Effective B2B Selling

The Guide to Effective B2B Selling with Insights

Microsoft Dynamics

InsideView

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?

Effective B2B Selling

Being Relevant Connects You to Your Buyer

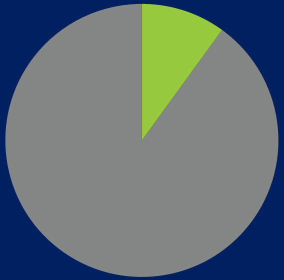
Being relevant and connected is the best way for sales teams to increase their chances of engaging with today's more informed, better connected, less responsive buyer.

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.

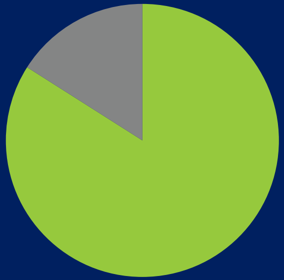
This guide will show you how to use Insights, powered by InsideView, for more effective B2B selling that will increase your engagement and win rates.

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.

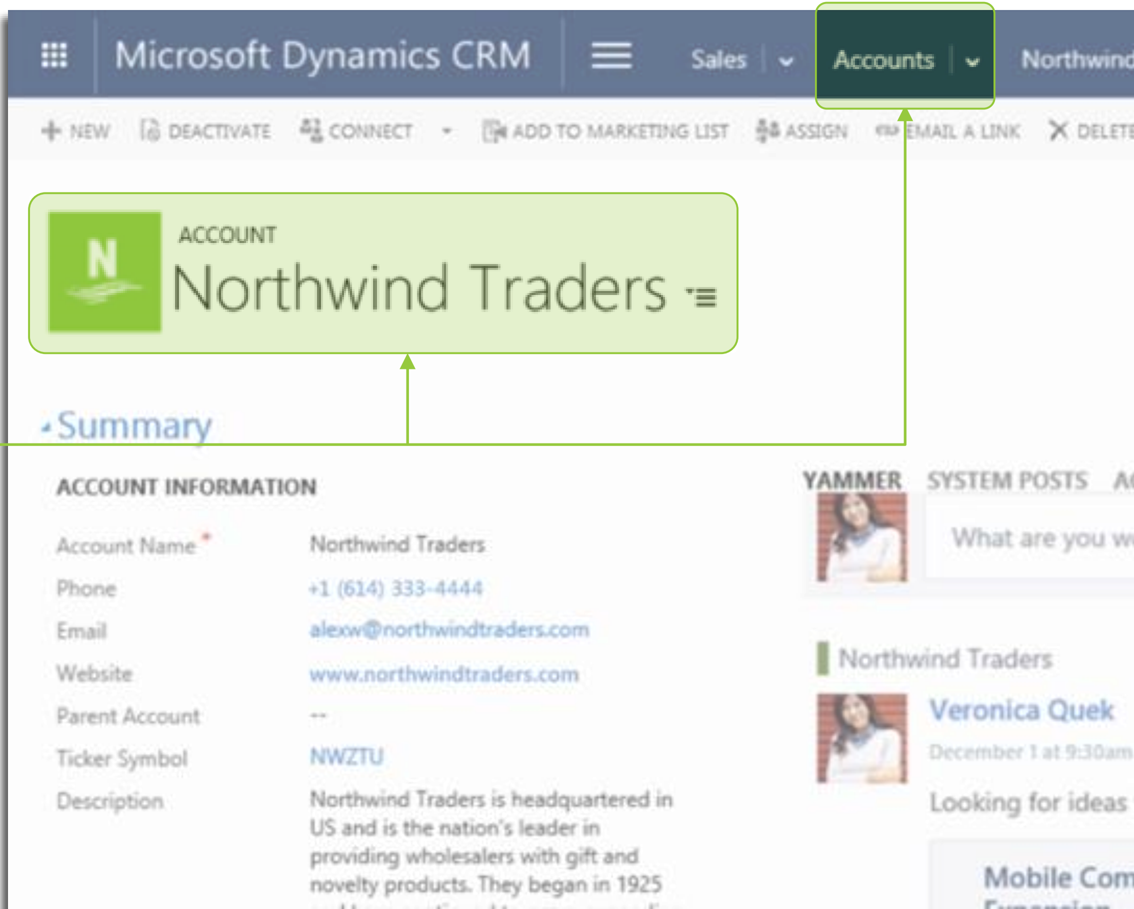
- Source: Craig Elias "Trigger Selling"

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.

