

Dynamics 365 CE Sales and Service Analytics *Power BI Demo Accelerator*

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Dynamics 365 CE GBB

<https://github.com/mscottsewell/ContosoBI>

Contoso

Revenue Won

\$2.2M

Revenue In Pipeline

\$2.4M

Owner Goal

\$4.3M

Forecast %

108%

Region

☐ APAC

☐ EMEA

☐ LATAM

☐ North America

Manager

☐ Low, Spencer

☐ Weiler, Anne

Product LOB

☐ Computers

☐ Electronics

☐ Furniture

☐ Software

Revenue Won and Revenue In Pipeline by Product LOB

Revenue Won

Revenue In Pipeline

Revenue In Pipeline by PipelineStep

PipelineStep	Revenue In Pipeline
1-Prospect	\$864.0K
2-Pre-Pipeline	\$542.3K
3-Pipeline	\$335.2K
4-Verbal	\$254.6K
5-Close	\$398.1K

Revenue Won, Revenue In Pipeline and Owner Goal by Owner

Revenue Won

Revenue In Pipeline

Owner Goal

Owner	Revenue Won	In Pipeline	Goal	Forecast %
Eric Gruber	\$53.3K	\$213.4K	\$200K	133%
Anne Weiler	\$83.4K	\$181.3K	\$200K	132%
Molly Clark	\$101.6K	\$150.7K	\$200K	126%
Alicia Thomber	\$219.1K	\$145.5K	\$300K	122%
David So	\$85.0K	\$151.1K	\$200K	118%
Sanjay Shah	\$81.3K	\$146.1K	\$200K	114%
Greg Winston	\$227.6K	\$204.9K	\$400K	108%
Spencer Low	\$355.5K	\$281.3K	\$600K	106%
Jeff Hay	\$384.3K	\$218.5K	\$600K	100%
Renee Lo	\$257.9K	\$240.2K	\$500K	100%
Dan Jump	\$226.8K	\$161.6K	\$400K	97%
Alan Steiner	\$97.3K	\$188.7K	\$300K	95%
Julian Isla	\$64.5K	\$110.9K	\$200K	88%
Total	\$2,237.6K	\$2,394.2K	\$4,300K	108%

Revenue by Location



Opportunity Health

41

Open Opportunities

\$111K

Total Value

16.83

Avg Days Remaining

\$110.5K

Value In Pipeline

Region

- ☒ APAC
- ☐ EMEA
- ☐ LATAM
- ☐ North America

Opportunity O...

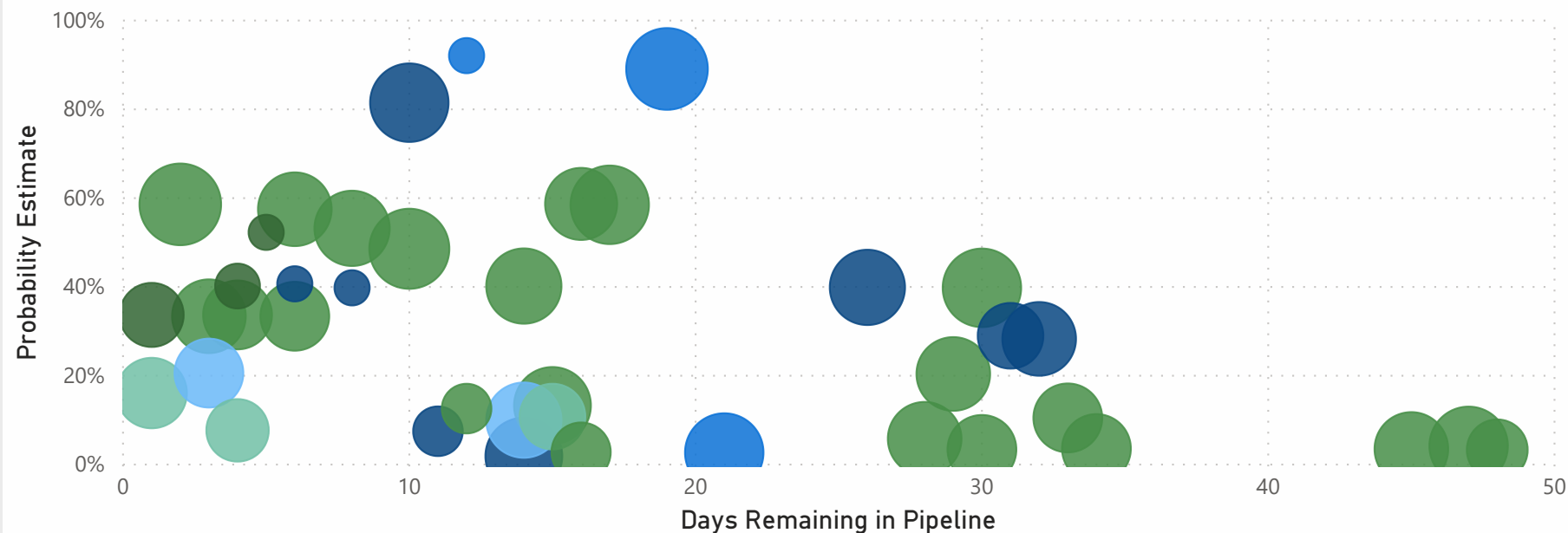
- ☒ Select all
- ☒ Alan Steiner
- ☒ Alicia Thomber
- ☒ David So
- ☒ Greg Winston
- ☒ Jeff Hay
- ☒ Renee Lo

Product

- ☐ Select all
- ☐ All-in-One
- ☐ Computer Desks
- ☐ Design app
- ☐ Desktops
- ☐ Laptops
- ☐ Laser Printers
- ☐ Mobile app
- ☐ Mobile Printers
- ☐ Scanners
- ☐ Stand-up Desks

