

A Quick-Start Guide to Accelerate Digital Selling




Over the last five years, brands have been making it easier for customers to shop and buy their products from anywhere and at any time. However, during times of rapid change, the difficulties organizations continue to face when it comes to digital selling come to the forefront.


This checklist targets common challenges that sales organizations face, with tips and tactics that can help. You won't find a lengthy list of to-dos—our goal is to provide you with a short set of concrete actions that will deliver the most impact, so your teams can sell seamlessly, wherever they are.


Choose your challenge

Click on the arrows to learn how to tackle each challenge.





We don't know what our customers need or how best to engage with them and move them through the sales funnel.

[Learn more](#) 





My team struggles to guide and collaborate with customers remotely.

[Learn more](#) 




We need help reducing our sales and marketing costs.

[Learn more](#) 



My teams need help working from remote locations.

[Learn more](#) 

To understand your customers' needs and move them down the sales funnel...



Learn [how Grant Thornton uses AI](#) to understand the health of client relationships and where new opportunities may lie, take actions based on those insights, close new opportunities faster, and win more deals.

Check off the tasks as you complete them.

- Build a comprehensive view of each customer relationship so you can engage with confidence.
- Predict near-term changes in demand and markets.
- Use survey and web forms to gather feedback and sentiment directly from customers and act quickly when you detect that a relationship is at risk.
- Track keywords to detect competitive shifts in real time.

To guide and collaborate with customers remotely...



Read how the [global Microsoft sales organization uses Microsoft Dynamics 365 Sales](#) to engage customers remotely.

Check off the tasks as you complete them.

- Equip your salesforce with video conferencing tools so they can communicate with customers and colleagues face-to-face, regardless of location.
- Manage timely communications and relevant customer journeys by having aligned sales and marketing platforms and integrated customer data to derive insights.
- Give salespeople the skills they need to be successful with remote and interactive coaching and training.
- Track customer relationship health to improve long-term relationships today and in the future.
- Stay informed and on-track with your customer's life event changes to reach out at the right time with the right message.

To optimize sales and marketing processes and reduce costs...

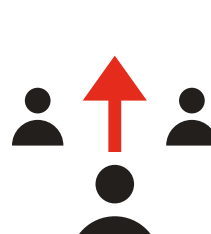


Take a self-guided tour to see how [Microsoft Dynamics 365 Sales and Marketing](#) can help you align sales and marketing with information and processes, modernize your sales organizations, and guide sellers through the process.

Check off the tasks as you complete them.

- Eliminate functional silos by unifying sales and marketing data with connected business processes to manage leads across the customer journey.
- Jointly plan complex buyer/customer journeys to effectively target accounts and prospects.
- Automate routine tasks to free up seller time and increase customer purchase volume.
- Maintain responsiveness by automatically routing and escalating customer requests.

To help teams work remotely...



Learn how to [accelerate digital selling with Dynamics 365](#).

Check off the tasks as you complete them.

- Keep customers informed with timely communications. Create campaign content with customizable templates for target segments, customer journey emails, and shareable sales collateral and knowledge articles.
- Keep the lines of communication open with your sales team by collecting continuous feedback.
- Identify and onboard sales resources to handle surges in demand, and re-skill and up-skill teams with online, interactive learning content.
- Gain real-time visibility into sales performance and provide insight-driven coaching.
- Provide real-time digital buying experiences with automated approvals and digital signatures.
- Give customers real-time inventory visibility to ensure fast and reliable order fulfillment while reducing out-of-stock or overstocked items.

Enable seamless, remote sales

Customers can shop and buy your products from wherever life takes them. It's time that your sales team can do the same. By fully embracing digital selling, you can empower your sales organization to effectively sell regardless of their location.

If you need help addressing your remote selling challenges or checking off the boxes on this list, our sales advisors are happy to help.