

# Dynamics 365 Sales Professional



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# Proposed Solution

The modules proposed within this solution are explained in more detail below:

## Dynamics 365 for Sales

Dynamics 365 Sales enables sales teams to build strong relationships with their clients, take actions based on insights, and close sales faster. Dynamics 365 Sales will keep track of your accounts and contacts, nurture your sales from lead to order, and create sales collateral. It also lets you create marketing lists and campaigns and follow service cases associated with specific accounts or opportunities.

### Sales Team Benefits:

- Follow guided business processes, so you know which steps to take next to close deals faster. You can tailor these business processes for your organization's needs.
- Manage customers and deals wherever you are, on any device (phone, tablet, PC, or Mac).
- Get productive faster by using familiar tools. Dynamics 365 Sales is tightly integrated with Office 365 apps, which makes it easier to get going more quickly:
  - Use SharePoint to store and view documents like presentations or notes in the context of a record, such as an opportunity, so anyone working on the opportunity can view them.
  - Open sales data in Excel, make changes, and save the changes back to Dynamics 365 Sales—all without switching between applications.
- Find all activities (appointments, phone calls, and so on) related to a customer or opportunity in one central place, so you have the context you need to do your job.

### Sales Manager Benefits:

- Accelerate team's performance by using real-time analytics based on historical data and predictive information.
- Monitor results, and provide feedback and coaching, in real time.

### Sales Premium Benefits:

- Accelerate Revenue with AI
  - Improve Account relationships – receive recommendations to help improve account relationships at risk.
  - Replace intuition with insights – streamline sales cycles through suggested best next actions, focusing on the highest-priority activity with the best propensity to close.
  - Take action seamlessly – take the suggested actions right from the dashboard.
  - Get notified about deal risks – get notified about deals that are stalled or at risk to help increase closure rates.
  - Get actionable insights and suggestions based on how you work. For example, if you have an opportunity closing next week, the Relationship Assistant will send you a reminder to connect with your customer.

# 1. Project Services

- Project & Sprint management
  - Management by Customer Lead Consultant & Dynamics Manager of overall project delivery, necessary project calls such as kick off and fact finding
  - Development Squad management
  - Managed project lifecycle in Azure Dev Ops
- Sales Training Demonstration – Consultant led session
  - Demonstration out of the box Dynamics Professional features
    - Dynamics Navigation & Fundamentals
    - Views, Dashboards, Searching, Data Structure
    - Managing Accounts & Contacts
    - Creating new Leads & Opportunities
    - The Sales Pipeline – Lead, Opportunity, Quote, Order
    - How to build a product catalogue & price list
    - Activity Management
    - App for Outlook & Document Storage
    - How to create Word templates
  - Summary Demonstration of Enterprise & Premium features
    - Assistant Cards
    - Lead & Opportunity Scoring
    - Sales Accelerator
    - Conversation Intelligence
    - Forecasting & Intelligent Forecasting
  - Q&A
- Sales Module Deployment
  - Setup of Development, UAT, Production and Fabric best practice deployment
  - Deployment of Dynamics Sales Professional Modules
  - Base Configuration of Dynamics Sales Professional Modules
  - Configuration of Users & Allocating out of the box security roles
  - Deploy the App for Outlook to requested Office 365 users
  - Deploy the SharePoint document storage integration
  - No allowance for setup of:
    - Setup of product libraries & pricing
    - Build of document templates
    - System customisations & development
    - Data import or creation
- Data Import
  - Collaboration with the customer to prepare the production environment with data required to operate
  - Effort here is bound as specified in the budget section, to maximise the outcomes of this time the client should provide clean data. Time spent tidying, correcting, or normalising data sources is counted against the allowance for data import
  - Suggested entities appropriate for import:
    - Accounts
    - Contacts
    - Leads
    - Opportunities
    - Products & Pricing
    - Orders
- Pre-Launch Training – Consultant led session
  - Ensure all users have access to the platform
  - Demonstration of any imported data & system walkthrough
  - Refresher summary of key elements from sales training session
  - Q&A
- Go-Live Hyper Care
  - For Go-Live day customer will have access to a dedicated consultant to triage any issues and answer questions for the Sales Team

## 2. Budget

### 2.1. Labour

| Service                                | Time          | Price (£)     |
|--|---------------|---------------|
| Project & Sprint Management            | 0.5 Days      | £475          |
| Sales Training Demonstration           | 0.5 Days      | £475          |
| Sales Module Deployment                | 2.5 Days      | £2,375        |
| Data Import (bound at 15 hours effort) | 2 Days        | £1,900        |
| Pre-Launch Training                    | 0.5 Days      | £475          |
| Go Live Hyper Care Day                 | 1 Day         | £950          |
| <b>Labour Total</b>                    | <b>7 Days</b> | <b>£6,650</b> |

NB: Go Live support labour usage is activated upon the formal Go Live Date. All support queries should be raised via [support@fabric-it.com](mailto:support@fabric-it.com) or by calling the office number on 01625 443110. A labour summary will be provided to the client, summarising all service requests that have been raised and the labour recorded against each request, respectively.

Once the Go Live support labour has been consumed, clients can take advantage of a formal Managed Services Agreement for the provision of additional support and change requests.

| Licencing                       | Unit               | Price (£) |
|---------------------------------|--------------------|-----------|
| Dynamics 365 Sales Professional | Per User Per Month | £49       |

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