Hitachi Solutions

Microsoft

Hitachi Solutions and Microsoft Dynamics 365 Sales

Drive Revenue Growth with Optimized Sales Processes

Sellers today face more challenges than ever. In this era of AI, the financial services and insurance industries are changing at lightning speed, and sales teams need to be set up for success with tools that help them boost productivity and improve the experience for their customers. Next-generation CRM systems are a critical part of that.

With Microsoft's CRM platform, Dynamics 365 Sales, you get more for less, and it's all delivered with a ton of value. In a **Total Economic Study** commissioned by Microsoft, Forrester found that companies can realize 215% ROI on their Microsoft CRM investment with payback of only 7 months. That's up to 55% savings compared to other CRM systems.

Strengthen Relationships

Help sellers engage with customers in the right way at the right time with AI guidance and insights.

Guide Sales Teams to Success

Scale best practices with automation, real-time data insights and visualizations.

Close More Deals

Improve seller productivity with forecasting, simplified customer tracking and generative AI copilots.

32%

Only **32%** of seller time is spent selling [1]

68%

68% of seller time is spent on non-revenue generating activities [2]

87%

87% of customers expect relevant, personalized information [3]

85%

85% want digital tools that help them be more agile, automate daily tasks, and make information more accessible [4]

Business Challenges

Customers Expect More

Increasingly, financial services customers expect a more personalized experience. The challenge is to provide employees with a complete view of their clients so they can deliver meaningful customer interactions no matter the time, channels, or specific needs of those customers.

Organizations need to:

- Help sellers engage with customers in the right way and at the right time with AI-powered guidance and relationship insights
- Orchestrate customer journeys to deliver personalized content in the right context
- Ensure a high-quality customer experience from the first interaction

Uncertain Economic Environment

With the tightening of monetary policy to fight inflation, companies want to reduce risky investments, cut costs, and drive efficacies, as well as find ways to innovate and bring new products and experiences to market that will yield greater differentiation.

Organizations need to:

- Improve seller focus and productivity with intelligent forecasting and lead and opportunity tracking
- Gain a more relevant and timely view of customers and the products and services they use to better align the recommendations for products with each customer
- Provide services that strengthen retention and loyalty while growing loan depos-its, profitability, and cross-sell ratios

Stringent Regulatory and Reporting Requirements

Year after year, financial organizations are asked to comply with a complex regulatory environment and reporting requirements that are often manual and burdensome. Regulators examine banks' safety and soundness to make sure they have adequate capital reserves and insured deposits. They need to comply with regulations, avoid expensive fines, and better protect themselves and their customers from financial crime. Insurers also face rapidly changing regulatory frameworks that can create compliance challenges and increase operational costs. Non-compliance can result in fines, penalties, reputational damage and even loss of license.

Organizations need to:

- Track compliance information for reporting and potential audits with tools to manage client lists, accounts, dates, and other necessary data
- Automate and centralize work processes relevant to the management of compli-ance and reporting
- Blend compliance with day-to-day business procedures so that it becomes a part of the advisory process

Changing Work Culture

Employees are an organization's most important asset for driving operations and growing and retaining their customer base. In the post-pandemic economy, many financial services and insurance organizations are grappling with a changing work culture. They're trying to balance in-office versus remote work requirements, as well as enhance employees' productivity.

Organizations need to:

- Align communication channels across departments
- Simplify communication for agents, advisors and managers with the tools necessary to collaborate in real time
- Empower employees and agents to get more done with actionable insights in the flow of work

Business Solutions

Dynamics 365 for Sales

An advanced CRM (Customer Relationship Management) system that provides a wide and powerful array of tools to help you take control of the entire sales process by automating common tasks, delivering insights, and providing personalized recommendations based on how you work.

Sales Insights for Dynamics 365

An add-on to Dynamics 365 for Sales with AI capabilities that provide the data-driven insights to empower sales teams to be more productive, agile, and customer-focused, leading to faster deal closures.

Microsoft Sales Copilot

A next-generation AI tool that assists sellers with tedious tasks like preparing for meetings, catching up on opportunities, drafting emails and meeting summaries, and surfacing relevant information so they can focus on closing the deal. The beauty of Copilot is that it works using natural language from within the CRM tools sellers use every day.

Did you know?

A recent **Forrester report** predicts that 6.9 million US knowledge workers — around 8 percent of the total — will be using Microsoft 365 Copilot by the end of 2024.

Key Features

Dynamics 365 for Sales

Lead and Opportunity Management

Manage and track leads and sales opportunities through a structured process from initial contact to close.

Sales Process Automation

Automate sales processes to guide sales teams through the steps needed to advance sales.

Customization and Extensibility

Tailor the solution to fit unique business needs and integrate with other CRM systems.

Sales Insights for Dynamics

Predictive Scoring

Prioritize leads and opportunities based on predictive scoring models that forecast which prospects are most likely to convert.

