

Building a Clear Customer View: Collaboration Across the Business

Overcoming the Obstacles to Unifying Customer Data



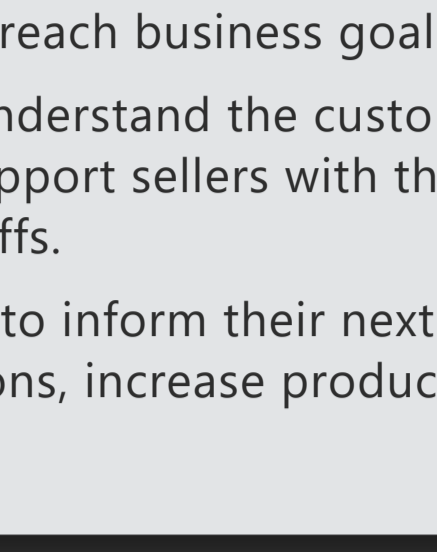
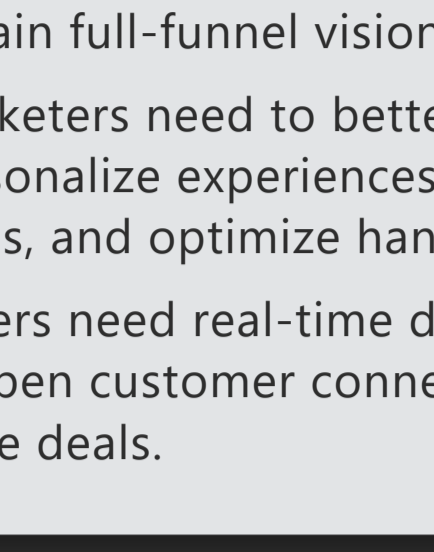
Success depends on your organization's ability to attract new customers and keep existing customers happy. Yet it's harder than ever to truly understand buyers. Today's digital-first buyers are engaging across channels and seeking out information alone or with their peers — rather than working through traditional sales channels.

This means marketing and sales teams need to understand who their customers are, where they are in their journey, and how best to engage them — on their terms. Business applications are at the heart of the effort, and can be used to create a hyper-connected sales and marketing environment where teams have the power they need to do exactly that — meet customers where they are.

The Challenge: Sales and Marketing are often Misaligned

The majority of sales and marketing teams have different goals, metrics, and key performance indicators (KPIs), and aren't oriented toward achieving revenue optimization. Eventually, these misalignments affect the customer's experience, overall perception of the company, and most importantly, satisfaction. In fact, LinkedIn found that for **85 percent**¹ of sales and marketing leaders, alignment is the largest opportunity for improving business performance today.

Sales professionals spend less than one-third of their time (30 percent) actually selling, spending more time on administrative and other non-revenue-generating duties.



Successful organizations drive change by empowering sales and marketing teams to transform the customer experience and gain full-funnel vision to reach business goals.

- Marketers need to better understand the customer, personalize experiences, support sellers with the best leads, and optimize hand-offs.
- Sellers need real-time data to inform their next steps, deepen customer connections, increase productivity, and close deals.

Today's Self-service, Digital-first Customer

Customers seek autonomy as they engage. They want digital first, immediate, self-service solutions. Once customers make the decision to engage with a salesperson, they expect the person to know their intentions, and will tune out one-size-fits-all interactions that make them feel like they're just another number. In fact, 80 percent of consumers say they are more likely to make a purchase when offered a personalized experience.

52%

In-person sales interactions dropped 52% during the pandemic, with just 29% of B2B companies now considering it their go-to-market sales model. — McKinsey²

3/5

3 out of 5 buyers are millennials (ages 25-39). Millennials are 2x more likely to discover products by searching online. — TrustRadius³

17-27

Digital interactions per purchase have increased with total number of interactions up from 17 to 27. The buying process has become more complex. — Forrester⁴

94%

Majority of B2B Buyers (94%) want personalized brand communications. — Gartner⁵

100%

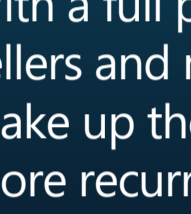
100% of buyers want self-serve options for at least part of the buying process, up 13% from 2021. — TrustRadius⁶

The Connected Sales & Marketing Solution



Already have organized, usable data? **Skip ahead!** >

1

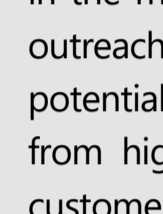


The journey starts with data, the foundation of success

Data is the key to turning relationships into revenue. But when data resides in silos, with disconnected tools and processes, it's impossible to derive meaningful and actionable insights. With a full picture of customer history, behavior and needs, sellers and marketers can personalize all the moments that make up the buying journey, leading to higher value and more recurring revenue.

Not quite there yet? Transform disparate data into centralized intelligence:

- [Hitachi Solutions Empower](#)

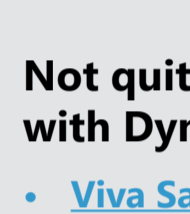


Retailers and wholesalers reach the right customers at the right time

Many retailers are using data and AI-infused analytics to gain real-time, eye-opening insights into customer behavior, campaign performance, website traffic, and other metrics. B2C and B2B sellers then use these insights to develop personalized and dynamic frameworks for high-touch, in-the-moment marketing. By tailoring outreach efforts to both current and potential customers, companies benefit from higher conversion rates, increased customer loyalty and retention.

On the sales side, AI-infused chatbots and virtual assistants can provide instant customer support, answer inquiries, and assist with product recommendations. Call center representatives can have the same detailed information and insights at their fingertips to address customer issues and concerns at the moment of contact.