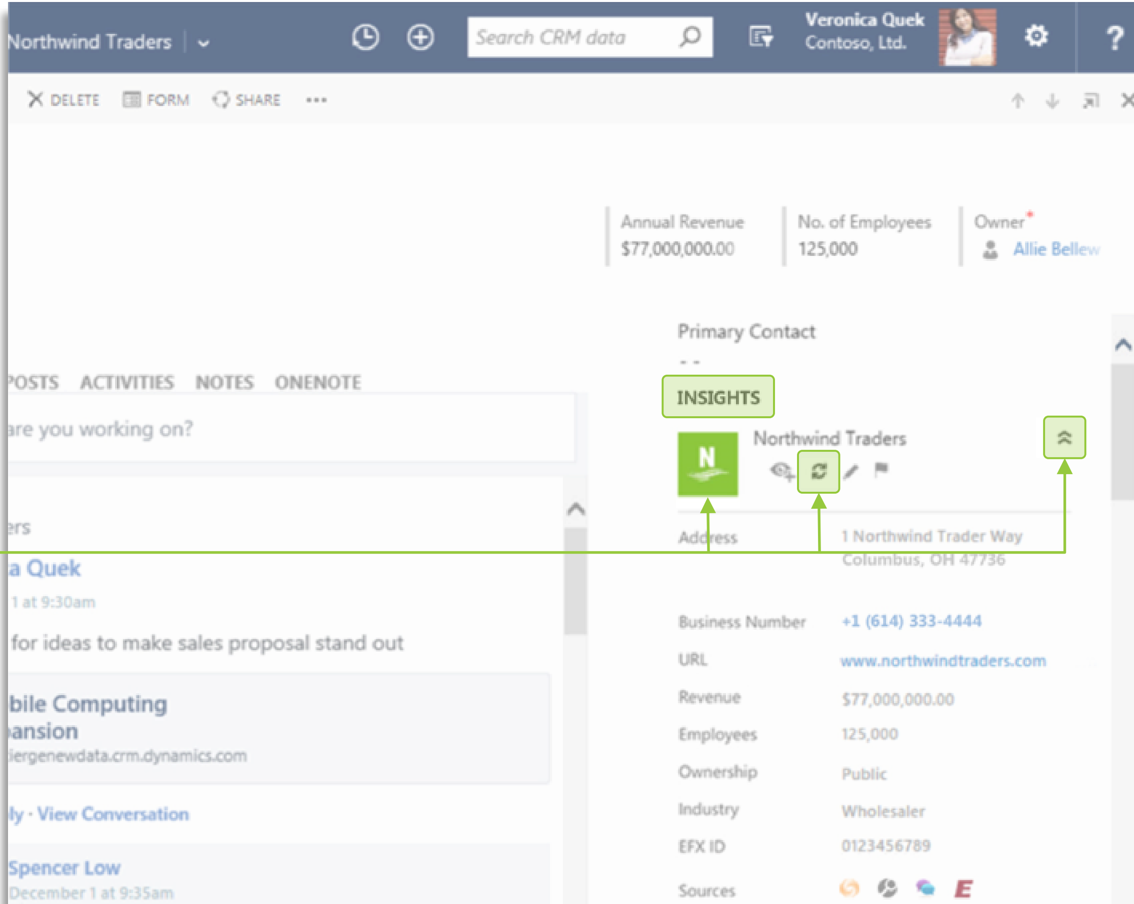


Step 1

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.



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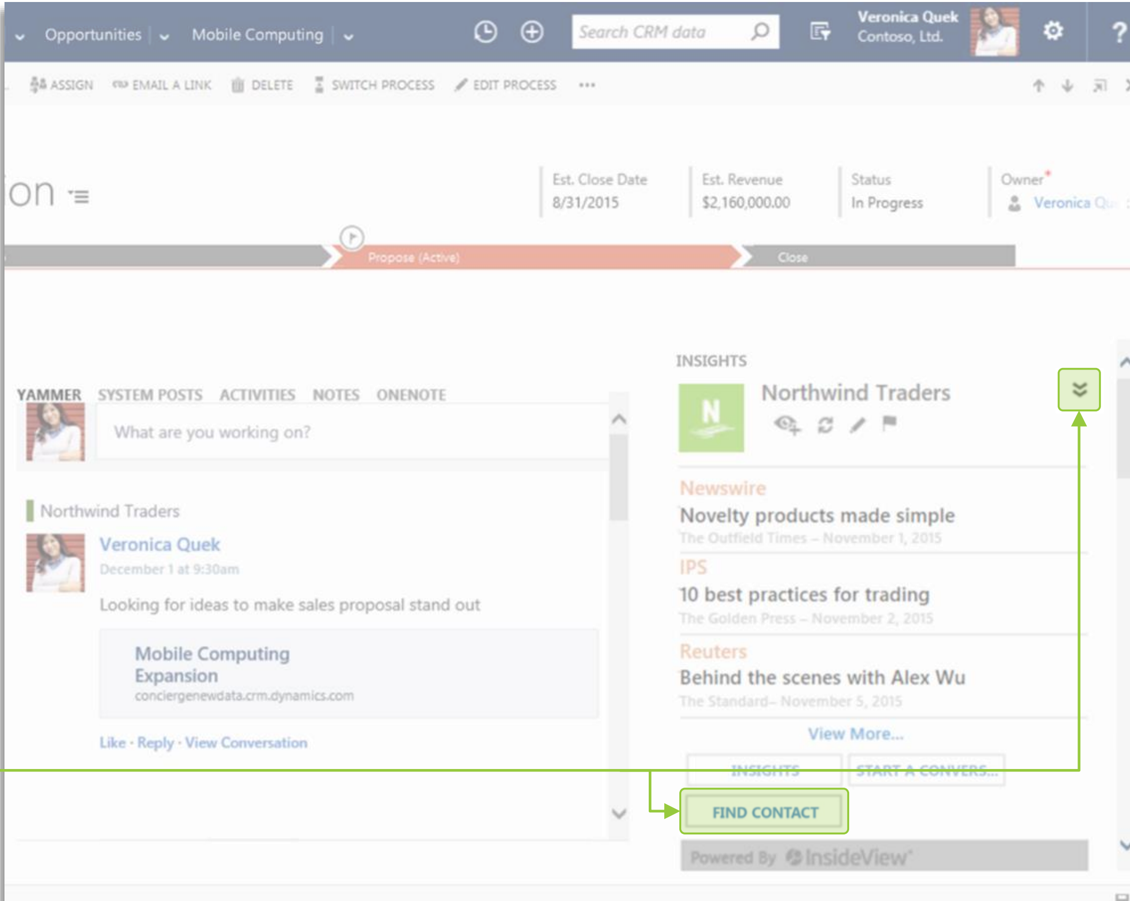
3 Click the **double chevron** at the top of the Insights panel to hide the firmographics, then click the **Find Contacts** button to open a larger window and find people within the account



