

Streamlining Sales Automation Processes Using Microsoft Dynamics 365

Our Value Proposition

Quickly automate the sales process by implementing the modern and continuously updating functionality of Microsoft Dynamics 365 Sales, based on a transparent, typical sales process.

Get a solution that can be adjusted with additional automation systems for other CRM process groups (such as Marketing, Customer Service, building a consolidated 360° customer profile, etc.), and an effective AI platform for automating any business processes simultaneously.

Choose a clear fixed budget and result, implementation timeframe and approach. Also, it includes the necessary work on the customer's side, a project schedule, and a roadmap for further development, which is created during the implementation and based on prior experience.

Key Benefits:

1. Ready-to-use sales process, extended relative to the basic D365 Sales functionality (with the option to select features and adjust the budget - chapter “Functionality to implement”)
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2. Clear approach and implementation schedule, including preparatory work and work during the implementation process on the customer's side

3. Workspace for the project team and transparent rules for project work management and communications. Adapted implementation process based on SCRUM and Agile.

4. Training of key users.

4. Support for the initial data loading process.

5. Acceptance testing and start support.

6. Post-launch Hyper Care support.

It can provide a solution for companies that:

- Do not yet have a specialized solution for sales process automation, or use simple, general automation tools, and wish to improve the quality of their processes by implementing best practices;
- Execute initial formalization of your processes, laying the foundation for further structuring and systematization of ones and the introduction of KPIs, planning, and analysis;
- Make a quick start and implement basic or even advanced CRM functionality;
- Obtain a platform for deepening and expanding the automation of practically all CRM processes, including handling requests, service maintenance, field service, marketing, Customer Data Platform, and even contact center with messengers, intelligent telephony, and system for creating powerful analytical reports and dashboards.
- Have a clear, optimal, and controlled budget, deadlines, and implementation methodology.



Why Choose OntargIT?

- Experienced Consultants: Our team has many years of experience working with Microsoft Dynamics 365 and Power Platform.
- Universal yet personalized approach to implementation
- Corporate implementation experience
- Broad technical and technological expertise
- Hands-on training
- Results for the business

Functionality to Implement

Here, you can choose between the basic and the extended package. Additional functionality in the extended one is marked with (+).

1. Phase “Lead Registration”

- Manually. Manual creation of a Lead (receiving a call by phone, importing from Excel, or a photo of a business card).
- Based on Email. Automated creation of a Lead from a Microsoft Exchange Online (M365) email.
- Import from Corporate Website(+). Integration with your website for automatic Lead creation.
- Based on Email Analysis using AI (+). The incoming email is analyzed, and key Lead fields and comments regarding the inquiry are filled. Automatic categorization of the inquiry.

2. Phase “Lead Distribution” (+)

- Adding necessary analytical fields for the Lead for its classification and configuring Lead distribution rules using the system's basic functionality.

3. Phase “Lead Qualification”

- Configuration of searching for basic company information on publicly available internet resources to detail the company profile using AI.





- Collection of additional company information on specialized services (+), for example, verification of status, security, and details (Youcontrol and others) through integration and AI.
- Support for the company's accepted Lead validation algorithm (+): adding necessary fields, checks on whether the Lead can be considered qualified, and required approvals.

4. Commercial Proposal Formation

- Creation of the proposal, its version.
- Proposal Status. Cancelled, not accepted, won.
- Proposal Approval for sending to the client (+). Adding necessary approvals and confirming approval status.

5. Contract Formation (+)

- Recording contract attributes (dates, type, automatic renewal).
- Registration of annexes and attributes.
- Contract Text Approval: Configuration of stages and roles in the contract approval process. Recording feedback from participants. Collaborative work on the file in SharePoint. Managing user access to the file during approval stages.

6. Approval Functionality (+)

- Mechanisms that support the possibility of configuring approvals (roles, stages, delegation).

7. Telephony.

- Connecting your PSTN provider to D365 Sales Cloud Telephony through a cloud partner or via your own compatible equipment.
- Integration with Microsoft Cloud Telephony.
- Call recording and transcription, sentiment analysis, mood analysis, and control via key phrases.

Implementation route for the project

1. Project Scope Formulation. (During the pre-sale stage)

- Discussion of relevant options from the proposal for the pilot implementation, along with a summary of key processes automation within the implementation.
- Creation of the final fixed implementation budget based on the proposal calculator.
- Estimation of the initial data loading task with a separate time & material budget.

2. Preparation for Implementation

- Identification of key employees on the client's side who will act as Product Owners and change ambassadors, and planning their presence time in the project.
- Creation of joint work and communication space (MS Teams Team, Planner, associated registers) and communication rules.
- Planning necessary work in the client's IT infrastructure.
- Purchase of the necessary minimum license package for development and client testing.
- Analysis and modeling stage: interviews with key employees, discussion of the automation concept using the real system with basic data adjustments and user interface modifications as an example, agreement on the list of system configurations and modifications, and adaptation of the implementation plan.

3. Implementation

- Execution of necessary system configurations.
- Execution of necessary modifications.
- Regular demonstration of functionality to key users and gathering feedback.
- Preparation and partial test data loading

4. Purchase of Remaining Licenses

5. Acceptance of Work by Key Users

- End-to-end process testing.
- Execution of real-world scenarios.

6. Go-Live

- Initial data loading.
- Training of end-users by key users.
- Launch and support: consultations for key users, issue resolution.
- Post-launch support: critical modifications based on usage results, creation of a system development backlog.

Our training plan includes the following:

We use a simplified SCRUM approach

-  Typical sprint duration — 2 weeks.
-  Each sprint has goals for both the client and vendor.
-  Each sprint ends with a report to the client.
-  The goals are a list of system requirements and tasks that the implementer and the client must complete to meet those requirements.
-  The vendor holds Daily Meetings for coordination.
-  Discussions on implementation details are carried out in online meetings with the client through the discussion of examples on the system being implemented.
-  All agreements and decisions are documented.
-  Functionality is demonstrated and handed over to the customer for testing as it is configured.

Typical Project Roles



Vendor:

- Project Manager
- Architect
- Consultant(s)
- Developer(s)




Client:

- Key business users
- Project Manager / Analyst(s)
- IT department (Azure & Local Network Administrator)



OntargIT is an international consulting company. Specializing in Microsoft Dynamics 365 and the Microsoft Power Platform, we are dedicated to implementing and supporting these advanced systems.

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