2



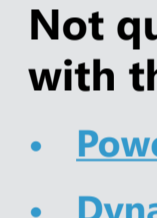
Empowering teams with a 360° customer view

With a unified, 360° profile, collaboration soars and sales and marketing teams begin to break down functional barriers, clear roadblocks, and deliver on the promise of an exemplary customer experience. When all customer-facing roles have a single version of the truth, lines of communication become seamless across departments and marketing can optimize lead handoffs to enhance nurturing and close deals.

Not quite there yet? Make collaboration a breeze with Dynamics 365 productivity tools:

- [Viva Sales](#)
- [Microsoft 365](#)
- [Microsoft Co-Pilot](#)

3

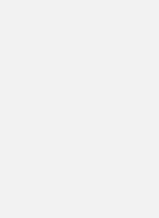


Automating processes for efficiency

With the right data, organizations can streamline the best experiences for each buyer to quickly advance the buyer to the next step of the sales process. Automated workflows can kick-off based on activities like a customer visiting a company's website or a change to a customer record in the CRM, and be set up to accommodate all the steps in the sales and marketing process so there won't be gaps in the sales process or the customer journey. Sellers can focus more time on customers, closing deals, and building relationships as trusted consultants, and customers get a better experience, and employees can do the work that most directly affects revenue and ROI.

Not quite there yet? Automate processes and tasks with the low-code ease of Power Platform:

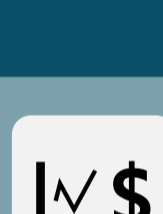
- [Power Automate](#)
- [Dynamics 365](#)



AEC companies modernize the quoting and proposal process

Struggling with a slow sales process, one AEC company used automated workflows to streamline the creation of quotes and proposals with automated retrieval of current customer terms and conditions, relevant pricing or delivery details, and even content suggestions based on past successful proposals. By integrating templates, content libraries, and project data, the system can quickly generate accurate proposals, reducing manual effort and turnaround time, and improving sales efficiency.

4



Tailoring experience for increased sales

Personalization is more than just using a customer's name in an email. AI personalization can be used to create personalized brand messaging, content, products, and services, resulting in more profitable customer journeys. Now companies can predict when individuals are going to make their next purchase through the use of CRM apps and AI technology. With this precise data, messaging can include order recommendations as well as exclusive offers or promotions, creating more personalized, tailored messages to customers who are likely to purchase.

Not quite there yet? Personalize marketing outreach a fully-functional AI-infused customer data:

- [Data Management](#)
- [Microsoft Co-Pilot](#)

5



Harnessing data for actionable insights

Accurate forecasting can make a critical difference in customer satisfaction levels and a company's ability to retain customers and keep them happy. Using automated predictive analytics, companies are identifying the patterns and indicators that influence consumer actions and, in turn, creating better forecasts. When sales and marketers understand what motivates customers to make buying decisions, they can create more high-value, high-conversion campaigns and eliminate the risk of human error.

Not quite there yet? Supercharge your demand forecasting with powerful data analytics:

- [Data & Analytics](#)



Manufacturers better align to customer need

In the manufacturing industry, predictive analytics are helping manufacturers forecast demand far more accurately so they can optimize inventory levels, minimize their production costs, and better meet customer expectations. For example, predictive analytics can identify patterns and indicators that suggest a customer is at risk of churning or switching to a competitor, and manufacturers can proactively intervene with targeted retention strategies, such as personalized offers or proactive customer service, to reduce churn rates and improve customer loyalty.

6



Bringing it together for success

Within all industries, enormous opportunities exist to use data to create value. The key elements to creating value-driven experiences—unified data, collaboration, automation, analytics, and personalization—all provide a much deeper understanding of customers and help orchestrate an end-to-end customer experience.

When you have data on your side, you can measure and improve the effectiveness of all your marketing and sales-related activities, concentrating on a customer experience that will return results.



According to a report by McKinsey, digital transformation can increase a company's revenue by up to 20 percent and reduce costs by 30 percent.

Sales and Marketing for the Future

To surpass customer expectations, begin by enhancing your understanding of your customers and uncover how Hitachi Solutions and Microsoft enable organizations to unlock personalized and exceptional experiences

An Intelligent, Full-funnel Sales and Marketing Solution

Built on secure, trusted, and compliant Microsoft Azure cloud



Work in concert with real-time signals from all touchpoints to deepen customer relationships, accelerate revenue, and get customers to 'yes' faster



Connected Sales and Marketing



Dynamics 365 for Sales and Dynamics 365 for Marketing share the power of the same platform and common data for a comprehensive customer profile

Troubleshoot journeys to identify friction points, gain insights into audience behavior and tailor marketing efforts



Automation streamlines sales cycles to increase efficiency and provide accurate and precise control of the customer experience

Start Your Connected Sales & Marketing Journey Today!

The next wave of digital transformation hinges on a company's ability to create integrated, moments-based journeys for consumers and use the data and feedback from those interactions to continuously evolve. Hitachi Solutions and Microsoft can help you close the gap between your sales and marketing departments with cloud-based modern solutions that ensure you can deliver clear, consistent, and personalized messaging to your customers.

With our expertise in real-time marketing and cross-channel orchestration, we can help you connect your organization's touchpoints and break down information silos, resulting in a more effective customer experience engine. Don't miss the opportunity to revolutionize your customer insights and achieve sustainable business success.

[Connect](#) with a Hitachi Solutions sales and marketing expert

[Learn](#) more about connected sales and marketing

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Sources:

¹ Moments of Trust

² How COVID-19 has changed B2B sales forever

³ How to Sell to Millennial B2B Buyers

⁴ Three Seismic Shifts in Buying Behavior

⁵ Critical Capabilities for B2B Marketing Automation Platforms

⁶ 2022 B2B Buying Disconnect: The Age of the Self-Serve Buyer

⁷ Getting digital transformation right in resource-heavy industries