



# Retailers transform connected people into customer relationship agents

Connected Experiences for Retail  
with Microsoft Dynamics

White Paper  
January 2010  
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## TRANSACTIONS VERSUS RELATIONSHIPS

How well do your sales associates and customer service team actually know your customers? Do they approach each customer encounter as a simple stand-alone transaction or as one element in a multi-faceted relationship?

Do your customers shop with you just occasionally, when they happen to be “in the neighborhood”? Or do they visit you *first* when they shop? Do they keep coming back? What would they say about their experiences with your company in an online review? The answers to such questions are strategic, and they depend on the ability of your frontline people to establish and sustain enduring customer relationships. These people are, after all, the “face” of your business. They directly engage with your customers, they impact customer satisfaction, and they influence your share of the customer’s wallet. Why not empower them to be more productive, more engaging, more effective? Why not transform your in-store sales associates and call center representatives into customer relationship agents?

Information technology can help you accomplish this transformation by helping you connect your people to the tools, processes, and information they need to excel in customer interactions. And empowering a legion of customer relationship ambassadors can deliver transformative value to your business.

## CONNECTED PEOPLE

To outshine the competition in managing customer relationships, your frontline people need access to information that goes well beyond what is needed for a stand-alone transaction. The ideal dataset might include customer purchase history, in-store inventory, availability in other stores, payment history and credit limits, order and shipping data, and more. Relevant information resides in many systems throughout your business, such as in-store point-of-sales (POS) systems and kiosks, call center databases, inventory systems, customer relationship management (CRM) systems, and financial/accounting systems. These systems may interoperate to some degree or not at all.

Merging data to gain new perspectives may require department data specialists to re-enter data and custom-build reports. And the new customer view, costly and labor-intensive to create, may differ across stores, call centers, and online channels. This approach makes it difficult to transform your sales and customer service people into customer relationship agents. Executing a two-step process can help improve the situation:

**Connect your data.** Define the information that will empower your sales associates and customer service staff, transforming them into your company’s ambassadors. If the POS, CRM, inventory, financial and other software applications now supporting your stores, Web site, and call center make it difficult and expensive to build this connected set of information, it may be time to upgrade the weak links.

**Connect your people.** Upgraded POS applications, in-store kiosks, wireless hand-held devices, and other solutions can be leveraged to deliver a more comprehensive customer view to store employees, who may already be comfortable with the interfaces these applications use. Deliver the same information to call center personnel and your e-commerce team. Building long-term, positive relationships with your customers requires that they enjoy a consistent, personalized, positive experience no matter how they choose to engage with your company. Build self-service functionality into your Web site, so that connected customers can be productive on their own.

And finally, keep security in mind as you connect your people to the information they need to become customer relationship agents. Delivering more information to them could expose sensitive information. Build in functionality that provides role-based data access. Customers need to have confidence that personally identifying information is carefully managed.

Connecting your frontline people to the processes, tools, and information they need to become customer relationship agents offers a host of benefits with the potential to improve your company's bottom line and long-term prospects, as the following table suggests. Note too that other roles, such as the buyer, can benefit.

Role	Sample Information	Potential Benefit
Store manager	<ul style="list-style-type: none"> <li>Customer requests</li> <li>Effectiveness of different price points</li> <li>Revenue per sales associate</li> <li>Sales by day part</li> </ul>	<ul style="list-style-type: none"> <li>Improved assortment planning</li> <li>Improved product mix</li> <li>Targeted training/coaching</li> <li>More cost-effective staffing</li> </ul>
Sales associate	<ul style="list-style-type: none"> <li>Shopper preferences (color, brand, and so on)</li> <li>Upsell and cross-sell opportunities</li> <li>Availability in store or other stores</li> <li>Promotional offers and credit limits</li> </ul>	<ul style="list-style-type: none"> <li>Improved assortment planning</li> <li>Increased sales associate productivity</li> <li>Increased customer satisfaction/revenue</li> <li>Greater customer satisfaction</li> </ul>
Call center representative	<ul style="list-style-type: none"> <li>Purchase history, previous returns, complaint resolution history</li> <li>Workload per call center representative</li> <li>Warranty status, back-order status</li> </ul>	<ul style="list-style-type: none"> <li>Increased call center representative productivity</li> <li>Targeted training/coaching</li> <li>Faster time to customer issue resolution; greater customer satisfaction</li> </ul>
Buyer	<ul style="list-style-type: none"> <li>Sales by store, product, and region</li> <li>Sales by price point</li> <li>Vendor performance monitoring</li> </ul>	<ul style="list-style-type: none"> <li>More cost-effective buying and inventory management</li> <li>Improved product mix</li> <li>Better management of cost of goods sold</li> </ul>

## GETTING STARTED

Investing in technology that helps your people transform customer interactions into long-term relationships offers a compelling return on investment (ROI). Potential benefits include improved sales associate productivity; larger average shopping transactions; and increased call volume per call center representative. But the greater return will be enduring customer relationships. Information-empowered frontline staff can help establish your company—your stores, your Web site, and your call center—as the preferred shopping venue in your customers' minds, the retailer they check first when they shop, the retailer they return to.

Microsoft Dynamics® offers the retail community a comprehensive, flexible, fully integrated set of business software solutions that help you compete effectively today, adapt to changing conditions, and capitalize on tomorrow's opportunities—at an attractive total cost of ownership (TCO). How?

- Microsoft Dynamics solutions are familiar. They work like and with Microsoft® Office, Microsoft SQL Server®, Microsoft Office SharePoint® Server, and other Microsoft products that your employees, customers, and suppliers already know and use. This helps simplify development, deployment, and training.
- Microsoft Dynamics solutions are comprehensive, and they work together. They help you create an end-to-end view of your total business and transform your sales associates and call center team into customer relationship agents.
- Microsoft Dynamics solutions are supported by a robust partner ecosystem, so you can get help customizing or deploying your applications if you choose.
- Microsoft Dynamics solutions fit into your current technology environment, so they deliver value today. And they deliver value tomorrow by enabling you to cost-effectively integrate new, more robust applications as these become available.

To learn more about Microsoft Dynamics in Retail, please visit [www.microsoft.com/dynamics](http://www.microsoft.com/dynamics).

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