

# STEP Sales Transformation Enablement Pack

STARTER PACKS TO INITATE THE JOURNEY OF OPTIMIZING  
SALES CAPABILITIES WITHIN PROFESSIONAL SERVICES /  
B2B SERVICE SALES"



# STEP AS A CONCEPT

Innofactors STEP offer is designed for the purpose of initiating the journey within **optimizing service organizations sales capability**. It's all about enabling organizations to **think big and taking small steps** towards achieving that goal.

STEP consists of three starter packs tailored to identify the customers unique needs and managing those by breaking it down and providing a natural next step.

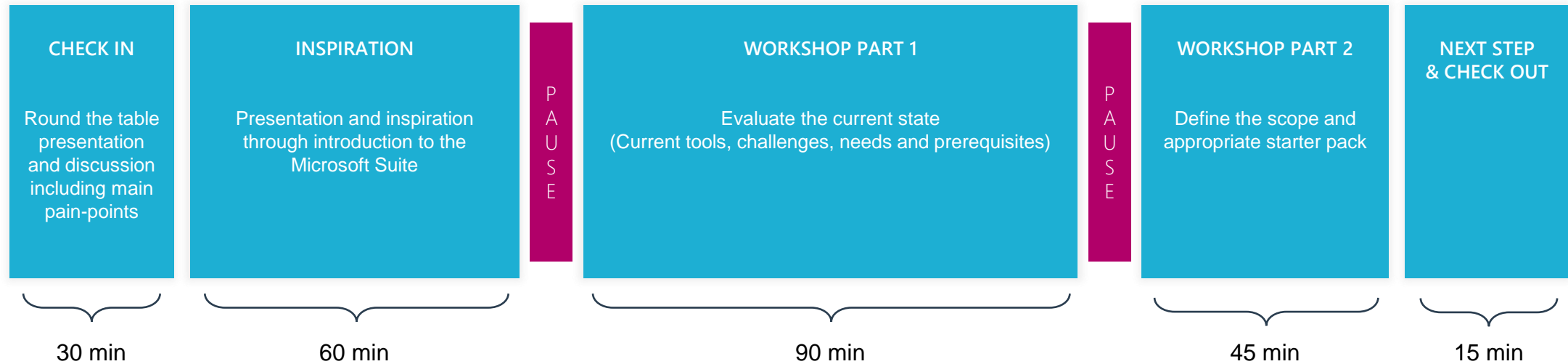
In close collaboration together with the customer our subject matter experts drives and facilitates the work to ensure a solution that meets the customers needs.



# STEP | FORMAT

WORKSHOP	PLAN	IMPLEMENTATION	EVALUATION & NEXT STEP	MANAGED SERVICE (Optional)
<p>Together we capture the current state of the customers sales capability</p> <p>Innofactor provides envisioned digital capabilities of relevance within D365</p> <p>Together we discuss the scope of relevance for first delivery target</p>	<p>Innofactor recommends relevant starter pack to initiate</p> <p>Innofactors anchors definition of first target scope with key stake holders</p> <p>Innofactor provides recommendations for appropriate stake holder representation within implementation</p>	<p>During the implementation we perform the necessary deliverables associated with the starter pack.</p> <div><div>SALES FOUNDATION</div><div>TAILORED SALES FOUNDATION ASSESSMENT</div><div>SALES OPTIMIZATION</div></div>	<p>Together with the customer we evaluatate the implementation and discuss recommendation for next step and effort associated</p>	<p>After the implementation of the cloud solution the customer is provided with the option of using our support and maintenance offering. The agreements are stipulated based on the solutions and the SLA of the customer.</p>

# STEP | WORKSHOP FORMAT



## STEP | OVERVIEW



### SALES FOUNDATION

For organizations that wants to get off to a flying start and start out simple with D365 for Sales



### TAILORED SALES FOUNDATION ASSESSMENT

For organizations that need to make a deep dive to gather the organizational requirements before entering into using D365 for Sales



### SALES OPTIMIZATION

For organizations that wants to take an active role within optimizing their core sales capabilities

**STEP - SALES FOUNDATION** allows organizations to take an important step towards a more active role in optimizing sales capabilities in order to reach profitability and growth targets



#### **SALES PRODUCTIVITY**

Reimagine sales productivity and the opportunity within removing time consuming cost drivers through automation.



#### **SALES TRANSPARENCY**

Reassess the organization's ability to make the customer relationship transparent and remove high dependencies on personal bound information.



#### **SALES INSIGHTS & ANALYTICS**

Re-evaluate the opportunities not only within management but also the ability to operationalize insights in order to support both tactical and strategic capabilities within the whole organization.



#### **SALES EFFECIENCY**

Reimagine sales efficiency and the possibility of working smarter through powerful tools that makes it easier to prioritize the right opportunity and the appropriate next steps within.



#### **SALES ENGAGEMENT & COLLABORATION**

Re-evaluate the opportunities to increase all stakeholders sales engagement, within the organization itself, partnerships as well as from the customers.

# STEP | SALES FOUNDATION

## WHOM IT CONCERNS?

The workshop targets decision-makers from Business and IT - Key representatives within the organization who have a commitment and responsibility associated with the current and future digital sales support. This to secure a good representation when facilitating the initial analysis of current and future state. This starter pack aims to provide the customer with a solid representation of the requirements needed to manage when entering into Dynamics 365 for Sales.

## HOW IS IT DELIVERED?

**STEP SALES FOUNDATION** - is a standardized process where the initial workshop aims gather current state, envision future state and scope first target delivery. During a 2-3-week assessment, the necessary deliverable associated with gathering the key insights associated with migrating/implementing Dynamics 365 for Sales. Finally evaluation is performed, and next step recommendation is provided.

## WHAT IS THE RESULT?

After the assessment you will have;

- ✓ Definition of current state, envisioned future state and first target anchored with key stakeholders
- ✓ Assessment report anchored with key stakeholders
  - ✓ Business goal alignment
  - ✓ Scope and limitations
  - ✓ Business requirements
  - ✓ Technical requirements
  - ✓ High level architectural representation
  - ✓ Recommendations for steering and project model for realization/implementation
- ✓ Recommendation for next step and associated estimates

Deliverables included in Sales Foundation	Hours
✓ 1. Documentation review & initial preparational interview	
✓ 2. Business requirements workshop	
✓ 3. Technical requirements workshop	
✓ 4. Management interview	
✓ 5. Report generation	
✓ 6. Report presentation	
	~100 h