

# **Sales Automation:**

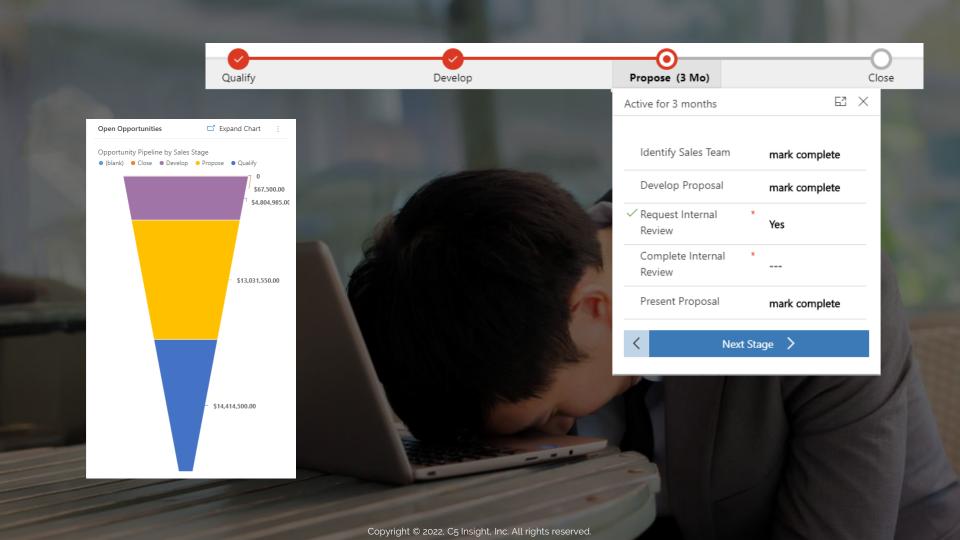


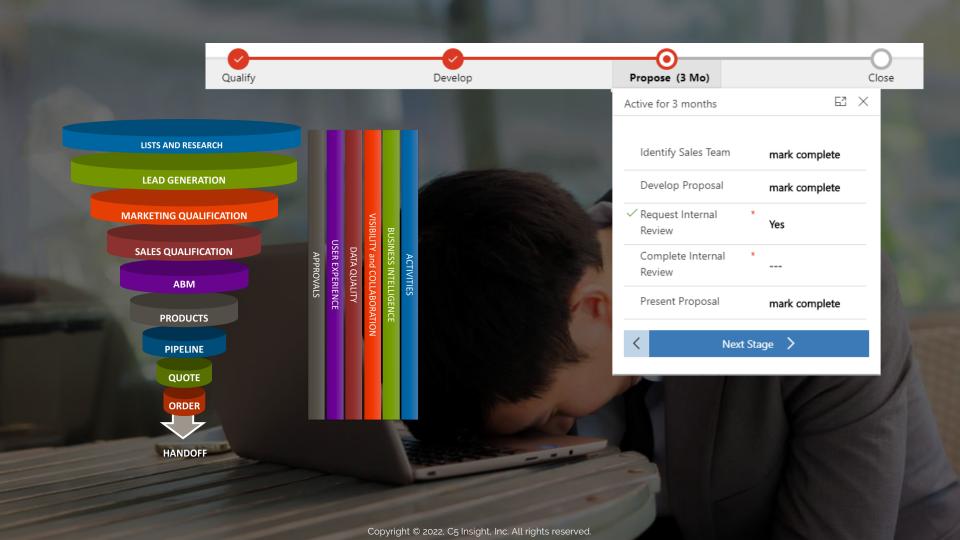


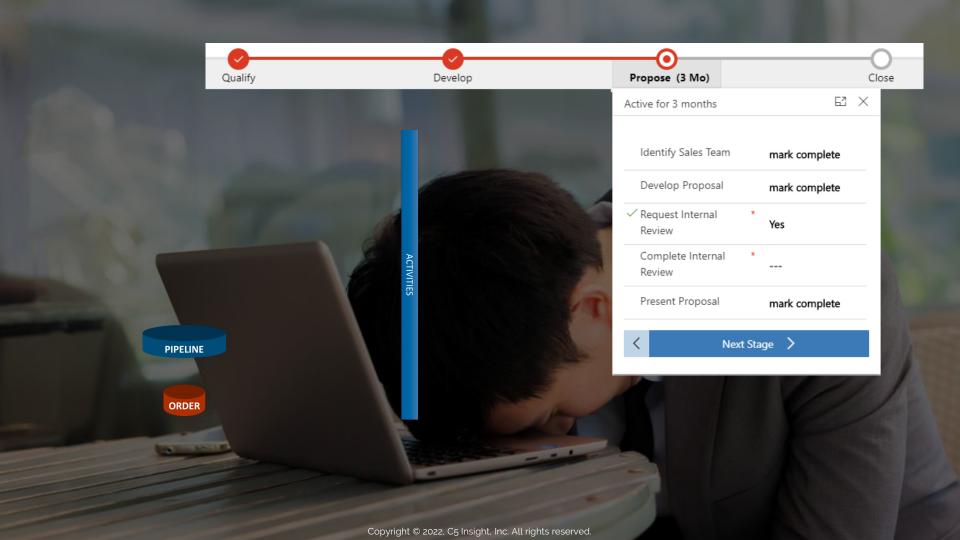
and opportunities. and strategic decisions,

educate team members.

employees to contribute to improvement.







USER EXPERIENCE

**APPROVALS** 



# **Meet Your Presenter**

### Tricia Desso-Cox, MM

Managing Director EOS Integrator

Advisor, Author, Speaker

**Customer and Employee Experience** 























Tricia.DessoCox@c5insight.com



Presentation is copyright © 2022, C5 Insight, Inc. All rights reserved.

**LEAD GENERATION** 

MARKETING QUALIFICATION

**SALES QUALIFICATION** 

**ABM** 

**PRODUCTS** 

**PIPELINE** 

QUOTE

ORDER



**HANDOFF** 

#### **ACTIVITIES**

SINESS INTELLIGENCE

**VISIBILITY and COLLABORATION** 

**DATA QUALITY** 

**USER EXPERIENCE** 

**APPROVALS** 

# 16 Areas of Sales Process Design and Productivity

- Dynamics 365 Functionality
  - Configuration
  - Process Flows
- Third Party Add-Ons
- External Vendors
- Links to More Info

Resources



