Dynamics 365 CE Sales and Service Analytics
Power BI Demo Accelerator

Prepared for the Microsoft TS Community by
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Dynamics 365 CE GBB

https://github.com/mscottsewell/ContosoBI

Opportunity Pipeline

Contoso

Forecast Adjustment

0

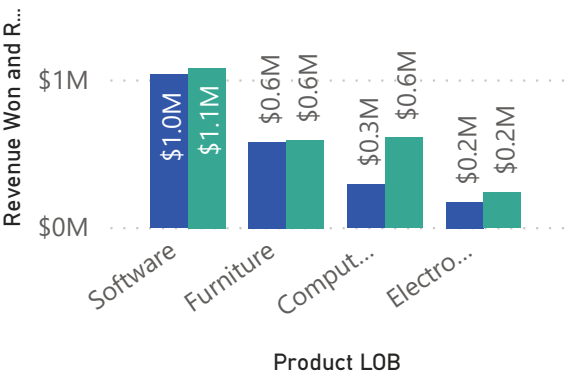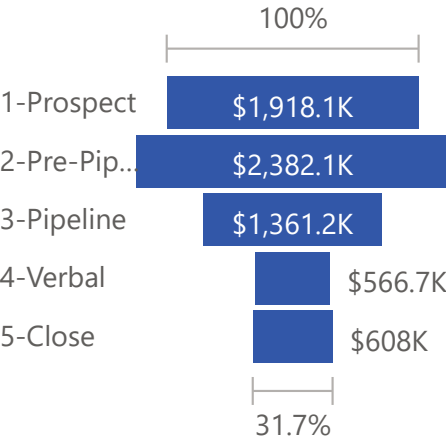|	
$2.1M Rev Won	**$2.5M** Rev In Pipeli...
$4M Rev Goal	**116%** Forecast %

Revenue Won and Revenue In Pipeline by Product LOB

● Revenue Won ● Revenue In Pipeline

Revenue Open by PipelineStep

1-Prospect	$1,918.1K
2-Pre-Pip...	$2,382.1K
3-Pipeline	$1,361.2K
4-Verbal	$566.7K
5-Close	$608K

100%

31.7%

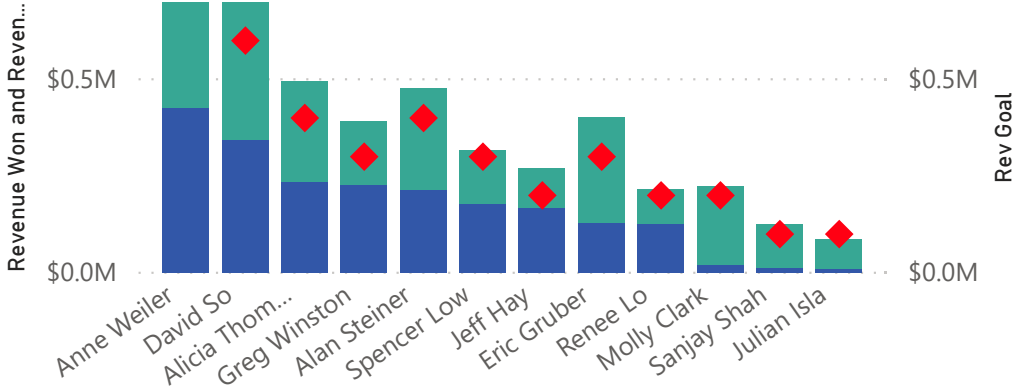## Revenue Won, Revenue In Pipeline and Rev Goal by Owner
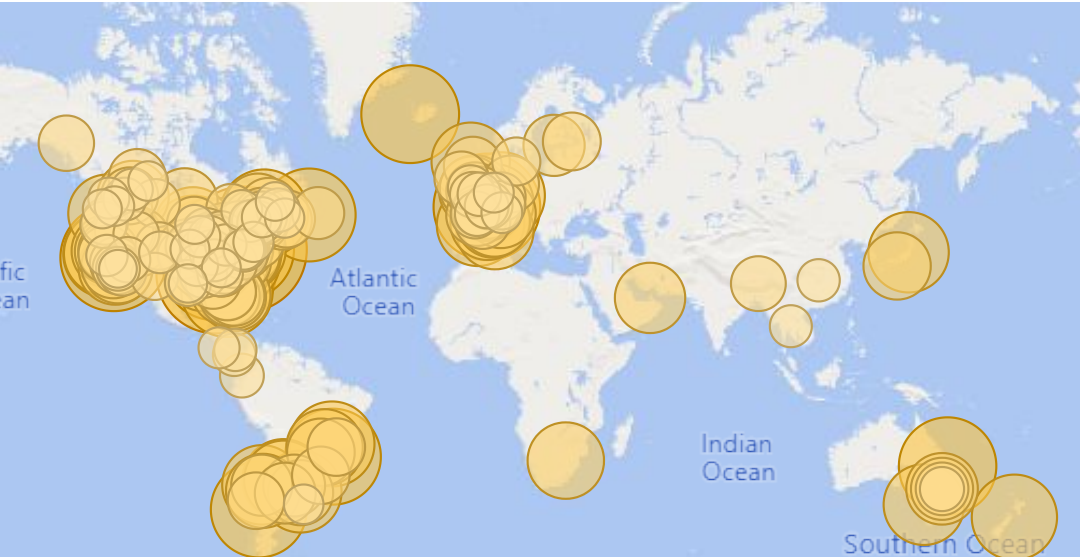
● Revenue Won ● Revenue In Pipeline ◆ Rev Goal

Region, Territory

- APAC
- EMEA
- LATAM
- North America
  - Canada
  - Mexico

Product LOB, Product

- Computers
- Electronics
- Furniture
- Software

Revenue by Location

Bing

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Owner	Revenue Won	In Pipeline	Goal	Forecast %
Anne Weiler	$427.4K	$481.2K	$800K	✔ 114%
David So	$344.7K	$380.3K	$600K	✔ 121%
Alicia Thomber	$236.6K	$259.4K	$400K	✔ 124%
Greg Winston	$226.9K	$163.2K	$300K	✔ 130%
Alan Steiner	$215.8K	$261.0K	$400K	✔ 119%
Spencer Low	$178.5K	$137.7K	$300K	✔ 105%
Jeff Hay	$167.0K	$102.8K	$200K	✔ 135%
Eric Gruber	$130.3K	$272.7K	$300K	✔ 134%
Renee Lo	$128.0K	$88.2K	$200K	✔ 108%
Molly Clark	$22.0K	$202.2K	$200K	✔ 112%
Sanjay Shah	$13.0K	$111.3K	$100K	✔ 124%
Julian Isla	$11.1K	$75.9K	$100K	⚠ 87%
Total	**$2,101.3K**	**$2,535.9K**	**$4,000K**	**116%**

Contoso **Opportunity Health**

100	$261K
Open Opportunities	Total Value

41.29	$102.8K
Avg Days Remaining	Value In Pipeline

Region
- ☐ APAC
- ☐ LATAM
- ☐ North America

Campaign Na...
- ☐ Commercial Tradeshow
- ☐ Consumer Tradeshow
- ☐ Customer Care Camp...
- ☐ Customer Loyalty Poi...

Manager, Oppo...
- ◉ Select all
- ⊟ ◙ Low, Spencer
  - ☑ Jeff Hay
  - ☐ Julian Isla
  - ☐ Molly Clark
  - ☐ Renee Lo
  - ☐ Sanjay Shah
  - ☐ Spencer Low
- ☐ Weiler, Anne

Product LOB, P...
- ☐ Select all
- ⊟ ☐ Computers
  - ☐ All-in-One
  - ☐ Desktops
  - ☐ Tablets
- ⊟ ☐ Electronics
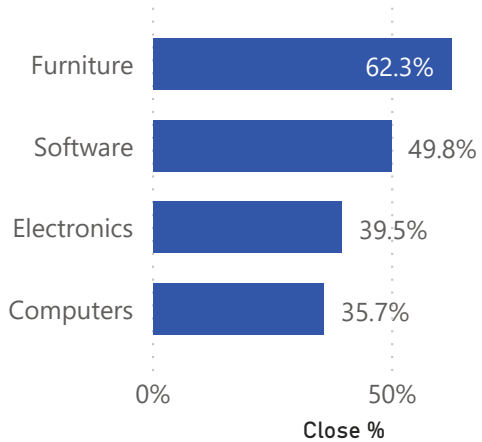 - ☐ Laser Printers
  - ☐ Mobile Printers
  - ☐ Scanners