Days Remaining in Pipeline, Probability Estimate, Value, Account Name, Owner and Product LOB by OpportunitySeq and Owner

Owner ● Alan Steiner ● Alicia Thomber ● David So ● Greg Winston ● Jeff Hay ● Renee Lo

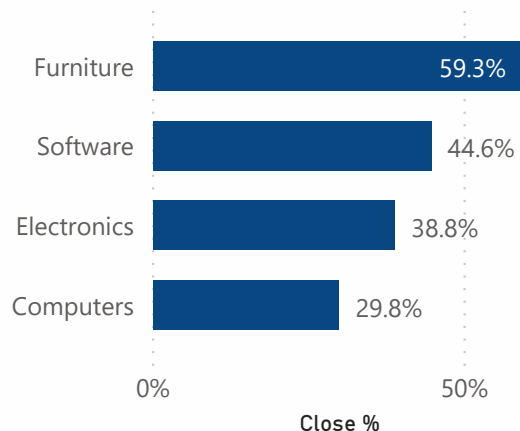


CloseDate	Territory	Account Name	Owner	Product	Discount	Value	Topic
2/12/2020	Australia	Reynolds, McLaughlin and G...	Jeff Hay	Mobile app	1.5%	\$2,300	Implemented 3rd Mobile app generation ...
2/12/2020	Australia	Ward Group	David So	All-in-One	1.5%	\$2,900	Automated multimedia All-in-One knowle...
2/13/2020	China	Weebly	Greg Winston	Design app	3.2%	\$3,900	Team-oriented solution-oriented Design a...
2/14/2020	Australia	Bradtke-O'Keefe	Renee Lo	All-in-One	1.5%	\$2,700	Inverse directional All-in-One project
2/14/2020	China	McClure, Hansen and Wilkin...	Greg Winston	Design app	3.2%	\$3,200	Fully-configurable tangible Design app pri...
2/15/2020	Japan	D'Amore-Gleason	Greg Winston	All-in-One	1.2%	\$2,800	Balanced tangible All-in-One moratorium
2/15/2020	Australia	Reynolds, McLaughlin and G...	Jeff Hay	Laser Printers	2.5%	\$1,000	Decentralized discrete Laser Printers proc...
2/15/2020	Australia	Ward Group	David So	Laptops	0.5%	\$2,200	Robust coherent Laptops instruction set
2/16/2020	Australia	Reynolds, McLaughlin and G...	Jeff Hay	Mobile Print...	4.0%	\$500	Re-engineered multimedia Mobile Printer...
2/17/2020	Australia	Hartmann, Rodriguez and Fa...	Alan Steiner	Mobile Print...	3.5%	\$500	Networked heuristic Mobile Printers pricin...

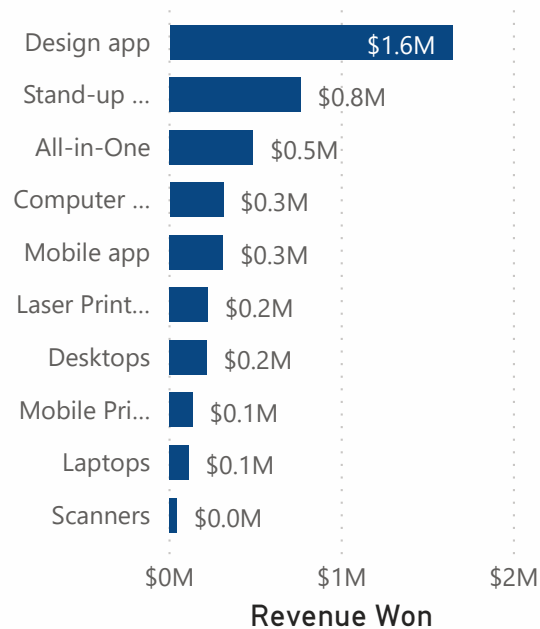


Influence on Opportunity Win/Loss Ratio

Close % by Product LOB



Revenue Won by Product



Key influencers Top segments

What influences Status to be ?

When...