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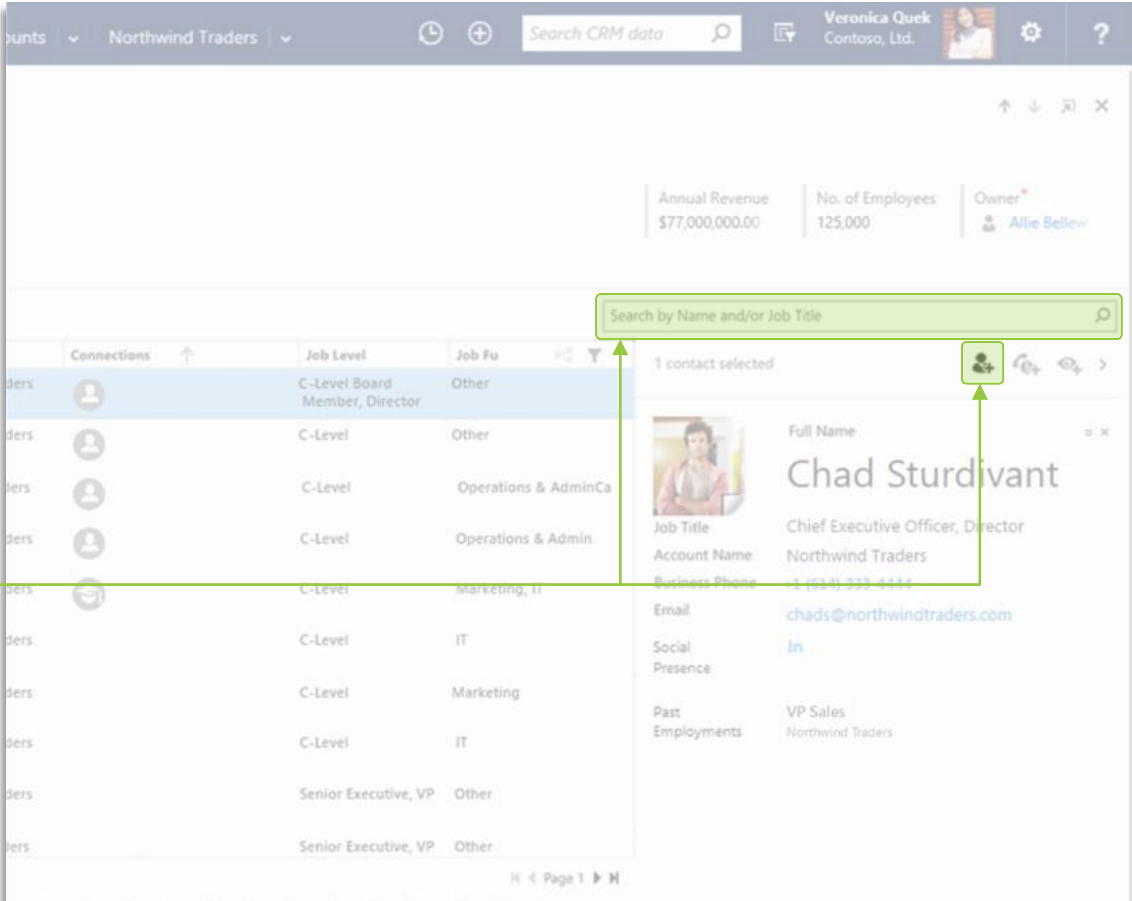
3 Click the **double chevron** at the top of the Insights panel to hide the firmographics, then click the **Find Contacts** button to open a larger window and find people within the account

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.



