Microsoft® Dynamics Process Manufacturing 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 process manufacturing vertical.

BACKGROUND INFORMATION

Vertical Overview

Process manufacturers are companies that convert large amounts of raw materials into final products. A list of typical companies in this vertical would include manufacturers of chemicals, food and beverages, pharmaceutical drugs, metals, paper, and others.

Today's process manufacturers face enormous pressures. In order to remain competitive, these businesses need to convert raw materials efficiently and cost-effectively into final products, while addressing a broad range of regulatory and customer requirements. They must constantly review and evaluate their internal processes to keep their operating costs low while controlling the variability of raw materials at each stage of production. Regulations may change, trading partners and suppliers may be replaced, and raw-material quality may improve or degrade, all of which potentially dictate adjustments in formulas or recipes.

Target Audience

Potential prospects are companies that:

▶ Have difficulty trying to control continuous manufacturing processes and the co- and by- products

▶ Experience complexity around the tracking of raw materials and finished goods

▶ Are unable to respond to dynamically changing market conditions

▶ Find it difficult to manage multiple marketing and distribution channels

▶ Have sales teams that lack real-time information from manufacturing and suppliers

Prospects and customers may or 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 roles to be interested in ERP or CRM solutions:

For ERP solutions:

▶ VP of Operations / Manufacturing

▶ Plant Manager

▶ Quality / Compliance Manager

For CRM solutions:

▶ VP of Sales / VP of Marketing

▶ CEO / President

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ROLE-SPECIFIC CHALLENGES AND QUESTIONS TO ASK

Role	Most Relevant Solution(s)	Challenges	Probing Questions
VP of Operations / Manufacturing	ERP	• Controlling operating costs • Improving on-time delivery of manufactured product • Driving efficiency in the supply chain • Working to decrease finished-product inventory • Increasing the speed and efficiency of production • Dealing with long or slow cycle times	• What have you done to improve on-time delivery of product? • Are you able to ensure product consistency when raw materials quality is low? How? • Do your customers require you to deliver the same product in multiple packaging configurations (e.g., bulk, drum, cans, etc.)? Is handling these packaging options a major issue for you? • How have you driven efficiency in your supply chain? • How do you manage finished-product inventory? • What have you done to deal with long or slow cycle times?
Plant Manager	ERP	• Managing raw-materials inventory • Controlling recipes and formulas • Monitoring overtime hours and overhead expenses • Maintaining productivity • Enhancing operational flexibility to adapt to materials changes • Resolving inaccurate orders	• Is it a challenge to manage raw materials inventory? How do you do it? • Who manages your recipes and formulas? Could this process be made simpler? • How do you monitor employee overtime hours? Overhead expenses? • How flexible is your operations process? • Are you able to quickly resolve inaccurate orders? How?
Quality / Compliance Manager	ERP	• Implementing new lean business processes • Managing safety-stock levels • Increasing process control and product quality	• Have you attempted to implement new lean business processes? Has that worked? • What have you done to increase process control? What about product quality?

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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	• Streamlining sales management • Improving customer service • Forecasting demand more accurately • Implementing CRM systems and methodologies • Enabling quick response to customers • Differentiating firm from competition • Supporting decisions with reliable data	• How have you streamlined sales management? • What initiatives have you put into place to improve customer service? • Do you feel that your business processes give you an advantage over your competitors? How? • Do your customers have access to the information they need in your back-end systems? • Are you able to forecast demand accurately? What systems do you use? • Have you considered implementing a CRM system? How would this help your business? • What have you done to enable quicker responses to customer requests? • From where do you get customer data? Is it accurate?
CEO / President	CRM	• Executing against strategic plans • Responding to changing market conditions • Employee retention	• How do you track your progress against the strategic plan? • How difficult is it to respond to changing market conditions? Tell me about a recent market change that has taken place. • What is your employee turnover? Has it increased or decreased lately?

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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 process manufacturing vertical to enable you to:

▶ **Increase operational speed and flexibility** – Support multiple manufacturing modes, including make to order, make to stock, and a hybrid or mixed-mode environment.

▶ **Enhance connectivity and communication** – Maintain high production levels and on-time delivery rates by sharing real-time information about specifications, order status, and quality control.

▶ **Gain insight into costs and process efficiency** – Understand and manage production schedules, capacity loadings, shop-floor activities, and production costs.

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.

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

▶ **Continuous complex manufacturing** – Difficult to control continuous manufacturing processes and the co- and by- products produced from formulas and recipes.

▶ **Quality control** – Firms are struggling to maintain quality in an environment of increasing cost sensitivity.

▶ **Manufacturing cycle** – Complexity is increasing around tracking of raw materials and finished goods.

Pain Points in the Vertical

▶ Difficult to control continuous manufacturing processes and the co- and by- products produced from formulas and recipes.

▶ Maintaining compliance and quality in an environment of increasing government regulation and cost sensitivity.

▶ Complexity is increasing around tracking of raw materials and finished goods.

Benefits of Microsoft Dynamics ERP Solutions

▶ **Streamlined and efficient production and delivery** – Provide real-time visibility. Manage production and distribution processes.

▶ **Reduced risk** – Increase visibility into production status. Minimize your company's exposure.

▶ **Increased agility** – Gain control of your business processes. Understand shifts in demand and the competition.

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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 process manufacturing vertical to enable you to:

▶ **Respond quickly to changing market conditions** – Model production capabilities and adjust product mix for changes in demand to capitalize on new opportunities as they arise.

