Power BI Departmental Demos

Sales

Target audience: Microsoft Sellers (TSPs, SSPs)

Published: Sept. 2015

# Contents

[Contents 2](#_Toc435017825)

[Prerequisites 3](#_Toc435017826)

[Demo script and steps 3](#_Toc435017827)

[Power BI Sales Scenario Demo iPhone Experience 3](#_Toc435017828)

# Prerequisites

Must complete the Power BI Scenario Demo 101 (Dashboard setup)

# Demo script and steps

## Power BI Sales Scenario Demo iPhone Experience

(Note: Android phone uses a very similar process.)

|  |  |
| --- | --- |
| Demo step/talking point | Screenshot |
| 1. Open Power BI on the iPhone. 2. After opening the **Power BI** app, tap on **Sign In**. 3. Sign in with your organizational account 4. IMPORTANT: use the same account as in the dashboard setup demonstration. | C:\Users\Shashank\AppData\Local\Microsoft\Windows\INetCache\Content.Word\IMG_5876.png |
| 1. After signing in, you will see **My Workspace** and a list of dashboards linked to your organizational account. 2. Tap on **Sales Dashboard** from the list. |  |
| 1. The Sales Dashboard will load with all the tiles. 2. Observe the first tile, **Actual vs. target revenue ($)** and notice that the actual revenue is almost half of the target revenue. 3. Notice the next tile, **Opportunity value by account type** and see that the maximum opportunity lies in ourPlatinum accounts. |  |
| 1. Scroll down to the ninth tile to the funnel chart, **Opportunity value by pipeline phase** to see the status of the pipeline. Tap on the tile to get a full screen view. |  |
| 1. See the opportunity value locked within each phase of the pipeline right from 1-Discovery to 7-Negotiation. Tap on the top right hand arrow to enable the edit screen with markers. |  |
| 1. Use the pen at the bottom of the screen to circle the 7-Negotiation bar so that it can be brought to notice. |  |
| 1. Click send icon on the top right corner and choose Mail to send an email to the account managers working on this phase on the actions that need to be taken to expedite the closing cycle.   End of demonstration. |  |