Sales Automation
Fasttrack

Factsheet Pixelzebra Sales Automation Fasttrack

With more then 20 year experience in implementing CRM-systems for Sales we know we need to focus on results. In every implementation we look at specific goals for your organisation that you want to accomplish. We can help you by providing you our top 10 list of Sales Improvement goals. Based on your goals we implement a working process for your Sales Team in Microsoft Dynamics for Sales in three weeks.

Our focus for every Dynamics for Sales Implementation:

We thought things through

Pixelzebra has implemented hundreds of CRM-systems. We know what works and doesn't work for your organization. What can you expect:

- We offer best practice templates for CRM processes like Account Management, Lead Management and Sales.
- Pixelzebra will provide a Sales Automation solution for Dynamics 365 free of charge that contains more then 800 improvements based on the out of the box Microsoft Dynamics 365 for Sales.
- We coach your users on the most effective way to use the systems
-

Pixelzebra Sales Automation Solution

The Pixelzebra Sales Automation Solution enhances the sales module of Dynamics 365 and the integration with Office 365. The Autopilot solution is primarily focused on supporting contact management and sales driven processes. The solution contains automated processes to increase efficiency and improve adoption.

- Opportunity management.
    - Customized sales process(es) based on your industry upon defined stages and steps.
    - Automated follow up activities.
    - Weighted personal and general sales pipeline(s).
- Account Management plans.
    - Account Management plans with reminders for important accounts and contacts.
- Smart email tracking solution in Outlook, to make email tracking even easier and more relevant.

A modern platform for Sales

The sales module offers every functionality a modern organization needs to contact relations on the right moment with the right information such as:

- Insight in activities
- Insight in the sales pipeline
- Insight in the status of each opportunity

Increased user adoption

The key to the success a CRM implementation is the user adoption. That is why we will focus on the added value it will have for the users, through training and coaching. It will create a broader support and increased usage for the system. Based on the experiences of the users, additional functionality can be added step by step in the future. We will start the sales implementation with a training, so that you know the system before you start the project. We will also end with a training to train the team on how to use the system with your sales processes.

Increasing efficiency

With Microsoft Dynamics 365 a large part of the currently used Excel sheets and lists can be eliminated. Customer related history will be found more easily, and analysis can be made faster to prioritize and improve sales productivity.

Future proof

The platform can grow, as the requirements grows. Your business never stops. Microsoft Dynamics can be adjusted and extended base on new initiatives. It also offers multiple other applications which can be added to the platform in the future. For example, customer service and marketing. You are in control and can customize the system yourself.

Project Approach

Leverage the experts to implement the Pixelzebra Sales Automation Environment. The pilot gives you the opportunity to engage one-on-one with a CRM Sales Consultant to get the most out of Dynamics. To increase user adoption, user coaching sessions will increase productivity and will get the user known to the user adoption. The Project Program will deliver a pilot configured to your needs in two weeks following the steps below.

- Kick-off session: We will discuss your businessmodel, goals, user community and functional expectations.
- AutoPilot Configuration: Immediately following this session, we will configure your pilot to support accountmanagement, sales process and collaboration. By the end of the first week, you'll be able to review your configured solution.
- Validation: The consultant will conduct a final configuration review with you. This will serve as the sign off to your configuration.
- User Training: We will provide an overview of the user experience. This training introduces system navigation, adding, searching and editing data and working with activities and opportunities. The end user training is also the go live for the pilot. We strongly advise to have the training in one physical location.
- User adoption & coaching: For two consecutive weeks following your training, we will schedule follow up sessions to focus on support and user adoption. Simply provide your questions and screenshots via email in advance to us and you will receive feedback during your scheduled session. Examples of activities which increase user adoption after Go Live are:
    - Measuring usage of the system
    - Coaching specific users, or user groups
    - Involving users in improving the system in the next release
    - Training, education and support
    - Keep on communicating
- Evaluation: At the end of the pilot we will have an evaluation session to define next steps and discuss the outcome of the pilot.