

The Missing Link of D365 and Lessons Learned Creating It

Presented by: Art Fromm – TSD
Anil Shah – Cloudfronts

October 22, 2019

 **D365UG | CRMUG**

TODAY'S AGENDA

Welcome & Introductions

Missing Link of D365 and the Solution

SOS for D365 ISV App Development

Final Questions

Summary

Recap/Contact info

Poll 1 - Role

What is your primary role/involvement with CRM or supporting the Sales Team:

- Sales Manager
- Sales Professional
- Pre/Post Sales Engineer
- IT/Support/Developer
- Microsoft Partner implementing D365 CE
- Sales Enablement
- Other (Please specify in Chat)

Poll 2 – CRM Extra Work or Helps Sell?

Please indicate what you think about this statement:

“CRM Opportunity Management is primarily extra work for me/my team/my customers (NOT primarily HELPING me sell)”

- Strongly Agree
- Agree
- Neutral
- Disagree
- Strongly Disagree
- No experience yet

Poll 3 – Challenges with CRM

What is your biggest challenge regarding Opportunity Management as a CRM User or Sales Manager or CRM implementer?

- Entering or getting the salesperson to enter the data
- Getting the salesperson to keep the data up to date
- Accuracy of data
- Accuracy of deal qualification
- Accuracy of win probability
- Ability to plan and track opportunity execution
- Other (Elaborate in Chat)

The Missing Link of D365 and Lessons Learned Creating It



Anil Shah

Managing Partner
CloudFronts Technologies LLP



Art Fromm

Owner/Principal - SOS for D365 App
Technical Sales Development



Sales Improvement Initiative

Job Title: SVP Sales [Sales Professionals, Implementation Partners, Sales Enablement]

Critical Issue: Achieving sales goals

Challenges: Deals are not properly qualified

Incomplete and inconsistent qualification information

Sales team tracking qualification info on Excel spreadsheets

Needs: Easy to use, intuitive qualification process integrated with D365 that helps sales sell

Capture data at each sales stage for analytics to help managers assess and guide to achieve deal closure (or exit)

Outcomes: Increase win rate from 58% to 74% - a 16 Point Increase

Increase bookings by 22%

Opportunity: Opportunity Consolidation Project for Simple Ma... Est. Close Date 1/31/2020 Est. Revenue \$1,000,000.00



Summary Product line items Quotes Related

Topic	* Consolidation Project for...
Contact	Jack Jacobs
Account	A. Datum Corporation
Purchase Timeframe	Next Quarter
Currency	* US Dollar
Stage	* Solution Development
Budget Amount	\$1,000,000.00
Purchase Process	Committee
Description	---

Timeline

Enter a note...

EARLIER THIS MONTH

- Action from Crm Admin: Convince Jack to influence others
- Action from Pat Jones: Meet with Jack's decision committee to determine how they will decide

Relationship Assistant

There are currently no insights.

Opportunity: SOS
Consolidation Project for Simple Ma...
 Currency: **US Dollar** | Status: **Open**



Snapshot Competitive Strategy Our Value Proposition Action Plan Related

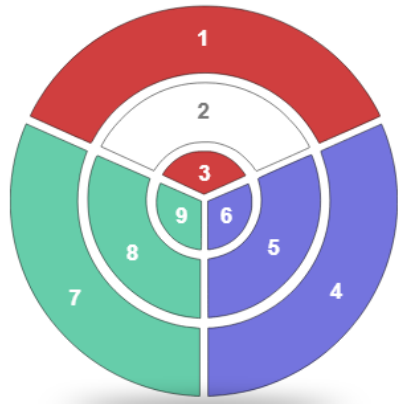
CLIENT A. Datum Corporation	SALES PERSON Pat Jones	SALES OPPORTUNITY Consolidation Project for Simple Machines	
SOLUTION PROPOSED Factory Floor Refresh with updated QR9 processes	ORDER AMOUNT \$1,000,000.00	EXPECTED CLOSE DATE Jan 30, 2020	COMPETITORS Factory Floor Solutions, Home Grown/ Internal Solution

Review each of the nine criteria against this sales opportunity. Rate a criterion FAVORABLE only if you conclude the information to be certain, positive and favorable to your company. For each FAVORABLE criterion, shade the appropriate section of the Snapshot by clicking on the corresponding number within the Snapshot graphic. Perform this assessment at multiple times during the sales campaign.

