# **STEP**

# Sales Transformation Enablement Pack

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



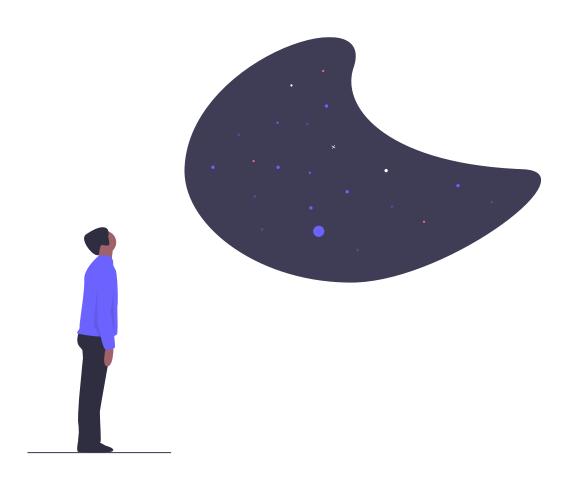


# STEP AS A CONCEPT

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**

Together we conduct a workshop to esablish mutual understanding of the current state as well as initiating the envisioning of the goal state.

The goal is to map the customers current state and understand the prioritzed needs and pain points unique to the

The result of the workshop is a recommendation of what starter pack best suits the customer.

Together we agree on the scope of the delivery phase associated with the starter pack.

#### PLAN

Based on the findings from initial workshop Innofactor presents a recommendation for the appropriate way to proceed and associated starter pack.

Together we set the framework and scope for the first implementation to ensure regards to what can be achieved within the first delivery.

Innofactor also provides recommendations as to secure the appropriate representation from both parties to ensure efficient and close collaboration.

#### **IMPLEMENTATION**

During the implementation we perform the necessary deliverables associated with the starter pack.





TAILORED SALES FOUNDATION ASSESSMENT



**SALES OPTIMIZATION** 

#### **EVALUATION & NEXT STEP**

Together with the customer we evaluatate the implementation and discuss recommendations for how to proceed as a next step.

Innofactor also provides documentation from the implementation based on what has been agreed within the planning phase.

#### MANAGED SERVICE

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.

Delivery of starter pack (<100h)

Managed service (optional)



# 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 complete scope before entering into using D365 for Sales



# SALES OPTIMIZATION

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





# SALES FOUNDATION

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

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



#### **SALES PRODUCTIVTY**

Reimagine sales productivity and the possibilities within removing time consuming activities 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 from the customers itself.



# STEP | SALES FOUNDATION

### WHOM THE WORKSHOP CONCERNS?

The workshop targets decision-makers as well as business-related people in your organization who have a commitment and responsibility within the organizations sales capability. This is to obtain a good dynamic in analyzing the current situation and the way forward. This starter pack aims to give the customer the opportunity to quickly anchor, set up and get started with the use of modern and future-proof sales support.

# HOW IS IT DELIVERED?

STEP SALES FOUNDATION - is a standardized process where the initial workshop aims to inspire the possibilities and create consensus within the scope of the first delivery. During a 3-4 week delivery, the necessary activities associated with introducing our preconfigured sales support based on Dynamics 365 for Sales are performed. Finally, Innofactor compiles and presents a recommendation for the appropriate next step.

# WHAT IS THE RESULT?

After workshop and delivery you will have;

- Engagement within the opportunities associated with a modern sales tool and established understanding of your first target
- Setup of D365 for Sales ready for use
  - ✓ Account and contact definition
  - √ A streamlined sales process/cycle definition
  - ✓ Streamlined activity management in standard engagement formats such as; email, meetings and tasks.
  - ✓ Streamlined storage guidlines for sales process related documentation
- Basis for prioritzed next step

**Deliverables included in Sales Foundation** 

Hours

- √ 1. Technical setup of environment
- 2. Installation off Innofactors pre-configured and managed solution
- √ 3. Minor configuration setup
- √ 4. Provide user access & privileges
- ✓ 5. Import customer data (account & contact)
- √ 6. Activiate SharePoint connector
- √ 7. Activate Outlook connector

Potentional add-ons excluded from the starter pack

- X.Migration additional data like opportunities, activities, docuemnts etc.
- √ X. Integrations additional integration points
- ✓ X. Training and adoption

100 h