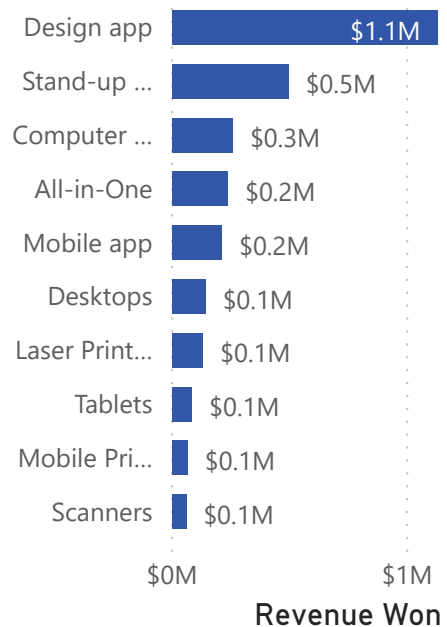## Days Remaining in Pipeline, Probability Estimate and Value by Topic and PipelineStep

PipelineStep ● 1-Prospect ● 2-Pre-Pipeline ◆ 3-Pipeline ■ 4-Verbal ▲ 5-Close
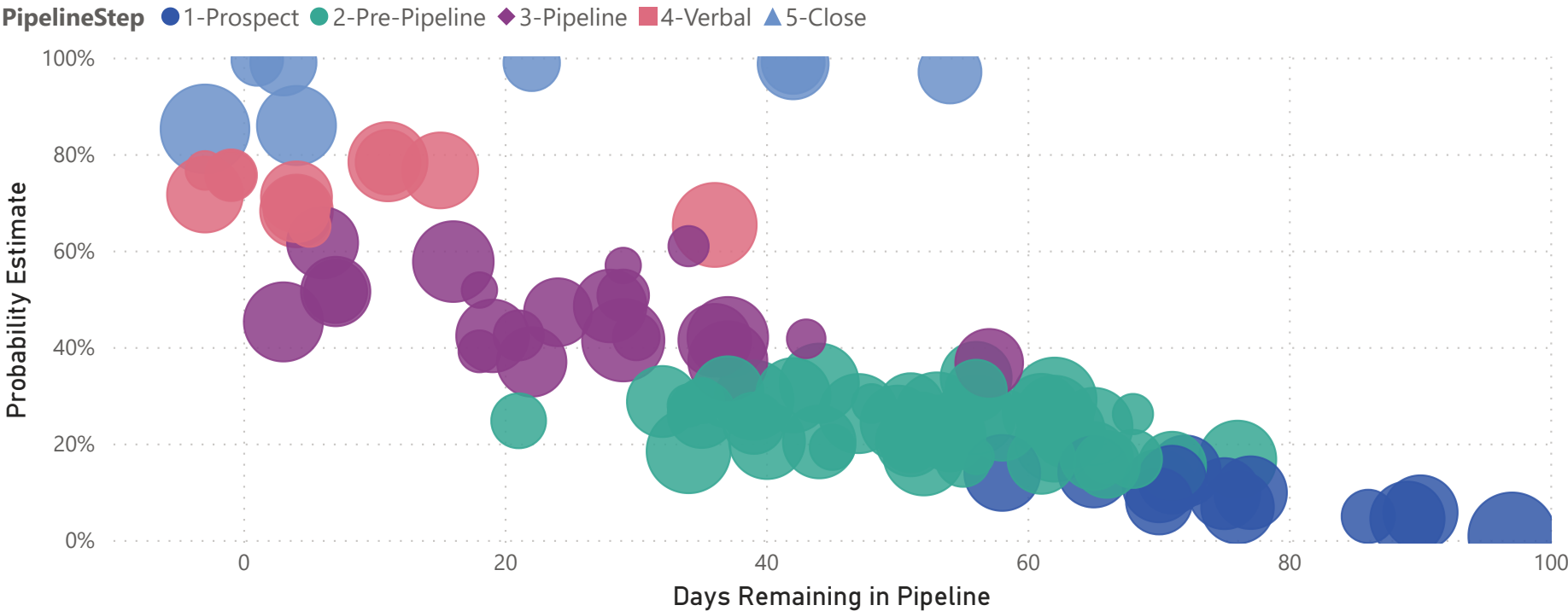
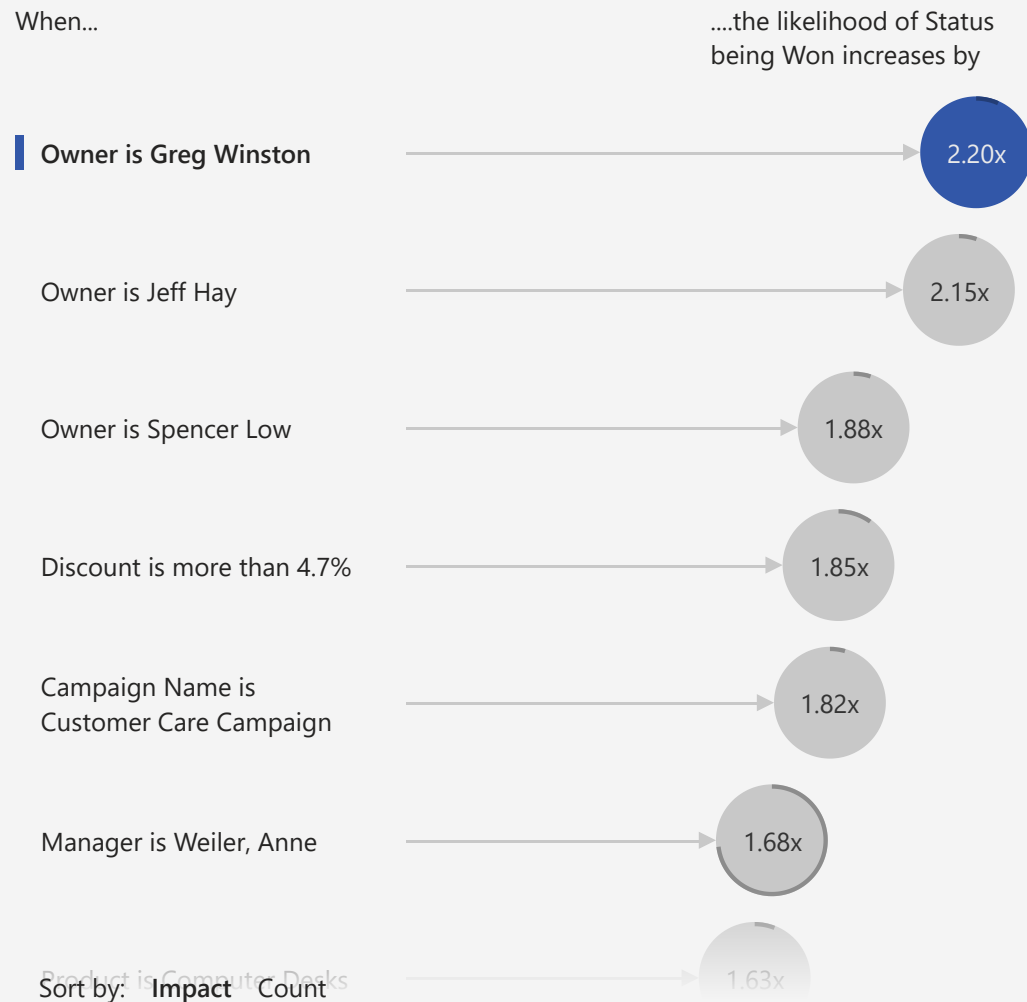| CloseDate	Territory	Account Name	Owner	Product	Discount	Value	Topic
6/1/2020	US-MID...	Halvorson-Harber	Jeff Hay	All-in-One	1.3%	$3,400	Visionary regional All-in-One portal
6/1/2020	US-MID...	Roob-Steuber	Jeff Hay	Mobile Print...	3.3%	$600	Robust contextually-based Mobile Printer...
6/1/2020	US-MID...	Roob-Steuber	Jeff Hay	Stand-up De...	3.3%	$4,700	Synergized reciprocal Stand-up Desks met...
6/3/2020	US-MID...	Halvorson-Harber	Jeff Hay	Laser Printers	2.3%	$1,200	Optional 24 Laser Printers hour contingen...
6/3/2020	US-MID...	Pfannerstill-Schumm	Jeff Hay	Laser Printers	3.8%	$1,400	Virtual secondary Laser Printers artificial i...
6/5/2020	US-MID...	Prosacco-Pagac	Jeff Hay	Desktops	4.3%	$1,400	Secured impactful Desktops migration
6/7/2020	US-MID...	Kautzer-Aufderhar	Jeff Hay	Computer D...	4.3%	$2,500	Quality-focused client-driven Computer D...
6/7/2020	US-MID...	Lynch and Sons	Jeff Hay	Design app	2.3%	$3,700	Virtual cohesive Design app database
6/8/2020	US-MID...	Feil, Krajcik and Hayes	Jeff Hay	Stand-up De...	5.8%	$3,100	Team-oriented discrete Stand-up Desks o...
6/8/2020	US-MID...	Kautzer-Aufderhar	Jeff Hay	All-in-One	1.3%	$3,000	Polarised mission-critical All-in-One emul...