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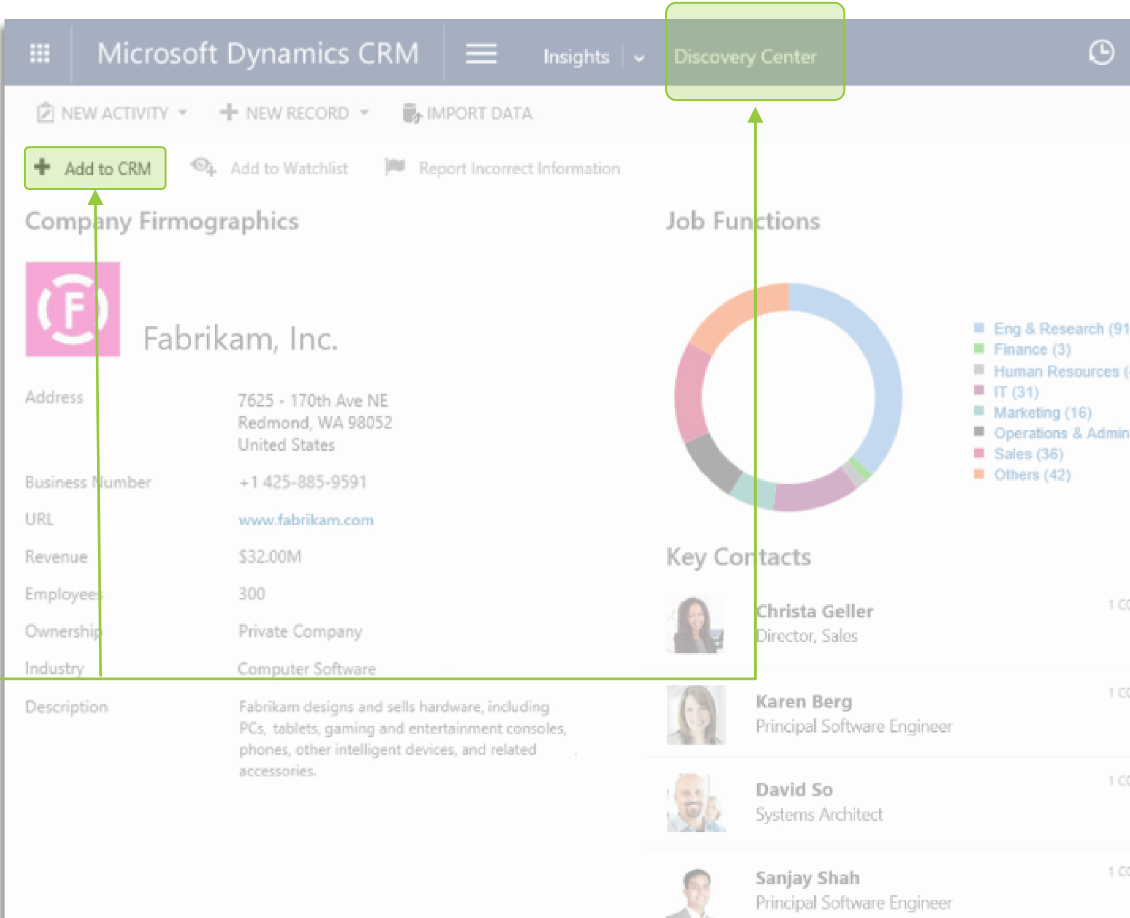
5 Alternatively, visit the Insights **Discovery Center**, found under Insights on the main CRM menu. There you can search for new prospects from the 12 million+ companies in the Insights database. Click on any to open an overview window and **Add to CRM**.

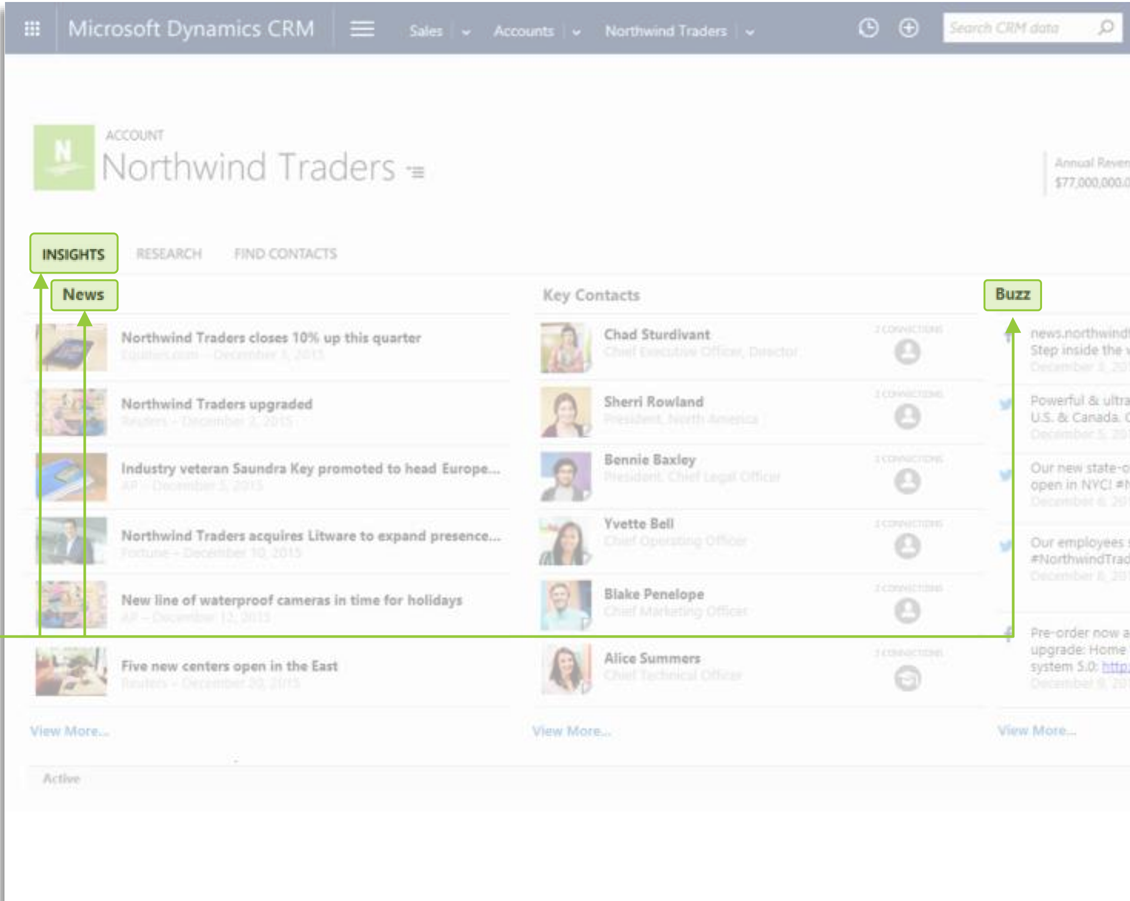


Step 2

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.



