

# SIX STAGES OF THE CUSTOMER BUYING JOURNEY

How Dynamics 365 Helps Throughout the Customer Buying Journey

## HOW DO CUSTOMERS BUY?

- Most customers research your company and product before buying.
- They have specific patterns, such as reading whitepapers, watching videos and talking to
- Learning how your customers buy, and providing the right content or in-person opportunities will help you sell.



### Dynamics 365 Helps During the Exploration Stage

- Use Marketing Automation tools like ClickDimensions to manage social media posting, review page clicks, and evaluate engagement on your website.
- Link webforms to Dynamics 365 for automated lead creation.
- Use ClickDimensions Campaign Automations to deliver unique branded content to explorers visiting your website.



## 1 EXPLORE

**72-94%** of buyers are B2B buyers & are researching online.



## 2 EVALUATE

The customer will likely research you a bit more than in the exploration stage. They will examine your website. They might read your blog entries or download a whitepaper.

About **3/4 OF CONSUMERS** have completed most of their research and have their buying decision made way before contacting sales.

### Dynamics 365 Helps During the Evaluation Stage

- Contacts, leads, and opportunities can easily be tracked in Dynamics 365.
- CRM workflows can automatically schedule 'next actions.'
- Phone calls, emails, communications can be documented in Dynamics 365. This gives your clients a personalized experience. You always know where you left off with a certain client, what was discussed, and recommended.
- Never miss following up with a prospect or client! Follow up reminders can be set up in Dynamics 365.

### Dynamics 365 Helps During the Purchase Stage

- Opportunities track the most important information about the sales process while business process flows ensure that your proven sales process is followed.
- Notes can be used to store important documents – signed agreements, invoices etc. regarding a client's purchase



## 3 PURCHASE

Prospects are likely concerned with value proposition and how you will support them. Make sure you are not only able to answer these questions verbally, but the answers to these questions are on your website as well.

They are making a purchase, but they want to be assured they have made the best decision possible.

## 4&5 EXPAND & RENEW

You might want to invite customer to subscribe to your blog/newsletter.

This would be a good time to inform clients of upcoming webinars or videos to watch.

### Dynamics 365 Helps During the Expand and Renew Stages

- Dynamics 365 gives upsell/add-on suggestions.
- Through Dynamics 365 and ClickDimensions, you can manage regular contact with clients.

### Dynamics 365 Helps During the Advocacy Stage

- Tasks can be assigned to follow up with a client after a while to make sure everything is working to their satisfaction/ address any issues.
- A case can be opened in Dynamics 365 to address any issues.
- Surveys, either using Voice of the Customer or ClickDimensions, allow customer feedback to be gathered, analyzed, and acted upon.

## 6 ADVOCACY

This is a great time to get referrals or testimonials which can not only be used on your website, but on a plethora of social media sites.

Over **70%** of all people seek out advice and opinions on goods and services before purchasing, many of them use social networks.



CONTACT US

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