Influence on Opportunity Win/Loss Ratio
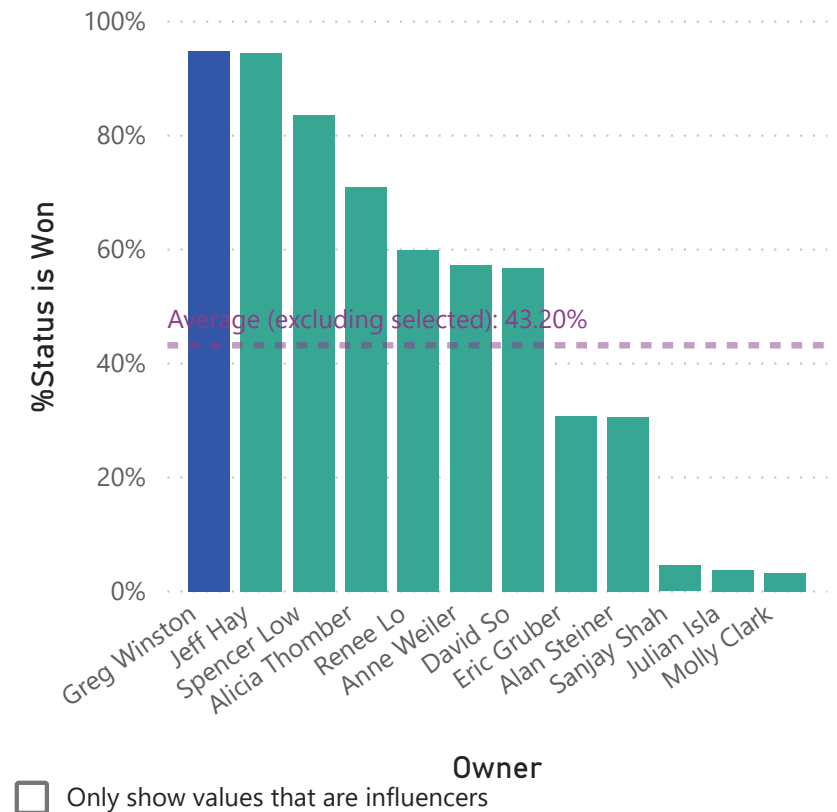
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Close % by Product LOB

Product LOB	Close %
Furniture	62.3%
Software	49.8%
Electronics	39.5%
Computers	35.7%

Close %

Revenue Won by Product

Product	Revenue Won
Design app	$1.1M
Stand-up ...	$0.5M
Computer ...	$0.3M
All-in-One	$0.2M
Mobile app	$0.2M
Desktops	$0.1M
Laser Print...	$0.1M
Tablets	$0.1M
Mobile Pri...	$0.1M
Scanners	$0.1M

Revenue Won

Key influencers   Top segments

👍 👎

What influences Status to be **Won** ▼ ?

When...   ....the likelihood of Status
                                                  being Won increases by

Owner is Greg Winston	2.20x
Owner is Jeff Hay	2.15x
Owner is Spencer Low	1.88x
Discount is more than 4.7%	1.85x
Campaign Name is Customer Care Campaign	1.82x
Manager is Weiler, Anne	1.68x
Product is Computer Desks	1.63x

Sort by: **Impact**   Count

← Status is more likely to be Won when Owner is Greg Winston than otherwise (on average).

%Status is Won

Average (excluding selected): 43.20%

Owners: Greg Winston, Jeff Hay, Spencer Low, Alicia Thomber, Renee Lo, Anne Weiler, David So, Eric Gruber, Alan Steiner, Sanjay Shah, Julian Isla, Molly Clark

Owner

☐ Only show values that are influencers

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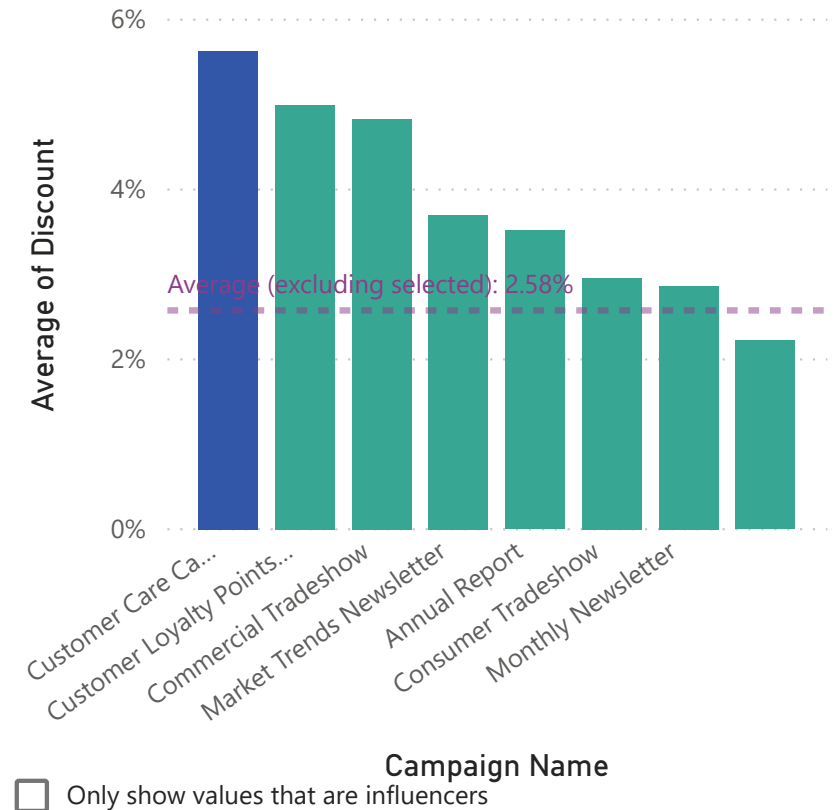
Influence on Sales Days to Close

Average of DaysToClose by Product LOB

	Average of DaysToClose
Computers	96.24
Software	93.58
Electronics	92.24
Furniture	83.23

Average of DaysToClose by Product

	Average of DaysToClose
Tablets	105.08
Scanners	104.23
Mobile app	99.57
All-in-One	98.95
Laser Print...	92.78
Design app	91.55
Mobile Pri...	84.43
Stand-up ...	84.35
Computer ...	80.88
Desktops	77.05
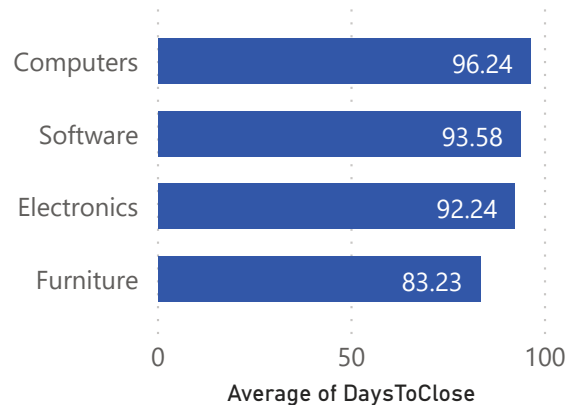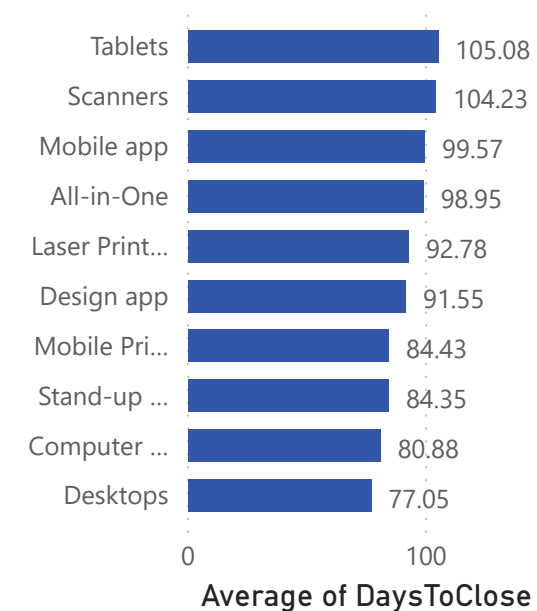
Key influencers   **Top segments**

What influences DaysToClose to [Increase ⌄] ?