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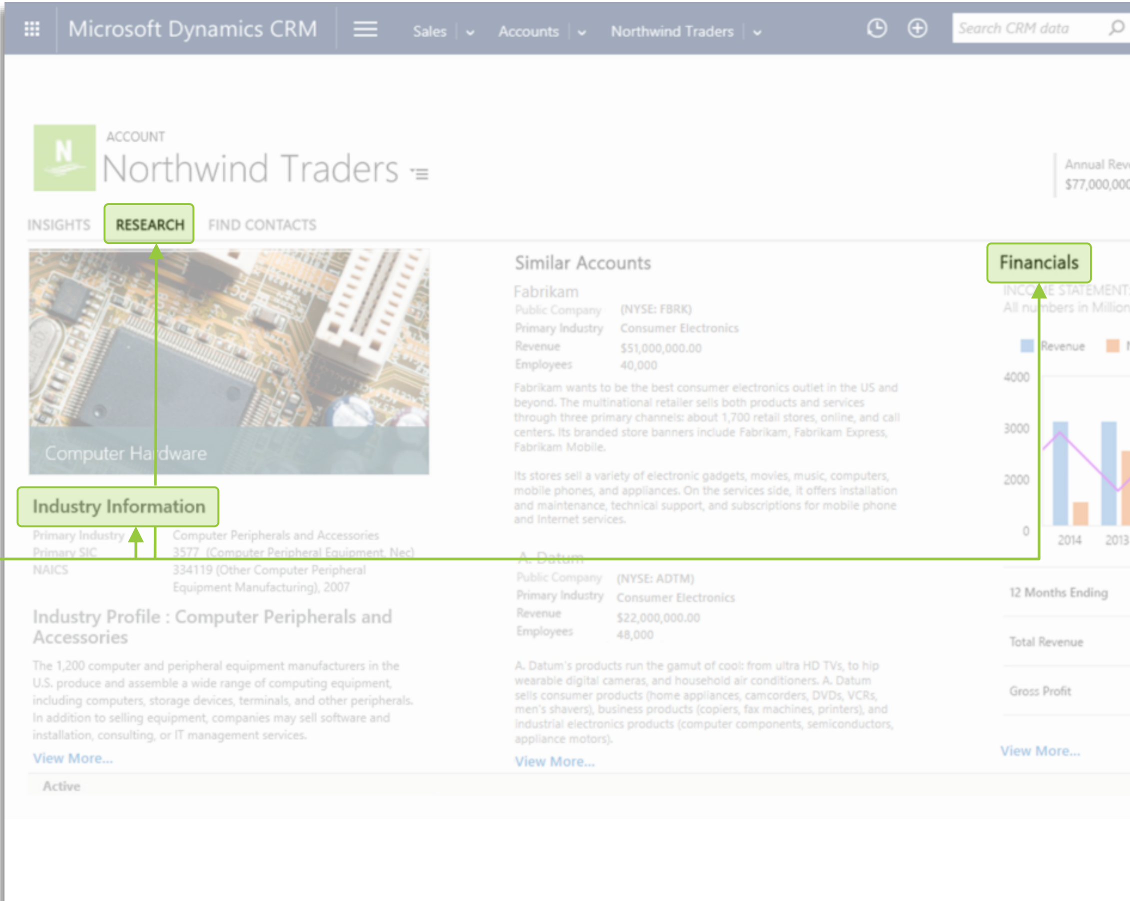
2 Scan the **Research tab** for deeper understanding of your prospect's industry and business to build rapport, earn trust, and close more, bigger deals

