

Created by MyCRM Ltd

# eMap

Prospecting using Local Search

REF – eMap.Local Search.pdf

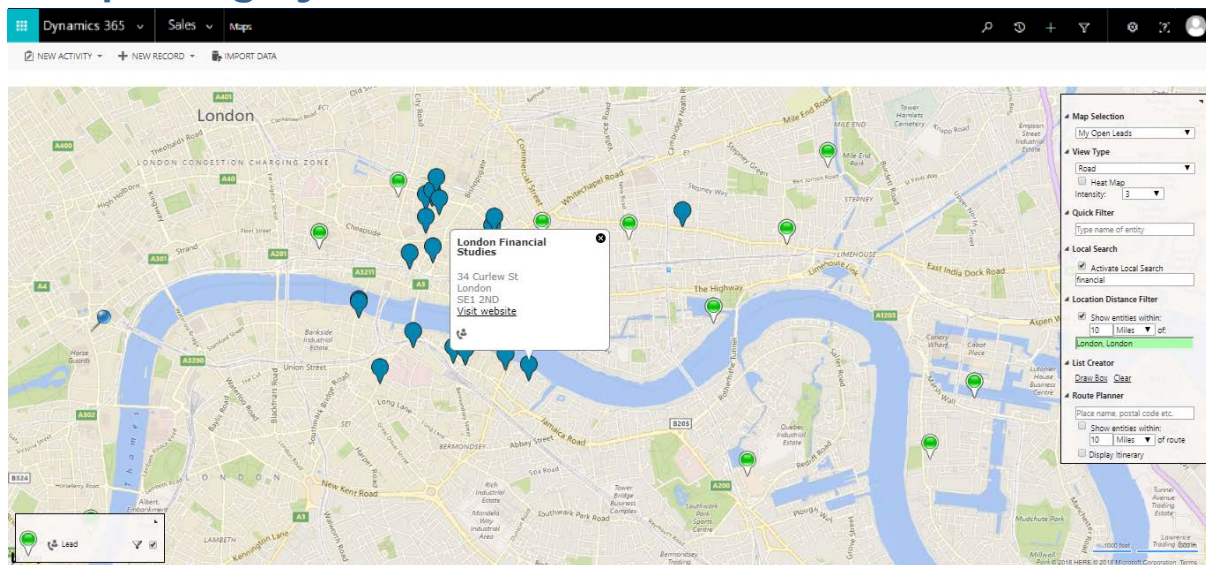
## About This Overview Guide

The purpose of this guide is to give an overview of using eMap's Local Search functionality to prospect for new Leads/Opportunities. This functionality delivers a very significant enhancement for both Microsoft Dynamics 365, or when on premise, Dynamics CRM 2016.

## Installation

Please refer to the separate eMap Installation and Configuration guide for instructions. This guide assumes that eMap has been installed with at least the default data, and that some entities in your Dynamics 365 or CRM system have been geocoded.

## Prospecting by Location with Local Search



One of the great new features in eMap is the integration of a localised data feed that enables end users of CRM to look up businesses in a given area.

The new Local Search (using a business data API) has access to over 85 million+ business names and addresses, many with phone numbers, email and full business addresses. In the example search (shown above), searching for businesses' that have a category of 'Finance' and that are located within 10 miles of central London, UK are displayed. The same search criteria will be used as you move around the map and zoom in or out, the data that is displayed can be quickly converted to a lead from the eMap interface.



