

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.

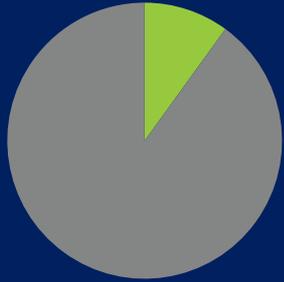
Buyers are demanding relevance and expecting sales people to know about them, their companies, and their needs before engaging. It's no longer enough to just have a connection to the buyer. The power of "who you know" is being trumped by "what you know about who you know."

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.

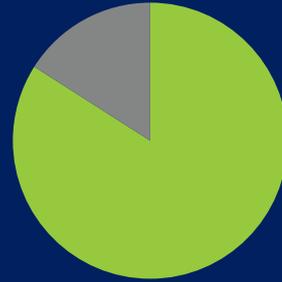


Being relevant works.



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 hamburger menu icon, and the 'Sales' dropdown menu. The 'Accounts' dropdown menu is highlighted with a green box, and a green arrow points from it to the 'Northwind Traders' account card. The account card features a green 'N' logo and the text 'ACCOUNT Northwind Traders'. Below the card, the 'Summary' section is visible, containing 'ACCOUNT INFORMATION' with fields for Account Name, Phone, Email, Website, Parent Account, Ticker Symbol, and Description. The 'Description' field contains the text: 'Northwind Traders is headquartered in US and is the nation's leader in providing wholesalers with gift and novelty products. They began in 1925'. On the right side of the interface, there is a 'YAMMER' section with a profile picture of a woman and a post titled 'What are you w...'. Below that, another profile picture of a woman is shown with the name 'Veronica Quek' and a timestamp 'December 1 at 9:30am'. A post titled 'Looking for ideas' is also visible. At the bottom right, there is a 'Mobile Com' section with the text 'Empower'.

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 | Search CRM data | 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: [Icons]

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 for an account named "Northwind Traders". At the top, there are navigation tabs for "Opportunities" and "Mobile Computing", a search bar for "Search CRM data", and user information for "Veronica Quek" at "Contoso, Ltd.". Below this, there are action buttons: "ASSIGN", "EMAIL A LINK", "DELETE", "SWITCH PROCESS", and "EDIT PROCESS".

The main content area shows account details: "Est. Close Date: 8/31/2015", "Est. Revenue: \$2,160,000.00", "Status: In Progress", and "Owner: Veronica Quek". A progress bar indicates the current stage is "Propose (Active)".

Below the account details is a "YAMMER" section with a post from "Veronica Quek" dated "December 1 at 9:30am" with the text "Looking for ideas to make sales proposal stand out". The post includes a link to "Mobile Computing Expansion" with the URL "conciernewdata.crm.dynamics.com".

On the right side, there is an "INSIGHTS" panel for "Northwind Traders". It features a "Newsire" section with articles like "Novelty products made simple" and "10 best practices for trading". At the bottom of the insights panel, there are buttons for "INSIGHTS" and "START A CONVERSATION...".

At the bottom of the page, there is a "FIND CONTACT" button. A green line with arrows points from the "FIND CONTACT" button in the bottom left to the "FIND CONTACT" button in the bottom right, and another green line points from the "FIND CONTACT" button in the bottom right to the double chevron icon at the top of the Insights panel.

Step 1

Find Prospects

- 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.

The screenshot displays the Microsoft Dynamics CRM interface for the account 'Northwind Traders'. At the top, the user 'Veronica Quek' is logged in. The main area shows a list of contacts with columns for 'Connections', 'Job Level', and 'Job Function'. A search bar at the top right of the list is highlighted with a green box and contains the text 'Search by Name and/or Job Title'. A green arrow points from the search bar to the 'Add New Contacts' button (represented by a person icon with a plus sign) in the top right corner of the contact details panel. The contact details panel for 'Chad Sturdivant' is open, showing his profile picture, full name, job title 'Chief Executive Officer, Director', account name 'Northwind Traders', business phone, email 'chads@northwindtraders.com', social presence, and past employment at 'Northwind Traders' as a 'VP Sales'.