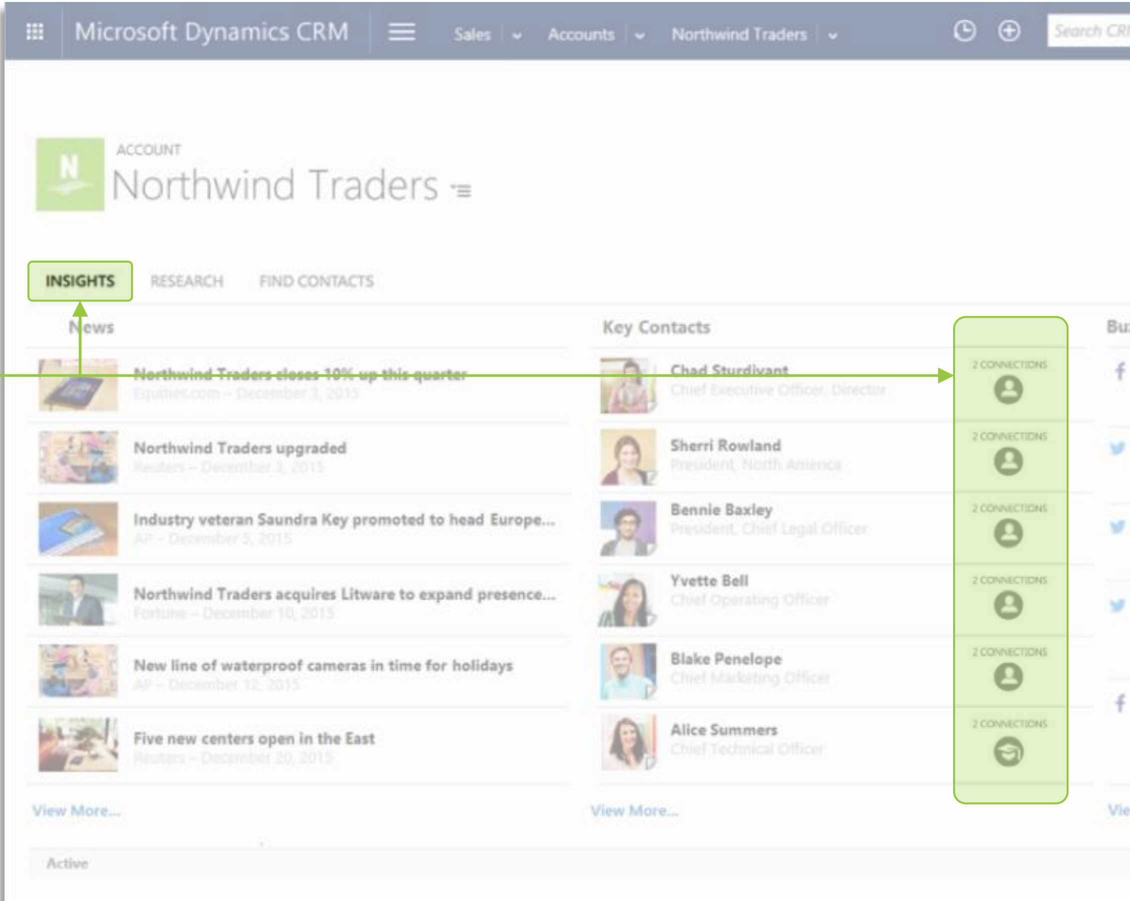


Step 3

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.



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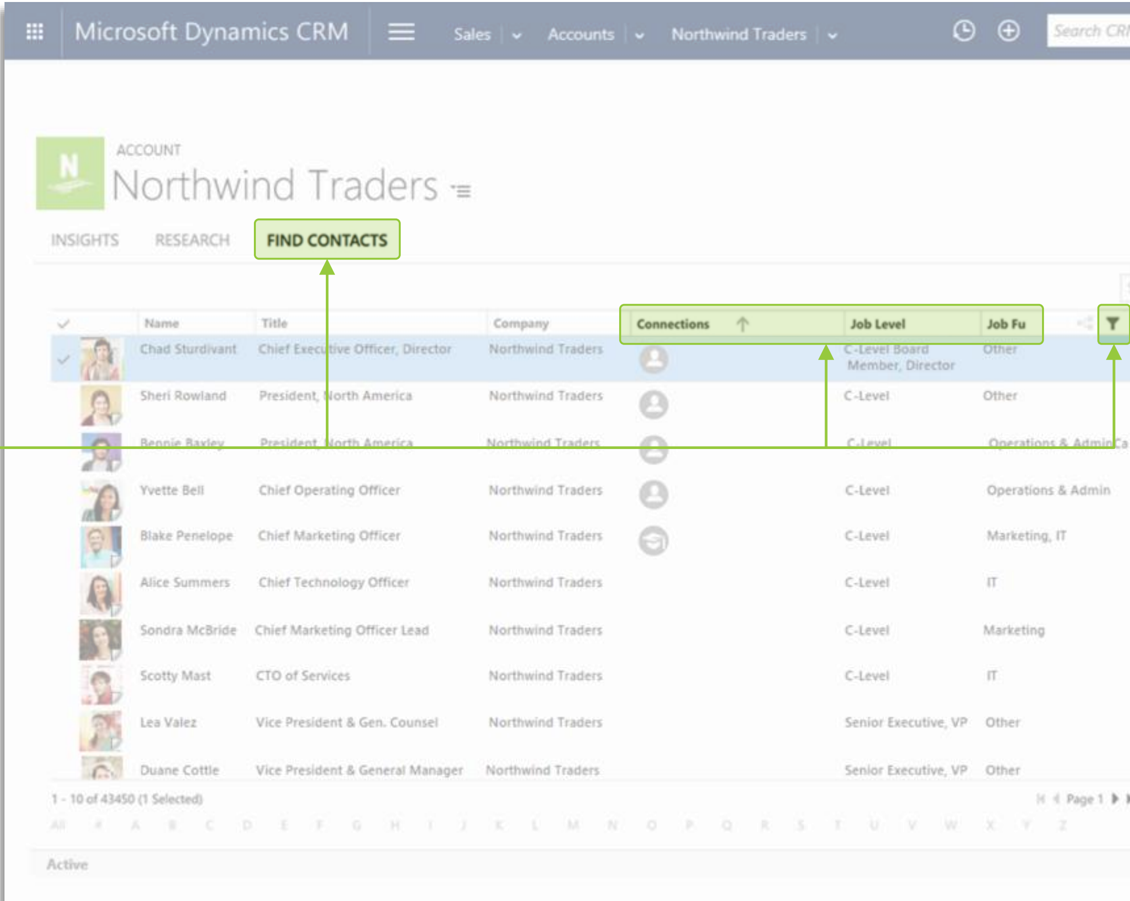
1 From the Insights tab, you can quickly see how many **connections** you have.

