

Microsoft® Dynamics Professional Services 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 professional services vertical.

BACKGROUND INFORMATION

Vertical Overview

The professional services industry accounts for a large part of the US economy, generating about \$600 billion in annual revenue. The largest segments are legal services, engineering services, computer-related services, accounting services, and management consulting. Most professional service organizations (PSOs) are small: only about 5,000 firms have annual revenue over \$10 million. The vast majority have a single office.

Smaller PSOs are located throughout the country, but large firms often cluster in big cities where the headquarters of big corporations are located. PSOs provide services that require special expertise, but are often needed only occasionally, hence demand is driven heavily by the health of the US economy and particularly by corporate profits.

Target Audience

Potential prospects are companies that:

- ▶ Are under pressure to conform to customer requirements for everything from invoicing to reporting
- ▶ Have inflexible systems that increase the non-billable manual work necessary to service accounts
- ▶ Have inefficient project and resource or knowledge management
- ▶ Experience complications in billing clients
- ▶ Have partners who struggle to split their time across current working projects, firm management, and sales-related activities
- ▶ Struggle to provide a platform for multiple people in multiple locations to interact with a customer and have a single customer view

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:

- ▶ CFO
- ▶ Operations / Project Manager

For CRM solutions:

- ▶ Principal / Partner
- ▶ VP of Sales / VP of Marketing

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ROLE-SPECIFIC CHALLENGES AND QUESTIONS TO ASK			
Role	Most Relevant Solution(s)	Challenges	Probing Questions
CFO	ERP	<ul style="list-style-type: none"> Billing time and materials is a challenge Systems and processes should accommodate complex and variable billing arrangements There is some difficulty collecting accounts receivable Financial management systems need to be relatively easy to implement and use 	<ul style="list-style-type: none"> Are your financial management systems easy to implement and use? Why or why not? How long does it take to process an invoice? Tell me about your billing process. Do you have any challenges in your billing process? Do you have fairly complex and variable billing arrangements? How do you deal with that? Do you have any difficulty in collecting your accounts receivables? How have you tried to relieve this process? Are you potentially over- or under-recognizing revenue during closing periods due to over- or under-reporting? How do you go about determining what should be recognizable today?
Operations / Project Manager	ERP	<ul style="list-style-type: none"> Professionals and clients must be able to easily collaborate remotely and in real time Knowledge resources and information on subject matter experts should be easily accessed and centrally stored Must align resources to project pipeline and weigh different allocation options Procedures should help employees conform to established business processes Training and development must be available on an ongoing basis and at a low cost per professional 	<ul style="list-style-type: none"> How do your professionals collaborate remotely? Do your clients have access to collaborate also? How do you manage your knowledge resources? How do you store and provide access to this information? How do you align resources to your project pipeline? How do your employees conform to established business processes? What training and resources do you have in place to help them? Do you keep track of allocations of your resources? If yes, how do you manage this today? What is your average utilization rate?

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ROLE-SPECIFIC CHALLENGES AND QUESTIONS TO ASK			
Role	Most Relevant Solution(s)	Challenges	Probing Questions
Principal / Partner	CRM	<ul style="list-style-type: none"> Partners generally struggle in splitting their time across customer interactions, sales-related activities, and firm management Partners must be equipped to identify and cultivate new leads Partners must find ways to solicit and act on customer feedback There is a need to establish a process to avoid conflicts of interest Partners must formulate succession plans and exit options 	<ul style="list-style-type: none"> How do you allocate your time across customer interactions, sales-related activities, and firm management? Are you able to focus sufficiently on revenue-generating activities? What do you do to identify and cultivate new leads? Do you solicit customer feedback? How do you act on it? Are you able to avoid serious conflicts of interest? How do you do that?
VP of Sales / VP of Marketing	CRM	<ul style="list-style-type: none"> Need to be able to measure and track which customers are profitable and which are not Must measure execution against strategic plans Marketing must differentiate the firm from its competition Marketing must support decisions and outcomes with reliable data 	<ul style="list-style-type: none"> How do you measure and track which customers are profitable and which are not? Are you able to measure your progress against the strategic plan? How do you do that? How are you able to differentiate against the competition? From where do you get customer and marketing data? Are the data reliable? Are you able to target high-profit customers in order to increase sales and communication with that group? How? How do you determine the best customers to invite to take place in research?

