

Hitachi Solutions



The AI-Powered Salesperson:

How Leading Sales Teams
are Thriving by Embracing AI



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Introduction



Today's sales landscape is a whirlwind of change.

Your buyers are more digitally savvy than ever, expecting personalized experiences across nearly every touchpoint. To thrive in this rapidly evolving environment, you need groundbreaking solutions to empower your teams for success.

The AI Advantage: How AI Transforms the Sales Process

Artificial Intelligence (AI) is a powerful tool that can be used to propel your sales teams to new heights. In the right hands, AI promises an arsenal of intelligent capabilities that can empower sales professionals:

- **Personalization:** Your sales professionals can be equipped with real-time customer insights to personalize outreach and conversations. This fosters stronger connections and boosts conversion rates. AI can help to analyze and curate customer data, past interactions, and online behavior to predict customer needs and recommend tailored content or product offerings.
- **Process Automation:** AI can automate tedious tasks like CRM data entry, and customer tracking. This frees your sellers to focus on building relationships and closing deals. AI-guided data entry leads to clean and largely accurate CRM data, while AI-powered forecasting provides valuable insights into your sales pipeline health and potential roadblocks.
- **Predictive Analytics:** AI-powered analytics can predict your sales outcomes with remarkable accuracy. This allows you to make data-driven decisions to prioritize your resources based on predicted deal probability and allocate time and effort towards leads with the highest potential for closing.



Transform your customer engagement with Hitachi Solutions

As a strategic Microsoft partner for nearly 20 years and a global systems integrator with leading Microsoft applications and technologies capabilities, Hitachi Solutions is well-positioned to support global sales teams to thrive by embracing AI. As part of Hitachi, Ltd.—one of the largest organizations in the world—we bring a wealth of industry experience to maximize the opportunity to transform your business's sales pipeline by harnessing AI technology.

Our skilled professionals deliver end-to-end business transformation by guiding our customers through each and every phase of their implementation. We are powered by two decades of experience to support and accelerate company-wide data and business system modernization initiatives.

With Hitachi Solutions as your guide, we can accelerate your journey to business value. As [2024 Microsoft Partner of the Year](#), we are experts at helping you get the most value from all your Microsoft investments.



Your Next Step to Understanding How AI Can Transform Your Sales Team

CRM Vision and Value Workshop

Today's organizations need advanced AI-powered tools to empower their sellers, no matter where they are. If your customers are powered by the latest technology in their industries, should your sales team still be reliant on manual processes and legacy systems to meet their needs?

By embracing AI-powered tools, your organization can reap the benefits of the industry's revolutionary technology and drive tangible growth in your annual sales figures.

Our CRM Vision and Value Workshop is your key to unlocking a future of groundbreaking sales strategies. It empowers your teams to personalize conversations, automate tasks, and leverage data-driven insights for superior performance while taking collaboration to new levels.

During this unique two-week engagement for your organization, we'll help you envision revolutionary solutions to your biggest challenges by asking and exploring thought-provoking questions like "What if..." and "Imagine if..."

What you'll receive:

- **A prescriptive Needs Assessment for CRM migration to Dynamics 365 Sales:** We'll provide a Gap analysis and uncover desired business outcomes, measures of success, and solution priorities. We'll also challenge the status quo and spark innovation to revolutionize the way your teams sell and serve.
- **Envisioning Session—The Art of the Possible:** We'll create a vision for your AI-powered sales transformation and showcase the value of migrating to Dynamics 365 Sales.
- **A Project Plan:** We'll create a standard business value analysis and proposal for your CRM migration, providing you with a project blueprint and boardroom-ready business case.

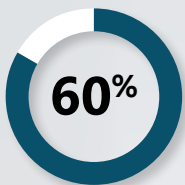
Your Path to AI-Driven Sales Transformation



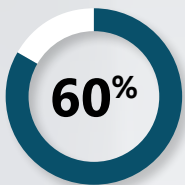
Our workshop will highlight the strategic advantage of AI, unlock your organization's specific strengths, and empower your sales team to perform at their best in the digital age. Together, we will create a practical step-by-step roadmap for your sales teams to embrace AI and overcome change resistance fully.