...the likelihood of Status being Won increases by

Discount goes up 0.02

2.53x

Owner is Jeff Hay

1.90x

Owner is Dan Jump

1.85x

Campaign Name is Customer Care Campaign

1.79x

Campaign Name is Commercial Tradeshow

1.71x

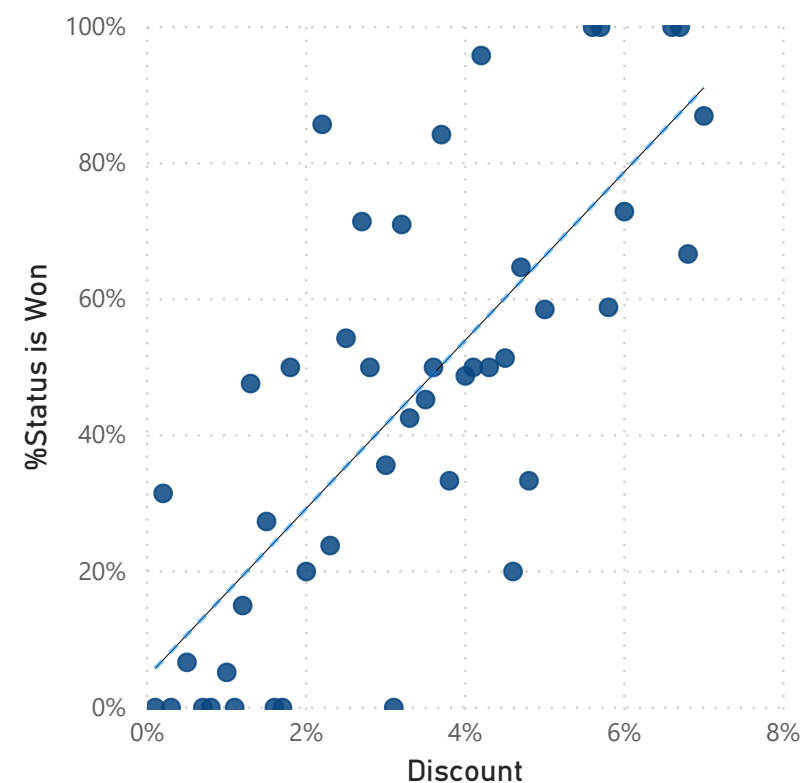
Owner is Greg Winston

1.68x

Campaign Name is Customer Loyalty Points
Sort by: Impact Count

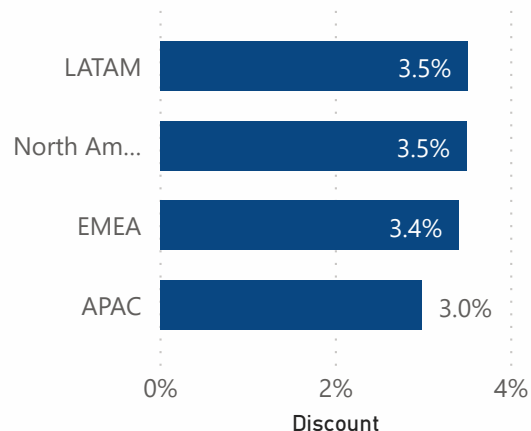
1.65x

← On average when Discount increases, the likelihood of Status being Won increases.

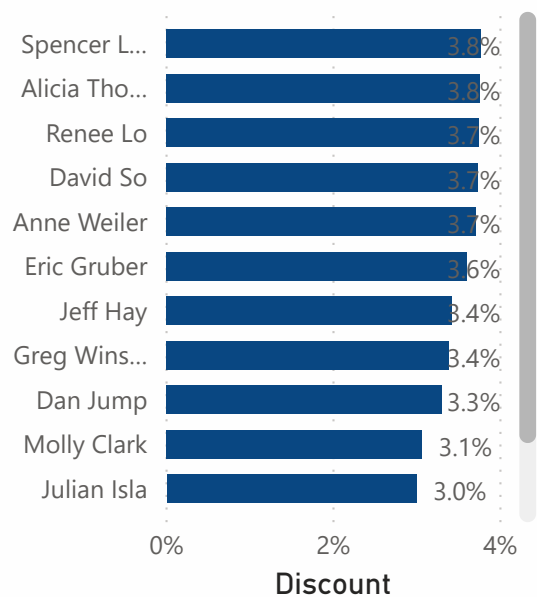


Influence on Sales Discount Offered

Discount by Region



Discount by Opportunity Owner Name



Key influencers Top segments

What influences Discount to ?

When...

...the average of Discount increases by

Campaign Name is Customer Care Campaign

2.65%

Campaign Name is Commercial Tradeshow

2.59%

Campaign Name is Customer Loyalty Points Update

2.21%

Product is Computer Desks

2.17%

Product is Desktops

1.49%

Product is Stand-up Desks

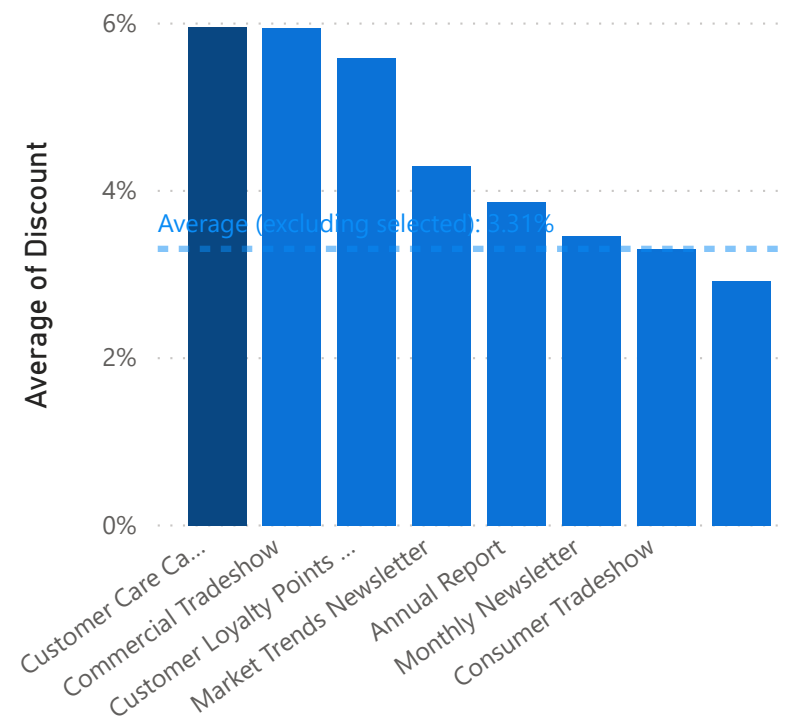
0.88%

Product is Design app

0.78%

Sort by: Impact Count

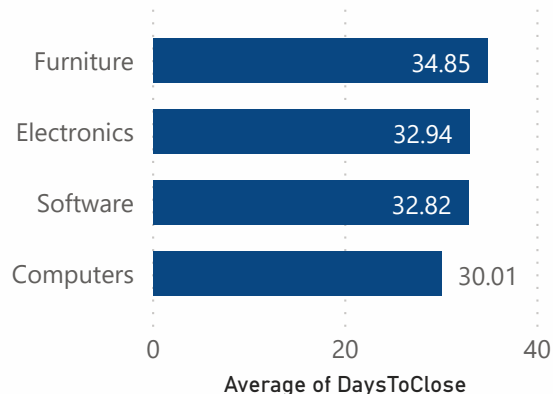
← Discount is more likely to increase when Campaign Name is Customer Care Campaign than otherwise (on average).