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.



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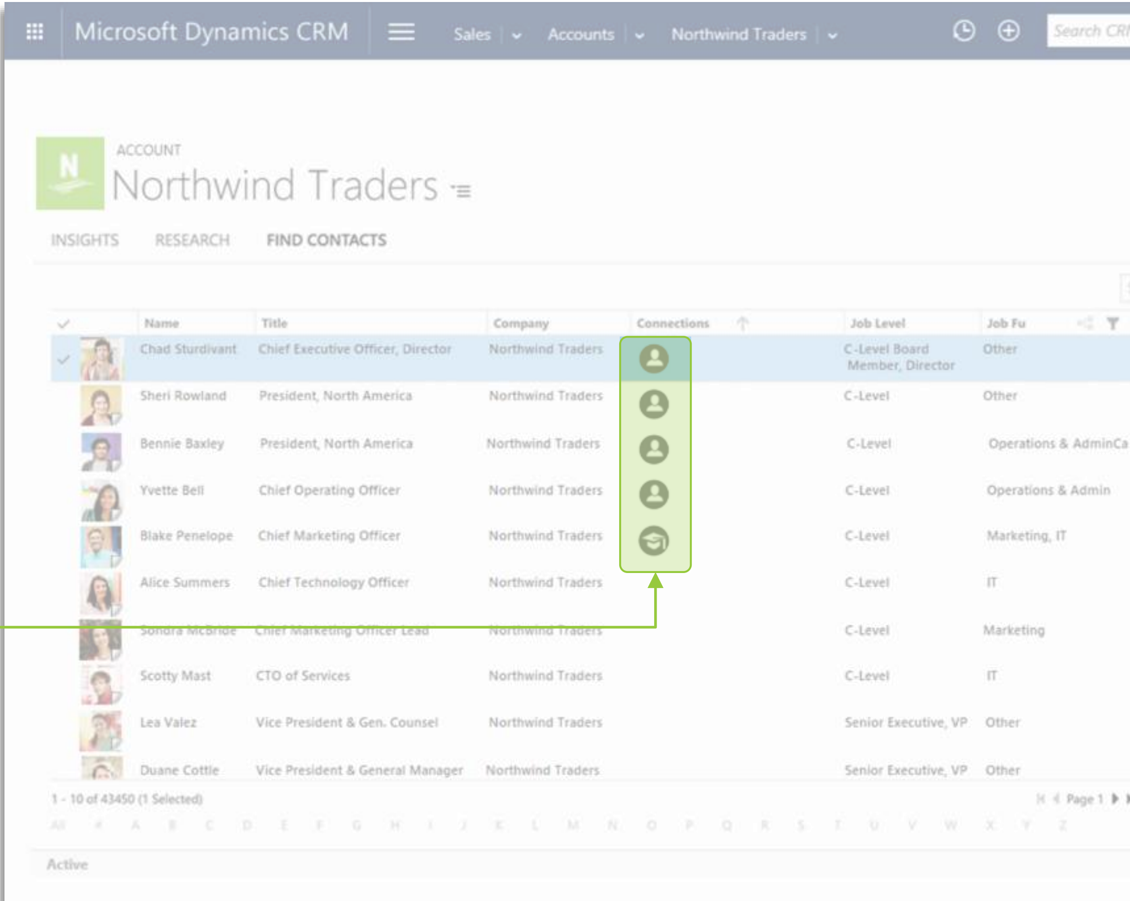