Opportunity Stage: **Solution Development**

[View Prev. Stage](#)

- Should we pursue this opportunity?**
 - 1. Client's Business Initiative
 - 2. Client's Ability to Fund the Project
 - 3. Client's Driving Reason to Change
- Can we effectively compete for this opportunity?**
 - 4. Viability of Our Solution (from the client's perspective)
 - 5. Sales and Implementation Resources Required
 - 6. Specific Business Value of Our Solution
- Can we reasonably expect to win this opportunity?**
 - 7. Our Ability to Impact the Client's Decision Process
 - 8. Executive Credibility and Support
 - 9. Alignment with the Relevant Executive



Opportunity: SOS v Consolidation Project for Simple Ma... Currency US Dollar Status Open



Snapshot Competitive Strategy Our Value Proposition Action Plan Related

Add Competitor Refresh Save Changes Print

Criteria	Our Solution	Competitors for this Sales Opportunity	
		Factory Floor Solutions	Home Grown/ Internal Solution
Solution	Factory Floor Refresh with updated QR9 processes	Xcel2000 with custom integration for Simple Machines	Internal solution developed early 2010
Strengths	Established process Local expertise	Already has integration based on previous project. Not currently installed.	Custom to their environment
Weaknesses	Integration with some of their systems will require customization	Still going with the "2000" version - not updated yet. Since it is custom they have very	Has not grown with business. Not capable of handling anticipated workload. Will need to be
Strategy	Our Strategy Direct	Probable Strategy of Our Competitors Alter Segment	
Our Company will win this deal if...		The Competition will win this deal if...	
We work with Jack to convince the committee to move forward.		They can convince Simple Machines that only the minimum is required based on their current solution.	The system creators convince management that their solution can provide part of the needs along

Opportunity: SOS
Consolidation Project for Simple Ma...

Currency: US Dollar
Status: Open



Snapshot Competitive Strategy Our Value Proposition Action Plan Related

The quality issues can be improved from 1/500 parts rejected to 1/10,000 parts rejected in Phase 1 which will include accommodating the legacy systems. This is estimated to improve customer satisfaction from 8.0 to 8.8, the minimum threshold required, reducing customer churn and cutting rework costs by \$75k/month.

Opportunity: SOS
Consolidation Project for Simple Ma...