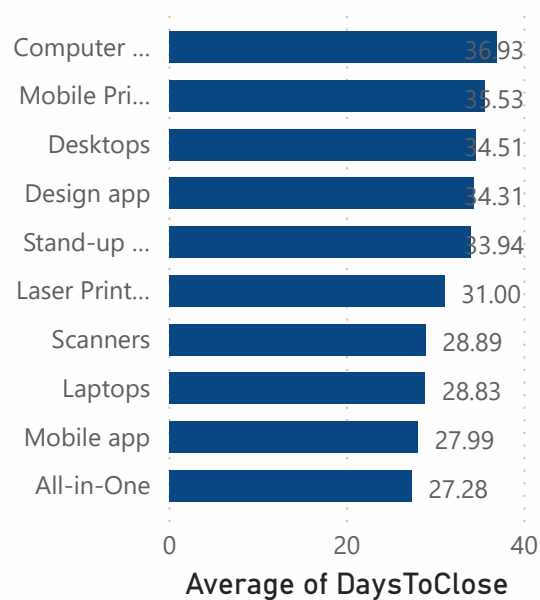
☐ Only show values that are influencers

Influence on Sales Days to Close

Average of DaysToClose by Product LOB



Average of DaysToClose by Product



Key influencers Top segments

What influences DaysToClose to ?

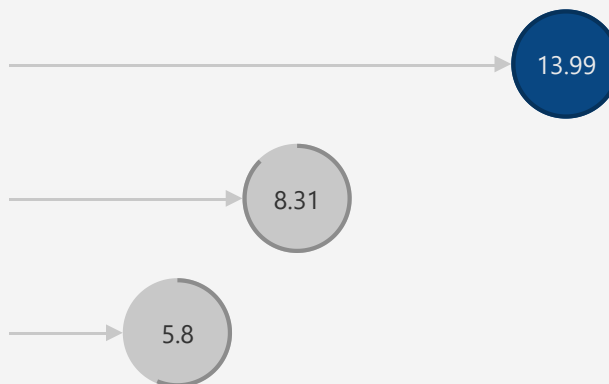
When...

