



DIGITAL SERVICES

AI Foundations

Sales IQ

AI Foundations – Sales IQ

MICROSOFT

AI Foundations defines the core technological pillars organizations need to succeed with AI and delivers solutions that make them a reality.

With **AI Foundations – Sales IQ**, we help organizations rapidly create a clean, structured, and analytics-ready sales data environment. Built on Microsoft Power BI and Fabric, it transforms raw ERP data—customers, items, sales reps, transactions, and dates—into a dynamic, interactive reporting layer. This layer gives our customers immediate insights and business intelligence, powers conversational and agent-based AI, and lays the groundwork for future AI applications.



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OVERVIEW

- **AI Foundations – Sales IQ** delivers a clean, governed, and extensible data layer that serves as more than a reporting tool—it's a launchpad for AI-driven sales transformation.
- **Data Readiness:** It standardizes and models core sales data tables, automatically generating relationships, calculations, and measures. This eliminates the need for manual setup and ensures consistency across analytics use cases.
- **Rapid Deployment:** With just a few key tables, organizations can move from raw data to actionable dashboards in weeks, accelerating time-to-value and reducing technical overhead.
- **Scalable Insights:** Pre-built metrics—including total sales, units, cost, profit, and margin—combined with time-based comparisons like year-over-year growth, create a strong foundation for trend analysis and forecasting.
- **Security & Governance:** Dynamic security roles align data access with organizational hierarchies, providing a critical prerequisite for responsible AI deployment.
- **Customization & Extensibility:** The solution is designed for flexibility, allowing teams to tailor visuals, filters, and KPIs to evolving business needs or to support more advanced AI models.



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CORE FEATURES

- Pre-built AI agent designed for Q&A and generative insights on the core data model
- Ready-to-use dashboards and visualizations for instant insights
- Dynamic filtering and slicing by customer, item, sales rep, and other key dimensions
- Built-in time comparisons, including prior periods and growth trends
- Role-based security with dynamic access controls
- Clean, customizable, and extensible reporting layer to support evolving business needs





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CORE METRICS

- Total Sales (\$)
- Total Units
- Total Cost
- Total Profit
- Total Margin
- Total Customers

TIME PERSPECTIVES

- Current Period
- Same Period Last Year
- Year-over-Year (YoY) Growth
- Growth Percentage



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DATA MODEL REQUIREMENTS

Getting started with AI Foundations – Sales IQ requires just a few standard **ERP** tables:

- Customers
- Items
- Sales Reps
- Transactions
- Dates

The **Transactions** table should include:

- Items
- Customers
- Quantity
- Price
- Cost
- Sales Rep
- Date



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LICENSING AND PRICING

- **Microsoft Licensing Requirements**
 - Microsoft Fabric Capacity (F8 SKU) – \$1,051.20/month (Pay-as-you-go)
 - Power BI Pro Licenses – \$14/user/month
- **Services and Implementation**
 - Implementation Fee: \$15,000 – Covers setup, configuration, and deployment of the Sales IQ solution
 - One-Time IP Fee: \$5,000 – Grants access to Citrin Cooperman's proprietary Sales IQ framework and templates



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TAKE THE NEXT STEP

Contact us to establish your sales data foundation for analytics and AI.

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