

# Sales and Marketing

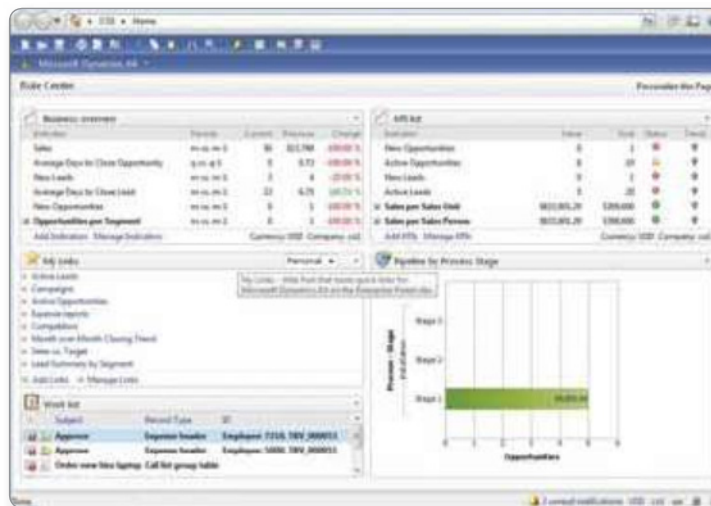
## Sales and Marketing in Microsoft Dynamics AX 2009

### BENEFITS

- **Improve customer relationships.** Get a real-time view of customer and prospect data with the ability to define relationships and track correspondence, phone logs, and automatically generated activities. Take advantage of that information to strengthen customer relationships.
- **Increase sales force productivity.** Identify and seize important sales opportunities with access to integrated sales information, and evaluate sales activities against the profitability of each segment or customer. Effectively manage your sales pipeline for increased closure rates.
- **Plan effective campaigns.** Simplify campaign planning, execution, and analysis by leveraging rich ERP data with definable processes that increase effectiveness and help control costs by measuring the success and profitability of each campaign.
- **Optimize sales by managing sales and marketing activities together.** Gain insight into customer needs, improve lead generation and qualification, and improve sales performance by combining sales and marketing information.

**Sales and Marketing in Microsoft Dynamics™ AX 2009 delivers powerful, integrated customer, sales, and marketing management capabilities that can help your people build and strengthen customer relationships and increase sales.**

With insight into business and customer information, you and your staff can proactively manage relationships and provide fast, informed answers to queries. Make smart marketing decisions, plan effective campaigns, and strategize for the future by analyzing individual and consolidated data on all business contacts to create precise target groups.



*Role Center for the Sales Manager*

Specialized sales and marketing Role Centers help organize relevant tasks, information, and tools so people manage their work easily. For example, sales managers can quickly find, visualize, and track key sales data, such as leads; wins and losses; and strengths, weaknesses, opportunities, and threats (SWOT) using RoleTailored reports and customized performance scorecards. Sales representative Role Centers display sales flow information, such as outstanding sales quotations, current offers, activities, and forecast data with links to related documents.

Alerts help your people keep on track, while links to familiar business productivity tools they already use, such as Microsoft® Office Outlook® and Microsoft Office Excel®, empower them to work productively.

## FEATURES

BUSINESS ESSENTIALS	<b>Unified communications</b>	<ul style="list-style-type: none"> <li>• Use presence information to collaborate easily with coworkers by sending e-mail or starting an instant message or phone conversation in Microsoft Dynamics AX.</li> </ul>
	<b>Global address book</b>	<ul style="list-style-type: none"> <li>• Streamline relationship management by defining and viewing relationships between customers, prospects, vendors, employees, competitors, and internal organizations, all from a single location.</li> </ul>
ADVANCED MANAGEMENT	<b>Role Centers</b>	<ul style="list-style-type: none"> <li>• Marketing Executive</li> <li>• Sales Manager</li> <li>• Super Sales Rep</li> <li>• Dedicated Sales Rep</li> <li>• Account Manager</li> <li>• Marketing Manager</li> <li>• Marketing Staffer</li> </ul>
	<b>Lead management</b>	<ul style="list-style-type: none"> <li>• Easily manage sales leads, create unique lead qualification processes, and turn leads into sales opportunities.</li> <li>• Reduce the time and expense of pursuing inappropriate deals, and create opportunities to close more sales.</li> </ul>
	<b>Opportunity management</b>	<ul style="list-style-type: none"> <li>• Expand opportunities by designing unique sales processes, creating quotations, and managing the sales pipeline.</li> </ul>
	<b>Hierarchical process templates</b>	<ul style="list-style-type: none"> <li>• Create reusable lead qualification, sales, and campaign processes.</li> <li>• Strengthen closure rates, manage pipeline data, and increase the return on marketing investments.</li> </ul>
	<b>Web-enabled CRM data</b>	<ul style="list-style-type: none"> <li>• Access core CRM functionality quickly with Enterprise Portal in Microsoft Dynamics AX.</li> </ul>
	<b>Microsoft Virtual Earth integration*</b>	<ul style="list-style-type: none"> <li>• Find locations quickly and build your customer base with Microsoft Virtual Earth™.</li> </ul>
	<b>Sales management</b>	<ul style="list-style-type: none"> <li>• Monitor and manage sales and measure revenue against sales targets in real time.</li> <li>• View graphs and reports from sales activities; analyze and report on sales, quotations, and other activities; and monitor the activities and performance of sales staff.</li> </ul>
	<b>Sales force automation</b>	<ul style="list-style-type: none"> <li>• Evaluate a given customer activity against profitability, and forecast and plan future revenue.</li> </ul>
	<b>Marketing automation</b>	<ul style="list-style-type: none"> <li>• Create marketing campaigns for any defined group of customers and prospects.</li> <li>• Quickly link campaigns and questionnaires, projects, and Web responses.</li> <li>• Automatically create follow-up activities and synchronize with Outlook for easy tracking and reminders.</li> <li>• Monitor ROI by linking campaigns to a specific project.</li> <li>• Broadcast campaigns via e-mail, Internet, fax, letter, or call list.</li> </ul>
	<b>Telemarketing/telesales</b>	<ul style="list-style-type: none"> <li>• Automatically map daily activities and receive automatically generated call lists.</li> <li>• Set telephones for automatic dialing and log call details.</li> <li>• Generate and execute custom call scripts based on questionnaire functionality.</li> <li>• Analyze and use call results to improve customer communications.</li> </ul>

\* A number of licensing and pricing options are available to accommodate your business requirements.

Features are organized by Business Ready Licensing edition. Actual editions may vary at the time of licensing.

**For more information about Sales and Marketing in Microsoft Dynamics AX, visit [www.microsoft.com/dynamics/ax](http://www.microsoft.com/dynamics/ax).**

This document is for informational purposes only.

MICROSOFT MAKES NO WARRANTIES, EXPRESS, IMPLIED, OR STATUTORY, AS TO THE INFORMATION IN THIS DOCUMENT.  
04/2008

**Microsoft**