



## Conquer Retail Challenges with a Unified ERP/CRM Solution

Microsoft Dynamics 365

## How retailers can manage data (and not the other way around) with a unified ERP/CRM system

With the unified ERP and CRM Microsoft Dynamics 365 solution, retail activities — from upper management generating a financial report to a warehouse assistant pulling inventory — synchronize instantly on the user's customized dashboard.

And that gives retailers the power to:

- **Launch exceptional marketing campaigns** built on customer-centered data.
- **Increase customer loyalty** with strategic customer-centered offers and rewards.
- **Give retail personnel the intuitive tools they need** for the greatest outcomes
- **Unleash the retail operation's full growth potential** by accessing data from every level of their retail operation.



### The retail manager's challenge

Modern retailers face the relentless daily challenge of managing complex business functions — from meeting customer expectations to creating brand promoters, juggling global logistics to staying ahead of the competition.

And to make important decisions that directly affect their operation's bottom line, they source data from their siloed Enterprise Retail Planning (ERP) and Customer Retention Manager (CRM) systems.

Each system plays a particular role... ERP provides data on back-office functions — such as purchase histories, accounting information, financial data and supply-chain management activities.

Alternatively, CRM gives insight on front-end functions — sales tracking, customer interactions, marketing campaigns and inventory management.

But today, the fast pace of retail demands instant responses to data analyses — at all operation points, in real time. And that requires accessing data in one place via an ERP/CRM integration.

**Microsoft Dynamics 365 for Retail unifies retail operations, including digital, in-store and back office, for greater responsiveness, increased sales and positive revenue streams.**





## Launch exceptional marketing campaigns

More than ever, retailers face the challenge of creating failsafe campaigns based on consumer behaviors and their buying histories. That includes understanding customer expectations and capitalizing on their social media activities. And when retailers build their sales campaigns around customers' data, success follows.

### Put integrated data to work

Access to quality data is essential for making accurate marketing decisions. And a powerful integrated system provides insight into all operational, financial and sales functions, helping retailers shape their marketing strategies.

### Maximize every customer contact

Every customer contributes to a retail operation's success. So, capitalizing on their activities — promotional outcomes, face-to-face interactions, online and social media actions (and reactions) — via a unified omni-channel platform brings each customer up close to the retail brand.

### Forecast with confidence

Marketing activities impact every aspect of a retail operation — from a customer's repeat business to the next quarterly report.

Dynamics 365's business intelligence (BI) and analytical features allow retailers to move forward with their marketing strategies — with a solid, data-based plan in place.

## Unlock surefire marketing outcomes

Unlike more typical marketing strategies drawn from segregated ERP and CRM data, Dynamics 365 merges both systems, allowing retailers to create successful marketing opportunities based on both front- and back-end operations.

### Take the guesswork out of marketing strategies

The cloud-based Dynamics 365 automated solution compiles critical data into a streamlined dashboard for easy access.

This allows marketing leaders to make timely data-based decisions minus the challenges of managing data within a physical IT infrastructure.

### Put trust in a proven solution

In the fast-moving world of information technology, finding a solid solution — one built for retail and backed by years of experience — is critical to a modern operation's success.

Dynamics 365 for Retail supports all aspects of retail digital marketing — from product promotion to ROI.

### Get maximum retail support

Dynamics 365 includes built-in features created specifically for the retail space — from brick-and-mortar locations to online platforms and mobile applications.

These functions enable retailers to customize reporting and to manage operational needs via retail apps available through Microsoft AppSource.



## Increase customer loyalty

It takes a lot of effort to nurture a new customer from visitor to delighted brand promoter. And keeping that customer close to the retail brand — fostering their loyalty — provides unlimited potential for organic brand reach. That's where Dynamics 365 for Retail comes in...

### Get the most from customer experience data

The Dynamics 365 suite includes features such as Power Business Intelligence (BI) and the Cortana Intelligence system.

These powerful tools help retailers interpret customer data for successful operational and financial results.

### Meet customers where they are

Intelligence-based data allows retail leaders to satisfy customers' needs based on previous shopping behaviors.

This includes tapping into a customer's seasonal preferences, such as their interest in: accessories (corresponding to a previous purchase), a service contract or types of promotions and incentives.

### Tailor their experience

Personnel responsible for customizing service for new and repeat customers (marketing teams, buyers, sales associates and customer service staff) appreciate the intuitive functionality of Dynamics 365. Ultimately, the solution's capabilities simplify operational deployment and execution.

## Style marketing campaigns based on customer preferences

### Deploy high-powered omni-channel marketing to improve a retail brand image

The Dynamics 365 unified suite helps retailers create a consistent — and memorable — brand image. That includes developing brand familiarity (and loyalty) in all messaging, product images and graphics in-store and online.