Relationship Analytics

Assess the health of customer relationships with AI-driven insights based on interaction data.

Sales Accelerators

Get suggestions for the next best actions to take with customers, improving engagement strategies.

Microsoft Sales Copilot

Content Creation

AI assistance in creating sales materials like pitch decks and reports helps sellers prepare for meetings more quickly with relevant data-driven content.

Real-time Sales Tips

Sellers can receive AI-generated tips and answers to customer questions during Teams meetings, allowing for more informed and responsive communication.

Meeting Summaries and Analysis

AI can provide post-meeting summaries and analysis, including keywords, competitor mentions, and follow-up tasks, enhancing the understanding of customer interactions and the required next steps.

Business Outcomes

Grow Revenue

- **Streamlining Sales Processes:** By automating routine tasks, sales teams can focus on selling rather than on administrative work, leading to more opportunities and closed deals.
- **Enhanced Decision Making:** Real-time analytics and predictive insights help sales teams make informed decisions that align with customer needs and market trends.
- **Improved Customer Engagement:** Understanding customer interactions and sentiment enables personalized engagement, fostering better relationships and customer retention.
- **Increased Productivity:** Integration with productivity tools means less time switching between applications, increasing the efficiency of sales activities.

Make Sellers More Effective

- **Data-driven Prioritization:** Salespeople can focus on the most promising leads and opportunities, increasing the likelihood of successful outcomes.
- **Actionable Insights:** With guided selling and intelligent recommendations, sellers can approach customers with the right message at the right time.
- **Reduced Admin Time:** AI-driven capabilities enable sellers and their organizations to automate processes and reduce time spent on administrative tasks, increasing productivity and time available for high-value relationship building with customers and prospects.

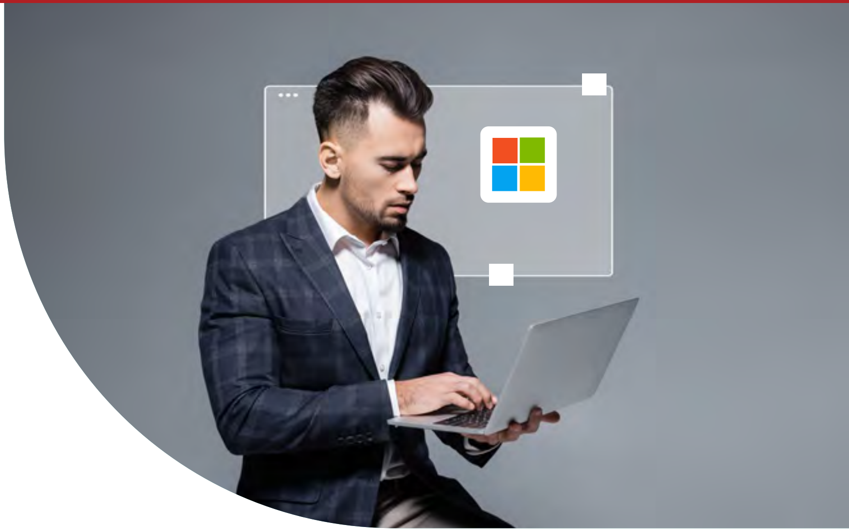
Improved ROI and Decision-Making

- **ROI Measurement:** By tracking the entire sales cycle, leaders can identify which strategies and tactics yield the best return on investment.
- **Pipeline Management:** Sales managers can better forecast sales and manage the sales pipeline with visibility into real-time data.
- **Strategic Planning:** Advanced analytics and AI insights help in identifying trends and making strategic decisions for future sales initiatives.

Hitachi Solutions and Microsoft follow Principles of Responsible AI

When you are looking to empower financial sales and advisor teams with AI-infused products, it's important to choose solutions that meet high standards of ethics and responsibility. As a premier Microsoft Partner, Hitachi Solutions adheres to Microsoft's established approach for responsible AI:

- Fairness
- Reliability and Safety
- Privacy and Security
- Inclusiveness
- Transparency
- Accountability



Start your Adventure with Us

Hitachi Solutions is a Microsoft Partner with the expertise and award-winning solutions to help guide your business in unlocking the benefits of an AI-powered CRM system. Because there is no one-size-fits-all solution, we focus on your organization's unique needs and design tailor-made solutions that will jumpstart your journey.

Hitachi Solutions can partner with you to demystify the potential value of Microsoft Copilot within your organization.

Check it Out Today

Hitachi Solutions

global.hitachi-solutions.com

References:

1. 2023 Microsoft Business Trends Survey of 4,500 business decision makers
2. Can AI Really Help You Sell?, Harvard Business Review, 2022
3. Work Trend Index | Will AI Fix Work?, Microsoft, 2023
4. Work Trend Index | Will AI Fix Work?, Microsoft, 2023