# 85.01 Prospect to quote scenario board discovery workshop

The Prospect to quote scenario board discovery workshop is designed to help establish a comprehensive understanding of the lead-to-quote process in Dynamics 365. This workshop supports both B2B and B2C sales models and includes marketing engagement, lead qualification, opportunity management, and quote generation. The goal is to align stakeholders on the sales process, identify key scenarios, and define the scope for solution design.

## Assumptions

* The Prospect to quote process is in scope for the Dynamics 365 implementation.
* The scenario board includes both marketing and sales perspectives.
* The key stakeholders are available and actively contribute to the workshop. The following stakeholders are recommended:
  + **Marketing managers** – responsible for lead generation, campaign management, and marketing automation.
  + **Sales development representatives (SDRs)** – responsible for qualifying leads and converting them into opportunities.
  + **Account executives / sales reps** – responsible for managing opportunities and generating quotes.
  + **Sales operations managers** – responsible for sales process governance, pipeline visibility, and CRM data quality.
  + **Pricing and product managers** – responsible for managing product catalogs, pricing rules, and discount structures.
  + **Finance representatives** – responsible for reviewing quote terms, pricing compliance, and margin analysis.
  + **IT and CRM administrators** – responsible for implementing and maintaining Dynamics 365 Sales and related systems.
  + **Customer success or onboarding leads** – responsible for ensuring smooth handoff from sales to delivery.
  + **Executive sales leadership** – responsible for sales strategy, forecasting, and performance oversight.

## Objectives

* Understand the customer’s lead-to-quote process and variations.
* Identify key scenarios and requirements across marketing and sales.
* Document agreed business scope and process gaps.

## High-level agenda

* Introduction and objectives
* Overview of Prospect to quote process
* Discussion of lead management, opportunity handling, and quoting
* Interactive Q&A session
* Wrap-up and next steps

## Key questions

* **Lead and opportunity management**
  + How are leads generated (e.g., campaigns, referrals, web forms)?
  + How are leads qualified and converted to opportunities?
  + What criteria are used to score and prioritize leads?
  + How are opportunities tracked and managed through the pipeline?
* **Quoting process**
  + How are quotes created and approved?
  + What pricing models are used (standard, tiered, negotiated)?
  + How are discounts, promotions, and approvals handled?
  + How are quotes shared with customers (e.g., PDF, portal, email)?
* **Sales team collaboration**
  + How do sales reps collaborate on opportunities?
  + How are handoffs managed between marketing and sales?
  + What tools are used for activity tracking and communication?
* **Data migration**
  + What historical lead, opportunity, and quote data needs to be migrated?
  + How is customer and product master data structured?
  + Are there known data quality issues?
* **Integrations**
  + What systems need to integrate with Dynamics 365 (e.g., CRM, CPQ, ERP)?
  + Are there real-time integration needs (e.g., pricing, inventory)?
  + What are the key challenges in current integrations?

## Scenario Board

Following is a sample scenario board template for the Prospect to Quote process.

A blue and green diagram

AI-generated content may be incorrect.

The image is a flowchart titled Prospect to Quote Scenario Board that outlines a business process from lead identification to quotation of sales. The top row depicts a basic flowchart of the business process areas for the Prospect to Quote process. Below each process step there are one or more blue boxes that depict scenarios and key attributes of the business process area for discussion in the workshop. The bottom of the graphic includes horizontal or supporting processes that support the entire Prospect to Quote process.

1. **85.15 Manage Customer Relationships**

* **Scenarios**
  + New customer onboarding
  + Existing customer engagement
  + Manage loyalty programs
  + Customer segmentation
* **Compliance**
  + Data privacy (e.g., GDPR, CCPA)
  + Consent management
  + Communication opt-in/out
* **Policies**
  + Customer data management
  + Contact frequency and cadence
  + Relationship tiering (e.g., strategic, transactional)
  + CRM usage standards