**LEAD GENERATION** 

MARKETING QUALIFICATION

**SALES QUALIFICATION** 

**ABM** 

**PRODUCTS** 

PIPELINE

QUOTE

ORDER



**HANDOFF** 

CTIVITIES

**BUSINESS INTELLIGENCE** 

VISIBILITY and COLLABORATION

DATA QUALITY

**USER EXPERIENCE** 

**APPROVALS** 

### **Lists and Research**

Sales Intelligence Social Selling Market Research Account and Lead Research

- InsideView
- Versium
- LinkedIn / Sales Navigator
- Import
  - Standard
- Automation
  - Web Forms
  - Marketing Automation Tools

**LEAD GENERATION** 

**MARKETING QUALIFICATION** 

**SALES QUALIFICATION** 

**ABM** 

**PRODUCTS** 

PIPELINE

QUOTE

ORDER



**HANDOFF** 

CTIVITIES

BUSINESS INTELLIGENCE

VISIBILITY and COLLABORATION

DATA QUALITY

**USER EXPERIENCE** 

**APPROVALS** 

#### **Lead Generation**

Referrals
Partner Relationships
Content Marketing/Inbound
Event Marketing
Nurture Marketing

- Campaigns, Marketing Lists, Quick Campaigns
- Power Apps Portal
- Marketing Automation Platform
  - D365 Customer Insights Journeys
  - ClickDimensions
  - HubSpot
  - Etc.

