

# 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

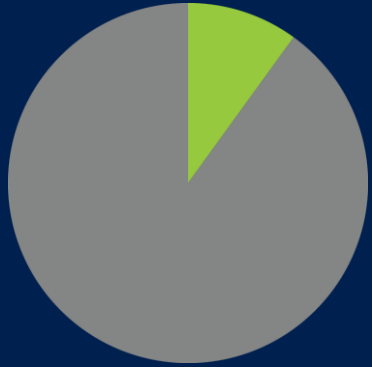
Being relevant and connected is the best way for sales teams to increase their chances of engaging with today's more informed, better connected, less responsive buyer.

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 about your prospects and leveraging it to connect in the most timely, relevant, and valuable way. Effective B2B selling requires intelligence that brings together both traditional data and social media.

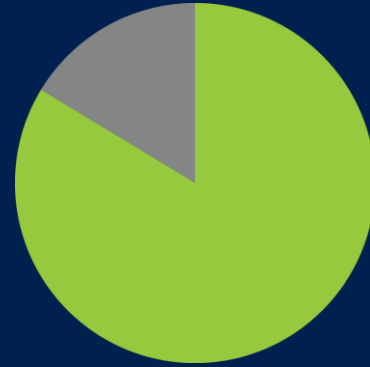
This guide will show you how to use Insights, powered by InsideView, for more effective B2B selling that will increase your engagement and win rates.

# 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.

# 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, extensive database of 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 30,000 news and social sources to provide you with realtime insights on the news and social activity of your prospects. Information is categorized based on relevance to you and alerts you to key events.

## Connections



Insights allows you to build a comprehensive network of your connections from a collection of social networks, including LinkedIn, Facebook, Outlook and others. The result is a more extensive and usable network that is private to you and your colleagues.

# Start Effective B2B Selling with Insights.

**Don't have Insights in your CRM? It's included with your Microsoft Dynamics CRM 2013 & 2015 Online Professional & Enterprise subscriptions for customers in the US and Canada. Click below to learn how to enable.**

[Get It Now](#) > Sell in the Now

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

- Find prospects using Insights' extensive database.
- Leverage relevant 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 Insight's massive database of companies and contacts and start finding prospects.

2



## Listen and Engage.

See all relevant news, 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.

## 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 going to the **Account tab** in Microsoft Dynamics CRM and select your target account or make a new one.

The screenshot displays the Microsoft Dynamics CRM interface. At the top, the navigation bar includes 'Microsoft Dynamics CRM', 'SALES', and 'Accounts' (highlighted with a green box). Below the navigation bar, there are action buttons: '+ NEW', 'DEACTIVATE', 'CONNECT', 'ADD TO MARKETING LIST', 'ASSIGN', 'EMAIL A LINK', and 'DELETE'. The main content area shows a profile for 'Microsoft Corporation' under the 'ACCOUNT' tab (highlighted with a green box). The profile includes a 'Summary' section and 'ACCOUNT INFORMATION' with the following details:

Account Name *	Microsoft Corporation
Phone	+1 425 882 8080
Fax	1-425-7067329
Website	www.microsoft.com
Parent Account	--
Ticker Symbol	MSFT
Description	Microsoft Corporation is engaged in developing, licensing and supporting a range of software products and services. The Company operates in five segments: Windows & Windows Live Division (Windows Division), Server and Tools, Online Services Division (OSD), Microsoft Business Division (MBD), and Entertainment and Devices Division (EDD). The Company's products include operating systems for personal

On the right side of the interface, there is a 'YAMMER' section with a text input field containing 'What are you working on?'. Below this, there are two posts: one by Mia Trefl and one by Theodore Kakos. The 'Active' status is visible at the bottom left of the interface.

## Step 1

# Find Prospects

1. Start by going to the Account tab in Microsoft Dynamics CRM and select your target account or make a new one.
2. Review the account information and refresh the **one-click sync**. Using up-to-date information significantly increases your chances of closing a deal.