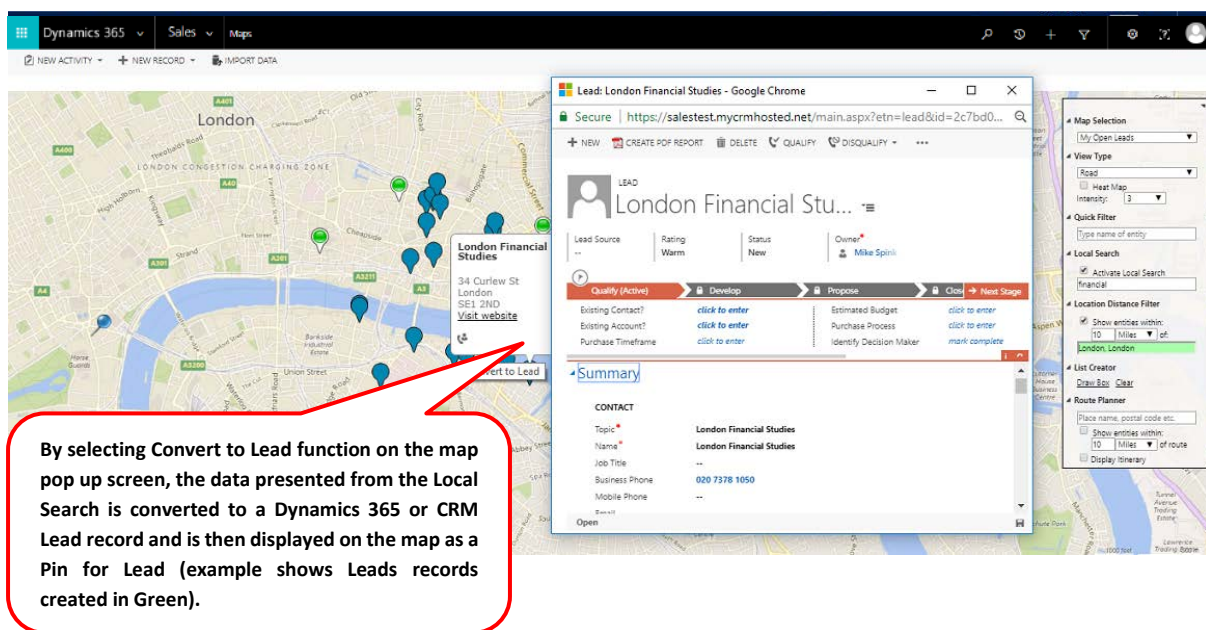
MyCRM's eMap solution extends the Microsoft Dynamics 365 and CRM solutions by introducing a full integration with the Bing Map service, which is used for rendering data on a map directly within the Microsoft Dynamics 365 or CRM environment.

## Creating Leads using eMap's Local Search

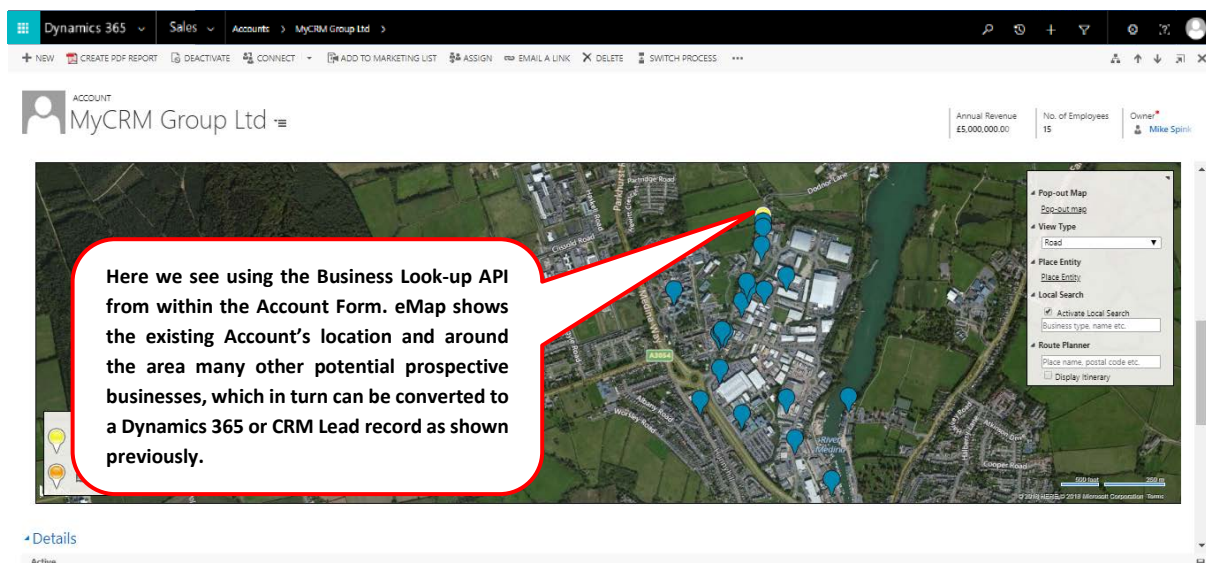
Finding prospects for your business and turning that data into a Lead or prospect record in Dynamics 365 and CRM has never been easier.

**Field Sales People** - Often sales executives, managers and directors will attend meetings with a prospect or a customer on a business park, industrial site or in a busy town or city location. Using the eMap data lookup, sales personnel can easily see what other potential businesses there are in the area and can target them accordingly to make contact and to arrange further meetings; either by pre-contacting or by executing marketing campaigns or a quick campaigns. Visiting other local business prospects when already visiting their location, results in far more effective use of a sales persons' time.

