

Effective B2B Selling

The Guide to Effective B2B Selling with Insights

What this eBook is:

It's a guide written to show professionals in Microsoft Dynamics CRM how to increase their productivity using Insights, powered by InsideView.

What this eBook isn't:

This is not a think-piece. It's an execution piece designed to help you get in and win.

Contents.

What is **Effective B2B Selling**?

How to win faster with Insights, powered by InsideView

1. Identify your prospects
2. Listen and engage
3. Connect and win

Pull it all together to win

What is Effective B2B Selling?



Effective B2B Selling

Being Relevant Connects You to Your Buyer

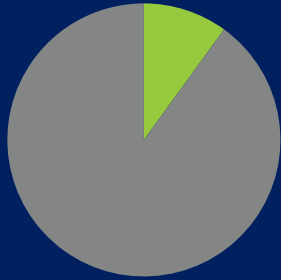
Being relevant and connected is the best way for sales teams to increase their chances of engaging with today's more informed, better connected, less responsive buyer.

Buyers are demanding relevance and expecting sales people to know about them, their companies, and their needs before engaging. It's no longer enough to just have a connection to the buyer. The power of "who you know" is being trumped by "what you know about who you know."

Effective B2B selling is about arming yourself with the wealth of information available today about your prospects and leveraging it to connect in the most timely, relevant, and valuable way. Effective B2B selling requires intelligence that brings together traditional data, news, social media, and connections.

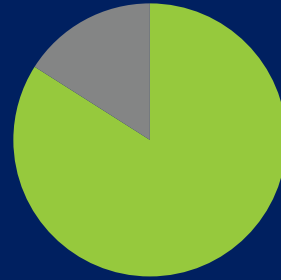
This guide will show you how to use Insights, powered by InsideView, for more effective B2B selling that will increase your engagement and win rates.

Being relevant works.



10%

of executives respond to cold calls or unsolicited emails, **yet...**



84%

will engage with a sales person when they are connected through a friend or colleague and offer value.

* Sources: DMA Response Rate Report 2010; Craig Elias "Trigger Selling"

How to start Effective B2B Selling with Insights

Effective B2B Selling Powered by InsideView.

Insights powers Effective B2B Selling with three key components.

Data



Insights offers the most accurate, relevant database of B2B companies and contacts. Use this to create lists of prospects and to update the ones you already have with accurate data.

Insights



InsideView, the platform behind Insights, monitors over 40,000 news and social sources to provide you with real-time insights on the news and social activity of your prospects. Information is categorized by relevant business events and you can choose to receive email alerts on topics of specific interest to you.

Connections



Insights empowers you to build a comprehensive network of your connections from a collection of social, personal, and professional networks, including LinkedIn, Outlook, previous employers, and others. The result is a more extensive, usable network that is private to you and your work colleagues.

Start Effective B2B Selling with Insights.

Don't have Insights in your CRM? It's included with your Microsoft Dynamics CRM Online Professional or Enterprise subscription, at no additional charge, for customers in the US and Canada. Click below to learn how to enable this Preferred Solution.

[Get it Now › Sell in the Now](#)

Once you've enabled Insights, you'll see the Insights panel embedded in your CRM on the right side of the Accounts, Leads, Contacts, and Opportunities pages. Just follow along to start Effective B2B Selling.

- Find prospects using Insights' extensive database.
- Leverage relevant news and social insights for your outreach.
- Discover professional connections that enable warm introductions.

Start Effective B2B Selling with Insights.

Follow these **3 steps** and learn how to use Insights, powered by InsideView, to:

1



Find prospects.

Access Insights' massive database of companies and contacts and start finding prospects.

2



Listen and Engage.

See all relevant news, critical business events, and social buzz to better engage with your prospects. It's 32% more effective* when you're relevant and timely.

3



Connect and Win.

Set up warm introductions to get in, establish trust, and win deals.

• Source: Craig Elias "Trigger Selling"

Step 1

Find Prospects

Effective Selling starts by finding the right person or company with which to engage. Insights helps you quickly find people and organizations that match your target criteria.