**LEAD GENERATION** 

**MARKETING QUALIFICATION** 

**SALES QUALIFICATION** 

ABM

**PRODUCTS** 

PIPELINE

QUOTE

ORDER



**HANDOFF** 

CTIVITIES

BUSINESS INTELLIGENCE

VISIBILITY and COLLABORATION

DATA QUALITY

**USER EXPERIENCE** 

APPROVALS

# **Marketing Qualification**

MQL = Marketing Qualified Lead Lead Scoring and Rules Fit (MQL), Ready (SQL)

- Power Automate / Workflows
  - Lead Assignment
  - Lead Routing
- Scoring
  - D365 Sales Insights (AI)
  - Versium Predict



**LEAD GENERATION** 

MARKETING QUALIFICATION

**SALES QUALIFICATION** 

**ABM** 

**PIPELINE** 

QUOTE

**HANDOFF** 

DATA QUALITY

USER EXPERIENCE

# **Marketing Qualification**

Marketing Automation

Customer Relationship Management

Marketing Qualified Leads to Sales

Sales Results to Marketing

Customer Care Visibility

Web Content Management

Event Marketing

Company Hosted

Social Marketing

Post Scheduling

Brand and

Brand

Design

Internal Comms

Intranet

Email

Social (Teams, etc

Shareholde

Integration

**PRODUCTS** 

**ORDER** 

**Planning** 

Strategic Planning Digital Marketing Plan Ad-Hoc Requests Mktg Process Design Personas & Journeys

Campaign Management Campaign Automation

Nurture

List Management

Email

SMS

Landing Pages

Web Analytics

Content Marketing

Chat

3<sup>rd</sup> Party Hosted

Neb / Virtual

Lead-to-Sales

Social Listening

Sentiment Analysis Executive Coaching

Templates

Collateral

Loyalty Catalog

Direct Mail

Digital Asset Mgmt

CTC Telephony

CRM to MAP

Customer Data for List Pulls sales, service, mktg)

Analytics Web/PPC/SEO/CTC Voice of Customer Campaign ROI Lead Conversion **Channel Analysis** 

Scoring, Modeling & Al

**LEAD GENERATION** 

MARKETING QUALIFICATION

**SALES QUALIFICATION** 

ABM

**PRODUCTS** 

PIPELINE

QUOTE

**ORDER** 

**HANDOFF** 

ACTIVITIES

BUSINESS INTELLIGENCE

VISIBILITY and COLLABORATION

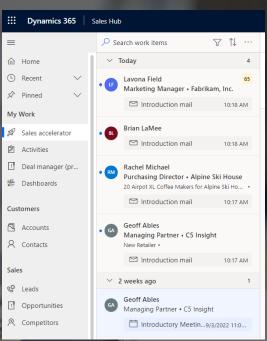
DATA QUALITY

USER EXPERIENCE

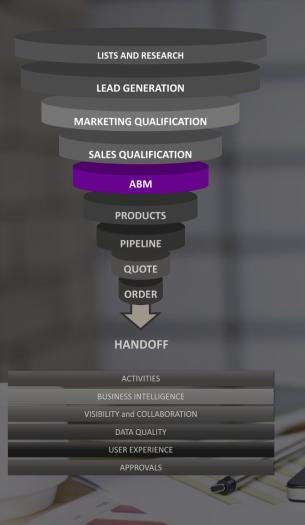
APPROVALS

### Sales Qualification

SQL = Sales Qualified Lead Fit (MQL), Ready (SQL) Sales Cadencing



- SharePoint (collateral and content)
- Rules and Scoring
- BANT fields (or custom)
- D365 Sales Insights (AI)
- Business Process Flows
- Cadencing Solutions
  - Playbooks
  - Sales Accelerator



#### ABM

ABM = Account-Based Marketing AKA: Key account or target account marketing Goal: Treat large accounts like a market

- Requirements (see previous slides)
  - Content, Data, Processes
- D365 Customer Service/Field/Project Ops
- ERP Integration
- Configure
  - Annual Plan Entity
  - Forecast, Loyalty, Allocation
  - Service Agreement Renewals

**LEAD GENERATION** 

**MARKETING QUALIFICATION** 

**SALES QUALIFICATION** 

**ABM** 

**PRODUCTS** 

PIPELINE

QUOTE

ORDER



**HANDOFF** 

ACTIVITIES

**BUSINESS INTELLIGENCE** 

VISIBILITY and COLLABORATION

DATA QUALITY

**USER EXPERIENCE** 

APPROVALS

#### **PRODUCTS**

- Sales Literature
- D365 Templates (Word)
- Product R&D Integration
  - Crowd Sourcing Ideas/Priorities
  - Power App Portal (Power Pages)
- SharePoint (collateral and content)
  - Unique Selling Proposition
  - Product Collateral
  - Templates