**Event Creation** - You can use the data look up to find organisations of a certain type in a certain area, which adds great value if you are holding events and need to have certain organisation types in specific, local or regional areas to be invited.



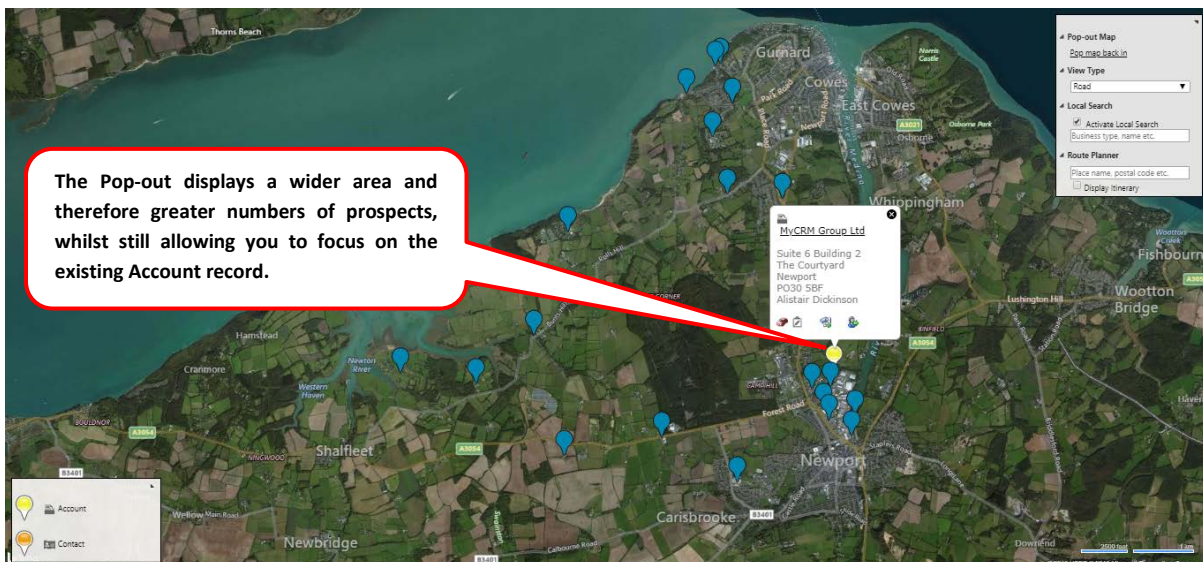
By selecting Convert to Lead function on the map pop up screen, the data presented from the Local Search is converted to a Dynamics 365 or CRM Lead record and is then displayed on the map as a Pin for Lead (example shows Leads created in Green).



Here we see using the Business Look-up API from within the Account Form. eMap shows the existing Account's location and around the area many other potential prospective businesses, which in turn can be converted to a Dynamics 365 or CRM Lead record as shown previously.

## Widening Your Prospecting Search

You can widen the search from prospective Leads by simply using the Pop-out Map function to enable eMap to take up the entire browser window. You'll see in the example (below) that whilst the original Account record is clearly identified, the area of search has widened significantly to increase the number of prospective new business Leads.



## eMap Visualisation – A Significant Enhancement for Microsoft Dynamics 365 and CRM

eMap provides your organisation with a far greater sense of awareness thanks to being able to visualise Dynamics 365 and CRM entities on a map. Using the Local Search will allow users to open the door to a new world of prospecting opportunity, which would otherwise be painstakingly slow and some might argue near on impossible to achieve.

eMap allows organisations to see things from a geographical based perspective, whether local, regional or country specific. eMap allows users to see just how wide their Sales, Marketing and Customer service reach is and how well it is performing. It also provides a quick and easy way to identify the 'Hot Spots' using eMap's Heat Mapping functionality. This allows users to recognise and build upon the most potentially lucrative areas for marketing and sales, and establish what areas present the best prospect to deliver their services to.

eMap truly enriches to enhance day to day productivity, which means less time is wasted searching for records, as your users and teams can quickly identify entity types by their location.

In addition to helping your organisation establish new prospects and record them as new Leads, eMap offers a great many other productivity enhancements for Dynamics 365 and Dynamics CRM 2016, which deliver an array of key functional areas of improvement. Every function delivers a great end user experience by making use of the enhanced data visualisation. Above everything, eMap is intuitive and very easy use and helps to boost Microsoft Dynamics 365 and CRM end user adoption.

You can refer to other eMap documentation or the full user guide from the MyCRM Download Centre.

## For Additional Information

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