- 1 Start by clicking on the **Account dropdown** in Microsoft Dynamics CRM and select your target account or create a new one. ●

The screenshot displays the Microsoft Dynamics CRM interface. At the top, the navigation bar includes the Microsoft Dynamics CRM logo, a menu icon, and the 'Sales' dropdown. The 'Accounts' dropdown is highlighted with a green box, and a green arrow points from it to the 'Northwind Traders' account card. The account card is a light green rectangle with a green 'N' logo and the text 'ACCOUNT Northwind Traders'. Below the card, the 'Summary' tab is selected. The 'ACCOUNT INFORMATION' section lists details for Northwind Traders, including account name, phone, email, website, parent account, ticker symbol, and description. A Yammer post from Veronica Quek is visible on the right side of the screen.

ACCOUNT INFORMATION	
Account Name	Northwind Traders
Phone	+1 (614) 333-4444
Email	alexw@northwindtraders.com
Website	www.northwindtraders.com
Parent Account	--
Ticker Symbol	NWZTU
Description	Northwind Traders is headquartered in US and is the nation's leader in providing wholesalers with gift and novelty products. They began in 1925

Step 1

Find Prospects

- 1 Start by clicking on the **Account dropdown** in Microsoft Dynamics CRM and select your target account or create a new one.
- 2 Click the double chevron at the top of the Insights panel to reveal current company firmographic information. Then refresh CRM by clicking the **Update Account Information icon**. Using up-to-date information significantly increases your chances of closing a deal. ●

Northwind Traders

Veronica Quek
Contoso, Ltd.

Annual Revenue
\$77,000,000.00

No. of Employees
125,000

Owner
Allie Bellew

Primary Contact

INSIGHTS

Northwind Traders

Address
1 Northwind Trader Way
Columbus, OH 47736

Business Number
+1 (614) 333-4444

URL
www.northwindtraders.com

Revenue
\$77,000,000.00

Employees
125,000

Ownership
Public

Industry
Wholesaler

EFX ID
0123456789

Sources

Step 1

Find Prospects

- 1 Start by clicking on the **Account dropdown** in Microsoft Dynamics CRM and select your target account or create a new one.
- 2 Click the double chevron at the top of the Insights panel to reveal current company firmographic information. Then refresh CRM by clicking the **Update Account Information icon**. Using up-to-date information significantly increases your chances of closing a deal.
- 3 Click the **double chevron** at the top of the Insights panel to hide the firmographics, then click the **Find Contacts** button to open a larger window and find people within the account

Microsoft Dynamics

The screenshot displays the Microsoft Dynamics CRM interface. At the top, there's a navigation bar with 'Opportunities' and 'Mobile Computing' dropdowns, a search bar labeled 'Search CRM data', and a user profile for 'Veronica Quek' from 'Contoso, Ltd.'. Below this is a toolbar with icons for 'ASSIGN', 'EMAIL A LINK', 'DELETE', 'SWITCH PROCESS', and 'EDIT PROCESS'. The main content area shows a 'Propose' process step that is 'Active', with a progress bar and a 'Close' button. On the left, there's a 'YAMMER' feed with a post from 'Veronica Quek' about 'Mobile Computing Expansion'. On the right, there's an 'INSIGHTS' panel for 'Northwind Traders' showing news articles. A green line with arrows points from the 'Find Contacts' button in the bottom right to the 'double chevron' icon at the top of the Insights panel, and another green line points from the 'double chevron' icon to the 'Find Contacts' button.

Step 1

Find Prospects

- Click the **double chevron** at the top of the Insights panel to hide the firmographics, then click the **Find Contacts** button to open a larger window and find people within the account
- Use the search bar to filter contacts by name, job title and/or job function and **Add New Contacts** to CRM. Insights constantly monitors over 40,000 data sources to deliver the most up-to-date information about your prospect companies and contacts.

The screenshot shows the Microsoft Dynamics CRM interface. At the top, there's a navigation bar with 'Accounts' and 'Northwind Traders' selected. A search bar labeled 'Search CRM data' is present. The user 'Veronica Quek' is logged in. Below the navigation bar, there's a summary section for 'Northwind Traders' showing 'Annual Revenue: \$77,000,000.00', 'No. of Employees: 125,000', and 'Owner: Allie Bellevue'. The main area displays a table of contacts with columns: 'Connections', 'Job Level', and 'Job Function'. A search bar above the table is labeled 'Search by Name and/or Job Title'. A green box highlights this search bar. To the right of the table, a detailed view of a contact is shown for 'Chad Sturdivant', including his photo, job title 'Chief Executive Officer, Director', account name 'Northwind Traders', business phone, email, social presence, and past employment.