When...   ....the average of
                           DaysToClose increases by

|	
Decision Maker Identified is False	14.46
Owner is Molly Clark	14.04
Product is Tablets	13.82
State or Province is PA	13.59
State or Province is TX	13.19
Owner is Sanjay Shah	12.97
Product is Scanners	12.72

Sort by: **Impact**   Count

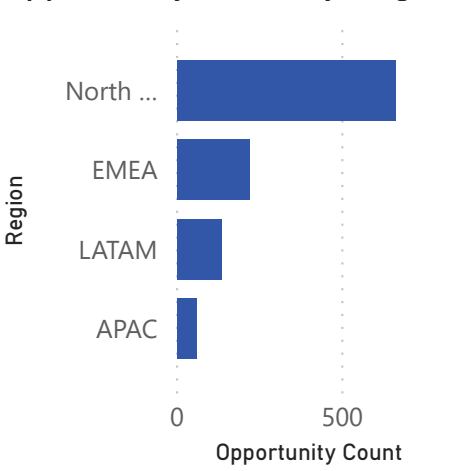← DaysToClose is more likely to increase when Decision Maker Identified is False than otherwise (on average).
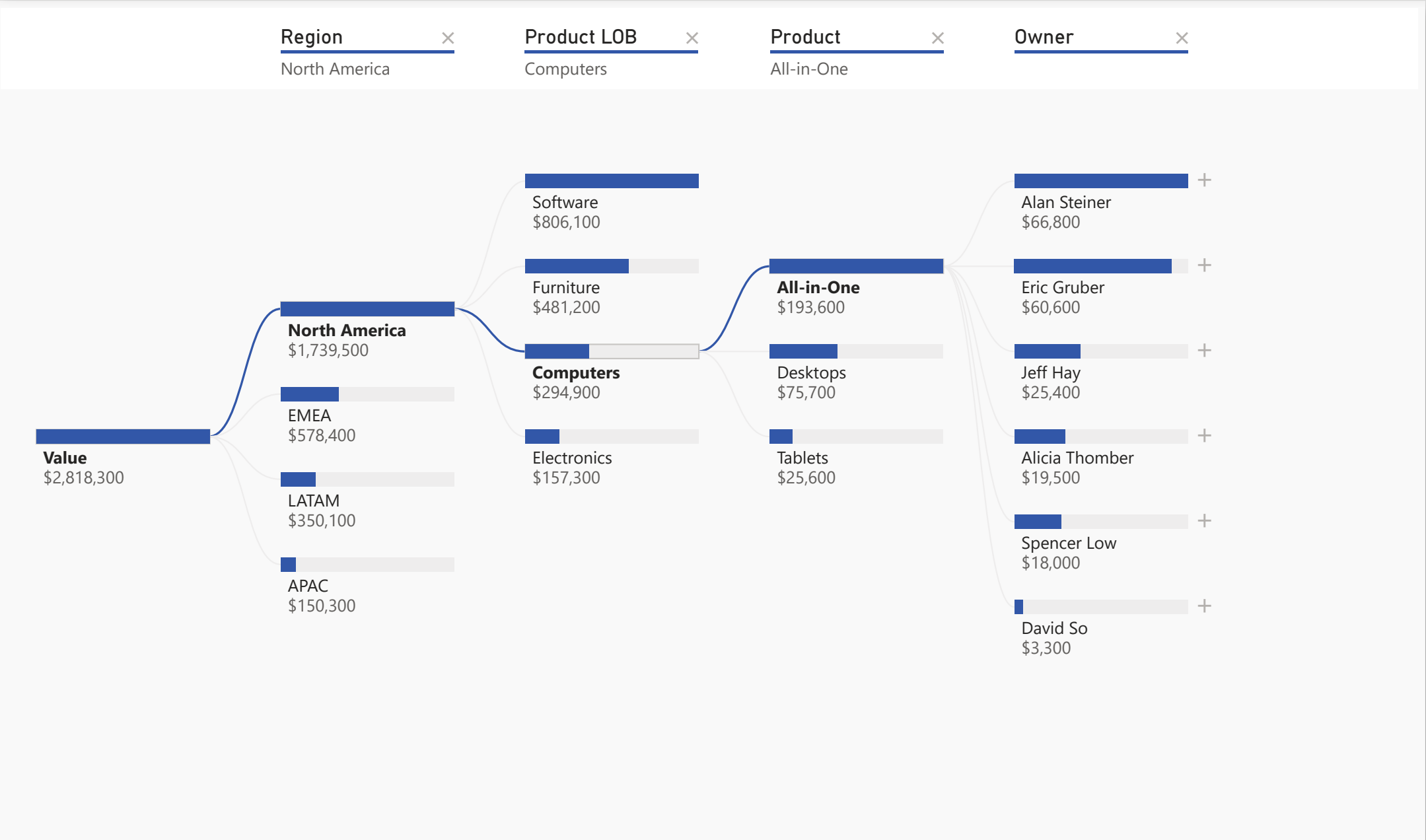

Average (excluding selected): 85.34
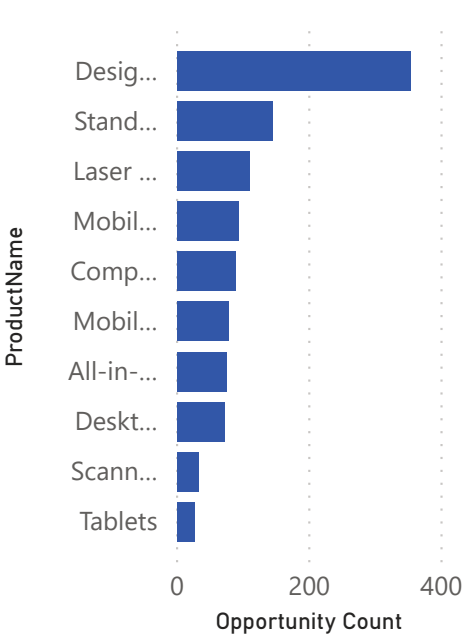
Decision Maker Identified
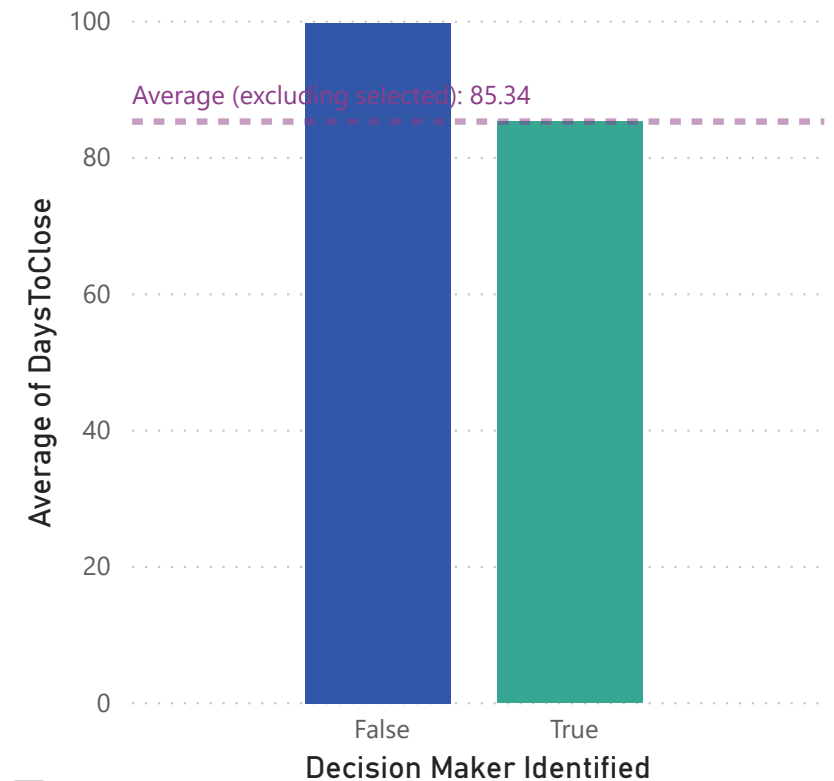
☐ Only show values that are influencers