1. **85.25 Identify and Qualify Sales**

* **Scenarios**
  + Lead generation (inbound/outbound)
  + Lead scoring and grading
  + Qualification frameworks (e.g., BANT, MEDDIC)
  + Marketing-to-sales handoff
* **Compliance**
  + Do-not-contact lists
  + Consent for outreach
* **Policies**
  + Lead qualification criteria
  + Lead routing rules
  + Follow-up SLAs
  + Data enrichment and validation

1. **85.35 Define Sales Strategy and Policies**

* **Scenarios**
  + Territory planning
  + Account planning
  + Channel strategy (direct, partner, digital)
  + Sales playbooks
* **Compliance**
  + Anti-bribery and fair competition laws
  + Industry-specific sales regulations
* **Policies**
  + Pricing and discounting guidelines
  + Sales commission structures
  + Deal approval thresholds
  + Strategic account criteria

1. **85.45 Pursue Opportunities**

* **Scenarios**
  + Opportunity creation and tracking
  + Sales stage progression
  + Collaboration across teams (e.g., pre-sales, legal)
  + Competitor tracking
* **Compliance**
  + Opportunity audit trails
  + Document version control
* **Policies**
  + Opportunity qualification rules
  + Sales methodology (e.g., Challenger, Solution Selling)
  + Forecasting cadence and accuracy
  + Deal desk engagement

1. **85.55 Estimate and Quote Sales**

* **Scenarios**
  + Product configuration (CPQ)
  + Services estimation
  + Multi-currency quoting
  + Bundled or tiered pricing
* **Compliance**
  + Pricing transparency regulations
  + Tax and regulatory compliance
* **Policies**
  + Quote approval workflows
  + Validity periods and terms
  + Discounting thresholds
  + Integration with ERP or pricing engines

1. **85.65 Analyze Sales**

* **Metrics**
  + Lead-to-opportunity conversion rate
  + Opportunity win rate
  + Average deal size
  + Sales cycle length
* **Reports**
  + Pipeline health reports
  + Forecast accuracy
  + Sales rep performance
  + Quote-to-close analysis

# 85.02 Prospect to quote storyline design review workshop

The Prospect to quote storyline design review workshop is a critical step in validating the proposed solution design for managing the sales process in Dynamics 365. This session focuses on reviewing the “happy path” scenarios from lead to quote, conducting a fit-to-standard review, and identifying any gaps or design decisions.

## Assumptions

* The agreed business scope from the scenario board workshop is finalized.
* Dynamics 365 is configured for selected storyline scenarios.
* The key stakeholders are available and actively contribute to the workshop. The following stakeholders are recommended:
  + **Sales managers and team leads** – responsible for validating the sales process and ensuring it aligns with team workflows.
  + **Marketing automation specialists** – responsible for ensuring lead capture and qualification processes are integrated.
  + **Sales operations analysts** – responsible for reviewing pipeline metrics, quote accuracy, and reporting needs.
  + **Finance and pricing analysts** – responsible for validating pricing logic, discounting rules, and quote approval workflows.
  + **IT and CRM solution architects** – responsible for reviewing system configuration, integrations, and user experience.
  + **Executive sponsors** – responsible for strategic alignment and sign-off on the proposed solution.

## Objectives

* Demonstrate Dynamics 365 capabilities for lead-to-quote management.
* Validate the solution design for sales and quoting scenarios.
* Identify gaps, risks, and decisions.
* Define next steps for configuration and testing.

## High-level agenda

* Introduction and objectives
* Demonstration of storyline scenarios (lead to quote)
* Fit-to-standard discussion
* Q&A and feedback
* Wrap-up and next steps

## Key questions

* Does the solution support your lead and opportunity management process effectively?
* Are there any gaps in quoting functionality or approval workflows?
* How are pricing, discounts, and product configurations handled?
* Are there any concerns with usability, scalability, or compliance?
* What changes are needed to align with your sales strategy?

# 85.15.001 Manage Customer Relationships Deep-Dive Discovery Workshop

The Prospect to quote scenario board discovery workshop is designed to help establish a comprehensive understanding of the lead-to-quote process in Dynamics 365. This workshop supports both B2B and B2C sales models and includes marketing engagement, lead qualification, opportunity management, quote generation, and loyalty program considerations. It also includes ERP-related scenarios such as pricing, inventory availability, fulfillment, and financial integration. The goal is to align stakeholders on the sales process, identify key scenarios, and define the scope for solution design.