Connections	Job Level	Job Function
1	C-Level Board Member, Director	Other
1	C-Level	Other
1	C-Level	Operations & AdminCa
1	C-Level	Operations & Admin
1	C-Level	Marketing, IT
1	C-Level	IT
1	C-Level	Marketing
1	C-Level	IT
1	Senior Executive, VP	Other
1	Senior Executive, VP	Other

1 contact selected

Chad Sturdivant

Full Name: Chad Sturdivant

Job Title: Chief Executive Officer, Director

Account Name: Northwind Traders

Business Phone: +1 (614) 333-4444

Email: chads@northwindtraders.com

Social Presence: LinkedIn

Past Employments: VP Sales, Northwind Traders

Step 1

Find Prospects

- 4 Use the search bar to filter contacts by name, job title and/or job function and **Add New Contacts** to CRM. Insights constantly monitors over 40,000 data sources to deliver the most up-to-date information about your prospect companies and contacts.
- 5 Alternatively, visit the Insights **Discovery Center**, found under Insights on the main CRM menu. There you can search for new prospects from the 12 million+ companies in the Insights database. Click on any to open an overview window and **Add to CRM**. ●

The screenshot displays the Microsoft Dynamics CRM interface. At the top, the 'Insights' menu is open, and the 'Discovery Center' option is highlighted with a green box. Below this, the 'Add to CRM' button is also highlighted with a green box. The main content area shows the profile for 'Company Firmographics' for 'Fabrikam, Inc.'. The profile includes a company logo, address, business number, URL, revenue, employee count, ownership, and industry. To the right, there is a 'Job Functions' donut chart and a 'Key Contacts' list. The donut chart shows the distribution of job functions across the company, with 'Eng & Research' being the largest category. The 'Key Contacts' list includes three individuals: Christa Geller (Director, Sales), Karen Berg (Principal Software Engineer), and David So (Systems Architect). The 'Add to CRM' button is positioned above the company profile, and a green arrow points from the 'Add to CRM' button to the 'Add to CRM' button, indicating the action to be taken.

Microsoft Dynamics CRM

Insights

Discovery Center

NEW ACTIVITY | NEW RECORD | IMPORT DATA

+ Add to CRM | Add to Watchlist | Report Incorrect Information

Company Firmographics

Fabrikam, Inc.

Address: 7625 - 170th Ave NE, Redmond, WA 98052, United States

Business Number: +1 425-885-9591

URL: www.fabrikam.com

Revenue: \$32.00M

Employees: 300

Ownership: Private Company

Industry: Computer Software

Description: Fabrikam designs and sells hardware, including PCs, tablets, gaming and entertainment consoles, phones, other intelligent devices, and related accessories.

Job Functions

- Eng & Research (91)
- Finance (3)
- Human Resources (3)
- IT (31)
- Marketing (16)
- Operations & Admin (16)
- Sales (36)
- Others (42)

Key Contacts

- Christa Geller, Director, Sales
- Karen Berg, Principal Software Engineer
- David So, Systems Architect
- Sanjay Shah, Principal Software Engineer

Step 2

Listen and Engage

After you have identified your prospect companies and contacts, you need a compelling reason to engage with them. Insights can help you find and monitor news, events, and social buzz that directly impact your prospect.

- 1 Open the **Insights** tab to access the latest **News** and social **Buzz**. Then click into any article, post, or feed to find relevant talking points and buying signals to act on. Even engage directly by responding to social feeds and blogs through links within Insights.