Demo Video: SharePoint Document Templates – 1:32

**LEAD GENERATION** 

MARKETING QUALIFICATION

**SALES QUALIFICATION** 

**ABM** 

**PRODUCTS** 

PIPELINE

QUOTE

ORDER

HANDOFF

**USER EXPERIENCE** 

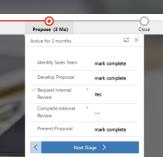
Qualify

ACTIVITIES

BUSINESS INTELLIGENCE

VISIBILITY and COLLABORATION

DATA QUALITY



Add an action

Determine Template and Build Proposa

Build Levels String

Switch for Level Options

S Get Props of saved proposal

S Update Props of saved proposal

Update Proposal Request

Email Salesperson Link to Proposal (Preview)



- Opportunity Types
  - Quick Project
  - Recurring/Renewal
  - RFP
  - Distributor/Partner
- Sales Cadencing Solutions
  - Workflow / Power Automate
  - Sales Accelerator
  - Sequences
- Proposals
  - D365 Word Templates
  - SharePoint
  - msCRM Add-Ons Document Core Pack
  - Power Automate

#### QUOTE

SALES INFORMATION

III Delete Ounte Line

CPQ = Configure, Price, Quote

LEAD GENERATION

MARKETING QUALIFICATION

**SALES QUALIFICATION** 

ABM

**PRODUCTS** 

PIPELINE

QUOTE

ORDER

**HANDOFF** 

ACTIVITIES

**BUSINESS INTELLIGENCE** 

VISIBILITY and COLLABORATIO

DATA QUALITY

USER EXPERIENCE

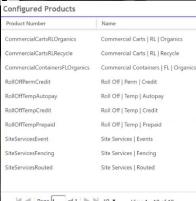
APPROVALS

ERP IntegrationQuote and Product Entities

- Rapid line-item entry
- Bundles: Packaged Pricing
- Properties: Customize Products
- Relationships: Up-Sell, Cross-Sell, Accessory, Substitute

#### CPQ Solutions

- Cincom CPQ Sync
- ExperLogix
- Configure One
- Custom Power App



Presentation is copyright © 2022, C5 Insight, Inc. All rights reserved.

LISTS AND RESEARCH **LEAD GENERATION** MARKETING QUALIFICATION **SALES QUALIFICATION ABM PRODUCTS PIPELINE** QUOTE **ORDER HANDOFF** DATA QUALITY

USER EXPERIENCE
APPROVALS

### **ORDER ENTRY**

Enable customer-facing personnel to do order entry directly in CRM rather than in ERP

- Order and Product Entities
  - Quote to Order Function
  - ERP Integration
  - UI Flows
- E-Commerce
  - D365 Commerce
  - ERP Integration

LISTS AND RESEARCH **LEAD GENERATION** MARKETING QUALIFICATION **SALES QUALIFICATION ABM PRODUCTS PIPELINE** QUOTE **ORDER HANDOFF USER EXPERIENCE APPROVALS** 

#### **HANDOFFS**

Deliver a better customer experience with seamless handoffs between Sales, Operations and Customer Care

- Record Ownership
- Business Process Flows (BPF)
  - Final Stage
  - Multi-Record BPF
  - Spin-up a New BPF
- Workflow and Power Automate
  - Alerts (Email, MS Teams)
  - Task Assignments
- Custom Tables/Integration
  - Proposal / RFP
  - Project Operations
  - Field Service

