

Microsoft Teams for Sales

Top practical tips and tricks to help sales organizations better communicate, collaborate and share resources.

Sales, especially B2B sales, is hardly ever a 9-to-5 affair based solely out of the head office. And if the events of the past year have taught us anything, it's how critical it is to business that we are efficient from anyplace and at any time.

Take Vivaan for example. As Director of Sales for a large industrial business, he's not surprised when he or his account executives are called day and night with customer requests. Prior to the pandemic, his team transferred knowledge and documentation somewhat manually with emails and notes. If an account executive moved on or needed a break, they'd need to spend days documenting the customer information that another would need to replace them.

Transferring accounts between reps was a months-long affair, during which customer experience balanced precariously. Reps could spend hours finding necessary customer information, often to learn it was out of date by the time they uncovered it. If a contact changed—or worse, a contract changed—and the account rep didn't have up-to-the-minute information there could be a reckoning.

Sales teams like Vivaan's needed better systems in place to share information and documentation that exists within and outside of the existing CRM system—in the field, at the office or when home. Once the pandemic hit, continual communication and the ability to share key documents and information at a moment's notice became a necessity. The best-case scenario without it was wasted cycles spent in search of vital customer information; the worst case was lost customers.

The answer for Vivaan, and sales teams like his, is Microsoft Teams.

Microsoft Teams can transform your sales organization. But how, where do you start, and how can you maximize your investment? This guide will provide you with answers to all that with strategies and tips to get the most from the platform as your sales organization evolves.

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Empowering Sales with Microsoft Teams

For remote teams, workplace chat and video meetings can help maintain the hallway-style discussions missing from many daily routines. So, it's no surprise these are often the most highlighted features.

But the ability for Microsoft Teams to provide secure file sharing and storage is a game-changer.

The value of having vital information accessible by any team member in a central location, updated in real-time, and immediately at an account reps' fingertips is tremendous. It saves time, creates consistency, eliminates information silos and importantly provides continuously up-to-date information. Collaboration in Teams is real-time, presented as ongoing works in progress rather than incrementally when document versions are finished. When sales teams change, or members go on vacation, knowledge transfer becomes seamless—since it's all in the same place.

Take Control of Management, Collaboration and Knowledge

While Microsoft Teams provides the tools needed to centralize team management, collaboration and information, it does require a shift in approach from many other technology tools.

With Microsoft Teams, sales leaders do not need to run to IT whenever there's a change or adjustment to be made to the platform. Team owners



can make substantial changes to the Team structure themselves, reducing the burden on IT but making it easier to meet your goals, creating cohesion and better manage your team's adoption.

Keeping it in the Microsoft Family — or Not

If your organization is already invested in the Microsoft family of products, Microsoft Teams is a natural choice for a communications and collaboration platform. Your team will have the familiarity that may make uptake easier, while the organization will benefit from native integrations with Microsoft 365 and enhanced Outlook integration.

For non-Microsoft shops, Team's extensive integration with other platforms is essential. For example, Microsoft partnered last year with Salesforce to integrate the two solutions. This integration provides sales teams a shared view of every customer while making collaboration and meeting easier.

Optimize Your Microsoft Teams Adoption

An all-in-one platform with extensive integrations, Microsoft Teams is something of a one-stop shop for sales team workflow and collaboration. But as with any new technology, success is based on how well it is adopted and used.





You can improve uptake by adopting some change management best practices:

› Create a Teams Steward

Choose someone to oversee creating processes, access rights, syntax and naming. It should be someone excited about the Teams adoption, but also ideally whose organizational skills are recognized and emulated.

› Don't be too Rigid

Some sales professionals can be notoriously set in their ways and hesitant to adopt new processes, even ones that will help them. Guide their Teams adoption, while recognizing that each member absorbs technology and thinks about organizing and workflow differently.

› Start Small and Grow with Use

Create a separate environment before going live where you can test apps and processes. When you do go live, don't throw everything at your team at once, but build incrementally as they use Teams more and more.

Pro Tip: Don't get locked into using a particular app, if something doesn't work the way you expected, stop using it.

› Show Don't Tell

Lead by example. Once a process is in place, use it consistently. For example, if a member messages someone from another group on Skype, message back in Teams.

Show how Teams will make their lives easier: having information to answer customer questions promptly; being organized more easily; responding faster than competitors; etc.

As your sales group begins to use Teams, you may find a few key features particularly important:

Data Labeling — Customer data is sensitive and must meet strict privacy requirements, not to mention being a competitive advantage. Information in Teams can be flagged as sensitive to keep it private, secure and accessible only to members or permitted guests.