The screenshot displays the Microsoft Dynamics CRM interface for an account. At the top, there's a navigation bar with a 'Create' button and the user's name 'Mia Trefl Contoso'. Below this, the account details are shown in a grid format:

Ownership Public	Annual Revenue \$91,505,000,00	No. of Employees 128,000	Owner* Mia Trefl
---------------------	-----------------------------------	-----------------------------	---------------------

Below the details, there's a section for 'Insights' with a refresh icon. To the right, there's a list of contacts with their names, titles, and a 'SYNC' button. The contacts listed are:

- Maxime Lohman, Chief Information Officer
- Philippos Hatzis, Chief Marketing Officer
- Anthony McLaurin, VP Marketing
- Milan Westerink, Chief Executive Officer

On the left side of the screenshot, there's a conversation history section with a text input field and a 'log out' button. A green arrow points from the 'one-click sync' text in the instructions to the 'Insights' button in the screenshot.

## Step 1

## Find Prospects

1. Start by going to the Account tab in Microsoft Dynamics CRM and select your target account or make a new one.
2. Review the account information and refresh the one-click sync. Using up-to-date information significantly increases your chances of closing a deal.
3. Review People in the Account record, and **sync new contacts** using Insights. Insights constantly monitors over 30,000 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 an account record. At the top, the user 'Mia Trefl' is logged in. The account details include: Ownership: Public; Annual Revenue: \$91,505,000,00; No. of Employees: 128,000; Owner: Mia Trefl. Below this, there is a conversation history with a message from 'ore Kakos' about a proposal. On the right, the 'Insights' panel is open, showing a list of contacts. A green box highlights the 'Maxime Lohman' contact, who is the Chief Information Officer. A green arrow points from the text 'sync new contacts' in the instructions to the 'SYNC' button next to Maxime Lohman's name. Other contacts listed include Philippos Hatzis (Chief Marketing Officer), Anthony McLaurin (VP Marketing), and Milan Westerink (Chief Executive Officer).

## 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. Expand the frame to see a **complete summary** of your prospect's activity.

INSIGHTS for Microsoft Dynamics CRM Search for company, person, or news

Activity Stream Watchlists Connections

**Microsoft Corporation** EXPORT UNFOLLOW

Public Company (NASDAQ:MSFT)

OVERVIEW PEOPLE BUZZ FAMILY TREE SIMILAR ACCOUNTS ...

Industry [Computer Software](#) | View Profile

Revenue(ttm) [\\$91,505.0M](#) | Financial Details

Employees [128,000](#)

Description Microsoft Corporation is engaged in developing, licensing and supporting a range of... | more

One Microsoft Way  
Redmond, WA 98052-6399  
United States  
[www.microsoft.com](http://www.microsoft.com)  
Phone +1 425 882 8080  
EFX ID 049615062

COMPANY INSIGHTS 30 DAYS

- 23 Leadership Chan...
- 187 New Offerings
- 53 Acquisitions
- 100 Partnerships
- 33 Expanding Opera...
- 10 Cost Cutting
- 12 Outperforming
- 10 Underperforming
- 40 Company Present...
- 47 Litigation
- 9 Compliance
- 10 Research & Deve...
- 106 Data Security

[Microsoft reveals plans to deliver cloud services from Australian datacent...](#)  
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4 Trader... - Nov 29, 2014 7:03:00 AM... | 2 more | Share

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[Microsoft Mobile Expands Smartphone Portfolio With Lumia 730, Lumia 830](#)  
Modern Gha... - Nov 25, 2014 9:25:00 AM... | Share

CONNECTIONS

You connect to 623 people

- [Maxime Lohman](#)  
Chief Information Officer
- [Philippos Hatzis](#)  
Chief Marketing Officer

Search for connections on LinkedIn

BUZZ

- [Minecraft Pocket Edition comes to Phone](#) <http://t.co/vOOJfsrMGP>  
<http://t.co/SQF15xVjkF>

## Step 2

## Listen and Engage

1. Click back to the Insights overview tab to see a complete summary of your prospect's activity. Click on the company name for a full profile.
2. Scroll down and use **Company Insights** to find relevant talking points and buying signals to act on.

INSIGHTS for Microsoft Dynamics CRM

Activity Stream Watchlists Connections

**Microsoft Corporation** EXPORT UNFOLLOW  
Public Company (NASDAQ:MSFT)

OVERVIEW PEOPLE BUZZ FAMILY TREE SIMILAR ACCOUNTS ...

Industry [Computer Software](#) | [View Profile](#)  
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[www.microsoft.com](http://www.microsoft.com)  
Phone [+1 425 882 8080](tel:+14258828080)  
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3. Scroll through the **results** to quickly see what's happening at the company. Click on any company Insight category to see more information.