**LEAD GENERATION** 

MARKETING QUALIFICATION

**SALES QUALIFICATION** 

**ABM** 

**PRODUCTS** 

**PIPELINE** 

QUOTE

**ORDER** 

**HANDOFF** 

#### **ACTIVITIES**

BUSINESS INTELLIGENCE

VISIBILITY and COLLABORATIO

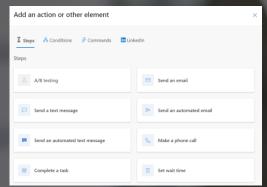
DATA QUALITY

USER EXPERIENCE

APPROVALS

#### **ACTIVITIES**

Tracking and planning activities



Indian seed

Indian seed on the seed of the seed

- Tracking and History
  - Date Fields and View Sorting
  - Viva Sales
- Next Activity Scheduling
  - Power App / Power Automate
  - Custom Fields / Workflow
- Sales Cadencing
  - Playbooks
  - Sales Accelerator
  - Sequences
- Telephony Integration
- Sales Meetings and Gamification
- Copilot IN and FOR Sales

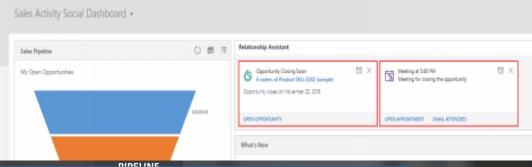
### **BUSINESS INTELLIGENCE**

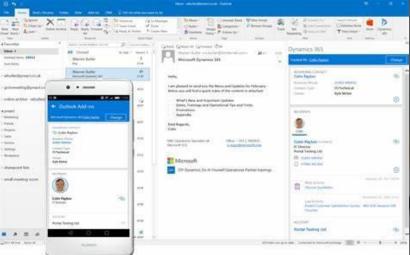
Extract the information needed to plan and manage your day, run the business, make decisions and coach the team.

IDENTIFY SALES PIPELINE BOTTLENECKS.

- Views
- Charts
- Dashboards
- Excel
- Relationship Assistant
  - Email capture and engagement
  - Assistant Cards (limited)
- Outlook Integration

- Power BI
- Al Add-Ons
  - Viva Sales
  - D365 Insights for Sales
    - Assistant Cards (full)
    - Notes and Relationship Analysis
    - Talking Points
    - Lead and Opportunity Scoring
  - D365 Customer Insights
    - B2C and Transactional Focus



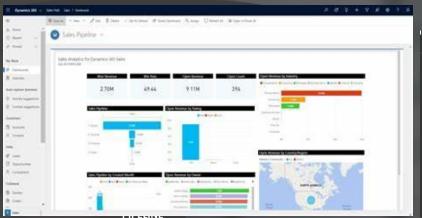


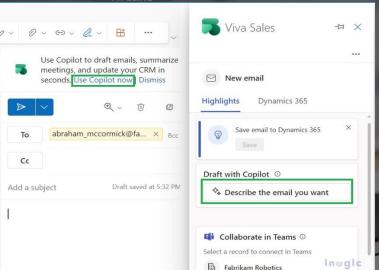
### **BUSINESS INTELLIGENCE**

Extract the information needed to plan and manage your day, run the business, make decisions and coach the team.

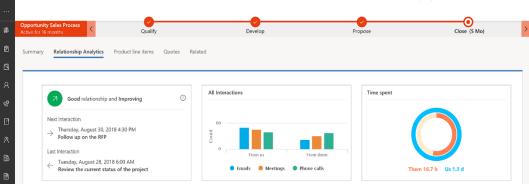
IDENTIFY SALES PIPELINE BOTTLENECKS.

- Relationship Assistant
  - Email capture and engagement
  - Assistant Cards (limited)
- Outlook Integration





### **BUSINESS INTELLIGENCE**



- Power Bl
- Al Add-Ons
  - Viva Sales
  - D365 Insights for Sales
    - Assistant Cards (full)
    - Notes and Relationship Analysis
    - Talking Points
    - Lead and Opportunity Scoring
  - D365 Customer Insights
    - B2C and Transactional Focus

## **VISIBILITY and COLLABORATION**

Share information across teams to identify more selling opportunities, identify more prospects, avoid service issues, and share best practices

- All customer-facing personnel on an integrated CRM platform
- Power BI centralized reporting
- ERP integration
- Microsoft Teams
  - D365 Integration
  - Power Automate Integration
- SharePoint with D365
- Gamification
- Adoption by front-lines, managers and executives

LISTS AND RESEARCH **LEAD GENERATION** MARKETING QUALIFICATION **SALES QUALIFICATION ABM PRODUCTS PIPELINE** QUOTE **ORDER HANDOFF DATA QUALITY** 