Revenue Decomposition Tree

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Opportunity Count by Region

Region (vertical axis): North ..., EMEA, LATAM, APAC
Opportunity Count (horizontal axis): 0, 500

Opportunity Count by ProductName

ProductName (vertical axis): Desig..., Stand..., Laser ..., Mobil..., Comp..., Mobil..., All-in-..., Deskt..., Scann..., Tablets
Opportunity Count (horizontal axis): 0, 200, 400

Region ✕	Product LOB ✕	Product ✕	Owner ✕
North America	Computers	All-in-One	

Value
$2,818,300

North America
$1,739,500

EMEA
$578,400

LATAM
$350,100

APAC
$150,300

Software
$806,100

Furniture
$481,200

Computers
$294,900

Electronics
$157,300

All-in-One
$193,600

Desktops
$75,700

Tablets
$25,600

Alan Steiner
$66,800

Eric Gruber
$60,600

Jeff Hay
$25,400

Alicia Thomber
$19,500

Spencer Low
$18,000

David So
$3,300

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Ad-Hoc Query

Ask a question about your data

Try one of these to get started

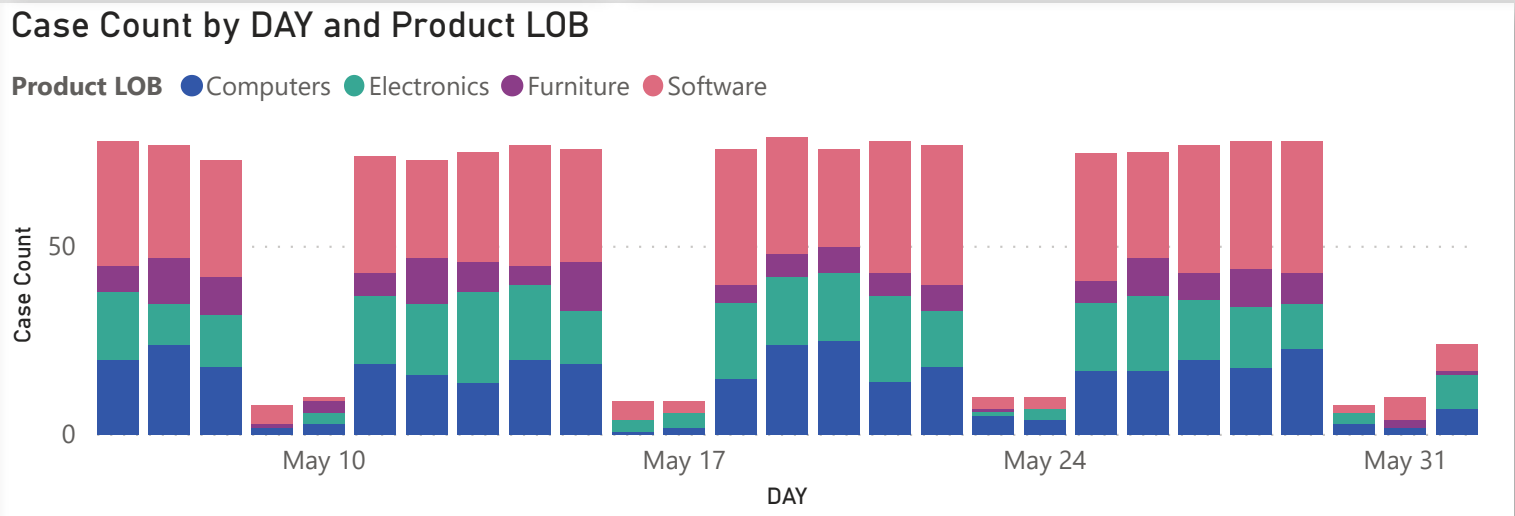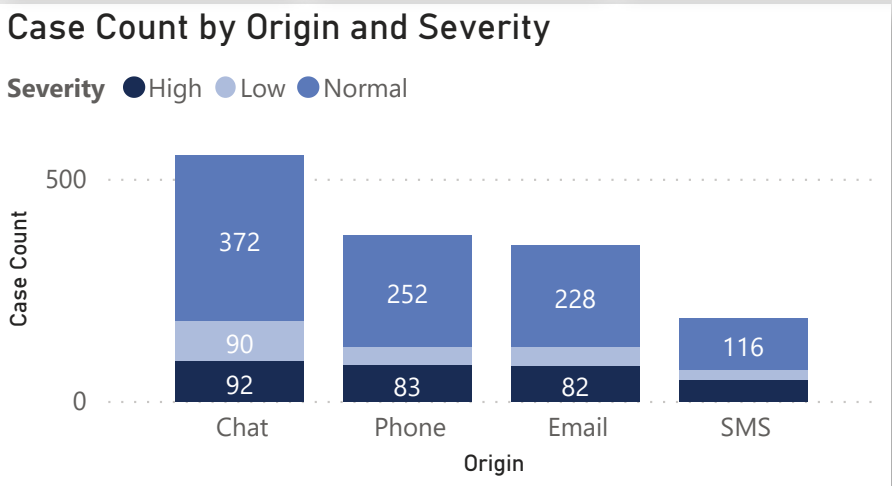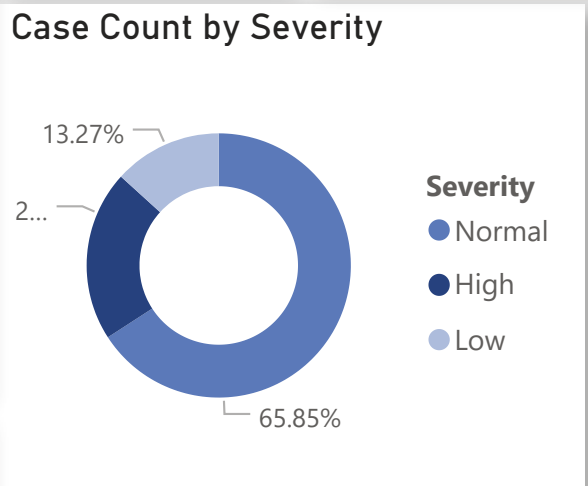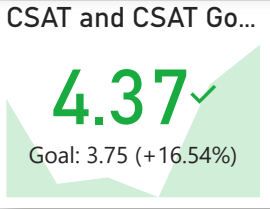| show me case count for the last week | show me count of won for the last week | show me count of lost for the last week | what is the rev goal by region | top territories by CSAT impact | what is the SLA compliance by case topic |

Show all suggestions

KPI Summary - Last 30 Days

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Topic	Case Count	Resolution Minutes	Escalations	SLA Compliance
All-in-One | Account ...	4	61.8		100% ⭐
All-in-One | Account ...	36	51.7		100% ⭐
All-in-One | General	85	68.1		96% ⭐
All-in-One | Login Qu...	27	59.8		100% ⭐
All-in-One | Returns	14	53.8		100% ⭐
All-in-One | Shipping ...	11	71.9		91% ⭐
Computer Desks | Acc...	15	94.1	87%	
Computer Desks | Acc...	13	81.8	92%	15% ☆
Computer Desks | Ge...	5	82.2	80%	20% ☆
Total	**1,470**	**67.1**	**14%**	**76%**

Case Count by RE...
1,470

Escalations and E...
14% ✓
Goal: 20% (+32.31%)

SLA Compliance a...
76% !
Goal: 90% (-16.02%)

Avg Resolution Ti...
67.1 ✓
Goal: 120.00 (+44.1%)

CSAT and CSAT Go...
4.37 ✓
Goal: 3.75 (+16.54%)

Case Count by Severity

Severity
- Normal — 65.85%
- High
- Low — 13.27%
- 2...

