

Is Dynamics 365 a Fit to Solve Your Clients' Business Problems?

Use these questions as a starting point to ask during your client QBRs. What business problems are they trying to solve? How can you help? Let Dynamics 365 be the solution they are looking for!

CRM Needs:

- “In reviewing your sales performance, are there opportunities where improved tools could help your team focus more on closing deals?”
- “Have you encountered challenges recently in tracking customer interactions or managing your pipeline?”
- “How confident are you in the insights your current systems provide about your customers?”

Customer Service Challenges:

- “How has your customer support performance been trending? Are there areas where faster response times or more personalized service could make a difference?”
- “What feedback are you hearing from your customers about their support experience?”
- “Are there specific tools or processes you’d like to improve to deliver a better customer experience?”

Operational Pain Points:

- “What operational bottlenecks have you noticed this quarter that might benefit from process automation?”
- “Have supply chain or inventory management issues impacted your ability to deliver for customers recently?”
- “Are you seeing any trends in inefficiencies that could be addressed with better tools or data?”

Productivity Goals:

- “Since our last QBR, have you identified any repetitive tasks or workflows that could be streamlined?”
- “How are your teams adapting to new productivity goals, and are they supported by your current systems?”
- “Are there gaps in collaboration or task management that are impacting productivity?”

Industry-Specific Needs:

- “What changes in your industry or market are creating new challenges for your operations?”
- “Are there emerging compliance or regulatory requirements we should discuss as part of your IT strategy?”
- “Do your projects require tighter integration between planning, tracking, and financial systems?”

Scalability and Growth:

- “With your growth goals in mind, do you see your current systems scaling effectively?”
- “Have you encountered any barriers when expanding into new markets or scaling operations?”
- “What would help you better prepare for the next stage of your business growth?”

Technology Challenges:

- “Are there any issues with your current tools or systems that we should prioritize addressing?”
- “How well are your current solutions integrating with the tools your team uses daily?”
- “Do you feel confident in the security and compliance of your systems as your business evolves?”