**USER EXPERIENCE** 

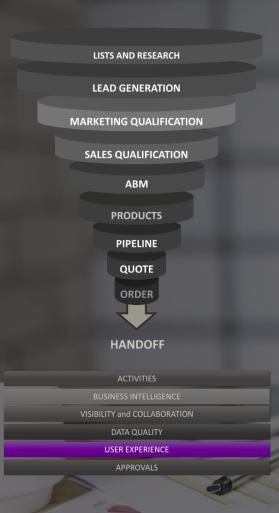
**APPROVALS** 

#### DATA QUALITY

MDM = Master Data Management ROTII = Redundant, Outdated, Trivial, Inaccurate or Incomplete

- The MDM App from C5 Insight
- Duplicate detection rules
  - Built-In (and recently upgraded)
  - Parabus
  - ClickDimensions Import
- Quality Data Entry, Auto-Entry and Update
  - Viva Sales
  - InsideView
  - LinkedIn Sales Navigator
  - SyncSort Trillium Quality
  - pcf.gallery
- Clarify Data Entry Standards
  - Outlook sync setup
  - Moved record handling (delete vs re-parent)
  - Update period
  - Definition of "quality record"
  - Supporting views/dashboards/alerts

Presentation is copyright © 2022, C5 Insight, Inc. All rights reserved.



#### **USER EXPERIENCE**

Make it easy for users to find the information they need to plan their day or engage with a customer. Make it easy to get new information into the system.

- Search Settings
- Forms and Views
  - Efficient Layout Less is More
  - Consistent Layout Practices
  - Naming Conventions
  - Social Pane Settings
- Simplify Dashboards
- Prioritize and Configure
  - What users ask for vs what they need
  - Benchmark: User feedback
- A
  - Viva Sales
  - Relationship Assistant
  - D365 Sales Insights

LISTS AND RESEARCH **LEAD GENERATION** MARKETING QUALIFICATION **SALES QUALIFICATION ABM PRODUCTS PIPELINE** QUOTE **ORDER HANDOFF** 

DATA QUALITY

**USER EXPERIENCE** 

#### **APPROVALS**

Flow required approvals through the system as friction-free as possible.

- Internal Approvals
  - Power Automate
  - Teams Approval Templates
  - Track History: Approval DB, CRM, SharePoint
- External Approvals (E-Signature)
  - Adobe Sign
  - DocuSign
  - Cincom CPQ Sync
  - **Documents Core Pack**

USER EXPERIENCE

**APPROVALS** 



**LEAD GENERATION** 

**MARKETING QUALIFICATION** 

**SALES QUALIFICATION** 

**ABM** 

**PRODUCTS** 

**PIPELINE** 

QUOTE

ORDER

**HANDOFF** 

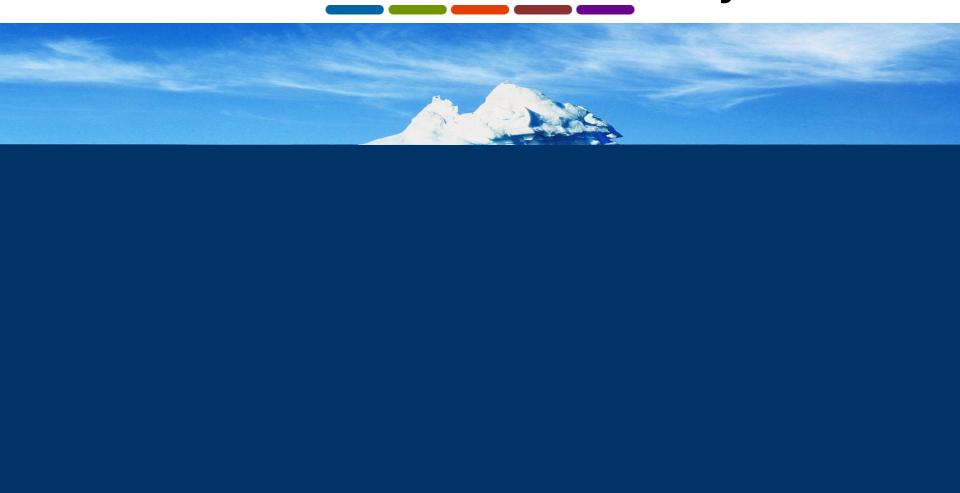
sales bottleneck?