## Assumptions

* The Manage Customer Relationships process is in scope for the Dynamics 365 implementation.
* Current CRM systems, customer engagement strategies, and communication tools are documented and accessible.
* The Prospect to quote process is in scope for the Dynamics 365 implementation.
* Stakeholders from sales, marketing, customer service, and IT are available and actively contribute to the workshop.
  + **Marketing managers** – responsible for lead generation, campaign management, and marketing automation.
  + **Sales development representatives (SDRs)** – responsible for qualifying leads and converting them into opportunities.
  + **Account executives / sales reps** – responsible for managing opportunities and generating quotes.
  + **Sales operations managers** – responsible for sales process governance, pipeline visibility, and CRM data quality.
  + **Pricing and product managers** – responsible for managing product catalogs, pricing rules, and discount structures.
  + **Finance representatives** – responsible for reviewing quote terms, pricing compliance, and margin analysis.
  + **IT and CRM administrators** – responsible for implementing and maintaining Dynamics 365 Sales and related systems.
  + **Customer success or onboarding leads** – responsible for ensuring smooth handoff from sales to delivery.
  + **Executive sales leadership** – responsible for sales strategy, forecasting, and performance oversight.

## Objectives

* Define detailed requirements and design for customer relationship management.
* Identify gaps and areas for improvement in current customer engagement and tracking.
* Plan data migration and integration with CRM and support systems.

## High-Level Agenda

* Introduction and objectives
* Review of current customer relationship management practices
* Customer segmentation and engagement strategies
* Account and communication management
* Satisfaction measurement and feedback loops
* CRM and support system integration
* Wrap-up and next steps

## Key Questions

* **Lead and Opportunity Management**
  + How are leads generated (e.g., campaigns, referrals, web forms)?
  + How are leads qualified and converted to opportunities?
  + What criteria are used to score and prioritize leads?
  + How are opportunities tracked and managed through the pipeline?
* **Quoting Process**
  + How are quotes created and approved?
  + What pricing models are used (standard, tiered, negotiated)?
  + How are discounts, promotions, and approvals handled?
  + How are quotes shared with customers (e.g., PDF, portal, email)?
* **Sales Team Collaboration**
  + How do sales reps collaborate on opportunities?
  + How are handoffs managed between marketing and sales?
  + What tools are used for activity tracking and communication?
* **Loyalty Programs**
  + Do you offer loyalty or rewards programs to customers?
  + How are loyalty points or rewards calculated and tracked?
  + How are loyalty benefits applied to quotes or pricing?
  + How do loyalty programs integrate with customer profiles and sales history?
* **ERP Integration and Operational Scenarios**
  + How is product pricing maintained and synchronized with ERP?
  + How is inventory availability checked during the quoting process?
  + Are there fulfillment constraints that need to be considered when quoting?
  + How are quotes converted into sales orders in the ERP system?
  + How is financial data (e.g., taxes, margins, credit limits) validated during quoting?
* **Data Migration**
  + What historical lead, opportunity, and quote data needs to be migrated?
  + How is customer and product master data structured?
  + Are there known data quality issues?
* **Integrations**
  + What systems need to integrate with Dynamics 365 (e.g., CRM, CPQ, ERP)?
  + Are there real-time integration needs (e.g., pricing, inventory)?
  + What are the key challenges in current integrations?

# 85.25.001 Identify and Qualify Leads Deep-Dive Discovery Workshop

This deep-dive discovery workshop is designed to explore the processes, systems, and strategies used to identify and qualify leads within the organization. It focuses on understanding lead sources, scoring models, qualification criteria, and the handoff process to sales. The session also covers data quality, integration with marketing automation platforms, and CRM systems to ensure a seamless lead management lifecycle.