Decision Maker Identified is False

Purchase Process is Committee

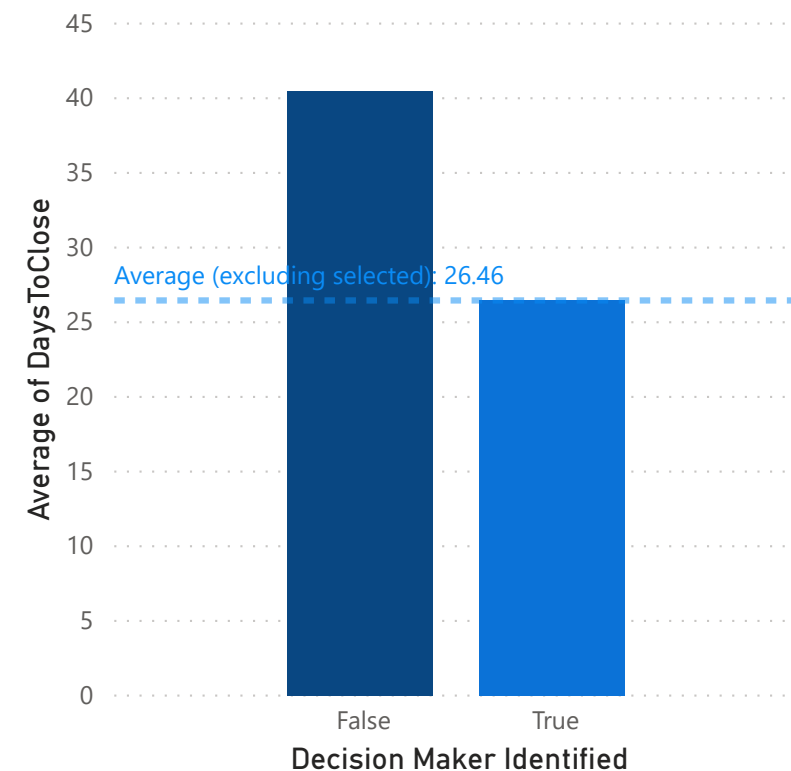
Purchase Process is Unknown

...the average of DaysToClose increases by



Sort by: Impact Count

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

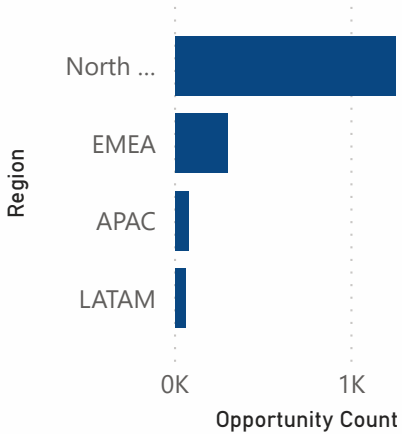


☐ Only show values that are influencers

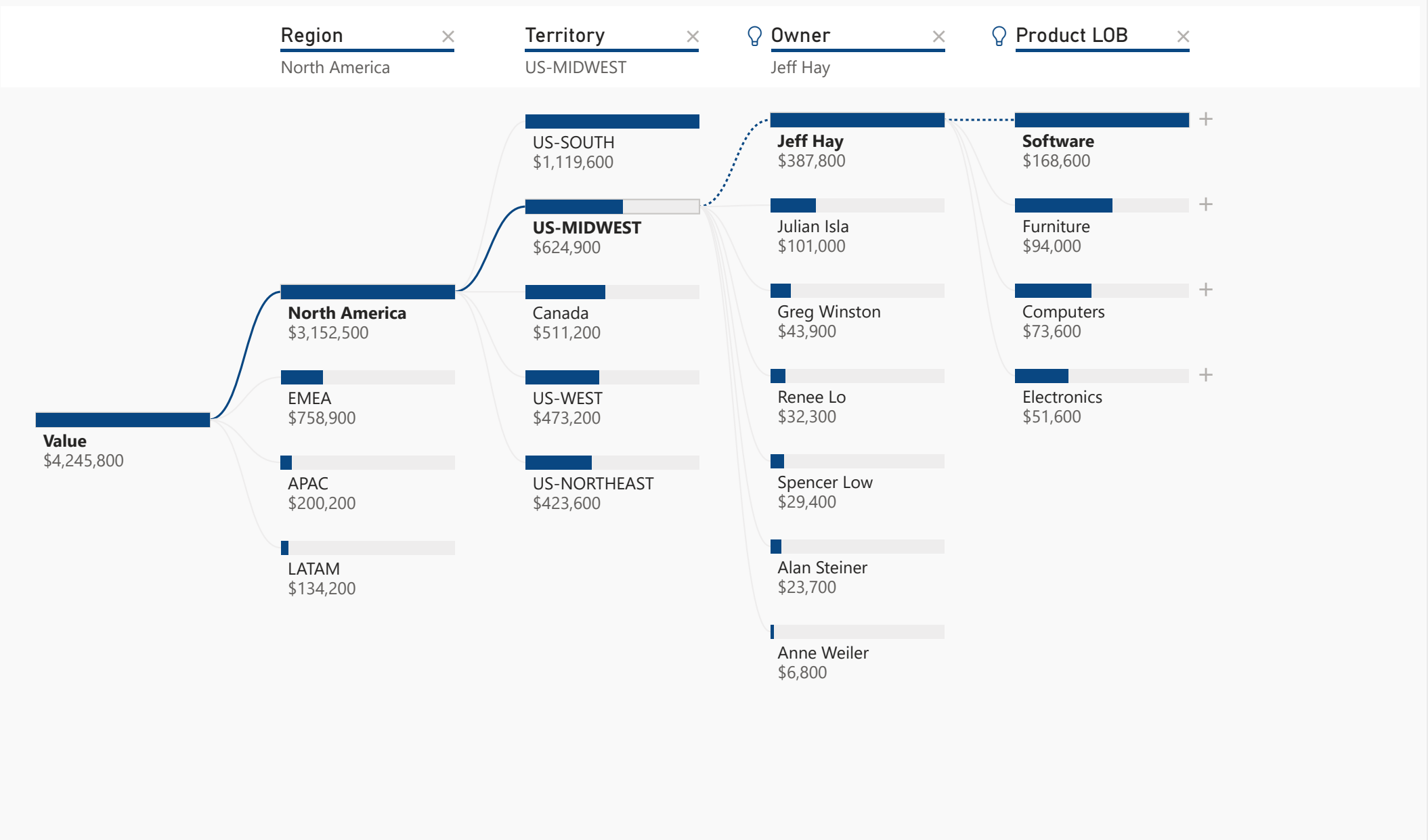
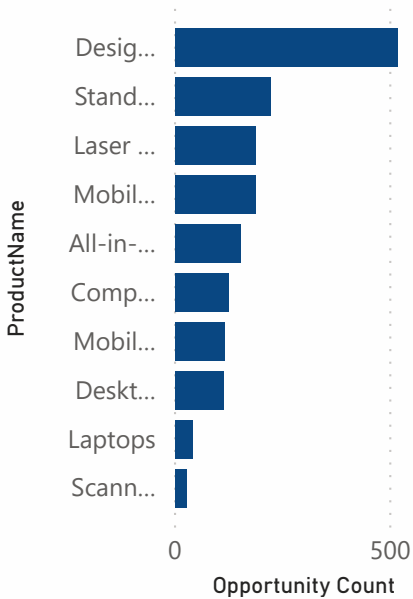


Revenue Decomposition Tree

Opportunity Count by Region



Opportunity Count by ProductName





Ad-Hoc Query

 Ask a question about your data



Try one of these to get started

top regions by count of
lost

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

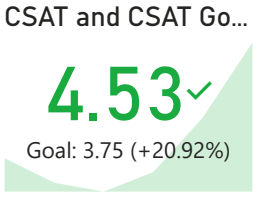
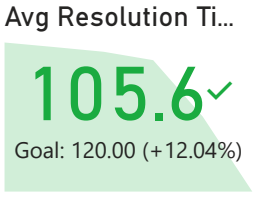
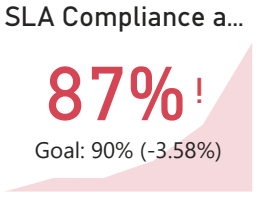
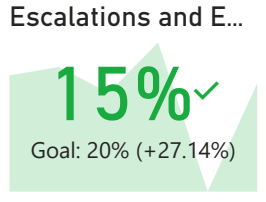
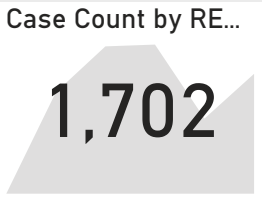
top subjects by CSAT
impact

what is the close % by
region

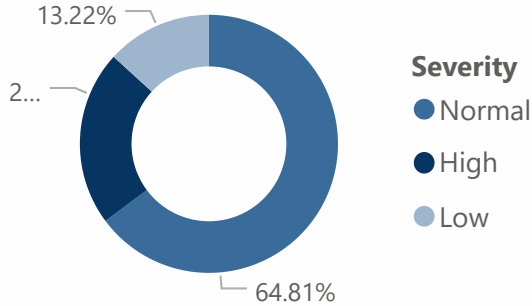
[Show all suggestions](#)