Your sales teams need a solution purpose-built for the AI-powered era. This solution offers streamlined workflows, powerful AI features, and seamless integration for a truly optimized sales experience. By partnering with Hitachi Solutions and implementing Microsoft Dynamics 365 Sales, your organization can set the pace and drive transformative sales for years to come.

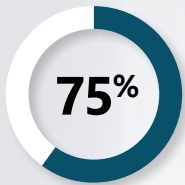
These were some of the findings of a [recent Microsoft survey](#) that examined the ways in which people work:



Nearly 60% of employees say their collaboration tools are clunky and don't work the way their teams need them to.



More than 60% say these tools don't connect with their daily tasks, making teamwork harder.



Almost 75% wish their collaboration tools could work together seamlessly.



Many employees struggle with inaccurate data, limited access to information, and working with different versions of the same data.

When asked what would work best for them, 86% pointed to the same solution: a single, centralized platform or portal where teams can collaborate in multiple ways.



A man and a woman are sitting at a desk, looking at a laptop. The man, on the right, is wearing glasses and a light blue blazer over a blue shirt. He is smiling broadly. The woman, on the left, has long brown hair and is also smiling. They appear to be in a professional setting, possibly a sales or marketing team. A dark blue semi-circular overlay is positioned in the lower-left corner, containing white text.

**Ready to see
the difference in
an AI-powered
sales force?**

Leveraging AI can significantly enhance your sales teams' performance and personalization efforts. This sounds great, but what does it look like in the real world?

Here are some practical steps that can bring the power of AI directly into your sales processes:

1. Automate appointment setting:

- Use AI tools to qualify leads and set calendar appointments.
- Let AI confirm and reschedule appointments, freeing up your sales reps' time.

2. Personalize customer interactions:

- Employ behavior analytics (e.g. Hotjar heatmapping) to identify high-interest areas on product pages.
- Use AI tools (e.g. Dynamic Yield) to suggest complementary products based on user behavior.

3. Lead enrichment:

- Use AI to append additional data to leads, providing more context for personalized outreach.
- Understand leads better and tailor your approach based on enriched information.

4. Predictive lead scoring:

- Implement AI-driven lead scoring to prioritize high-potential, sales-ready leads.
- Focus your efforts on engaged prospects that match your ideal customer profile.

5. Automate data management:

- Leverage AI to handle data entry, lead enrichment, and scheduling tasks.
- Maintain accurate and up-to-date CRM records without manual effort.



Roadblocks to Sales Success



How Your Legacy CRM Solution is Holding You Back

While leading CRM platforms offer a foundation for managing customer relationships, they can struggle to keep pace with the demands of modern sales processes. Cumbersome workflows can slow down the sales process, hindering the efficiency of your teams. Additionally, many CRM systems lack robust built-in AI capabilities, which means tasks like data entry are usually manual, leading to inaccuracies and the loss of valuable sales intelligence.

The absence of advanced AI features can limit your personalization efforts and automation potential. These limitations can be particularly challenging for larger organizations with numerous users, as subscription costs can become significant. Complex customization processes and integration issues with your other business systems can create further frustration.

Additional challenges with an outdated CRM solution:

- **Integration issues:** Your team may be utilizing a complex web of disparate tools (CRM, marketing automation, email platforms, etc.) Ensuring seamless integration between these tools can be a significant hurdle and data silos can form if information doesn't flow freely. This can hinder visibility and create reporting difficulties.
- **Tool overload and user adoption:** When your sales reps are bombarded with too many sales tools, learning and mastering multiple platforms becomes overwhelming. This leads to low user adoption and an inevitable return to legacy methods. As a business leader, you must prioritize tools that integrate well and offer clear value to users.
- **Data quality and inaccuracy:** The effectiveness of any sales technology hinges on clean and accurate data. Manual data entry could be error-prone, which leads to inaccurate reporting and hinders your ability to generate valuable sales insights.
- **Lack of customization:** "Off-the-shelf" sales technology solutions might not perfectly align with your company's specific sales process or workflows. Limited customization options can restrict technology effectiveness and hinder your sales teams' efficiency.
- **Security concerns:** Sales technology solutions often store sensitive customer data. Ensuring robust data security measures are in place is critical to protect your confidential information and comply with data privacy regulations.