## Assumptions

* The organization uses Dynamics 365 or a similar CRM platform to manage leads.
* Marketing automation tools are integrated or planned for integration.
* Lead data and qualification processes are documented or accessible.
* Stakeholders from marketing, sales, and IT are available to participate.
  + **Marketing managers** – responsible for lead generation and campaign strategy.
  + **Sales development representatives (SDRs)** – responsible for qualifying and routing leads.
  + **Sales managers** – responsible for managing the handoff and conversion process.
  + **CRM administrators** – responsible for lead data structure and automation.
  + **Marketing operations** – responsible for lead scoring models and marketing automation.
  + **IT and integration leads** – responsible for system connectivity and data flow.
  + **Data governance or compliance officers** – responsible for data quality and regulatory compliance.

## Objectives

* Understand current lead identification and qualification processes.
* Identify gaps and improvement opportunities in lead management.
* Define requirements for lead scoring, routing, and handoff.
* Plan for data quality improvements and system integrations.

## Agenda

* Introduction and objectives
* Review of current lead management process
* Lead sources and qualification criteria
* Lead scoring and routing
* Data quality and integration
* Wrap-up and next steps

## Key Questions

* **Lead Sources**
  + What are the primary sources of leads (e.g., web forms, events, referrals, purchased lists)?
  + How are leads captured and entered into the system?
  + Are there any manual processes involved in lead entry?
* **Lead Scoring**
  + What criteria are used to score leads (e.g., demographics, behavior, engagement)?
  + How is the scoring model maintained and updated?
  + Are scores used to prioritize follow-up or route leads?
* **Qualification Criteria**
  + What defines a qualified lead in your organization?
  + Are there different qualification criteria for different segments or products?
  + Who is responsible for lead qualification and what tools do they use?
* **Handoff to Sales**
  + How are qualified leads routed to sales?
  + What triggers the handoff (e.g., score threshold, manual review)?
  + How is feedback from sales captured and used to refine qualification?
* **Data Quality**
  + What are the common data quality issues with leads?
  + How is lead data validated and enriched?
  + Are there any deduplication or cleansing processes in place?
* **Integration with Marketing and CRM Systems**
  + What marketing automation platforms are in use?
  + How is lead data synchronized between marketing and CRM systems?
  + Are there any integration challenges or limitations?
  + How is lead lifecycle tracked across systems?

# 85.35.001 Define Sales Strategies and Policies Deep-Dive Discovery Workshop

This workshop focuses on defining the sales process, structuring sales teams, setting sales targets, and designing commission and incentive structures. It aims to align sales strategy with business goals and ensure effective execution through Dynamics 365.

## Assumptions

* Sales strategy and policy definition is in scope for the Dynamics 365 implementation.
* Current sales processes and compensation models are documented.
* Stakeholders from sales leadership, HR, and finance are available.
  + **Sales leadership**
  + **Sales operations managers**
  + **HR compensation specialists**
  + **Finance and payroll representatives**
  + **CRM administrators**

## Objectives

* Define the end-to-end sales process and stages.
* Establish sales team structures and roles.
* Set sales targets and performance metrics.
* Design commission and incentive models.

## Agenda

* Introduction and objectives
* Review of current sales strategy and structure
* Sales process and team design
* Target setting and performance metrics
* Commission and incentive planning
* Wrap-up and next steps

## Key Questions

* **Sales Process**
  + What are the defined stages of your sales process?
  + How are leads and opportunities managed through the pipeline?
  + Are there variations in process by region, product, or customer type?
* **Sales Teams**
  + How are sales teams structured (e.g., by territory, product, industry)?
  + What roles exist within the sales organization?
  + How is collaboration managed across teams?
* **Targets and Metrics**
  + How are sales targets set (top-down, bottom-up)?
  + What KPIs are tracked for sales performance?
  + How is performance reviewed and adjusted?
* **Commissions and Incentives**
  + What commission models are used (e.g., flat, tiered, quota-based)?
  + How are incentives aligned with strategic goals?
  + How are commissions calculated and paid?

# 85.35.002 Define Sales Channels – Brick and Mortar Deep-Dive Discovery Workshop

This workshop focuses on defining the structure, operations, and technology needs of physical retail or branch-based sales channels. It includes store operations, staffing, POS systems, and customer experience.

