database

### Solutions Specific to This Vertical

Energy Financial Management for Microsoft Dynamics AX was designed with the specific needs of oil and gas and mining companies in mind, providing a standard global solution that supports multi-location, multi-currency, and multi-language requirements. Meet all your accounting, resource planning, and system integration needs with a worldwide financial management system customized to the precise needs of companies within the energy industry.

### Evidence

#### Petro-Canada

Petro-Canada is one of Canada's largest oil and gas companies, operating in both the upstream and downstream sectors of the industry in Canada and internationally.

#### Summary

Using Microsoft Dynamics AX, Petro-Canada eliminates redundancies and cuts administration time.

#### Business Situation

Petro-Canada needed to update its aging legacy inventory and financial systems. Installed throughout 700 retail locations, the time-consuming system was difficult to use and expensive to upgrade.

#### Solution

Petro-Canada deployed a solution based on Microsoft Dynamics combined with Microsoft BizTalk Server and a Web-based user interface.

#### Benefits

- Real-time efficiency
- Faster reporting process
- Easier system-wide upgrades
- Accelerated training process

#### Link

<http://www.microsoft.com/casestudies/casestudy.aspx?casestudyid=400000825>

## PROVE VALUE - CRM

### General Microsoft Dynamics CRM Benefits for the Vertical Transfer Customer Data from Workforce to Efficient CRM System

**Pain:** We have found that a lot of indispensable customer information in oil and gas companies resides in the aging workforce instead of appropriate databases and systems.

**Benefit:** Microsoft offers business-management solutions that make it easier for oil and gas companies to build an effective CRM system by:

1. Streamlining installation with diagnostic tools that reduce setup time and help ensure a successful deployment of Microsoft Dynamics CRM
2. Allowing for easy customization to your business workflows by adding custom objects and activities, designing custom views for different users, and building business logic into CRM
3. Providing mobile support that helps enable field workers to get instant access to customer data from the most popular portable devices, including laptops and mobile phones with Web browsers

### Focus on the Customer

**Pain:** We understand that oil and gas companies often have difficulty focusing on the customer because there are no capabilities to gather and analyze real-time customer information.

**Benefit:** Microsoft offers business-management solutions that make it easier for oil and gas companies to focus on the customer by:

1. Helping multiple personnel in many locations interact with a customer while maintaining a consistent customer view
2. Keeping track of customer progress by providing access to dashboard views of customer and sales management information
3. Consolidating information across and within the enterprise, which leads to improved customer service and lasting relationships

## Evidence

### A-Gas Australia

Based in Melbourne, Australia, A-Gas Australia is a blender, re-packer, and distributor of specialty gases and chemicals, including refrigerants, foam-blowing agents, aerosol propellants, and solvents.

### Summary

Chemicals distributor enhances customer service and sales with Microsoft Dynamics CRM.

### Business Situation

A-Gas Australia needed a customer-relationship-management solution to help it provide better service to its customers and provide richer information to its sales force.

### Solution

A-Gas Australia is deploying Microsoft Business Solutions CRM running on Windows Server 2003 operating system.

### Benefits

- Unified view of the customer
- Integrated solution
- Better customer service
- Enhanced sales management

### Link

<http://www.microsoft.com/casestudies/casestudy.aspx?casestudyid=48474>



## QUALIFY:

Based on what we've spoken about today, I would recommend that you look at [solution].

Can I send you more information related to [solution]?

May we schedule a meeting to determine the best solution to your current needs?

Microsoft has a current offer on [product]. This special offer ends [date]. Would you like to know more?



## CLOSE THE CALL:

I will send you a [solution] information packet immediately.

I will schedule . . .

Before we close, can I confirm your contact information?

- Correct spelling on name
- Title
- Mailing address, city, state, and ZIP
- E-mail address
- Direct phone number and fax

Thanks very much for your time. Please feel free to call me at any time. You can reach me at [phone number and e-mail address].

# Microsoft® Dynamics Oil and Gas Telesales Script

## VOICE MESSAGE SCRIPT

If you know the name of the CFO, VP of Finance, CIO, VP of Sales, VP of Marketing, ask for that person directly. You may reach his or her voice mail box first.

Hello, this is [Name] from Microsoft/[Partner Name]

I'm calling today to talk to you about some of the affordable Microsoft Dynamics business management solutions we offer—designed specifically to help businesses in the oil and gas vertical.

Please call me at [XXX-XXXX] and we can discuss how Microsoft Dynamics can help you achieve more of your business goals.

Thank you for your time, and I look forward to speaking with you.

## RECEPTIONIST SCRIPT

If you don't have a specific person's name to ask for, a receptionist can connect you.

Hello, this is [Name] from Microsoft/[Partner Name]

For ERP Solutions

I hope you can help me. I'm trying to reach the person who manages your Accounting and Finance department. Who would be the best person to speak with?

For CRM Solutions

I hope you can help me. I'm trying to reach the person who manages your customer relations. Who would be the best person to speak with?

Can you connect me please?

If challenged, say:

I'd like to speak to the person responsible for purchasing business software solutions in your company.