365 Dynamics CRM Connector — Users of the Microsoft Dynamics CRM platform will benefit from the integration between it and Microsoft Teams. Files can be synced directly between the two, and conversations and meetings in Teams can be added directly to a CRM account.

Power BI Dashboard — Reports from Microsoft's business analytics platform Power BI can be embedded right into Microsoft Teams, unlocking real-time access to powerful easy-to-read business intelligence visualizations and insights for team members as you collaborate.

Teams Meetings — Use Microsoft Teams to schedule, host and record sales calls, or meetings with customers, all integrated directly with Outlook. The business of a sales meeting does not begin and end with the meeting itself, and Microsoft Teams tracks actions so members can remain productive before and after the meeting.

Group Chats — Not every exchange is a meeting and using Teams you can hold workplace discussions in a highly organized manner, by team or customer account. This keeps vital 'water cooler' conversations happening, even when working remotely.

Pro tip: Think about creating private groups to prevent conversations from being disrupted or taken off-topic. Of course, you can also mute conversations that have gone too far afield, or once they are no longer needed.



Tips and Tricks for Microsoft Teams Mastery

Promote uptake and prepare your sales group for the greatest success with their Teams adoption with a few practical tips and tricks:

Use Planner Tabs to Organize Activities

The Tasks application in Teams is a robust way to keep your sales group on top of the activities that need to be performed. Microsoft Teams combines individual task programs such as Microsoft To Do and Outlook with team tasks from Microsoft Planner to ensure every task gets assigned and completed. Owners can see tasks broken down by team or account, while notes around tasks can be assigned to team members.

Create Account Management Teams

Keep all customer information in one place by creating account Teams that include chats such as: customer news and updates; current engagements; new opportunities; and a sales playbook. Teams allows all customer emails to be directly attached to channels, creating a living history of client activity.

Don't Forget Training, Training and Retraining

The more your group adopts teams the more they will learn to make it work for them, but it's important to incorporate formal training on the platform into your adoption program. Remember to be patient, everyone picks up new technology at a different rate and it may take multiple training sessions for something to stick.

Have faith that your team will learn the technical skills they need to work with Teams—even if they haven't worked with similar software before. Studies have shown that having directly transferable skills isn't as important as we all think. For instance, a LinkedIn study conducted for



the World Economic Forum recently found that many employees moving into "emerging roles" like data science and AI are from occupations that don't share similar skills.

Create a Request for Proposal (RFP) Channel

Be ready for new business when it comes by creating a cross-functional RFP channel bringing together sales, technical and legal teams as needed. This shares all relevant links, knowledge and documentation in one place, keeping your team on track with your RFP submission efforts.

Invite Customers to Teams

Even as you move internal communications to Teams, there are great advantages to inviting customers to Teams. You will benefit from the enhanced scheduling, task tracking and meeting lifecycle capabilities of Teams, optimizing account management and improving customer experience by recording conversations and requests.

Integrations and APIs

Connecting Microsoft Teams with the organization's existing sales tools and CRM applications ensures critical collaborations, meetings and customer chats don't get lost. The sales group is also working with the most up-to-date customer data. This all makes it easier for sales reps to access customer information and to collaborate with marketing and technical teams.

As mentioned, Microsoft has already partnered with Salesforce to integrate the solution into the Teams platform and has deep integrations with Microsoft 365 Dynamics CRM. To better answer RFPs, sales groups can benefit from integrations with cloud-based RFP response management software from RFPIO.

Conversation threads and notes from outside of Teams can also be linked to create a unified repository of all customer and sales knowledge. In addition, connecting Microsoft Teams' APIs with other applications improves productivity by saving time and connecting even more workflows.

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Better Together: How SHI Complements Microsoft Teams

The only thing that is better than implementing a platform built to drive your team's success is working with a partner that can help you deploy and adopt that platform with ease.

Through SHI's Microsoft Teams Deployment and Adoption Services, you can depend on industry experts, who have served thousands of organizations like yours, to help you create a Teams adoption and rollout strategy. SHI will cover all of your bases by ensuring your information is secure and compliant with policies throughout your move to Teams.

As you begin to plan for and implement Microsoft Teams, SHI will guide you through the best path forward to improve your collaboration and workflow processes every step of the way.

Remaining competitive in today's reality is an increasingly challenging endeavor. It's one that Microsoft Teams can aid with by giving the right sales reps the right information on the right customers at the moment they most need it.

Is it time for your sales group to look into the advantage Microsoft Teams can bring?

We're here to help. [Get in touch with an account representative](#) today to discuss how SHI can help your organization implement Teams effectively.