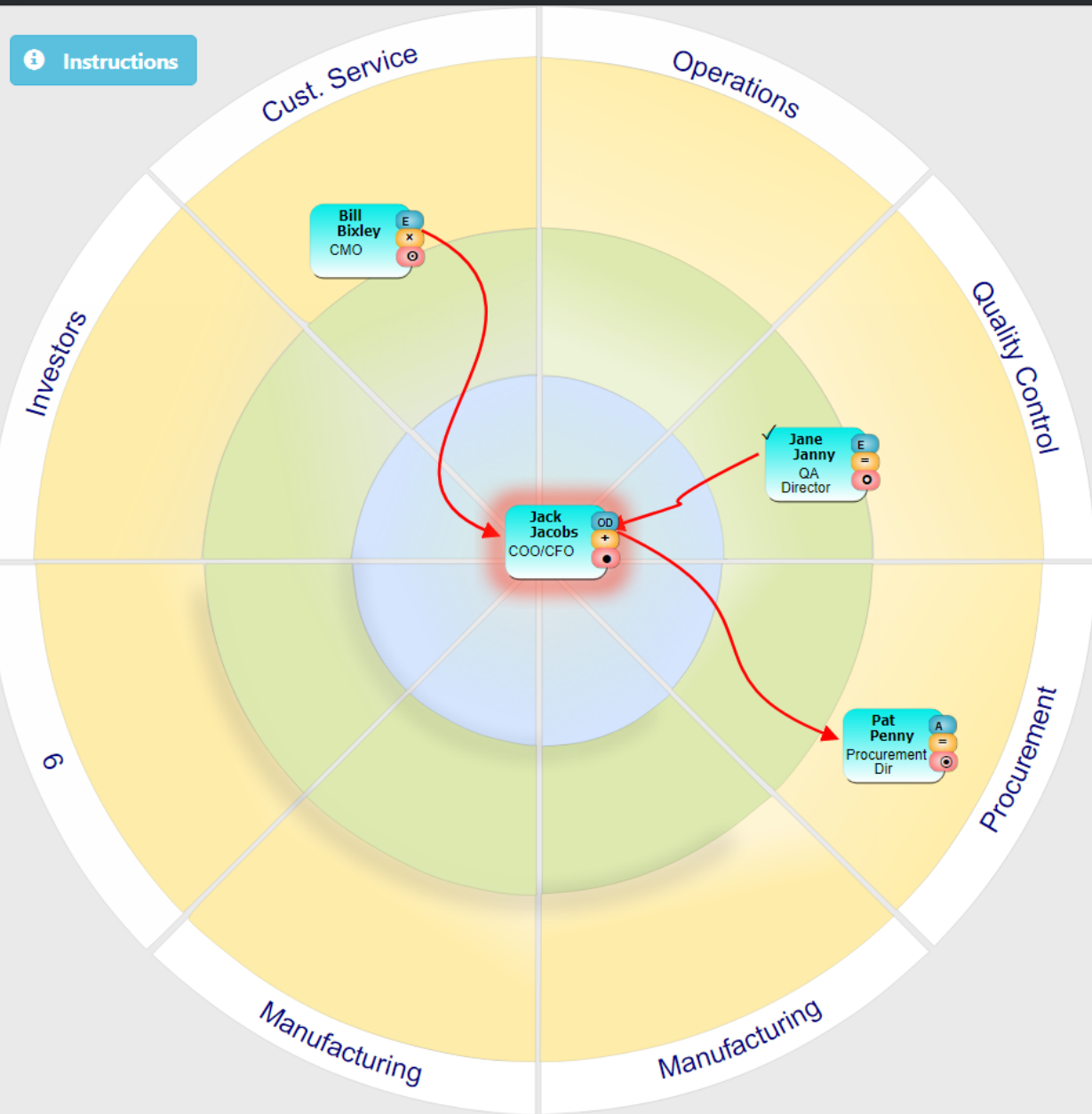
Currency: US Dollar Status: Open



Group By: (no grouping)

Subject	When will it happen?	Is CRM ...	Owner	Who will do it?	Strengthen	Obtain	Soften	Status
Meet with Jack's decision committee to ...	11/26/2019	No	Pat Jones	Katie Kelly	No	Yes	Yes	Open
#6 Review Proposal Draft with Jack	11/5/2019	Yes	Sophia Coll	---	Yes	No	No	Open
Convince Jack to influence others	10/18/2019	No	Crm Admin	Jim	Yes	No	No	Open
Meet with Jack to spec out needs	6/21/2018	No	Pat Jones	Katie Kelly	Yes	Yes	No	Completed
7. Set up meeting with Ops Lead	6/6/2018	No	Pat Jones	Anil	Yes	Yes	No	Completed

Instructions



Opportunity: Consolidation Project for Simple Machines

DASHBOARD REFRESH

Name
 Title
 Role
 Relationship
 Contact

Need to meet
 Access blocked
 Relevant Executive

Modify

Name: Jack Jacobs
Title: COO/CFO
Role 1: Owner
Role 2: Decision-Maker
Relationship: Supporter
Past Contact: Extensive

Add to Map Modify
Clear Fields Remove from Map

Draw Line From: To:
Connect Print

Populate from Existing Influence Map

SOS for D365 ISV App Development

- Cloudfronts as Development Partner and User
- How we connected
- Mock-up of visuals
- Created as Managed Solution – Classic UI
- Free Trial on AppSource starting 8.x ["SOS for D365"](#)
- Updated to 9.x – Unified Interface (and Classic)

First Sales Methodology for Dynamics 365
Sales/Customer Engagement

Opportunity: SOS
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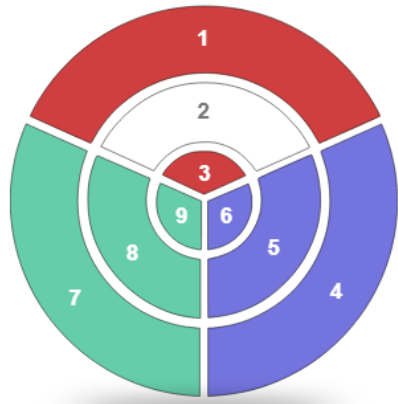
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 YMMV

THANK YOU FOR ATTENDING!

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Technical Sales Development



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