Microsoft Dynamics CRM 101:
Basics for Sales Professionals

xRM³

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The 4 CRM Records You'll Use the Most

If you're like most Sales professionals, you don't aspire to be a Dynamics CRM expert. You want to know enough to keep the CRM working for you, i.e., help you stay organized and close more sales. Understanding basic CRM concepts will help you get up to speed faster on your new CRM. Let's start with some background on 4 basic types of sales records: Account, Contact, Lead, and Opportunity.
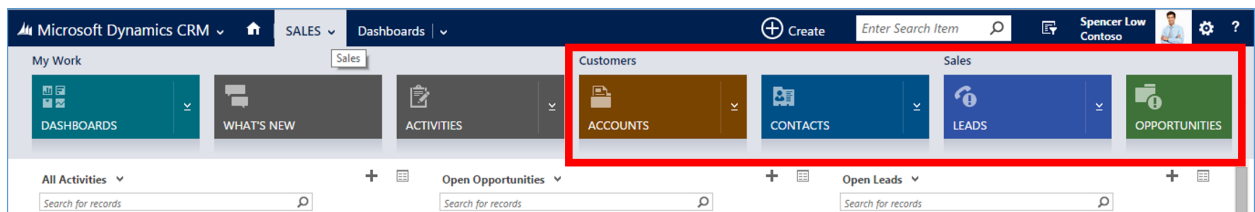

In Dynamics CRM, you work with and inside different types of Records. Each of the basic record types we'll address are specially designed to capture specific kinds of data about existing and potential customers. These records not only store basic information about your customers but also help you keep organized as you move customers through your specific selling processes.

Accounts

We'll start with Account records. Account records store information that you and your staff need to know about businesses or organizations you sell to or work with. Basic information like address, main phone and fax number, and primary contact are typically found in Account records.

Additionally, critical information like annual revenue, number of employees, industry, and financial information can also be found in Account records.
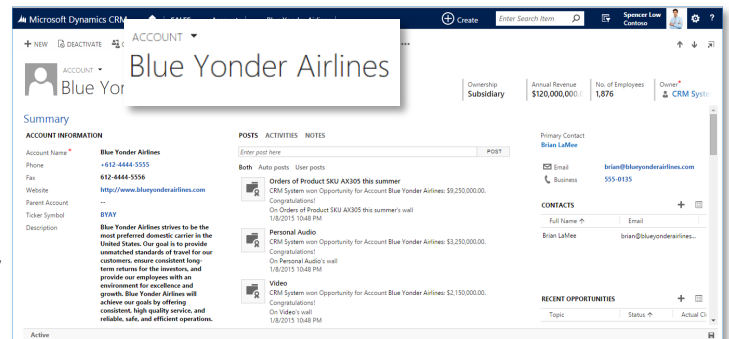
Contacts

Next let's look at Contact records. Contact records store the information and data you need about the people that are employed by your Accounts.


For sales people, the most important Contacts are typically the person or people that make buying decisions. Other important Contacts may include the Accounts Payable clerk, the Warehouse Manager, or the Chief Operating Officer. Direct phone numbers, email addresses, and branch location are all things you'll find in Contact records. You can also track your sales -related activities like appointments, phone calls, and emails in contact records.

Leads

Another important record is the Lead record. Leads are people or companies that may represent legitimate sales opportunities. We say "may" because Lead status is generally reserved for people that we don't know enough about to categorize as a potential customer. Leads may or may not have a real need, an approved budget, a time frame to move forward, or the authority to make a firm buying decision.