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 professional services vertical to enable you to:

- ▶ **Streamline communication** – Collaborate and communicate in real time efficiently and economically.
- ▶ **Gain business insight** – Improve access to, and integration of, information assets across the enterprise.
- ▶ **Make real-time decisions** – Gather and analyze data to support business decisions.
- ▶ **Quickly deploy technology tools** – Provide staff with the tools to meet both company and personal professional goals.

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, service company now supports advanced business decisions.

<http://www.microsoft.com/casestudies/casestudy.aspx?casestudyid=1000003724>

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

- ▶ **Inefficient Project Management** – Project management is complicated and when run inefficiently often causes shortfalls in customer service, increased costs and revenue write-offs.
- ▶ **Billing is a major hassle** – Systems and processes can’t accommodate complex and variable billing arrangements. Plus, collecting accounts receivables is often difficult.

Pain Points in the Vertical

- ▶ PSOs are constantly under pressure to conform to customer requirements for everything from invoicing to reporting; yet inflexible systems only increase the non-billable manual work necessary to service accounts.
- ▶ Project and resource-knowledge management is inefficient, which causes strain in customer engagements.
- ▶ Billing clients is complicated and causes constant pain for PSOs. Systems and processes must accommodate complex and variable billing arrangements.

Benefits of Microsoft Dynamics ERP Solutions

- ▶ **Greater visibility into the organization** – Offers more timely and accurate access to resource and project data. Presents better visibility to help project and operational managers to optimize resources.
- ▶ **Improved resource utilization** – Manages and tracks resource usage to help organizations deliver significant benefits. Presents better alignment of people and skills to billable (and non-billable) projects.
- ▶ **Reduced billing cycle time** – Captures resource time and expenses in a more streamlined and accurate manner, resulting in fewer adjustments and faster project allocation. Provides faster, more accurate customer invoicing and lower administrative costs.

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 professional services vertical to enable you to:

- ▶ **Facilitate collaboration** – Provides information sharing and collaboration among team members and customers.
- ▶ **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

Real-estate management firm links global operations using Microsoft Dynamics CRM.

<http://www.microsoft.com/casestudies/casestudy.aspx?casestudyid=4000000293>

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

- ▶ **Focus on revenue-generating activities** – Partners generally have difficulty splitting their time across current working projects, firm management, and sales-related activities. This leaves little time to focus on existing customers.
- ▶ **Single customer view** – It is difficult for multiple people in multiple locations to interact with a customer and have a single customer view in real-time.

Pain Points in the Vertical

- ▶ Partners generally struggle to split their time across current working projects, firm management, and sales-related activities. This leaves little time and focus for existing customers.
- ▶ It is difficult for multiple people in multiple locations to interact with a customer and have a single customer view.

Benefits of Microsoft Dynamics CRM Solutions

- ▶ **Greater customer satisfaction and loyalty** – Maintain service quality throughout the service life cycle. Effective customer collaboration will significantly improve customer loyalty and repeat business.
- ▶ **Keep the customer front and center** – Track all customer-facing activities from the initial point of contact. Facilitate customer interactions with electronic-document capabilities and protect deliverables with version control for approval workflows, document-profiling, and publishing.

Microsoft® Dynamics Professional Services 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 professional services 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 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.

Microsoft® Dynamics Professional Services Telesales Script

PROVE VALUE - ERP

General Microsoft Dynamics ERP Benefits for the Vertical

Inefficient Project and Resource-knowledge Management

Pain: We understand that PSOs experience difficulty in managing projects and resource-knowledge assets, and that this has caused strain in customer engagements.