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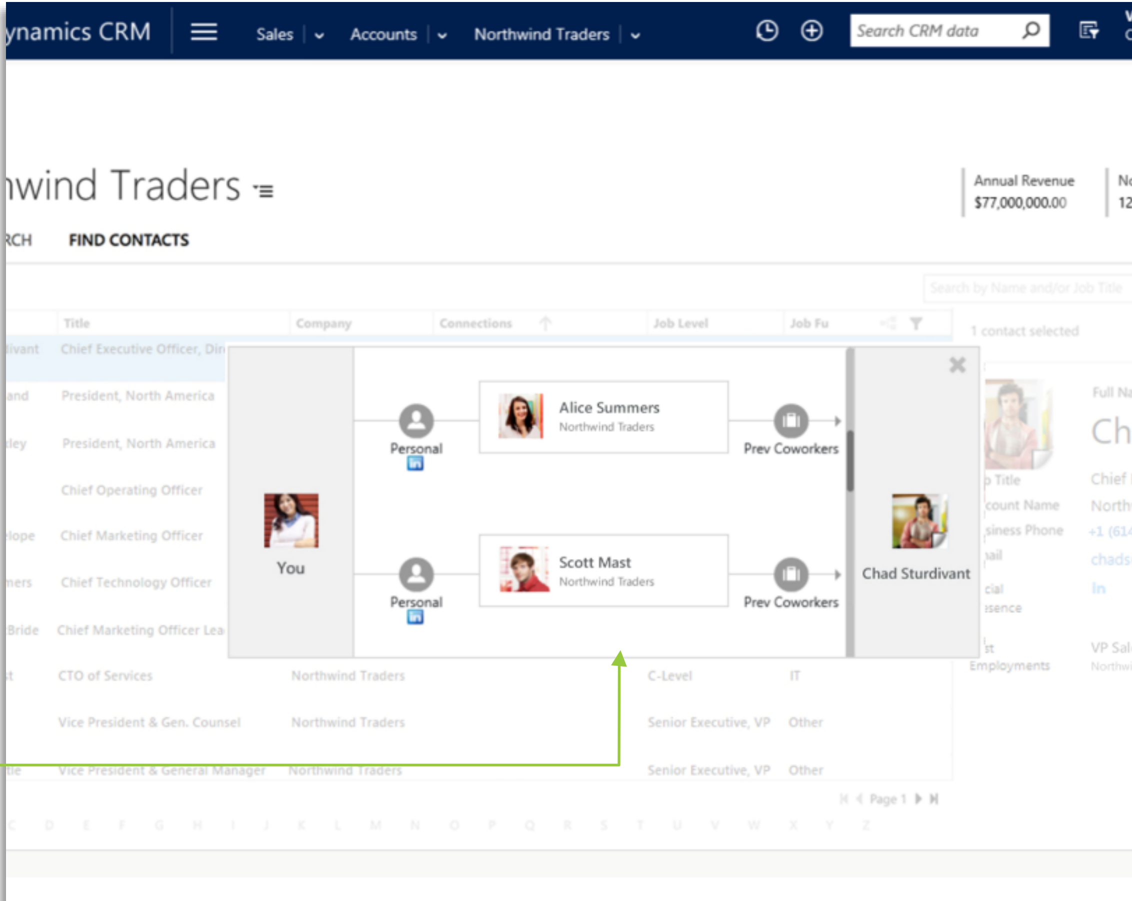
4 Finally, click on the connection icon to see details. Then use your **mutual connections** to ask for a warm introduction.



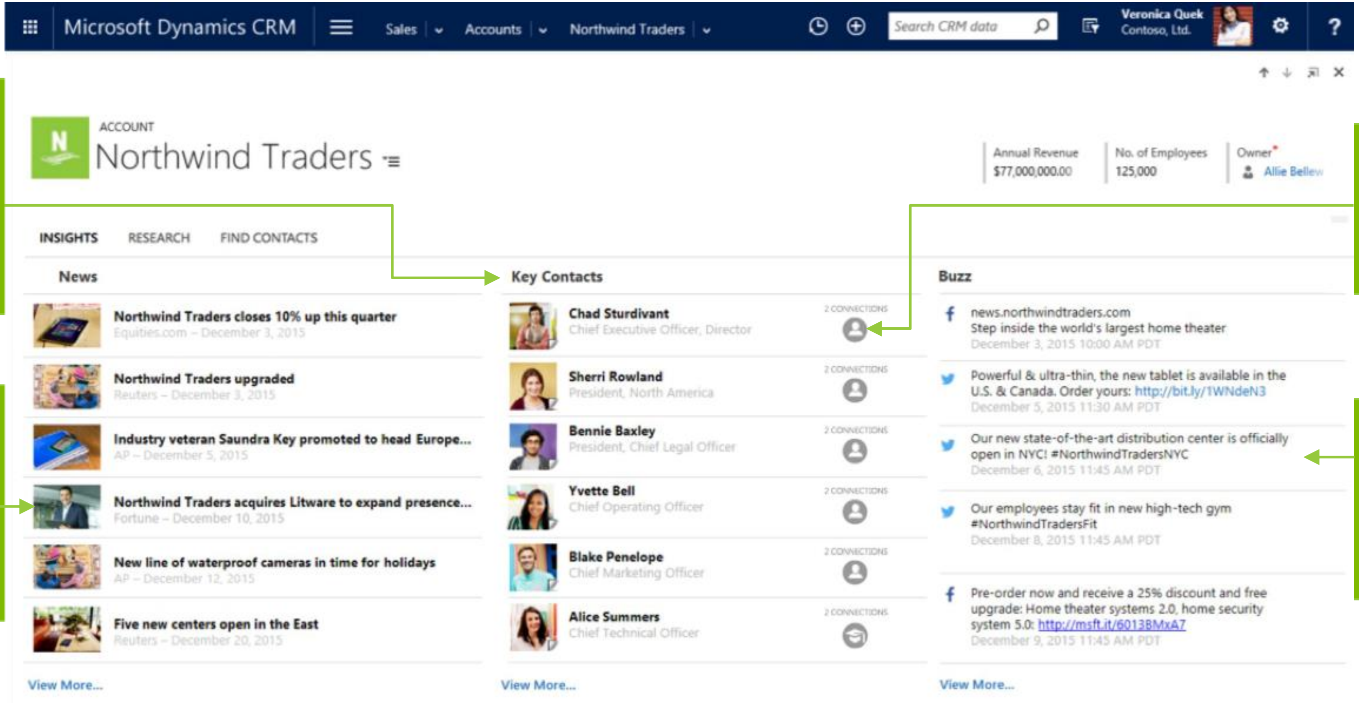
Put it all together to win.

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



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.

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