The Lead record is designed to help gather important information about or "Qualify" our potential customers. Leads are especially important for recording attributes like urgent need, lead source, budgeting and purchasing process, decision maker and so on.
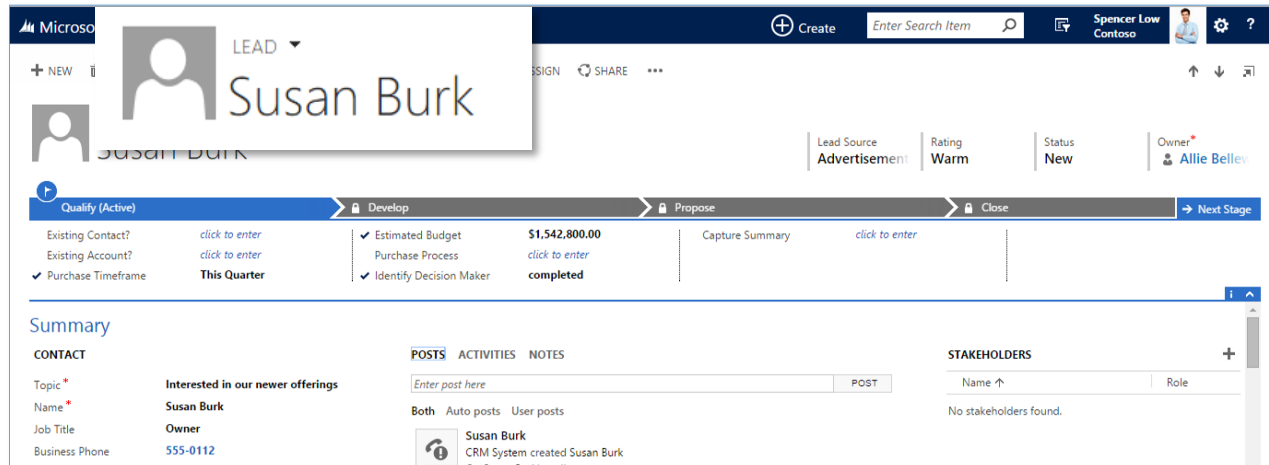
Opportunities

Opportunity records hold information on potential sales that we feel have a real shot at becoming a reality. Often these Opportunities started out as Leads but over time have proven themselves to be something we definitely want to pay more attention to, spend more time on, and work hard to close.

It's common for Opportunity records to contain an estimate of the sales revenue figure, probability of closing, and a projected close date. Other information you may want to capture for yourself or management could be the sales team associated with the Opportunity, specific products or services, status of your proposal, promotional discounts, delivery dates, etc.

"CRM doesn't start with technology. It starts with a process for acquiring and keeping happy profitable customers. Configure Dynamics CRM to support your optimal customer-facing and internal processes. Then you're looking at success."

Mark Abes/xRM[3]

Getting a handle on the nature and purpose of these basic Dynamics CRM Sales records is a good first step and will make it easier for you to understand how they all work together. With a little experience you'll be on your way to making the CRM really work for *you* and not the other way around.

"What do your sales people really know about who they are interacting with? Have you provided them with the critical customer data they need in real time? Have you set them up for success?"

Ken Farmer/xRM[3]

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Working with Activity Records

Are you a Sales professional using Microsoft Dynamics CRM 2015? If so, you should definitely be using Activity records to document and schedule your customer interactions, as well as collaborate and communicate with members of your internal staff.

As an enthusiastic CRM user, I can attest to the fact that organizing my day and to-do list with the help of activity records is a must. I'm constantly juggling lots of leads and opportunities. Trying to keep track of all the moving pieces necessary to manage these relationships would be impossible without taking advantage of Dynamics CRM Activity records.

The term Activities covers a lot of ground. Think of Activities as all the things we salespeople do in connection with closing business, e.g., note taking, emails, calls, scheduling and following up on meetings, as well as assigning tasks for yourself and other staff members. The menu to the right provides a list of common Activity records from Microsoft Dynamics CRM.
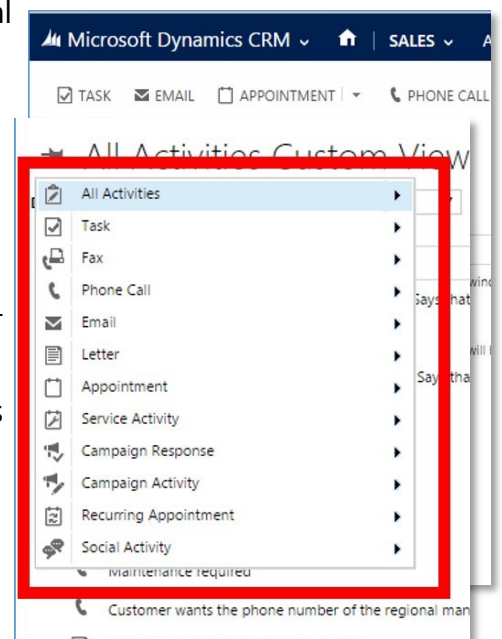
Let's look at 3 common sales-related Activity types:

- Phone calls
- Customer Appointments
- Follow up action items

We'll look at Activities in 2 different contexts: Activities individual Users create for themselves and Activities created for other CRM Users on their team.

The following is an example of how to use Activities in a simple sales process. In this example, Sales Representative Veronica Quek places an outgoing phone call to Cat Francis to gauge her level of interest and schedule a meeting with Cat's team. Cat is definitely interested so Veronica documents that in the call record.