## Assumptions

* Brick and mortar sales channels are in scope for the Dynamics 365 implementation.
* Current store processes and systems are documented.
* Retail operations and store management stakeholders are available.
  + **Retail operations managers**
  + **Store managers**
  + **Sales associates**
  + **IT and POS system administrators**
  + **Inventory and supply chain coordinators**

## Objectives

* Define the structure and roles of physical sales locations.
* Identify technology and integration needs (e.g., POS, inventory).
* Align store operations with sales strategy.

## Agenda

* Introduction and objectives
* Overview of store operations and structure
* Technology and systems review
* Customer experience and service model
* Wrap-up and next steps

## Key Questions

* **Store Operations**
  + How are stores organized and staffed?
  + What are the key sales processes in-store?
  + How is inventory managed at the store level?
* **Technology and Systems**
  + What POS systems are currently used?
  + How is store data integrated with central systems?
  + What reporting is needed from store operations?
* **Customer Experience**
  + What services are offered in-store (e.g., consultations, returns)?
  + How is customer feedback captured and used?
  + How is loyalty or CRM data used in-store?

# 85.35.003 Define Sales Channels – Call Center Deep-Dive Discovery Workshop

This workshop focuses on defining the structure, workflows, and tools used in call center-based sales operations. It includes inbound and outbound sales, scripting, CRM integration, and performance tracking.

## Assumptions

* + Call center sales channels are in scope for the Dynamics 365 implementation.
  + Current call center systems and scripts are documented.
  + Call center operations and sales leadership are available.
    - **Call center managers**
    - **Sales agents**
    - **Sales operations analysts**
    - **CRM and telephony system administrators**
    - **Training and quality assurance leads**

## Objectives

* + Define call center sales workflows and team structure.
  + Identify integration needs with CRM and telephony systems.
  + Align call center KPIs with sales strategy.

## Agenda

* Introduction and objectives
* Review of call center operations and structure
* Sales workflows and scripting
* Technology and integration needs
* Wrap-up and next steps

## Key Questions

* **Call Center Operations**
  + What types of calls are handled (inbound, outbound, blended)?
  + How are leads routed and assigned?
  + What are the key sales workflows and scripts?
* **Technology and Integration**
  + What telephony systems are used?
  + How is call data integrated with CRM?
  + What reporting and dashboards are needed?
* **Performance and Quality**
  + What KPIs are tracked (e.g., conversion rate, call duration)?
  + How is agent performance reviewed?
  + What training and QA processes are in place?

# 85.35.004 Define Sales Channels – Online Sales Deep-Dive Discovery Workshop

This workshop focuses on defining the structure, tools, and processes for digital and eCommerce sales channels. It includes website platforms, digital marketing, cart and checkout processes, and customer engagement.

## Assumptions

* + Online sales channels are in scope for the Dynamics 365 implementation.
  + eCommerce, marketing, and IT stakeholders are available.
  + Current digital platforms and customer journeys are documented.
* The following stakeholders are available and actively contribute to the workshop:
* **eCommerce managers**
* **Digital marketing leads**
* **Web development and IT teams**
* **Customer service representatives**
* **CRM and ERP integration leads**

## Objectives

* Define the structure and tools for online sales.
* Identify integration needs with ERP, CRM, and marketing systems.
* Align digital sales with customer experience goals.

## Agenda

* + Introduction and objectives
  + Overview of online sales platforms and structure
  + Customer journey and checkout process
  + Technology and integration needs
  + Wrap-up and next steps

## Key Questions

* **Online Sales Operations**
  + What platforms are used for online sales (e.g., Shopify, Dynamics 365 Commerce)?
  + How are products and pricing managed online?
  + What is the typical customer journey from landing to checkout?
* **Technology and Integration**
  + How is the online store integrated with ERP and inventory systems?
  + How is customer data captured and used in CRM?
  + What analytics and reporting are needed?
* **Customer Experience**
  + What personalization or targeting is used?
  + How are promotions and campaigns managed?
  + What support is available during and after purchase?