Topic	Case Count	Resolution Minutes	Escalations	SLA Compliance
Mobile app General	119	67.9		100% ★
Design app Returns	102	113.0	21%	100% ★
All-in-One General	95	66.7		100% ★
Design app Login Q...	87	138.5	20%	43% ☆
Design app General	86	86.4	6%	100% ★
Design app Account ...	83	114.2	17%	99% ★
Laptops General	81	58.9		100% ★
Mobile app Account ...	58	92.2		100% ★
Laser Printers General	53	77.2		100% ★
Total	1,702	105.6	15%	87%

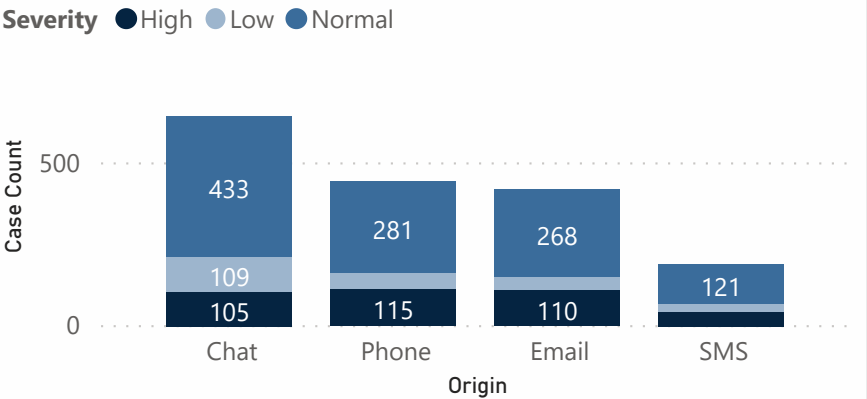
Topic	Case Count	Cases MoM%	CSAT	CSAT Impact
Mobile app General	119	-6.3% ↓	4.26	0.16%
Design app Returns	102	4.1% ↓	4.95	0.86%
All-in-One General	95	3.3% ↓	5.00	0.97%
Design app Login Q...	87	-13.0% ↓	3.79	1.43%
Design app General	86	10.3% ↓	4.67	0.44%
Design app Account...	83	-2.4% ↓	4.33	0.36%
Laptops General	81	-1.2% ↓	4.83	0.48%
Mobile app Account...	58	1.8% ↓	3.78	0.58%
Laser Printers General	53	0.0% ↓	4.66	0.22%
Total	1,702	0.8%	4.53	0.00%