Microsoft Dynamics CRM

Sales Accounts Northwind Traders

Search CRM data

ACCOUNT Northwind Traders

INSIGHTS RESEARCH FIND CONTACTS

News

Northwind Traders closes 10% up this quarter
Equities.com - December 5, 2013

Northwind Traders upgraded
Reuters - December 5, 2013

Industry veteran Sandra Key promoted to head Europe...
AP - November 5, 2013

Northwind Traders acquires Litware to expand presence...
Fortune - December 10, 2013

New line of waterproof cameras in time for holidays
AP - December 12, 2013

Five new centers open in the East
Reuters - December 20, 2013

View More...

Key Contacts

Chad Sturdivant
Chief Executive Officer, Director

Sherri Rowland
President, North America

Bonnie Baxley
President, Chief Legal Officer

Yvette Bell
Chief Operating Officer

Blake Penelope
Chief Marketing Officer

Alice Summers
Chief Technical Officer

View More...

Active

Buzz

news.northwind...
Step inside the...
December 8, 2013

Powerful & ultra...
U.S. & Canada, O...
December 5, 2013

Our new state-o...
open in NYC! #N...
December 6, 2013

Our employees...
#NorthwindTrad...
December 6, 2013

Pre-order now a...
upgrade: Home...
system 5.0: <http://...>
December 6, 2013

Step 2

Listen and Engage

- 1 Open the **Insights** tab to access the latest **News** and social **Buzz**. Then click into any article, post, or feed to find relevant talking points and buying signals to act on. Even engage directly by responding to social feeds and blogs through links within Insights.
- 2 Scan the **Research** tab for deeper understanding of your prospect's industry and business to build rapport, earn trust, and close more, bigger deals

Microsoft Dynamics CRM

Sales Accounts Northwind Traders

Search CRM data

ACCOUNT Northwind Traders

INSIGHTS **RESEARCH** FIND CONTACTS

Computer Hardware

Industry Information

Primary Industry Computer Peripherals and Accessories
Primary SIC 3577 (Computer Peripheral Equipment, Nec)
NAICS 334119 (Other Computer Peripheral Equipment Manufacturing), 2007

Industry Profile : Computer Peripherals and Accessories

The 1,200 computer and peripheral equipment manufacturers in the U.S. produce and assemble a wide range of computing equipment, including computers, storage devices, terminals, and other peripherals. In addition to selling equipment, companies may sell software and installation, consulting, or IT management services.

[View More...](#)

Active

Similar Accounts

Fabrikam
Public Company (NYSE: FBK)
Primary Industry Consumer Electronics
Revenue \$51,000,000.00
Employees 40,000

Fabrikam wants to be the best consumer electronics outlet in the US and beyond. The multinational retailer sells both products and services through three primary channels: about 1,700 retail stores, online, and call centers. Its branded store banners include Fabrikam, Fabrikam Express, Fabrikam Mobile.

Its stores sell a variety of electronic gadgets, movies, music, computers, mobile phones, and appliances. On the services side, it offers installation and maintenance, technical support, and subscriptions for mobile phone and internet services.

A. Datum
Public Company (NYSE: ADTM)
Primary Industry Consumer Electronics
Revenue \$22,000,000.00
Employees 48,000

A. Datum's products run the gamut of cool: from ultra HD TVs, to hip wearable digital cameras, and household air conditioners. A. Datum sells consumer products (home appliances, camcorders, DVDs, VCRs, men's shavers), business products (copiers, fax machines, printers), and industrial electronics products (computer components, semiconductors, appliance motors).

[View More...](#)

Financials

INCOME STATEMENT
All numbers in Millions

Revenue

2014 2013

12 Months Ending

Total Revenue

Gross Profit

[View More...](#)

Step 3

Connect and Win

Building connections to win the deal is essential. By leveraging existing relationships to find new ones, your new relationships start from a position of trust.

- 1 From the Insights tab, you can quickly see how many **connections** you have. ●

Microsoft Dynamics CRM

Sales Accounts Northwind Traders

ACCOUNT Northwind Traders

INSIGHTS RESEARCH FIND CONTACTS

News

- Northwind Traders closes 10% up this quarter
Bloomberg - December 3, 2015
- Northwind Traders upgraded
Reuters - December 3, 2015
- Industry veteran Sandra Key promoted to head Europe...
AP - December 3, 2015
- Northwind Traders acquires Litware to expand presence...
Fortune - December 10, 2015
- New line of waterproof cameras in time for holidays
AP - December 12, 2015
- Five new centers open in the East
Reuters - December 20, 2015

View More...