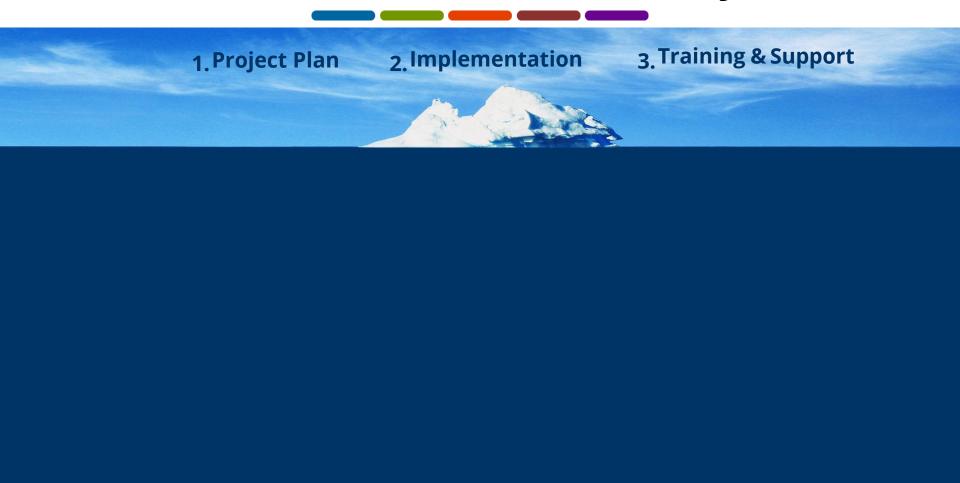
Where is your biggest

Anyone have ideas to share related to solutions that have worked really well for them?

Presentation is copyright © 2022, C5 Insight, Inc. All rights reserved.









#### **IMPLEMENTATION SUCCESS!**

#### **ROADMAP**

Leadership Vision and Prioritization

Stakeholder Workshops

Art of the Possible Demonstrations

User Feedback Surveys

Ride-Alongs

Proof-of-Value Projects

Audits and Health Checks

Elimination - Migration - Integration Planning

**Business Case and ROI** 

2-5 Year Milestones

Phase One Project Plan



#### **CENTER OF EXCELLENCE**

Steering Committee and Project Status

Annual Planning and Quarterly Reviews

Policies & Procedures

Monitoring (Adoption, Data, Process)

**Proactive Maintenance** 

**Governance Automation** 

Health Checks and Security Audits

Change Mgmt.: Training, Comms, Engagement

Leader and Manager Coaching

Support

Ad-Hoc Projects

#### **IMPLEMENTATION SUCCESS!**

#### **ROADMAP**

Leadership Vision and Prioritization

Stakeholder Workshops

Art of the Possible Demonstrations

User Feedback Surveys

Ride-Alongs

Proof-of-Value Projects

Audits and Health Checks

Elimination - Migration - Integration Planning

**Business Case and ROI** 

2-5 Year Milestones



#### **CENTER OF EXCELLENCE**

Steering Committee and Project Status

Annual Planning and Quarterly Reviews

Policies & Procedures

Monitoring (Adoption, Data, Process)

**Proactive Maintenance** 

**Governance Automation** 

Health Checks and Security Audits

Change Mgmt.: Training, Comms, Engagement

Leader and Manager Coaching

Support

Ad-Hoc Projects

# **Questions and Resources**





# C5insight

Customer and Employee Experience
D365, M365, Power Platform, Copilot (AI/BI)



Grab a copy of the book

Amazon.com



# Today's Resources

e-Books, Links and More ... just ask!

Tricia.DessoCox@c5insight.com



#### **Tricia Desso-Cox**

Tricia.DessoCox@c5insight.com

704.516.6269

in /in/tdesso blog.c5insight.com



## Engage C5 Insight!

Questions, Planning, Coaching and Implementation

Swing by booth #616