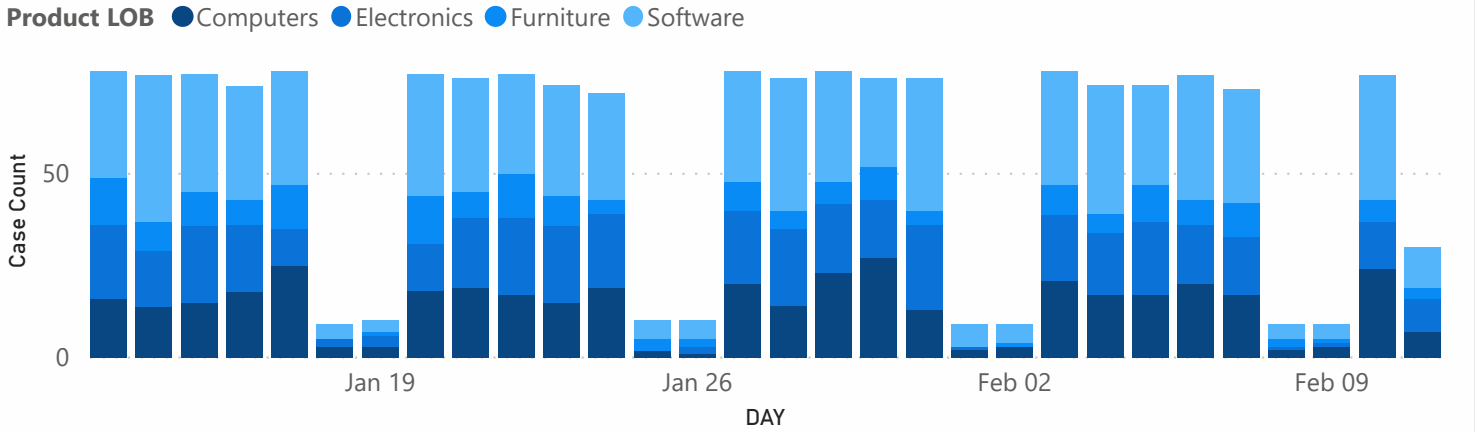
Case Count by Severity



Case Count by Origin and Severity



Case Count by DAY and Product LOB

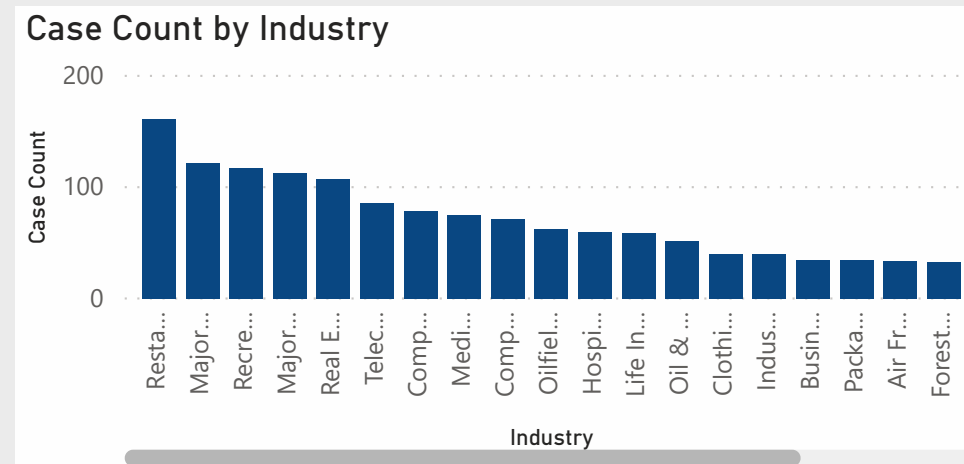




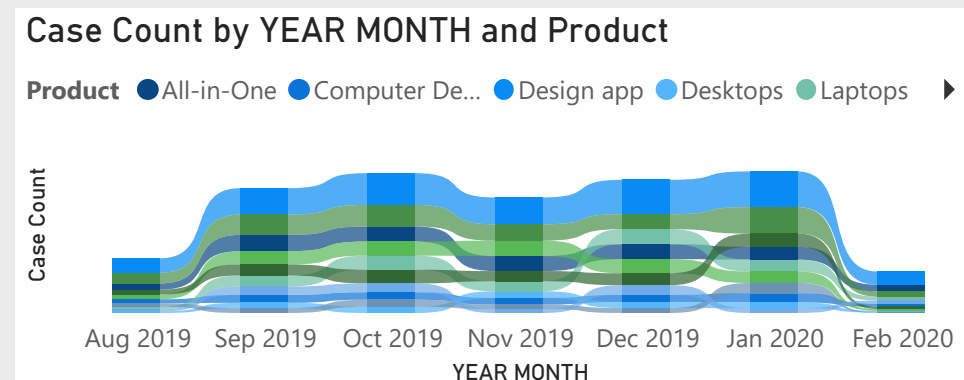
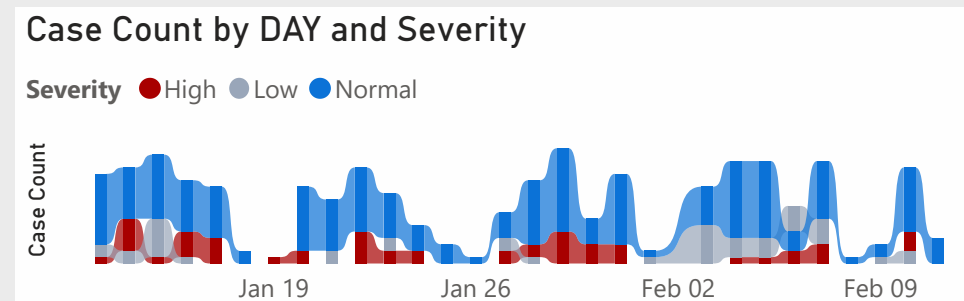
New Cases - Last 30 Days



Subject	Case Count	Escalations	SLA Compliance	Resolution Minutes	CSAT	CSAT Impact - Subject
General	89	7%	100%	72.0	4.72	3.66%
Account Set-up	61	16%	100%	106.6	4.57	-0.55%
Login Question	55	24%	62%	133.0	4.33	-2.15%
Returns	42	38%	100%	110.9	4.93	2.72%
Shipping Question	22	14%	77%	125.7	4.14	-2.70%
Account Reset	17	29%	29%	158.6	4.24	-0.11%
Total	286	19%	87%	106.1	4.57	0.00%

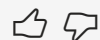


Product LOB	Case Count	Escalations	SLA Compliance	Resolution Minutes	CSAT	CSAT Impact - Products
<input checked="" type="checkbox"/> Software						
Design app	77	23%	81%	122.5	4.42	2.06%
Mobile app	44		100%	89.0	4.18	1.94%
<input checked="" type="checkbox"/> Computers						
All-in-One	33		100%	88.6	4.88	1.33%
Laptops	30		100%	75.4	4.93	0.75%
Desktops	11	91%	64%	128.5	4.91	0.12%
<input checked="" type="checkbox"/> Electronics						
Total	286	19%	87%	106.1	4.57	0.00%



Influence on Customer Satisfaction Scores

Key influencers Top segments



What influences CSAT to Increase ?

When...
...the average of CSAT increases by

Origin is Chat

0.93

Subject is Returns

0.68

Is Escalated is False

0.54

Product is All-in-One

0.52

Subject is General

0.5

Product is Stand-up Desks

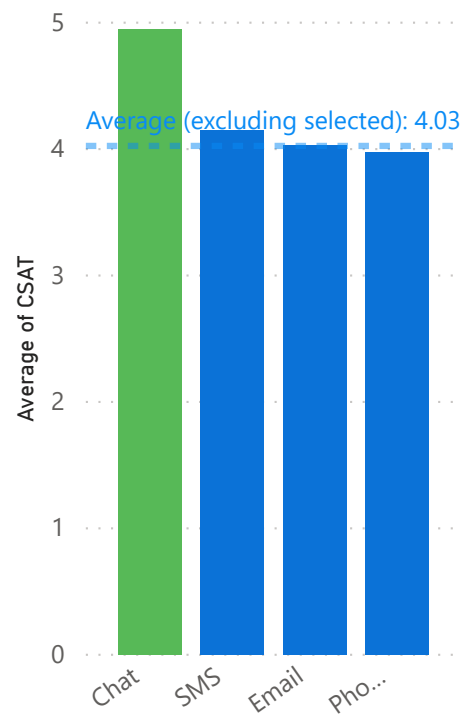
0.48

Product is Laptops

0.39

Sort by: Impact Count

← CSAT is more likely to increase when Origin is Chat than otherwise (on average).



Origin

☐ Only show values that are influencers

Key influencers Top segments



What influences CSAT to Decrease ?