Key Contacts

- Chad Sturdivant
Chief Executive Officer, Director
2 CONNECTIONS
- Sherri Rowland
President, North America
2 CONNECTIONS
- Bennie Baxley
President, Chief Legal Officer
2 CONNECTIONS
- Yvette Bell
Chief Operating Officer
2 CONNECTIONS
- Blake Penelope
Chief Marketing Officer
2 CONNECTIONS
- Alice Summers
Chief Technical Officer
2 CONNECTIONS

View More...

Active

Step 3

Connect and Win

- 1 From the Insights tab, you can quickly see how many **connections** you have.
- 2 Or filter your connections **by Job Level, Function, or Connection Level** to quickly identify contacts most important to you. Simply click on the filter icon on the Find Contacts tab and then click on the column you want to filter by.

Microsoft Dynamics CRM

Sales Accounts Northwind Traders

ACCOUNT Northwind Traders

INSIGHTS RESEARCH FIND CONTACTS

	Name	Title	Company	Connections	Job Level	Job Fu
✓	Chad Sturdivant	Chief Executive Officer, Director	Northwind Traders	1	C-Level Board Member, Director	Other
✓	Sheri Rowland	President, North America	Northwind Traders	1	C-Level	Other
	Rennie Baxley	President, North America	Northwind Traders	1	C-Level	Operations & Admin
	Yvette Bell	Chief Operating Officer	Northwind Traders	1	C-Level	Operations & Admin
	Blake Penelope	Chief Marketing Officer	Northwind Traders	1	C-Level	Marketing, IT
	Alice Summers	Chief Technology Officer	Northwind Traders	1	C-Level	IT
	Sondra McBride	Chief Marketing Officer Lead	Northwind Traders	1	C-Level	Marketing
	Scotty Mast	CTO of Services	Northwind Traders	1	C-Level	IT
	Lea Valez	Vice President & Gen. Counsel	Northwind Traders	1	Senior Executive, VP	Other
	Duane Cottle	Vice President & General Manager	Northwind Traders	1	Senior Executive, VP	Other

1 - 10 of 43450 (1 Selected)

Active

Step 3

Connect and Win

- 1 From the Insights tab, you can quickly see how many **connections** you have.
- 2 Or filter your connections **by Job Level, Function, or Connection Level** to quickly identify contacts most important to you. Simply click on the filter icon on the Find Contacts tab and then click on the column you want to filter by.
- 3 **To the right of the contact's name**, you will see how you are connected based on the type of icon, such as personal or alumni network.

Microsoft Dynamics CRM

Sales Accounts Northwind Traders

ACCOUNT Northwind Traders

INSIGHTS RESEARCH FIND CONTACTS

	Name	Title	Company	Connections	Job Level	Job Fu
✓	Chad Sturdivant	Chief Executive Officer, Director	Northwind Traders		C-Level Board Member, Director	Other
✓	Sheri Rowland	President, North America	Northwind Traders		C-Level	Other
	Bennie Baxley	President, North America	Northwind Traders		C-Level	Operations & AdminCa
	Yvette Bell	Chief Operating Officer	Northwind Traders		C-Level	Operations & Admin
	Blake Penelope	Chief Marketing Officer	Northwind Traders		C-Level	Marketing, IT
	Alice Summers	Chief Technology Officer	Northwind Traders		C-Level	IT
	Sonora McBride	Chief Marketing Officer Lead	Northwind Traders		C-Level	Marketing
	Scotty Mast	CTO of Services	Northwind Traders		C-Level	IT
	Lea Valez	Vice President & Gen. Counsel	Northwind Traders		Senior Executive, VP	Other
	Duane Cottle	Vice President & General Manager	Northwind Traders		Senior Executive, VP	Other

1 - 10 of 43450 (1 Selected)

Active

Step 3

Connect and Win

- 1 From the Insights tab, you can quickly see how many **connections** you have.
- 2 Or filter your connections **by Job Level, Function, or Connection Level** to quickly identify contacts most important to you. Simply click on the filter icon on the Find Contacts tab and then click on the column you want to filter by.
- 3 **To the right of the contact's name**, you will see how you are connected based on the type of icon, such as personal or alumni network.
- 4 Finally, click on the connection icon to see details. Then use your **mutual connections** to ask for a warm introduction.