A woman with long brown hair, wearing a light blue button-down shirt, is sitting at a desk in an office. She is looking up and to the right with a slight smile, while her hands are on a laptop keyboard. The background is a blurred office interior with large windows.

Microsoft Dynamics 365 Sales

Seize the Advantage with AI

Microsoft Dynamics 365 Sales, powered by cutting-edge AI and Copilot capabilities, empowers your sales team to deepen customer relationships, close deals faster, and simplify the sales process.

Key Benefits

- **Deepen customer relationships:** Gain real-time insights to personalize interactions and build stronger connections.
- **Close deals faster:** Boost productivity with intelligent prospecting and save time with streamlined email communications and predictive forecasting.
- **Simplify the seller experience:** Enjoy a user-friendly platform that empowers your team to sell smarter, not harder.



Addressing Your Sales Challenges

Microsoft Dynamics 365 Sales incorporates Microsoft's Copilot AI for your biggest sales hurdles:

- **Personalization:** Use customer interactions to suggest relevant content. For example, Copilot excels at creating customized emails, suggesting sales best practices, and improving intelligent interactions during customer meetings.
- **Streamlined processes:** Automate tasks like data entry and lead scoring. Copilot frees up reps to focus on building relationships and closing deals while ensuring clean CRM data for better insights.
- **Predictive sales insights:** Gain real-time pipeline health insights and identify potential roadblocks. Copilot's AI-powered forecasting helps predict deal probability, prioritize resources, and identify top opportunities and leads.
- **Seamless collaboration:** Break down silos between marketing and sales. Facilitate smooth lead handoff and ongoing collaboration throughout the sales cycle.
- **Simplified sales intelligence:** Get clear, actionable insights derived from customer data. AI presents insights in an easily digestible format for data-driven decisions.





The AI Difference with Copilot

Copilot takes Microsoft Dynamics 365 Sales to the next level with advanced AI features:

- **Natural language or Predefined Prompts:** You can ask Copilot questions related to your sales records or sales-specific terms to save time and gain insights.
- **Record summarization:** To help you stay on top of your sales records, Copilot summarizes any changes that were made to your lead, opportunity, and account records.
- **Meeting Preparation:** Copilot helps you prepare for your upcoming meetings effortlessly, summarizing relevant information from the opportunity or lead records associated with the meeting.
- **Real-time coaching:** Receive in-the-moment guidance within the application, suggesting conversation topics and optimal next steps based on customer interactions.
- **Opportunity risk assessment:** Identify potential roadblocks in your sales pipeline and proactively develop contingency plans.

By harnessing the power of AI and Copilot within Microsoft Dynamics 365 Sales, your sales team can achieve new levels of efficiency, productivity, and customer satisfaction.

Invest in the Future of Sales with Microsoft Dynamics 365 Sales



Every business is a sales business. By embracing AI-powered solutions like Microsoft Dynamics 365 Sales, you're investing in your organization's success today, and in its security tomorrow. Empower your teams to sell smarter, not harder, and achieve exceptional results using the latest AI technologies.

Contact us

Hitachi Solutions is a 100% Microsoft platform-focused organization and your go-to partner on the journey to adopting Microsoft Dynamics 365 Sales and Microsoft Copilot for Sales within your business. With Hitachi Solutions as your guide, we are on hand to support your team's planning, budgeting, and deployment needs.

We invite you to contact us with any questions about our CRM Vision and Value Workshop, or to learn more about how our people-first approach can help move your business in the right direction.

Contact us today to learn more about the powerful AI capabilities inside Microsoft Dynamics 365 Sales and what they can do for your organization's sales performance.



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