Veronica uses another Activity record to document her onsite appointment with Cat.

Managing Team Activities

Let's look at a common business scenario in which multiple staff members work together to close a sale. We'll look at how CRM Activity records synchronize and manage this process so everyone is on the same page in respect to their role in the sales process.

In this scenario our Call Center Manager Jamie Reding is passing a Lead to a Sales Representative named Veronica. The Lead is a woman named Cat Francis. Cat Francis works for a company called Coho Winery.

Jamie lets Veronica know that Cat Francis and her colleagues are ready to get serious about evaluating Contoso's new line of products. Veronica asks Jamie to schedule a hand-off call and provide a warm introduction to Cat Francis.

Veronica syncs her CRM tasks and appointments with her Microsoft Outlook account, so she'll also find the appointment there too.

Veronica likes that the native integration of Microsoft Dynamics CRM and Outlook provides her with multiple reminders of her appointment, ensuring she doesn't forget to follow up and disappoint her customers.
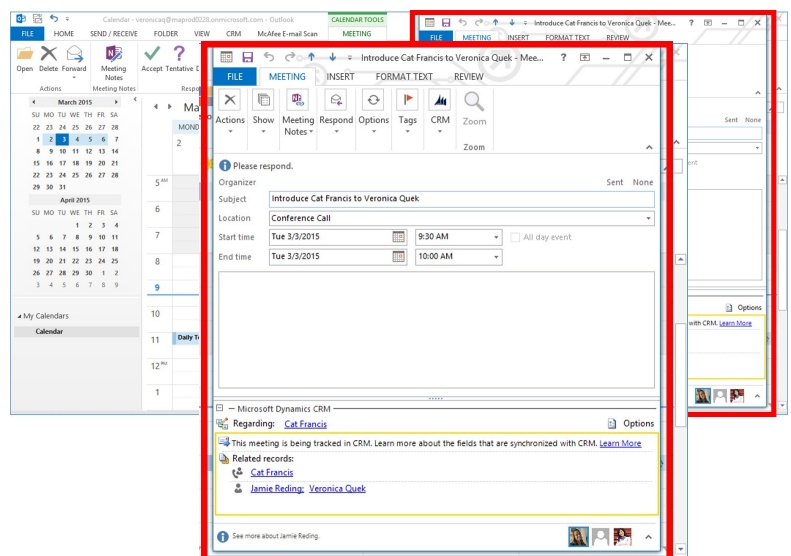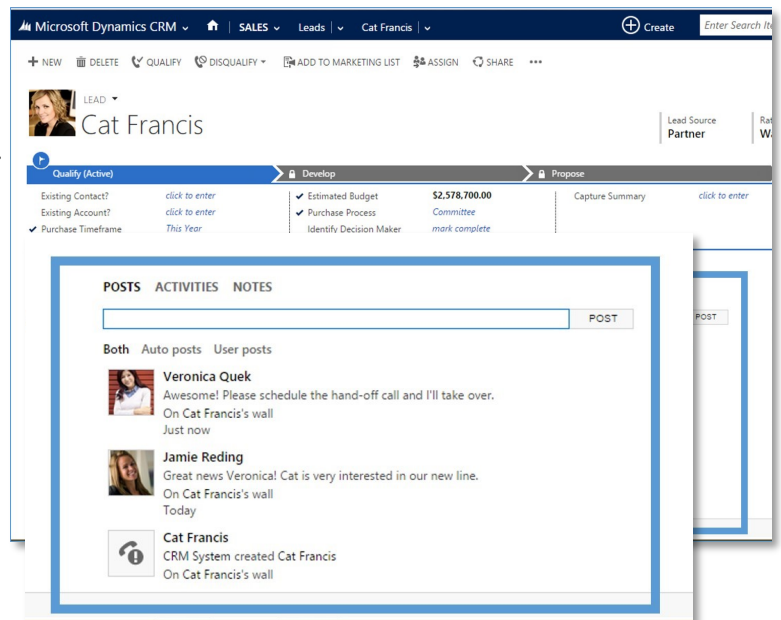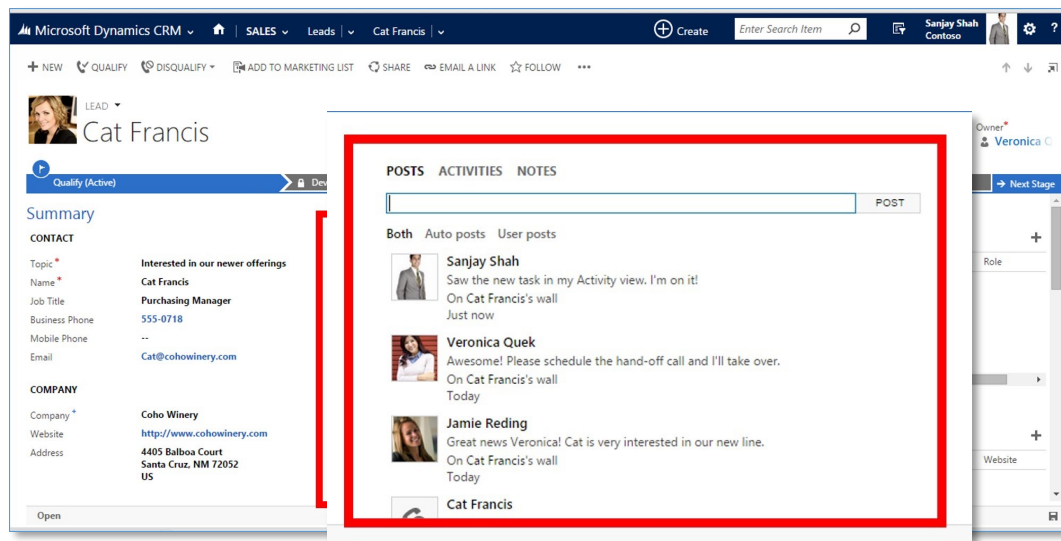
Veronica has a technician on her team named Sanjay. Veronica creates a task for Sanjay to review the preliminary information they have regarding Cat's facility and business need.
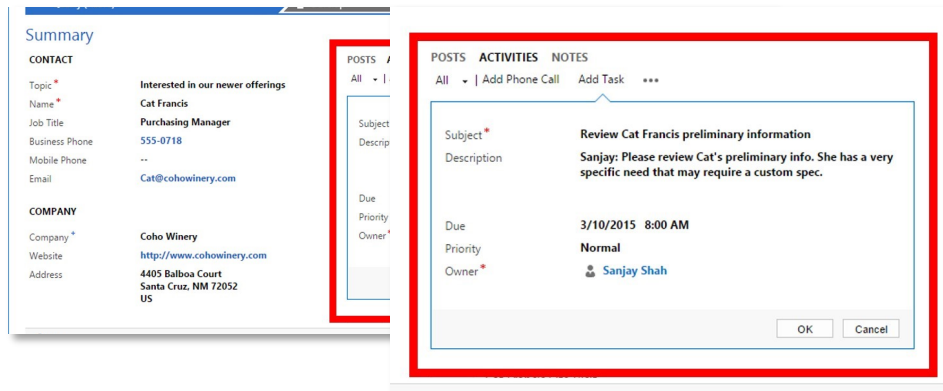
Sanjay uses the Social Activity pane to let his team members know that he's aware of the new task he's been assigned and ready to do his part to close the sale.