INSIGHTS for Microsoft Dynamics CRM

Activity Stream Watchlists Connections

### Microsoft Corporation

Public Company (NASDAQ:MSFT) EXPORT UNFOLLOW

OVERVIEW PEOPLE BUZZ FAMILY TREE SIMILAR ACCOUNTS ...

Industry [Computer Software](#) | [View Profile](#)  
 Revenue(ttm) **\$91,505.0M** | [Financial Details](#)  
 Employees **128,000**  
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You connect to 623 people

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Search for connections on LinkedIn

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2. Scroll down and use Company Insights to find relevant talking points and buying signals to act on.
3. Scroll through the results to quickly see what's happening at the company. Click on any company Insight category to see more information.
4. Click on the **Buzz** tab to engage directly by reading and immediately responding to key social activities.

The screenshot displays the 'INSIGHTS for Microsoft Dynamics CRM' interface. At the top, there is a search bar with the text 'Search for company, person, or news'. Below this, navigation tabs include 'Activity Stream', 'Watchlists', and 'Connections'. The main content area is titled 'Microsoft Corporation' and 'Public Company (NASDAQ:MSFT)'. A green box highlights the 'BUZZ' tab, which is selected. Below the tabs, there is a search input field containing '@MSFTnews' and a 'View All' button. The search results are titled 'Search results for "@MSFTnews"' and list several tweets from Microsoft, including announcements about Minecraft Pocket Edition and travel apps. On the right side, there is a profile card for 'MICROSOFT' with a 'Follow' button and statistics: 10117 Tweets, 14847 Lists, 1211 Following, and 5774121 Follower.

## Step 3

# Connect and Win

Building connections in order to win the deal is essential. By leveraging your existing relationships to find new ones, you can ensure you have all your bases covered.

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

INSIGHTS for Microsoft Dynamics CRM

Activity Stream Watchlists Connections

## Microsoft Corporation

Public Company (NASDAQ:MSFT) EXPORT UNFOLLOW

OVERVIEW PEOPLE BUZZ FAMILY TREE SIMILAR ACCOUNTS ...

Industry	Computer Software   View Profile	One Microsoft Way Redmond, WA 98052-6399 United States <a href="http://www.microsoft.com">www.microsoft.com</a>
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### CONNECTIONS View All

You connect to **623 people**

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Search for connections on LinkedIn

### BUZZ All Buzz

Minecraft Pocket Edition comes to Windows Phone  
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Dec 10, 2014 8:00:02 AM PST | Microsoft

## Step 3

# Connect and Win

1. From the company overview tab, you can quickly see how many connections you have.
2. Click on "View All" to see the list of people you are connected to.

INSIGHTS for Microsoft Dynamics CRM Search for company, person, or news

Activity Stream Watchlists Connections

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## Step 3

# Connect and Win

1. From the company overview tab, you can quickly see how many connections you have.
2. Click on "View All" to see the list of people you are connected to.
3. You can filter connections by **Job Level**, **Function**, or **Connection Level** to quickly identify contacts important to you.

**Microsoft Corporation**  
Public Company (NASDAQ:MSFT)

EXPORT UNFOLLOW

OVERVIEW PEOPLE BUZZ FAMILY TREE SIMILAR ACCOUNTS ...

All Job Levels

- C-Level (25)
- Senior Executive (129)
- VP (70)
- Director (466)
- Manager (298)
- Other (777)
- Board Member (23)

All Job Functions

- Sales (269)
- Marketing (273)
- Finance (65)
- Human Resources (49)
- Eng & Research (134)
- Operations & Admin (208)
- IT (279)
- Other (742)

All People

Name and / or Title  🔍 Sort by: Relevance

1765 People

- Maxime Lohman**  
Chief Information Officer  
17 connections to Maxime
- Milan Westerink**  
Chief Executive Officer  
4 connections to Milan
- Anthony McLaurin**  
VP Marketing  
1 connection to Anthony
- Philippos Hatzis**  
Chief Marketing Officer  
1 connection to Philippos
- Amelia Fatnowna**  
Chief Financial Officer  
1 connection to Amelia

Load More

You connect to 51 former employees

Load

424 People across Family Tree

## Step 3

# Connect and Win

1. From the company overview tab, you can quickly see how many connections you have.
2. Click on "View All" to see the list of people you are connected to.
3. You can filter connections by Job Level, Function, or Connection Level to quickly identify contacts important to you.
4. For a complete connection list, click **Load More** at the bottom of the People section.