### Turn every communication point into a customer retention machine

Whether sending an email or completing a phone order, Dynamics 365's standard and customizable features help retail staff ensure a positive customer experience based on the comprehensive information they have at their fingertips.

### Make it personal

With access to customer profiles and transaction histories, retailers can personalize every customer interaction, developing stronger, longer-lasting customer relationships.

## Give retail personnel the intuitive tools they need

Staying ahead of retail trends puts your operation on a path of sustainability. But reacting to consumer preferences and market fluctuations is key to leading the retail pack. And that starts with creating a streamlined data processing platform every staff member can utilize with ease. **Dynamics 365 for Retail** provides retail personnel, from CMO to store assistant, with a user-friendly, fully customizable dashboard, allowing them to perform tasks with accuracy and speed.

### Enable store associates to engage loyal customers with recommendations based on their buying history

Customer interactions last for just seconds. Within this small window of time, the store associate has to interpret the customer's needs and decide on an approach.

With access to the customer's preferences, via a mobile device or tablet, the associate can make instant, valuable recommendations to secure the sale.

### Empower department managers to oversee and contribute to an efficient operation

With real-time reporting capabilities on hand, department managers can guarantee positive customer experiences and sales outcomes.

Via a streamlined dashboard, they can monitor sales activities, initiate stock replenishment and respond to customer preferences.

### Provide operations personnel with the ability to respond to back-office situations quickly before they impact customer satisfaction

The impact of insufficient or delayed stock cannot be underestimated. A unified database allows personnel to track back-office operations, such as monitoring logistics, coordinating returns and managing supplier accounts, with efficiency and accuracy.

### Give top-level executives the tools they need to make high-stakes decisions

Retail executives require the means to quickly evaluate overall strategic efforts and make important decisions based on the operation's data. Easy access to that data is imperative for results-driven business choices.



## Increase profits with laser-focused analyses

Dynamics 365 enables all personnel to record retail activities in real time, creating immediate insight into the store's overall performance ... and profits. That includes:

### Personalized dashboards

Depending on the individual users' needs, personnel, from floor associate to CIO, can customize their Dynamics 365 dashboard according to their specific use and department.

### Excel spreadsheet compatibility

For situations requiring analysis via spreadsheets, personnel can easily transfer data from their Dynamics 365 database into the Excel platform.

### Built-in, customized reporting capabilities

Generating internal and external reports with Dynamics 365 allows staff to customize and simplify their reporting activities.





## Unleashing the retail operation's full growth

Staying ahead of retail trends requires an agile response to customer desires and competitors' maneuvers. Dynamics 365 gives retailers the power to adapt to consumer and market trends, positioning their operation for maximum growth.

### Bolster business forecasts

Retail operations rely on prior year or year-to-date metrics for predicting inventory needs. With access to "in-the-moment" data from a broad digital landscape, retailers can forecast stock requirements based on web traffic, social media activity and consumer trends.

### Enhance customer experiences across all channels

A unified data management solution gives retailers the flexibility to create exceptional shopping experiences online.

Additionally, it supports their in-store digital promotions -- digital signage, interactive displays or product-centered videos.

### Grow your business, not your IT infrastructure

Once retailers move their business functions to the cloud, they're free from the IT infrastructure upfront and maintenance costs.

## Succeed with a proven approach

For more than a decade, Dynamics 365 has helped mid-size and large retailers adapt to an ever-changing digital landscape. And this innovative cloud-based solution continues to position retailers for their greatest success.

### Compete with unified data management

Dynamics 365 provides retailers with the resources they need to stay competitive.

That includes having the capabilities to manage the scores of applications (including trusted third-party applications): customer management, eCommerce platforms, loyalty programs and social engagement.

### Turn ideas into profitable reality with Power BI

Retail leaders can build creative promotions by tracking and analyzing data in custom dashboards on any device.

That includes quickly assessing internal transactions and financial readings, web and foot traffic. Also, with KPI views, they can capitalize on trends using Big Data and Cortana analytics.

### Make informed decisions with predictive intelligence

Microsoft Dynamics 365's Artificial Intelligence (AI) capabilities allow retailers to make informed decisions based on their own historic data.

## How AlfaPeople helps retailers transition to the cloud

Transitioning from a traditional IT infrastructure, one that houses critical ERP and CRM systems, to a unified cloud-based solution is a big step. So, it's imperative that an operation transitions to their new Dynamics 365 system seamlessly and with the support they need.

AlfaPeople is an award-winning Microsoft Dynamics retail solution provider. For over a decade, we've helped leading retail organizations move their existing operations to the Dynamics 365 cloud-based solution. Most importantly, AlfaPeople provides friendly, expert support for a smooth and efficient transition.