▶ **Make your sales process more efficient** – CRM solutions can help you manage and track all customer-facing activities from the initial point of contact.

▶ **Integrate with Microsoft solutions** – Allows employees to pull information from Microsoft Office applications.

▶ **Use a solution that grows with your business** – Allows for customization and integration to meet your business needs.

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

High-tech manufacturer uses Microsoft Dynamics CRM to gain business visibility and streamline processes with dealers.

http://www.microsoft.com/casestudies/casestudy.aspx?casestudyid=200427

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

▶ **Dynamic markets** – Firms suffer from an inability to respond to changing market conditions.

▶ **Multiple channels** – Firms are struggling to manage multiple channels, such as direct, manufacturer's representatives, distributors, and retail.

▶ **Real-time data** – Sales teams lack real-time information from manufacturing and suppliers.

Pain Points in the Vertical

▶ Inability to respond to dynamically changing market conditions.

▶ Firms are struggling to manage multiple channels, such as direct, manufacturer's representatives, distributors, and retail.

▶ Sales teams lack real-time information from manufacturing and suppliers.

Benefits of Microsoft Dynamics CRM Solutions

▶ **Improved coordination and performance** – Respond more quickly to market changes. Coordinate sales efforts by using consistent customer information.

▶ **Improved profits** – Better understand your customers' requirements. Gain visibility to deploy resources and improve delivery performance.

▶ **Strengthen customer relationships** – Facilitate communication between your sales team and your customers. Capture and store customer information from the field.

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Microsoft® Dynamics Process Manufacturing 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 process manufacturing 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 timeframe 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 already 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.

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PROVE VALUE - ERP

General Microsoft Dynamics ERP Benefits for the Vertical

Continuous Manufacturing Difficulty

Pain: We understand that process manufacturing companies have difficulty controlling the continuous manufacturing processes and the co- and by- products produced from formulas and recipes.

Benefit: Microsoft offers business-management solutions that make it easier for process manufacturing companies to deal with continuous manufacturing difficulty by:

1. Tightly integrating new recipe and formula development to manufacturing

2. Managing recipes globally with the flexibility to manufacture recipes as needed due to raw-material availability or market fluctuations

3. Integrating recipe development, procurement, manufacturing, lot tracking and regulatory reporting

Manufacturing Cycle Efficiency

Pain: We have learned that process manufacturing companies struggle with manufacturing-cycle efficiency, in part due to the complexity surrounding the tracking of raw materials and finished goods as well as increased regulation and cost sensitivity.

Benefit: Microsoft offers business-management solutions that make it easier for process manufacturing companies to more efficiently manage the manufacturing cycle by:

1. Collaborating globally in real time on product development and manufacturing

2. Utilizing real-time supplier and transportation status to schedule production, meet customer deliveries, and lower costs

3. Using familiar, desktop tools to easily access real-time inventory, sales, purchasing, and financial information across multiple locations and companies

Solutions Specific to This Vertical

By integrating information and capabilities throughout the design and manufacturing life cycle, Process Industries for Microsoft Dynamics AX can help you maximize capacity, manage co-products and by-products, comply with regulatory mandates, meet changing customer demands, and drive continuous process improvement.

Improve operational efficiency by integrating sales, production, inventory, quality control, and customer service capabilities throughout the process manufacturing life cycle.

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PROVE VALUE - CRM

General Microsoft Dynamics CRM Benefits for the Vertical

Responding to Dynamic Markets

Pain: We understand that process manufacturing companies do not have the ability to respond to dynamically changing market conditions.

Benefit: Microsoft offers business-management solutions that make it easier for process manufacturing companies to respond to the changing marketplace by

1. Easily adapting and localizing product formulas or packaging for new markets

2. Assisting in the development of new product formulations in conjunction with the customer and product development

3. Predicting the impact of different sales forecasts using "what-if" simulation.

Real-time Customer Data

Pain: We have seen sales teams within process manufacturing companies struggle to access and analyze real-time information from manufacturing and suppliers, which prolongs the sales process.

Benefit: Microsoft offers business-management solutions that make it easier for process manufacturing companies to develop and utilize real-time customer data by

1. Providing insight into operations and suppliers to deliver accurate quotations and reliable service to customers

2. Utilizing raw material costs and recipe data in CRM to allow sales people to quickly create customer specific quotations

3. Enabling customers to look into operations to see order status and receive automatic alerts when changes to plans have occurred

Evidence

A-Gas Australia

Roland DGA has an extensive network of dealers that sell its inkjet printers to customers in North and South America.

Summary

High-tech manufacturer uses Microsoft Dynamics CRM to gain business visibility and streamline processes with dealers.

Business Situation

Roland DGA needed an efficient way to distribute leads to dealers and to complete product literature fulfillment. Roland DGA also lacked visibility into a lead's status once it was sent to a dealer.

Solution

The company implemented Microsoft Dynamic CRM.

Benefits

- Comprehensive data visibility
- Streamlined processes
- Industry-specific support

Link

http://www.microsoft.com/casestudies/casestudy.aspx?casestudyid=200427

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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
- Email 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 email address].

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VOICE MESSAGE SCRIPT

If you know the name of the VP of Operations / Manufacturing, Plant Manager, Quality / Compliance Manager, VP of Sales, VP of Marketing, CEO / President, 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 process manufacturing 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.

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