**Microsoft Corporation**  
Public Company (NASDAQ:MSFT)

EXPORT UNFOLLOW

OVERVIEW PEOPLE BUZZ FAMILY TREE SIMILAR ACCOUNTS ...

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Chief Financial Officer  
1 connection to Amelia

**Load More**

You connect to 51 former employees

**Load**

424 People across Family Tree

## Step 3

# Connect and Win

1. From the company overview tab, you can quickly see how many connections you have.
2. Click on "View All" to see the list of people you are connected to.
3. You can filter connections by Job Level, Function, or Connection Level to quickly identify contacts important to you.
4. For a complete connection list, click Load More at the bottom of the People section.
5. To the right of the contact's name, you will see how your are connected.

The screenshot displays the LinkedIn profile for Microsoft Corporation, specifically the 'PEOPLE' tab. The page shows a list of 1765 people associated with the company. On the left, there are filter options for 'All Job Levels' and 'All Job Functions'. The main list includes the following individuals:

Name	Title	Connections
Maxime Lohman	Chief Information Officer	17 connections to Maxime
Milan Westerink	Chief Executive Officer	4 connections to Milan
Anthony McLaurin	VP Marketing	1 connection to Anthony
Philippos Hatzis	Chief Marketing Officer	1 connection to Philippos
Amelia Fatnowna	Chief Financial Officer	1 connection to Amelia

At the bottom of the list, there is a 'Load More' button and a note: 'You connect to 51 former employees'. Below that, there is another 'Load' button and a note: '424 People across Family Tree'. A green box highlights the connection count for Maxime Lohman, and a green arrow points from the text in step 5 of the list to this box.

## Step 3

# Connect and Win

1. From the company overview tab, you can quickly see how many connections you have.
2. Click on "View All" to see the list of people you are connected to.
3. You can filter connections by Job Level, Function, or Connection Level to quickly identify contacts important to you.
4. For a complete connection list, click Load More at the bottom of the People section.
5. To the right of the contact's name, you will see how you are connected.
6. Use your **mutual connections** to make a warm introduction and start a conversation.

The screenshot displays the 'INSIGHTS for Microsoft Dynamics CRM' interface. At the top, there is a search bar with the text 'Search for company, person, or news'. Below the search bar, the navigation tabs include 'Activity Stream', 'Watchlists', and 'Connections'. The main content area is titled 'You have 17 connections to Maxime Lohman'. It shows a network diagram where 'You' (represented by a silhouette) is connected to 'Maxime Lohman' (Chief Information Officer at Microsoft Corp) via a 'Personal' connection. Two other individuals, 'Sharon Moser' and 'Lucas Icely', are also connected to 'You' via 'Personal' connections. Both Sharon Moser and Lucas Icely are highlighted with a green box, and their connection to Maxime Lohman is labeled 'Previous coworkers'. Below the network diagram, there are filter options for 'Human Resources (49)' and 'Eng & Research (134)'. At the bottom right, a partial view of another contact, 'Amelia Fatnowna' (Chief Financial Officer), is visible with a note '1 connection to Am'.

Put it all  
together to win.


Now you know...

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

INSIGHTS for Microsoft Dynamics CRM

Activity Stream Watchlists Connections


**Austin Wintle**





**VP Products**  
 Microsoft Corporation  
 Redmond, WA | View Colleagues


austin@microsoft  
 Corp. Phone +1 425 882 8080

1 CONNECTION TO AUSTIN


 **Olivia Prinsep**

 **AUSTIN WINTLE** View Profile

 **AUSTIN WINTLE**

 30 years of experience in cloud technology, mobile computing, and big data for the financial services industry

Redmond



**IN THE NEWS**

**Dynamics CRM 2015 Hits General Availability**  
 Redmond Channel Partner - Dec 1, 2014 3:41:59 PM PST

**Microsoft Dynamics CRM 2015, with Cortana integration, now generally available**  
 ZDNet - Dec 1, 2014 8:54:53 AM PST

58 Tweets

42 Lists

1225 Following

1395 Followers

Complete and accurate contact data delivered directly to you

Key events help you find relevant reasons to engage

Identify 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 by up to 84% with insights and connections.

# Reach out to learn more.

[www.microsoft.com/dynamics](http://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**