Case Count by Origin and Severity

Severity: ● High ● Low ● Normal

Origin	High	Low	Normal
Chat	92	90	372
Phone	83		252
Email	82		228
SMS			116

Topic	Case Count	Cases MoM%	CSAT	CSAT Impact
Design app | General	110	-9.1% ⬇	4.99	1.28%
Mobile app | General	97	-20.5% ⬇	4.51	0.37%
All-in-One | General	85	1.2% ⬇	4.99	0.83%
Design app | Login Q...	85	-15.8% ⬇	2.19	-3.08%
Tablets | General	70	-4.1% ⬇	5.00	0.82%
Design app | Account...	65	-34.3% ⬇	4.28	-0.09%
Design app | Returns	59	-15.7% ⬇	4.80	0.56%
Mobile app | Account...	50	2.0% ⬇	3.72	-0.82%
Design app | Shippin...	44	4.8% ⬇	4.02	-0.20%
Total	**1,470**	**-11.9%**	**4.37**	**0.00%**

Case Count by DAY and Product LOB

Product LOB: ● Computers ● Electronics ● Furniture ● Software

May 10   May 17   May 24   May 31
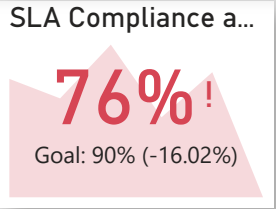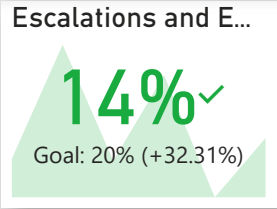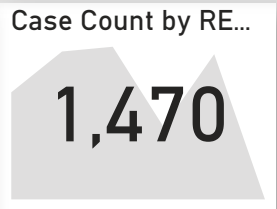
Agent Performance - Last 30 Days

Agent	Case Count	Escalations	SLA Compliance	Resolution Minutes	CSAT	
⊞ Spencer Low	90	18%	72%	70.5 🚩	4.47	⬆
⊞ Sanjay Shah	103	6%	88%	60.9 🚩	4.52	⬆
⊞ Renee Lo	52	21%	71%	71.3 🚩	4.33	⬊
⊞ Molly Clark	221	7%	86%	59.8 🚩	4.37	⬈
⊞ Julian Isla	73	7%	78%	62.6 🚩	4.32	⬊
⊞ Jeff Hay	54	28%	54%	75.3 🚩	4.35	⬊
⊞ Greg Winston	72	21%	58%	73.1 🚩	4.19	⬇
⊞ Eric Gruber	149	11%	74%	65.6 🚩	4.20	⬇
⊞ David So	167	17%	76%	70.4 🚩	4.36	⬊
Total	**1,470**	**14%**	**76%**	**67.1**	**4.37**	

Case Count by Product

Case Count by DAY and Severity

Severity ●High ●Low ●Normal
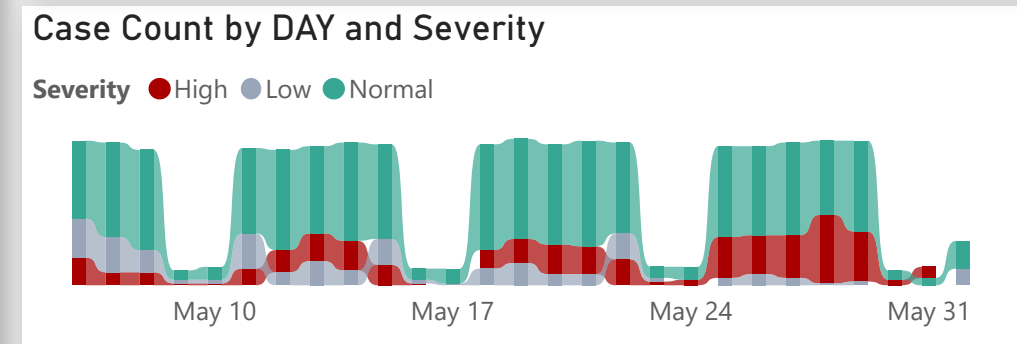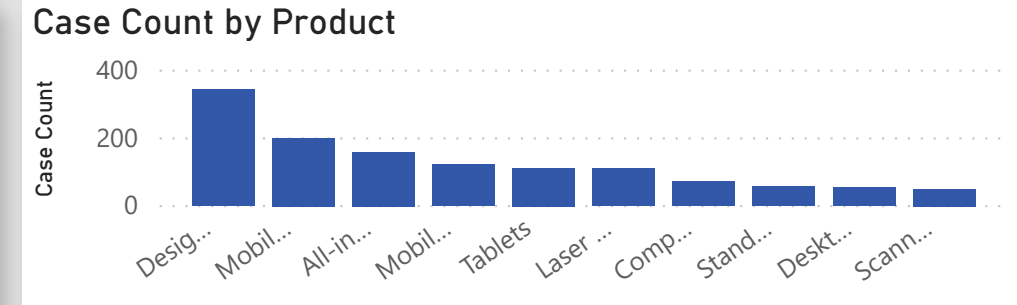
Case Created On	Status	Agent	Account Name	Product	Subject	Title	Is Escalated	Is SLA Violation	Minutes to First Contact	Minutes to Resolution	CSAT
2020-05-15	Closed	Alicia Thomber	Wehner-Schroeder	Mobile Printers	Account Reset	Synergistic heuristic a...	False	True	7.00	112.0	5.00
2020-05-26	Closed	David So	Timber	Mobile Printers	Account Reset	Re-contextualized sca...	False	True	4.00	112.0	5.00
2020-05-21	Closed	Jeff Hay	Cormier-Kerluke	Mobile Printers	Account Reset	Persistent fresh-thinki...	True	True	4.00	111.0	5.00
2020-05-12	Closed	Anne Weiler	Bailey-Schmeler	Stand-up Desks	Account Reset	Innovative zero tolera...	True	True	6.00	108.0	4.00
2020-05-12	Closed	David So	Rolfson-Nicolas	Mobile Printers	Account Reset	Reactive full-range da...	False	True	5.00	108.0	4.00
2020-05-26	Closed	Alicia Thomber	Miller, Schiller and Streich	Mobile Printers	Account Reset	Adaptive multimedia ...	False	True	7.00	108.0	5.00
2020-05-12	Closed	Greg Winston	Cronin-Mills	Computer Desks	Account Reset	Open-source systema...	True	True	7.00	105.0	5.00
2020-05-06	Closed	Alan Steiner	Price-Rau	Mobile Printers	Account Reset	Fully-configurable rad...	False	True	7.00	103.0	4.00
2020-05-25	Closed	Julian Isla	Schmeler Inc	Mobile Printers	Account Reset	Right-sized increment...	False	True	6.00	102.0	5.00
Total									**6.62**	**67.1**	**4.37**
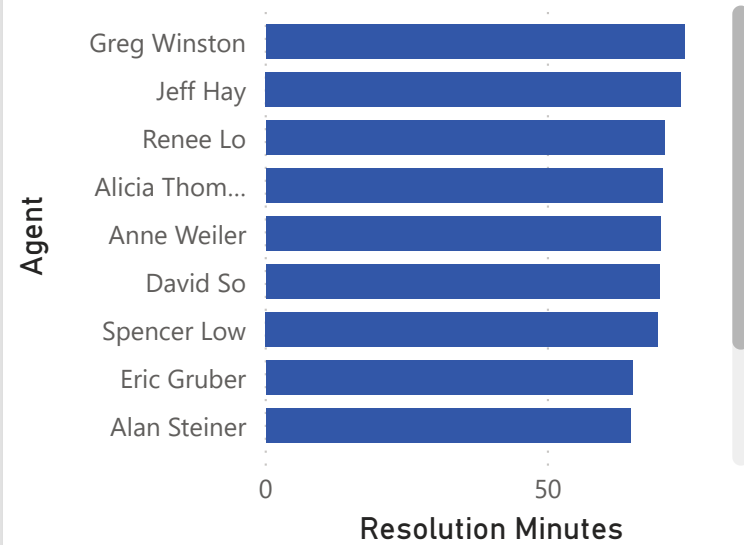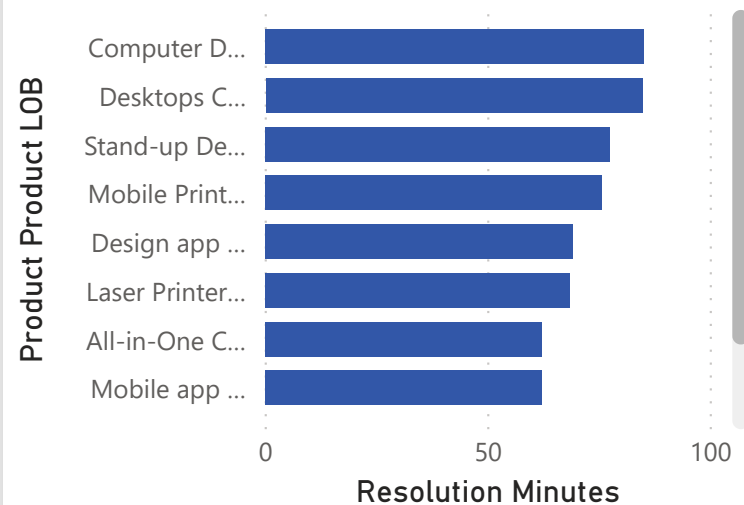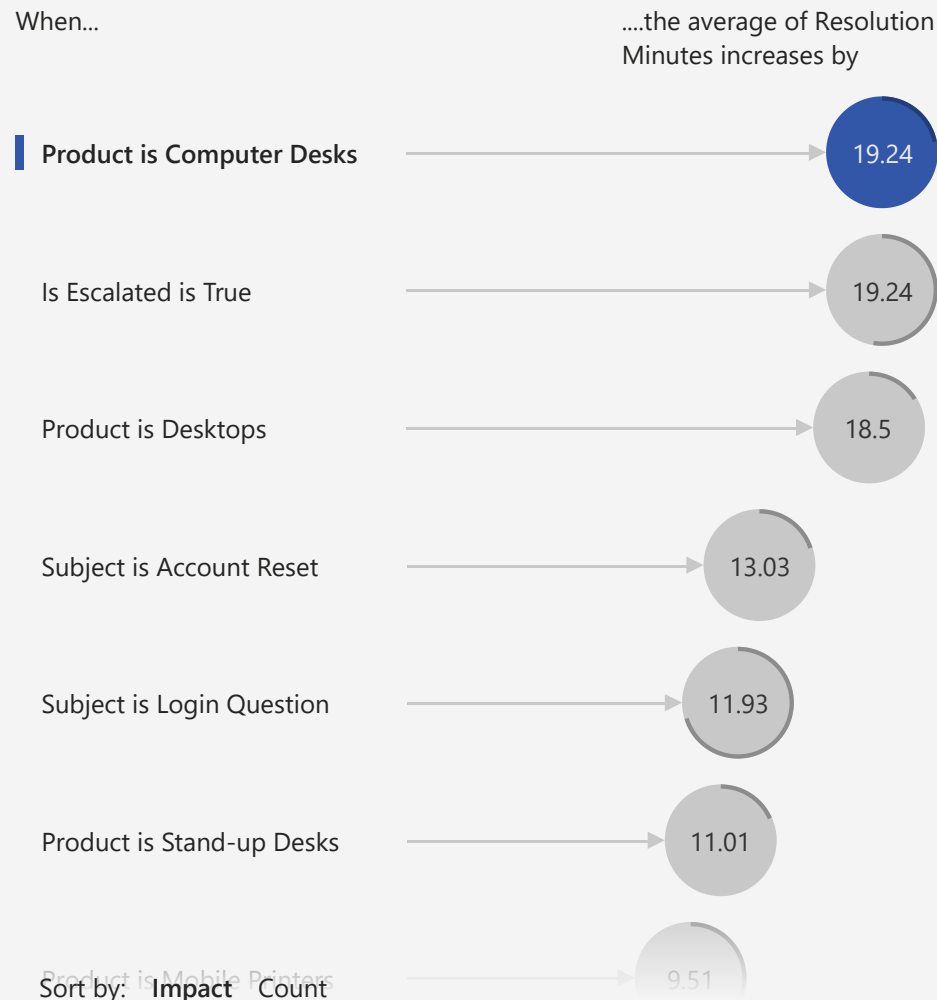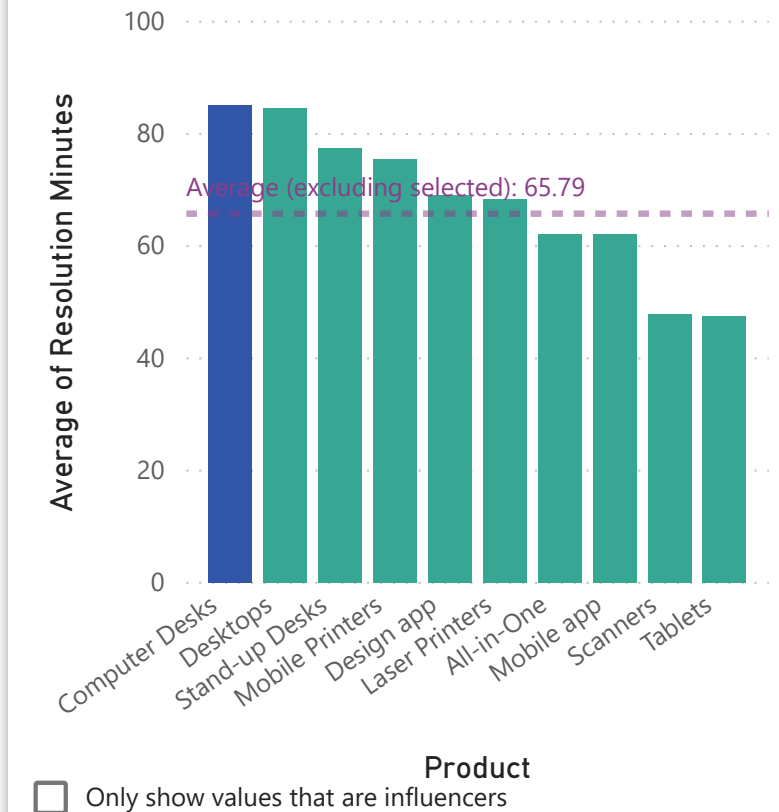
Influence on Customer Satisfaction Scores