After completing the initial research, Sanjay marks the task complete and provides the preliminary research to Veronica. As you can see, Microsoft Dynamics CRM Activity Records provide a very effective tool for managing your own day-to-day activities as well as those of your fellow staff members. Your team stays in sync and working together toward their common goal – closing sales.

Saving Time With Quick Create Records

Salespeople are always looking for faster and easier ways of managing their customer-facing processes. After all, that's a large part of what we expect when we invest in CRM. CRM customers want to empower staff to quickly and easily enter and assign Leads, help Customer Service get customers on the way to their "happy place", or document customer engagements. I'm here to tell you that my very favorite CRM feature is one of the most unsung and unappreciated. It's called the Quick Create button and it resides at the top of your CRM forms.


Quick Create allows you to create new records: leads, contact, accounts, calendar appointments, etc. without jumping out of the system view you happen to be in at the moment. Let's say you're reviewing your sales funnel or opportunities – suddenly the phone rings with a Customer Service request. Or you're at a conference working the booth and you need to quickly enter a Lead. Or you're the receptionist covering phones and no Service lines are open. These are examples of where Quick Create comes in very handy.

Just hit the Quick Create button in your CRM command bar. Click on the tile that represents the type of record you need to create.
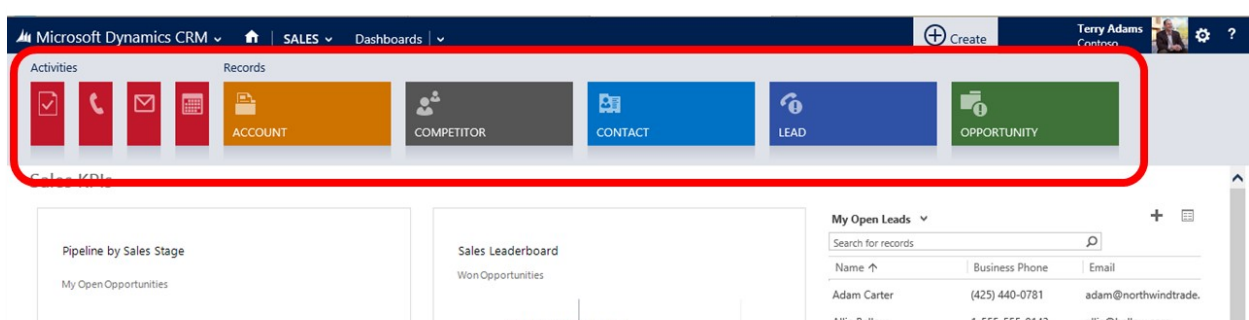
The Quick Create form descends from the top of the screen. It doesn't take over the CRM, it just opens up enough to input the minimum information you need to create (in this case) a Lead record and get this person started on the customer journey.
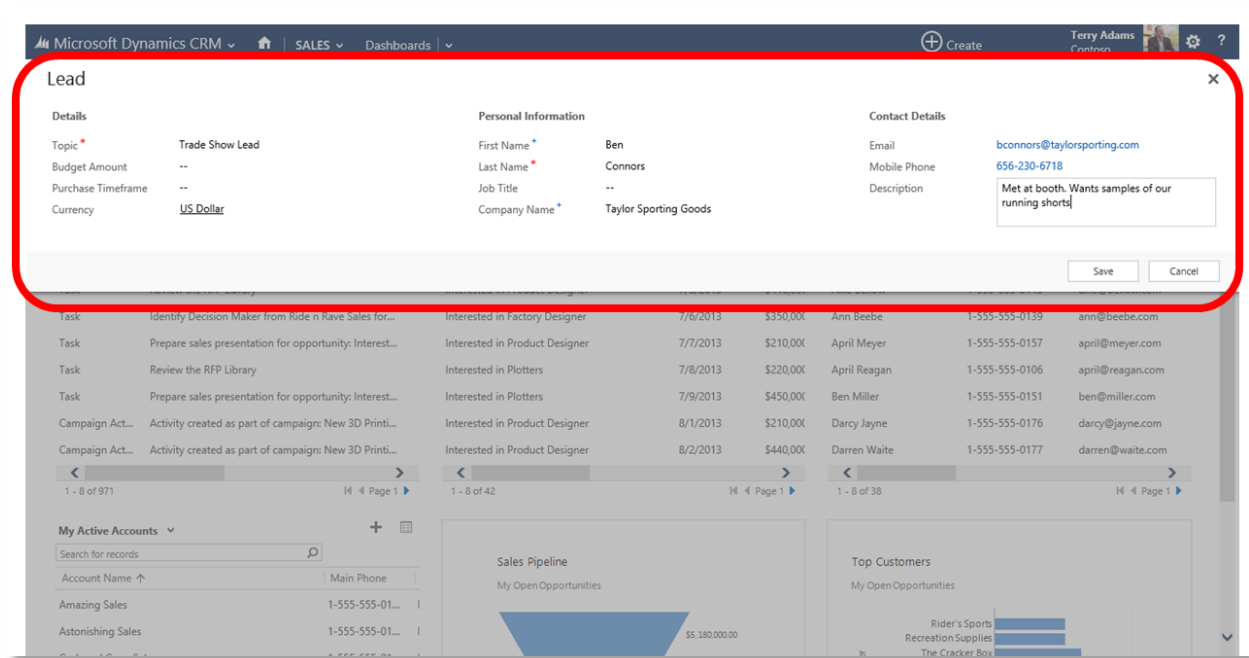
Hit Save. The Quick Create form disappears, leaving you working with the record you had visible beforehand. Finish what you were doing before you used Quick Create form. Reopen the lead record later in the standard format and fill in more information if you want. Quick Create saves you time and allows you to enter information while it's still fresh in your mind.

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Click once more to pull up the detailed report, in this example sorted by Owner.

Conclusion

I hope you found Microsoft Dynamics CRM 101: Basics for Sales Professionals valuable, and it gets you on the way to making you more productive and successful. There's a lot more to learn. Stay tuned for future xRM[3] E-books, webinars, videos and blogs.

Contact Information

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