# 85.45.001 Pursue Opportunities - Deep-Dive Discovery Workshop

This deep-dive discovery workshop is designed to help organizations define and refine their approach to pursuing sales opportunities using Dynamics 365. It focuses on opportunity management, pipeline visibility, sales activities, collaboration, forecasting, and integration with CRM and ERP systems. The session will explore how opportunities are tracked, advanced, and forecasted across the sales cycle, and how teams collaborate to close deals efficiently.

## Assumptions

* The Pursue Opportunities process is in scope for the Dynamics 365 implementation.
* Opportunity management is supported by a CRM system integrated with ERP.
* The following stakeholders are available and actively contribute to the workshop:
  + **Sales managers** – responsible for pipeline oversight and opportunity progression.
  + **Account executives** – responsible for managing and closing opportunities.
  + **Sales operations** – responsible for CRM data quality and sales process governance.
  + **Marketing managers** – responsible for lead handoff and campaign attribution.
  + **Finance and forecasting analysts** – responsible for revenue forecasting and sales performance.
  + **IT and CRM administrators** – responsible for system configuration and integration.
  + **Executive sales leadership** – responsible for strategic oversight and sales targets.

## Objectives

* Define detailed requirements for opportunity management and forecasting.
* Identify gaps and areas for improvement in current sales processes.
* Plan data migration and integration needs between CRM and ERP systems.

## Agenda

* Introduction and objectives
* Review of current opportunity management process
* Pipeline visibility and forecasting
* Sales activities and collaboration
* Data migration and integration
* Wrap-up and next steps

## Key Questions

* **Opportunity Management**
  + How are opportunities created and qualified?
  + What stages are used in the opportunity lifecycle?
  + How are products, pricing, and discounts managed within opportunities?
  + How are opportunity close reasons and outcomes tracked?
* **Pipeline Visibility**
  + How is the sales pipeline segmented (e.g., by region, rep, product)?
  + What reports or dashboards are used to monitor pipeline health?
  + How are stalled or aging opportunities identified and addressed?
* **Sales Activities and Collaboration**
  + What types of activities are tracked (calls, meetings, emails)?
  + How do sales teams collaborate on opportunities?
  + How are tasks and follow-ups managed within the CRM?
  + Are there handoffs between teams (e.g., SDR to AE)?
* **Forecasting**
  + How is revenue forecasting performed?
  + What forecasting models are used (e.g., weighted, best case)?
  + How are forecasts reviewed and adjusted?
  + How is forecast accuracy measured?
* **Integration with CRM and ERP**
  + What systems are integrated with the CRM (e.g., ERP, CPQ, marketing automation)?
  + How is opportunity data shared with ERP for order processing or financial planning?
  + Are there any manual steps or duplicate data entry between systems?
  + What are the key integration pain points today?

# 85.55.001 Estimate and Quote Sales Deep-Dive Discovery Workshop

This workshop is designed to define and evaluate the organization's approach to estimating and quoting sales using Dynamics 365. It focuses on product configuration, pricing, discounting, approvals, quote generation, and integration with ERP and CPQ systems. The session will help identify current challenges, gather detailed requirements, and align stakeholders on the desired future state.

## Assumptions

* + Key stakeholders involved in sales estimation and quoting are available and willing to participate.
    - **Sales managers**
    - **Account executives**
    - **Sales operations analysts**
    - **Pricing and product managers**
    - **Finance and compliance representatives**
    - **IT and CRM/CPQ system administrators**
    - **Executive sales leadership**
  + Current quoting processes, pricing models, and approval workflows are documented and accessible.
  + Participants have a working knowledge of sales operations and quoting tools.
  + Relevant data on product catalogs, pricing rules, and quote templates is available.

## Objectives

* + Define detailed requirements for estimating and quoting sales.
  + Identify gaps and areas for improvement in the current process.
  + Plan for data migration and integration with ERP and CPQ systems.