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

Search by Name and/or Job Title

1 contact selected

Chad Sturdivant

Full Name

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

Page 1

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 'Discovery Center' is highlighted in a green box. Below the navigation bar, there are buttons for 'Add to CRM', 'Add to Watchlist', and 'Report Incorrect Information'. The main content area shows the profile for 'Company Firmographics' for 'Fabrikam, Inc.', including its address, business number, URL, revenue, employee count, ownership, and industry. To the right, a 'Job Functions' donut chart is shown, and below it, a 'Key Contacts' list features profiles for Christa Geller, Karen Berg, David So, and Sanjay Shah. A green line connects the 'Add to CRM' button to the 'Add to CRM' text in the text block on the left.

Job Function	Count
Eng & Research	91
Finance	3
Human Resources	(Count not fully visible)
IT	31
Marketing	16
Operations & Admin	(Count not fully visible)
Sales	36
Others	42

Contact Name	Job Title
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.

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: 'INSIGHTS', 'RESEARCH', and 'FIND CONTACTS'. The 'INSIGHTS' section is further divided into 'News' and 'Key Contacts'. The 'News' section lists several articles, including 'Northwind Traders closes 10% up this quarter', 'Northwind Traders upgraded', 'Industry veteran Sandra Key promoted to head Europe...', 'Northwind Traders acquires Litware to expand presence...', 'New line of waterproof cameras in time for holidays', and 'Five new centers open in the East'. The 'Key Contacts' section lists several individuals, including 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), and Alice Summers (Chief Technical Officer). A 'Buzz' section is also visible on the right side of the interface, showing social media posts related to the account.

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: FBRIK)
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.

Financials

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...](#)

INCOME STATEMENT
All numbers in Million

Revenue

4000
3000
2000
0

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.

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 tabs: 'INSIGHTS' (highlighted in green), 'RESEARCH', and 'FIND CONTACTS'. The 'INSIGHTS' tab shows a 'News' section with several articles, such as 'Northwind Traders closes 10% up this quarter' and 'Northwind Traders upgraded Reuters'. To the right, the 'Key Contacts' section lists several individuals, including 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). A green box highlights the '2 CONNECTIONS' indicator next to each contact's profile picture. A green arrow points from the text in the first list item to the '2 CONNECTIONS' indicator for Chad Sturdivant.

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

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 & Admin
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
Sondra 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.

Microsoft Dynamics CRM

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

- From the Insights tab, you can quickly see how many **connections** you have.
- 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.
- 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.
- 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 for the 'Northwind Traders' account. The top navigation bar includes 'Sales', 'Accounts', and 'Northwind Traders'. A search bar is present with the text 'Search CRM data'. The main content area shows a list of contacts under the 'FIND CONTACTS' tab. A modal window is open, showing a network diagram of connections. The diagram includes 'You' (represented by a person icon), 'Alice Summers' (Northwind Traders), and 'Scott Mast' (Northwind Traders), all connected to 'Chad Sturdivant' (Northwind Traders). The connections are labeled 'Personal' and 'Prev Coworkers'. A green arrow points from the text 'mutual connections' in the list to the connection icon between Alice Summers and Scott Mast.

Title	Company	Connections	Job Level	Job Fu
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.

The screenshot displays the Microsoft Dynamics CRM interface for the account 'Northwind Traders'. 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, such as 'Northwind Traders closes 10% up this quarter' and 'Northwind Traders acquires Litware to expand presence...'. The 'Key Contacts' section lists individuals like Chad Sturdivant (Chief Executive Officer, Director) and Sherri Rowland (President, North America). The 'Buzz' section shows social media posts from Facebook and Twitter, including 'news.northwindtraders.com' and 'Powerful & ultra-thin, the new tablet is available in the U.S. & Canada.'.

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.

1-800-477-7989