## Start with a no-obligation assessment

AlfaPeople offers retailers the opportunity to explore Dynamics 365 with a no-obligation assessment of their existing system. From the assessment of the ERP/CRM solution, one of our AlfaPeople team members will provide a report detailing cloud-based solution recommendations and options.

AlfaPeople can also conduct assessments for customers using Microsoft Dynamics AX systems. The assessment team will provide a report detailing upgrade options, as well as budget and timeline projections.

Ask an AlfaPeople retail specialist about setting up a tour of Dynamics 365, as well as a FREE assessment. [Request a Demo!](#)

*Got questions?  
It's easy to get in touch:*

**Call us at: 1-855-732-6484**

**Email us at: [dynamics365team@alfapeople.com](mailto:dynamics365team@alfapeople.com)**

## Global Offices

### Brazil - Barueri

Al. Tocantins, 125 – Conj. 250,  
Alphaville Industrial  
06455-931  
Barueri-SP  
Phone: +55 (11) 4082-3232  
Email: [info.br@alfapeople.com](mailto:info.br@alfapeople.com)

### Brazil - Porto Alegre

Rua Mostardeiro, 366  
5° andar  
90430-001  
Porto Alegre  
Phone: +55 (51) 2117-1865  
Email: [info.br@alfapeople.com](mailto:info.br@alfapeople.com)

### Chile

Av. Tamar 481, of. 607  
Torre Sur, World Trade Center  
Las Condes, Santiago  
Phone: +56 (2) 2 751 90 00  
Mobile: +56 9 75296062  
Email: [info.cl@alfapeople.com](mailto:info.cl@alfapeople.com)

### China

Four Seasons Square, Building 2  
No. 503 NingGuo Road,  
Shanghai  
200090  
Phone: +966 2 6929450  
Email: [kle@alfapeople.com](mailto:kle@alfapeople.com)

### Colombia

Ave Cra 9 # 123-86  
Edificio Uraki – Ofi 401, Bogotá  
Phone: +571 6054222  
Fax: + 571 2082198  
Email: [info.co@alfapeople.com](mailto:info.co@alfapeople.com)

### Costa Rica

Calle 36. Av 4 y 6.  
Edificio Don Bosco. Tercer Piso  
San Jose  
Phone: +506 2233 7000  
Fax +506 2233 3238  
Email: [info.cr@alfapeople.com](mailto:info.cr@alfapeople.com)

### Denmark

Støberigade 14, 4. sal  
2450 København SV  
Denmark  
Phone: +45 70 20 27 40  
Email: [info.dk@alfapeople.com](mailto:info.dk@alfapeople.com)

### Germany

Elsbach Haus, Goebenstraße 3-7  
32052 Herford  
Phone: +49 5221 28440-0  
Fax +49 5221 28440-44  
Email: [info.de@alfapeople.com](mailto:info.de@alfapeople.com)

### Guatemala

5ta Avenida 4-55 Zona 14  
Edificio Europlaza Torre 1, 2do Nivel,  
Oficina 208/209  
Phone: +502 2386 9981  
Fax: +502 2386 8800  
Email: [info.gt@alfapeople.com](mailto:info.gt@alfapeople.com)

### Mexico

Baja California 245 Piso 8  
Colonia Hipódromo.  
Condesa C.P. 06170  
México, D.F.  
Phone: +55 5265 6030 Ext.878  
Email: [info.mx@alfapeople.com](mailto:info.mx@alfapeople.com)

### Saudi Arabia

King Road Tower (1106)  
King Abdulaziz Road – Jeddah  
PO Box 11787, Jeddah 21463  
Phone: +966 2 6929450  
Fax: +966 2 6068744  
Email: [info.me@alfapeople.com](mailto:info.me@alfapeople.com)

### Switzerland

Hohenbühlstrasse 2  
8152 Glattbrugg  
Phone: +41 43 355 30 60  
Fax: +41 43 355 30 61  
Email: [info.ch@alfapeople.com](mailto:info.ch@alfapeople.com)

### United Arab Emirates

Sidra Tower (1801)  
Sheikh Zayed Road  
PO Box 9588, Dubai  
Phone: +971 4 5585066  
Fax: +97144405988  
Email: [info.me@alfapeople.com](mailto:info.me@alfapeople.com)

### United Kingdom

Phoenix House  
18 King William Street,  
London, EC4N 7BP  
Phone: +44 (0) 20 3167 4911  
Email: [info.uk@alfapeople.com](mailto:info.uk@alfapeople.com)

### United States

Chrysler Building  
405 Lexington Avenue,  
26th Floor, New York 10174  
Phone: +1 (855) 732-6484  
Email: [info.us@alfapeople.com](mailto:info.us@alfapeople.com)