Benefit: Microsoft offers business-management solutions that make it easier for PSOs to deal with inefficient project management by:

1. Improving visibility for key decision-makers by configuring workflow-driven approval processes, critical path schedules, and exception-driven alerts
2. Delivering detailed, multidimensional project information for more complete initial project estimates, and future quotes
3. Configuring role-based views of relevant data, so that employees have faster access to the information they need and want

Billing Complications

Pain: We have learned that PSOs often experience pain when billing clients, due to the fact that their systems and processes must accommodate the clients' complex and variable billing arrangements.

Benefit: Microsoft offers business-management solutions that make it easier for PSOs to deal with billing complications by:

1. Providing multiple project types, like Time & Materials (with and without a cap), Fixed Price, Milestone, and P&L
2. Allowing projects to allocate costs and revenues across multiple contracts (useful for co-op projects or multi-year projects spanning multiple contracts)
3. Enabling Pre-billing, Billing off Estimate, Scheduled Payments, Milestone Billing

Solutions Specific to This Vertical

Professional Services for Microsoft Dynamics AX can help you better manage project teams, increase employee productivity, improve service capabilities, and accelerate billings while controlling costs through tighter integration of client and project-related information. Increase your profitability and offer unmatched client service that sets you apart from the competition by managing the financial, human, and intellectual capital aspects of project-based organizations.

Evidence

Linc Service and Mechanical

Linc Service and Mechanical provides innovative preventive maintenance for heating, air conditioning, and control systems.

Summary

Using Microsoft Dynamics AX, service company now supports advanced business decisions.

Business Situation

The organization's users relied on bespoke business applications and a legacy UNIX financial-management system. The highly decentralized system lacked consistency and limited information access for users.

Solution

The company worked with Microsoft Gold Certified Partner Iteration2 to take part in the Microsoft Dynamics Technology Adoption Program (TAP).

Benefits

- Central data and work flows boost employee productivity
- Business-intelligence features support critical decisions
- New integration with Microsoft technologies adds value to existing investment

Link

<http://www.microsoft.com/casestudies/casestudy.aspx?casestudyid=1000003724>

PROVE VALUE - CRM

General Microsoft Dynamics CRM Benefits for the Vertical

Focus more on revenue-generating activities

Pain: We understand that partners at PSOs often struggle to split their time across current working projects and firm management, which leaves little time and focus for existing customers.

Benefit: Microsoft offers business-management solutions that make it easier for PSOs to focus more on revenue-generating activities by:

1. Providing easy-to-understand, simplified reports that are conducive to quick action
2. Providing collaborative work spaces for CRM and marketing activities
3. Automating everyday tasks for marketing, sales, and service

Single customer view

Pain: We have seen that it is difficult for PSOs to provide a single customer view for multiple people in multiple locations, which causes shortfalls in customer interactions.

Benefit: Microsoft offers business-management solutions that make it easier for PSOs to have a single customer view by

1. Helping multiple personnel in many locations interact with a customer while maintaining a consistent customer view
2. Keeping track of engagement progress by providing access to dashboard views of customer and practice management information
3. Integrating customer-relationship-management tools with proposals, contracts, and billing

Evidence

Jones Lang LaSalle

Jones Lang LaSalle is a leading real-estate services and money-management firm, committed to delivering strategic, fully integrated services for property owners, investors, and occupiers.

Summary

Real-estate management firm links global operations with Microsoft Dynamics CRM.

Business Situation

With 15 disconnected customer-relationship-management systems, Jones Lang LaSalle could not efficiently share customer information across organizational and geographical boundaries.

Solution

Jones Lang LaSalle chose Microsoft Dynamics CRM for its seamless integration with Microsoft Office Outlook, which allows secure data sharing at a global level, providing more opportunities to clients.

Benefits

- Improves client service
- Increases sales
- Accelerates time-to-benefit
- Fits securely with existing systems

Links

<http://www.microsoft.com/casestudies/casestudy.aspx?casestudyid=4000000293>



Microsoft® Dynamics Professional Services Telesales Script

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].

VOICE MESSAGE SCRIPT

If you know the name of the CFO, Operations / Project Manager, Principal / Partner, 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 professional services 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.