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Left Panel

Key influencers   Top segments

What influences CSAT to [Increase ▾] ?

When...	....the average of CSAT increases by
Origin is Chat	0.85
Subject is General	0.84
Is Escalated is False	0.67
Product is All-in-One	0.57
Subject is Returns	0.5
Subject is Account Reset	0.25
Product is Stand-up Desks	0.23

← CSAT is more likely to increase when Origin is Chat than otherwise (on average).
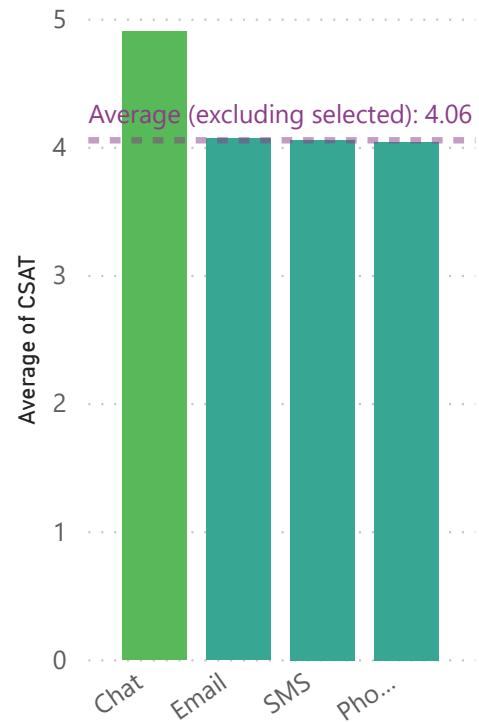
Average (excluding selected): 4.06

Chart (Average of CSAT vs Origin): Chat, Email, SMS, Pho...

☐ Only show values that are influencers

Sort by: **Impact** Count

Right Panel

Key influencers   Top segments
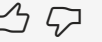
What influences CSAT to [Decrease ▾] ?