The screenshot displays the Microsoft Dynamics CRM interface. At the top, the navigation bar includes 'Sales', 'Accounts', and 'Northwind Traders'. A search bar on the right says 'Search CRM data'. Below this, the 'Find Contacts' tab is active, showing a list of contacts for 'Northwind Traders'. The list includes columns for Title, Company, Connections, Job Level, and Job Function. A pop-up window shows a network diagram with 'You' at the center, connected to 'Alice Summers' and 'Scott Mast' via 'Personal' connection icons. Both Alice and Scott are listed as 'Prev Coworkers' and are associated with 'Northwind Traders'. To the right of the pop-up, a sidebar shows details for 'Chad Sturdivant', including his title, phone number, and email. A green arrow points from the text 'mutual connections' in the list to the 'Connections' column in the table.

Title	Company	Connections	Job Level	Job Function
Chief Executive Officer, Director	Northwind Traders	Personal	C-Level	IT
President, North America	Northwind Traders	Personal	Senior Executive, VP	Other
President, North America	Northwind Traders	Personal	Senior Executive, VP	Other
Chief Operating Officer	Northwind Traders	Personal	Senior Executive, VP	Other
Chief Marketing Officer	Northwind Traders	Personal	Senior Executive, VP	Other
Chief Technology Officer	Northwind Traders	Personal	Senior Executive, VP	Other
Chief Marketing Officer Lead	Northwind Traders	Personal	Senior Executive, VP	Other
CTO of Services	Northwind Traders	Personal	Senior Executive, VP	Other
Vice President & Gen. Counsel	Northwind Traders	Personal	Senior Executive, VP	Other
Vice President & General Manager	Northwind Traders	Personal	Senior Executive, VP	Other

Put it all
together to win.

Now you know...

Who to call. What to say. How to get in and win.

Complete and accurate contact data delivered directly to you

Key events help you find relevant reasons to engage

The screenshot displays the Microsoft Dynamics CRM interface for the 'Northwind Traders' account. The top navigation bar includes 'Sales', 'Accounts', and 'Northwind Traders'. The main content area is divided into three sections: 'News', 'Key Contacts', and 'Buzz'. The 'News' section lists several articles, including 'Northwind Traders closes 10% up this quarter' and 'Northwind Traders upgraded'. The 'Key Contacts' section lists individuals such as Chad Sturdivant (Chief Executive Officer, Director), Sherri Rowland (President, North America), Bennie Baxley (President, Chief Legal Officer), Yvette Bell (Chief Operating Officer), Blake Penelope (Chief Marketing Officer), and Alice Summers (Chief Technical Officer). The 'Buzz' section shows social media posts from Facebook and Twitter, including a post about a new tablet and a post about a new state-of-the-art distribution center. Green arrows point from the callouts to specific elements in the interface: one from 'Complete and accurate contact data...' to the 'Key Contacts' section, one from 'Key events help you find relevant reasons to engage' to the 'News' section, and one from 'Follow your contacts through social channels' to the 'Buzz' section. Another green arrow points from 'Leverage internal connections' to the 'Connections' column next to the contacts.

Microsoft Dynamics CRM

ACCOUNT
Northwind Traders

Annual Revenue: \$77,000,000.00
No. of Employees: 125,000
Owner: Allie Bellev

INSIGHTS RESEARCH FIND CONTACTS

News

Key Contacts

Buzz

View More...

Leverage internal connections

Follow your contacts through social channels

The bottom line:

Effective B2B Selling with Insights, powered by InsideView, increases sales productivity and effectiveness.

Increase your engagement rate up to 84% with insights and connections.*

* Source: Craig Elias "Trigger Selling"

Reach out to learn more.

www.microsoft.com/dynamics

Talk to a Microsoft representative
(United States and Canada).

Availability hours of operation:
Monday–Friday, 8:00 A.M. – 5:30 P.M.
Central Time (UTC-6) in the United
States and Canada.

1-800-477-7989