## Agenda

* + Introduction and objectives
  + Review of current estimation and quoting process
  + Product configuration and pricing models
  + Discounting and approval workflows
  + Quote generation and versioning
  + Integration with ERP and CPQ systems
  + Wrap-up and next steps

## Key Questions

* **Product Configuration**
  + How are products configured during the quoting process?
  + Are there configurable bundles, kits, or options that need to be supported?
  + How are product dependencies and exclusions managed?
  + Are there industry-specific configuration rules or constraints?
* **Pricing**
  + What pricing models are used (list, tiered, volume-based, negotiated)?
  + How are price lists managed and maintained?
  + Are there customer-specific or contract-based pricing rules?
  + How is pricing validated during quote creation?
* **Discounting and Approvals**
  + What types of discounts are offered (manual, promotional, volume-based)?
  + What approval workflows are required for discounting?
  + How are discount thresholds and escalation paths defined?
  + How are approvals tracked and audited?
* **Quote Generation and Versioning**
  + How are quotes generated and formatted?
  + Are there standard templates or branding requirements?
  + How are quote versions managed and tracked?
  + How are quotes shared with customers (email, portal, PDF)?
* **Integration with ERP and CPQ Systems**
  + What ERP systems need to be integrated for pricing, inventory, and fulfillment?
  + Is there a CPQ system in use or planned?
  + How is data exchanged between CRM, CPQ, and ERP systems?
  + What are the key integration challenges or limitations?

# 85.65.001 Analyze Sales - Deep-Dive Discovery Workshop

The Analyze Sales deep-dive discovery workshop is designed to help organizations define their requirements for sales performance analysis using Dynamics 365 and integrated BI tools. This session focuses on understanding how sales KPIs are tracked, how performance dashboards are used, and how forecasting and win/loss analysis are conducted. The workshop also explores territory and sales rep performance tracking and integration with CRM and business intelligence platforms.

## Assumptions

* + Key stakeholders from sales, operations, finance, and IT are available and actively participate.
    - **Sales leadership** – responsible for defining sales strategy and performance goals.
    - **Sales operations** – responsible for reporting, forecasting, and pipeline visibility.
    - **Finance analysts** – responsible for revenue tracking and forecasting accuracy.
    - **CRM administrators** – responsible for data quality and CRM reporting.
    - **BI/reporting analysts** – responsible for dashboard development and data integration.
    - **IT and data architects** – responsible for system integration and data governance.
  + Current sales reporting tools and dashboards are documented and accessible.
  + Participants have a working knowledge of sales processes and performance metrics.
  + Relevant data sources and integration points are known and can be discussed.

## Objectives

* + Define detailed requirements for sales performance analysis.
  + Identify gaps in current reporting and forecasting capabilities.
  + Understand integration needs with CRM and BI tools.
  + Align on KPIs and metrics for sales performance and forecasting.

## Agenda

* + Introduction and objectives
  + Review of current sales reporting and analytics
  + Discussion of KPIs and dashboards
  + Forecasting and win/loss analysis
  + Territory and rep performance tracking
  + Integration and data sources
  + Wrap-up and next steps

## Key Questions

* **Sales KPIs and Dashboards**
  + What KPIs are currently tracked (e.g., revenue, pipeline, conversion rate, quota attainment)?
  + How are these KPIs visualized and consumed by different roles?
  + Are dashboards role-based and interactive?
  + What tools are used to build and maintain dashboards?
* **Forecasting Accuracy**
  + How is sales forecasting currently performed?
  + What methods are used (manual, historical trends, AI-based)?
  + How accurate are forecasts compared to actuals?
  + How frequently are forecasts updated and reviewed?
* **Win/Loss Analysis**
  + How is win/loss data captured and analyzed?
  + What are the common reasons for lost deals?
  + How is this information used to improve sales performance?
  + Are there structured processes for capturing feedback from sales reps?
* **Territory and Rep Performance**
  + How is performance tracked by territory and individual sales rep?
  + Are there benchmarks or targets by region or role?
  + How is underperformance identified and addressed?
  + Are incentive plans tied to performance metrics?
* **Integration with CRM and BI Tools**
  + What CRM system is used and how is data extracted for reporting?
  + What BI tools are used (e.g., Fabric, Power BI, Tableau)?
  + Are there challenges with data quality or consistency?
  + How are data refreshes and access managed?