

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

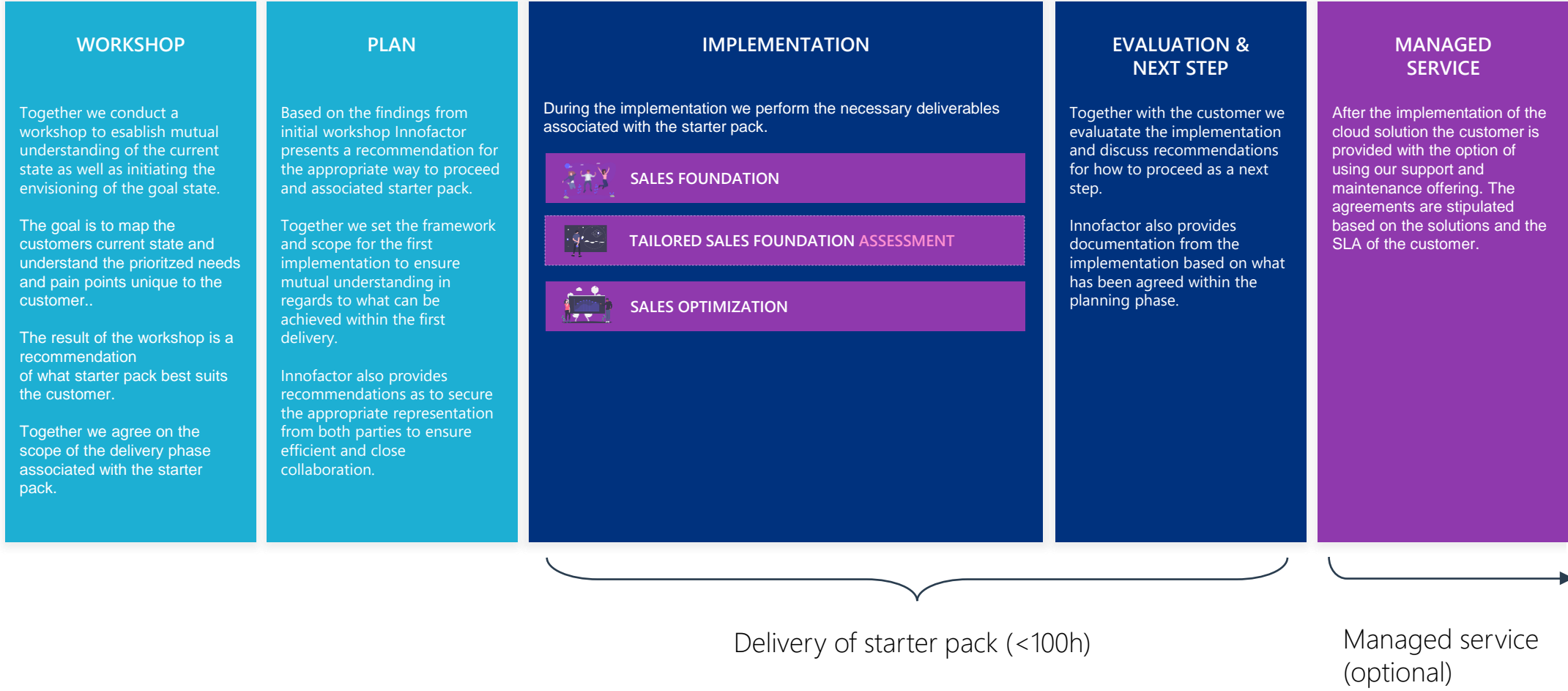
Innofactors STEP offer is designed for the purpose of initiating the journey within **optimizing service organizations sales capability**. It's all about enabling organizations to **think big and taking small steps** towards achieving that goal.

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.

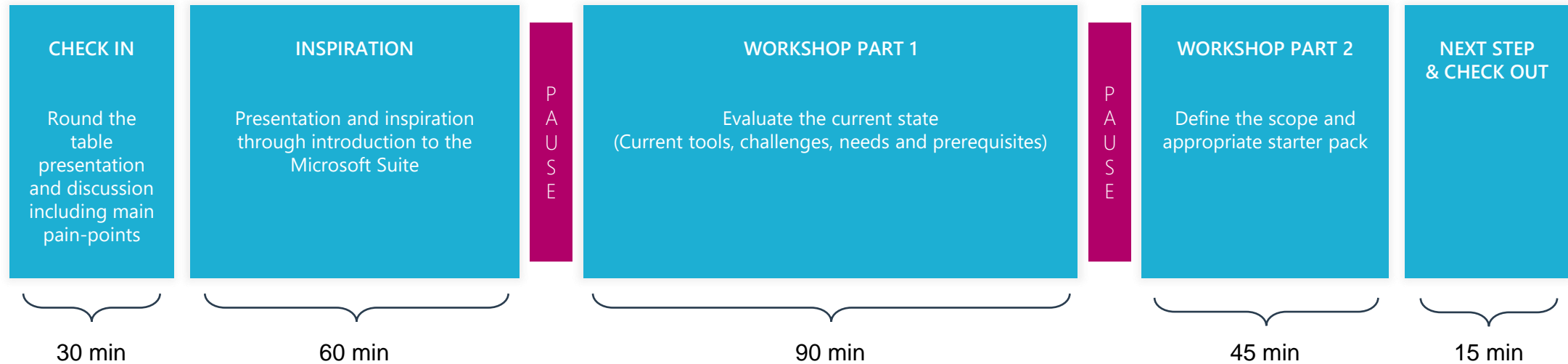
In close collaboration together with the customer our subject matter experts drives and facilitates the work to ensure a solution that meets the customers needs.



STEP | FORMAT



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 PRODUCTIVITY

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 possibiltiy 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 guidelines for sales process related documentation
- Basis for prioritized 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. Activate SharePoint connector	
✓ 7. Activate Outlook connector	
Potential 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