When...	....the average of CSAT decreases by
Subject is Login Question	1.02
Subject is Shipping Question	0.84
Is Escalated is True	0.67
Product is Computer Desks	0.37
Origin is Phone	0.36
Origin is Email	0.31
Product is Design a...	0.29
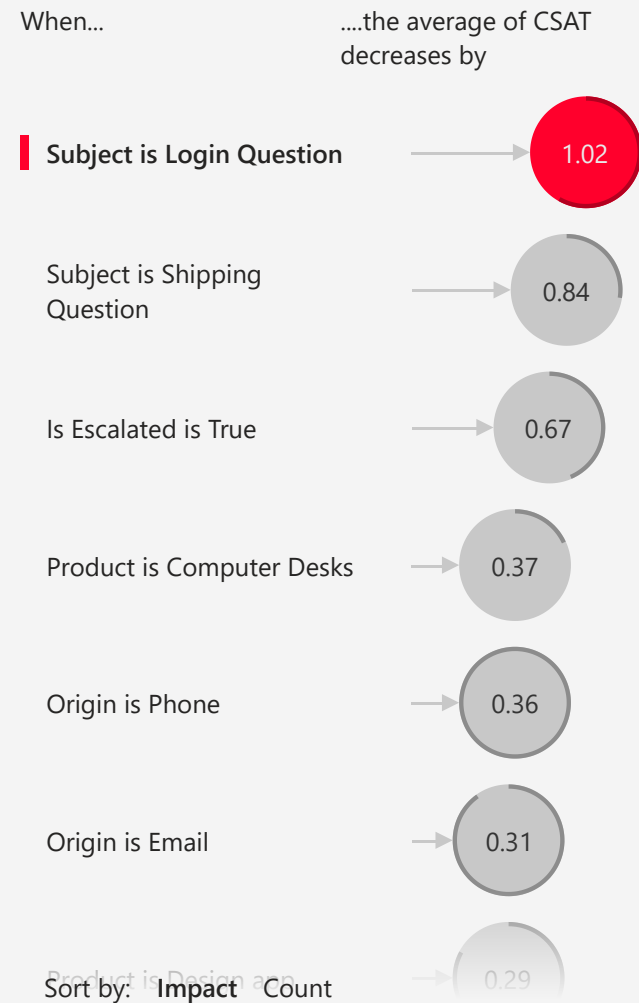
← CSAT is more likely to decrease when Subject is Login Question than otherwise (on average).

Chart (Average of CSAT vs Subject): Login Question, Shipping Question, Account Set-up, Account Reset, Returns, General

☐ Only show values that are influencers

Sort by: **Impact** Count

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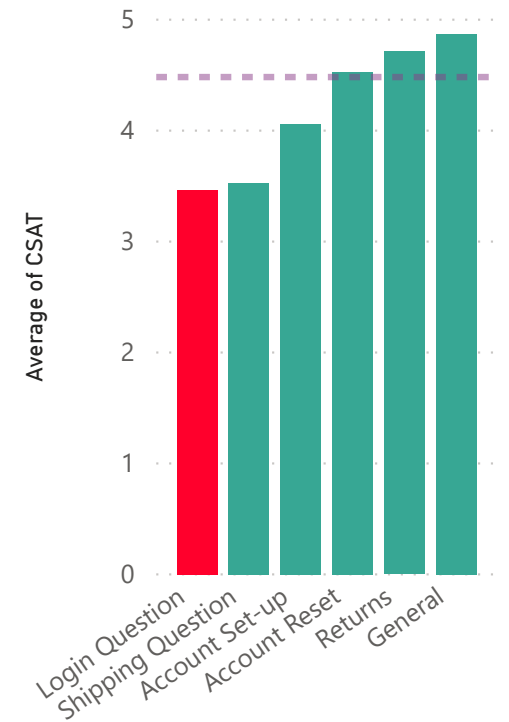
Influence on SLA Violation Frequency

By Manager

Weiler, Anne — 2.8%
Low, Spencer — 2.6%

Discount

By LOB

Furniture — 4.4%
Electronics — 2.6%
Software — 2.6%
Computers — 1.9%

Discount
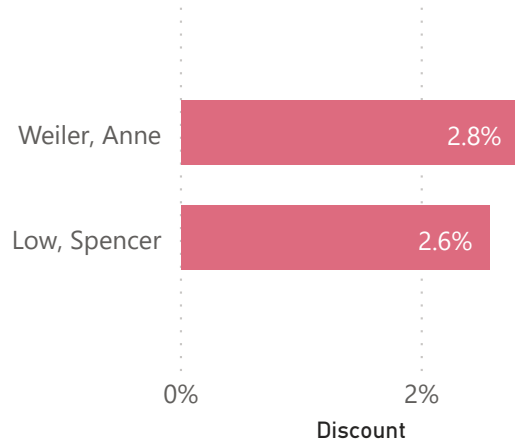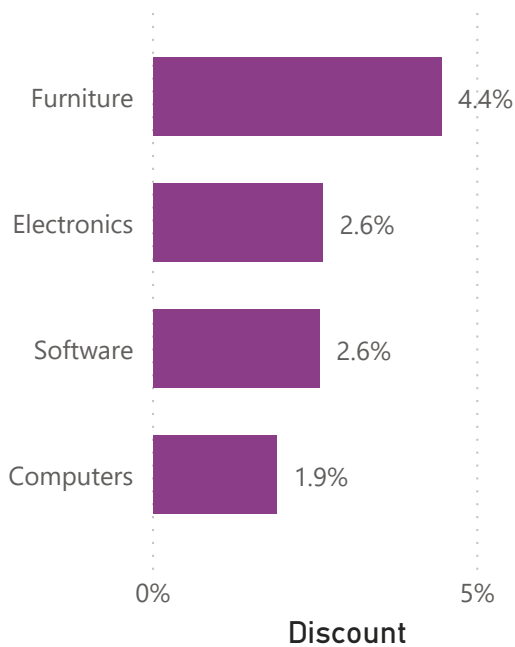
Key influencers   Top segments

What influences Is SLA Violation to be [True ▾] ?

When...   ....the likelihood of Is SLA Violation being True increases by

Is Escalated is True → **5.74x**

Product is Computer Desks → 4.73x

Subject is Login Question → 4.49x

Product is Desktops → 4.47x
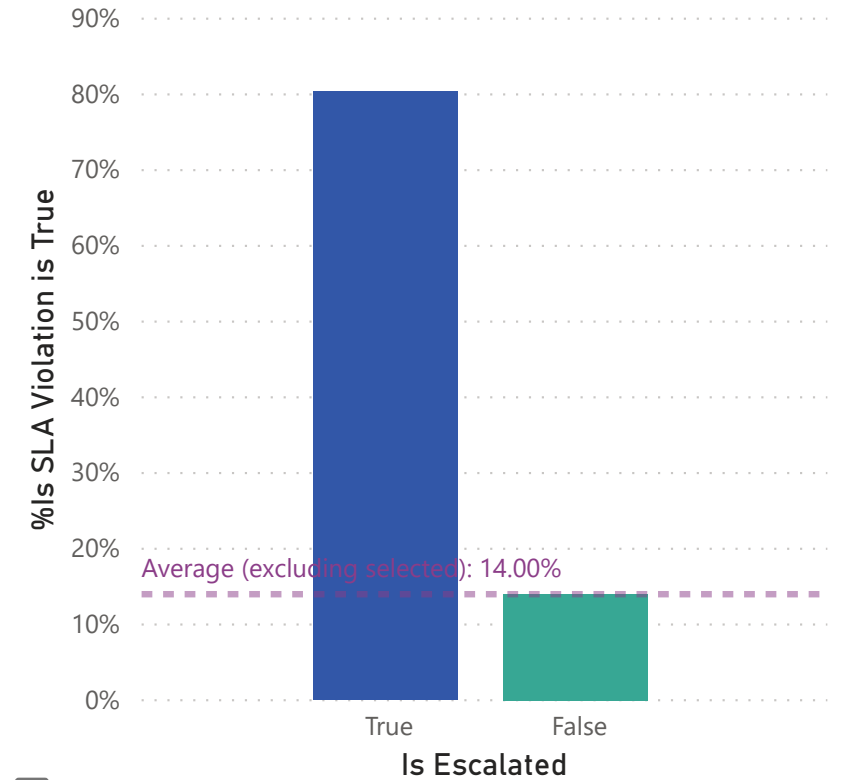
State or Province is IA → 2.25x

Territory is Argentina → 2.07x

Sort by: **Impact** Count

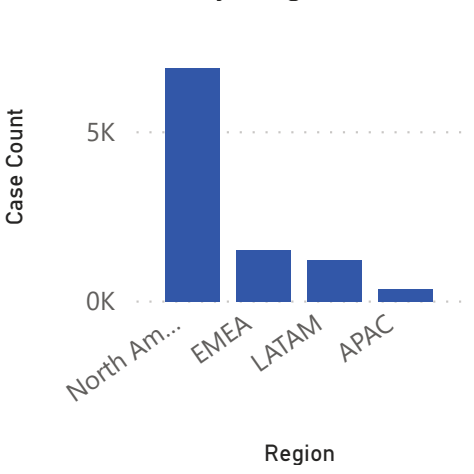← Is SLA Violation is more likely to be True when Is Escalated is True than otherwise (on average).

%Is SLA Violation is True

90%
80%
70%
60%
50%
40%
30%
20%
10%
0%

Average (excluding selected): 14.00%

Is Escalated
True   False

☐ Only show values that are influencers