

## THE POWER OF BEING UNDERSTOOD

# MICROSOFT DYNAMICS 365 CUSTOMER ENGAGEMENT SALES ACCELERATOR

Get a 360-degree view of sales operations, from anywhere

The key principles of any successful sales operation are consistent, but unfortunately they are often challenging for middle market businesses. These three enduring fundamentals are:

- The ability to measure performance
- The establishment of effective metrics to predict outcomes
- The alignment of the sales team with the goals of the organization

To help fulfill these principles, Microsoft Dynamics 365 Customer Engagement (CE) comes with a built-in sales dashboard. These out-of-the-box dashboards fill immediate needs, but soon lead to a desire for additional analytics. The basic dashboards also have limited drill-down capabilities.

Some customers export raw data from Microsoft Dynamics 365 manually into spreadsheets and create reports and analytics within Excel. While this approach works in the short term and provides some basic capabilities, it is a manual process; it is not scalable and it creates silos of information. The information is also stale as soon as the export takes place.

In addition to not providing a 360-degree view of the business, spreadsheets do not allow for easy collaboration among multiple users because they require emailing or manual sharing of findings and insights. The results include multiple versions of documents, often with different conclusions.

### Generate more actionable sales insight

To address these limitations, RSM has built the Microsoft Dynamics 365 Customer Engagement Sales Accelerator, leveraging customer relationship management (CRM) data in real time using Power BI to enhance the user's experience. Not only have we developed full filtering and drill-down capabilities,

but we have also designed the dashboards to allow users to ask questions of the data using natural language querying, which ties into Microsoft's artificial intelligence engine. These dashboards reside natively in Dynamics 365, providing the users a seamless experience from inside the application.

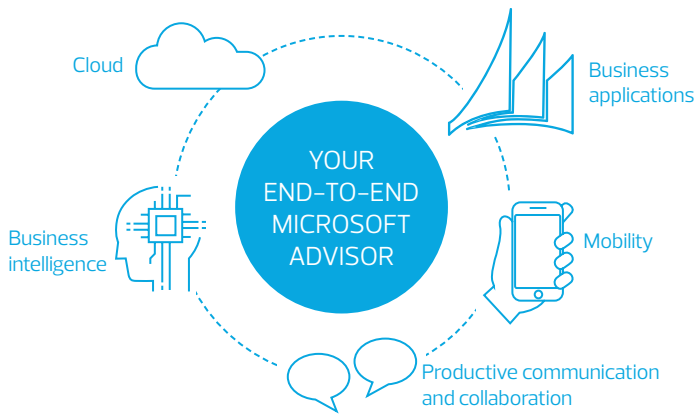
With the accelerator, Dynamics 365 users are able to get insights into their sales operations on day one. The accelerator uses sales opportunity, contact, account and product data to provide secure insights into wins and losses, forecast product needs and measure the performance of your sales team.

#### Sales accelerator key benefits:

- Open opportunities detail
- Won opportunities analysis
- Performance
- Drill-down capabilities to unlock details
- Self-service analytics

#### Built for Microsoft Dynamics 365 Customer Engagement





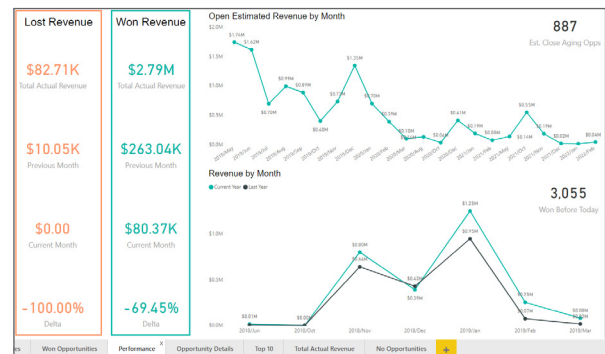
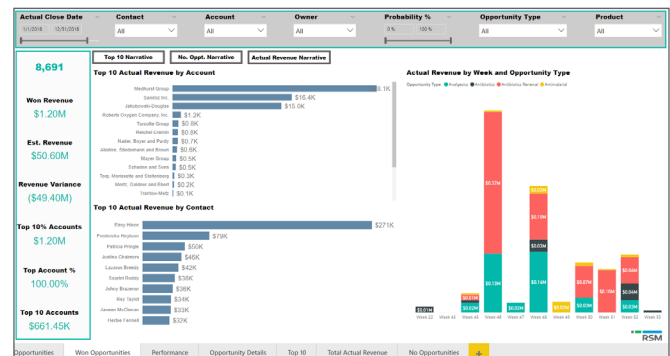
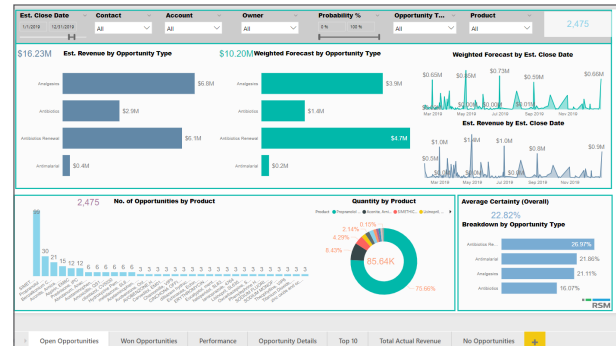
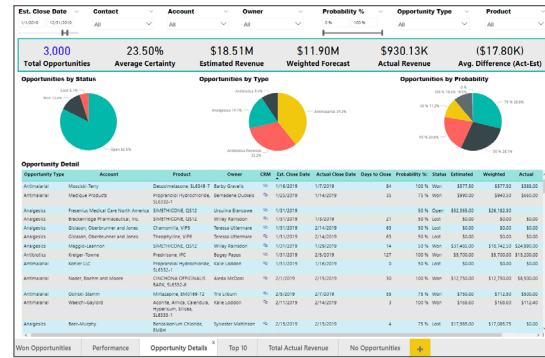
## Optimize your sales environment

RSM's sales accelerator provides five key benefits:

- Open opportunities** – The accelerator breaks down open opportunities by product, quantity and probability. Understanding that a limitation in Dynamics 365 surrounds weighted opportunities, the accelerator breaks down the weighted forecast by the close date.
- Won opportunities** – Understanding wins is key to understanding performance. To that end, the accelerator shows top revenue accounts and contacts. Summations of revenue won versus estimated revenue as well as actual revenue by week and opportunity type demonstrates trends associated with revenues.
- Performance** – Comparing wins and losses paints an overall picture of sales efforts and where the pipeline can be improved. The accelerator provides monthly analytics based on wins and losses. Estimated revenue by month and revenue won by month provides insight into the current state and future state of financials.
- Opportunity details** – The accelerator also allows decision-makers to view each opportunity in detail; high-level analysis is also provided by the previous views. Each high-level summary view has an option to drill down into the detailed view.
- Self-service analytics** – With the accelerator, salespeople and regional directors can create their own reports and analytics in addition to the built-in dashboards to gain additional insights.

The goal of the sales accelerator is to provide enhanced, meaningful analytics to your sales team. The accelerator is designed to be dropped into an existing environment with simple configuration. The tool allows for a quick entry into Microsoft's analytics tool, Power BI, with a built-out starting point, providing an immediate return on investment.

## Screenshots: RSM Dynamics 365 Customer Engagement Sales Accelerator



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