When...
...the average of CSAT decreases by

Subject is Shipping Question

1.22

Is Escalated is True

0.54

Subject is Login Question

0.52

Product is Mobile app

0.51

Origin is Phone

0.46

Origin is Email

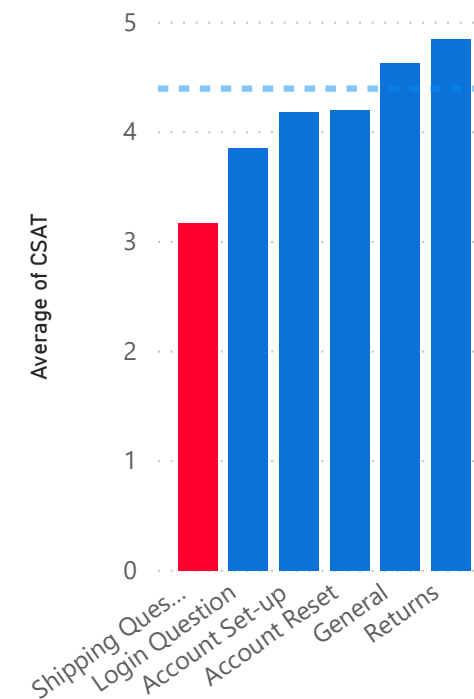
0.35

Product is Design app

0.34

Sort by: Impact Count

← CSAT is more likely to decrease when Subject is Shipping Question than otherwise (on average).



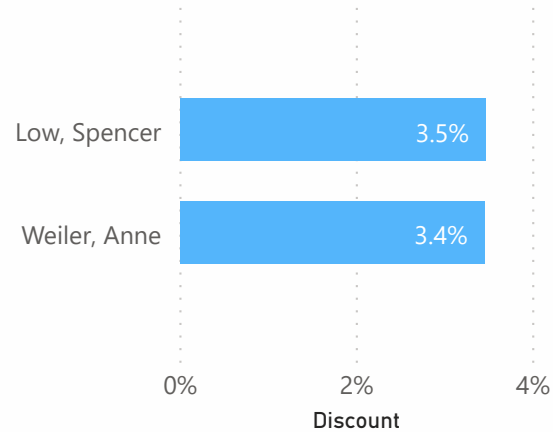
Subject

☐ Only show values that are influencers

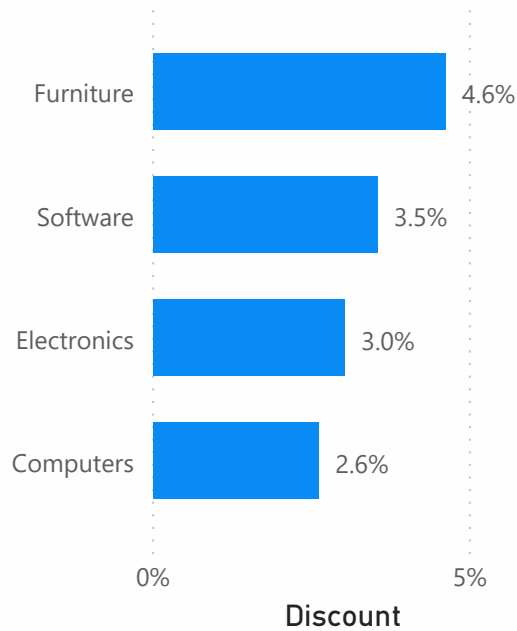


Influence on SLA Violation Frequency

By Manager



By LOB



Key influencers Top segments

What influences Is SLA Violation to be ?

When...

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

Subject is Login Question

4.36x

Subject is Account Reset

4.25x

Is Escalated is True

2.76x

Product is Computer Desks

2.59x

Product is Desktops

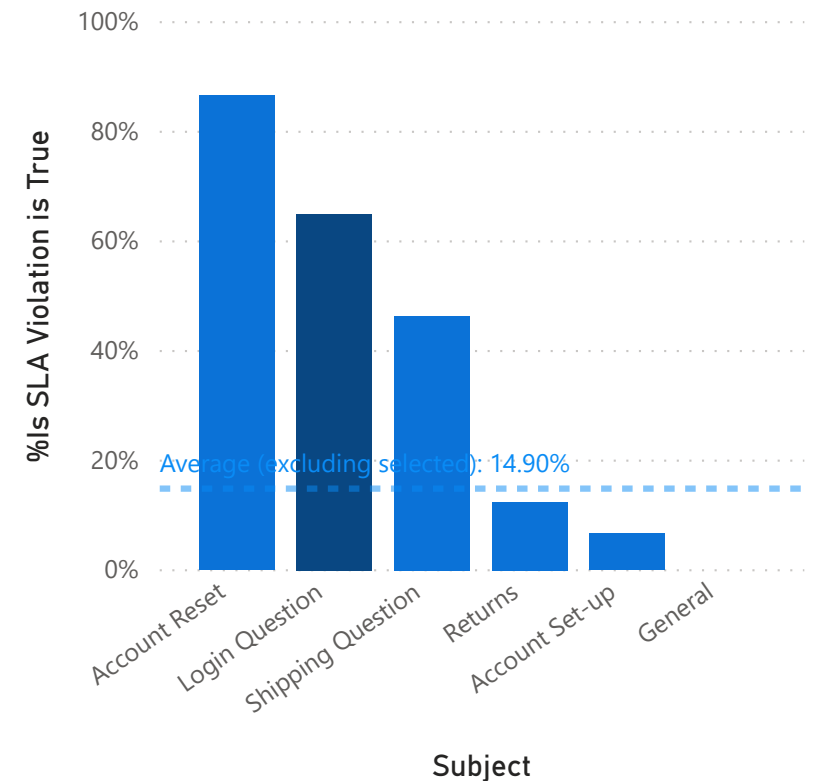
2.44x

City is Concord

2.25x

Sort by: Impact Count

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

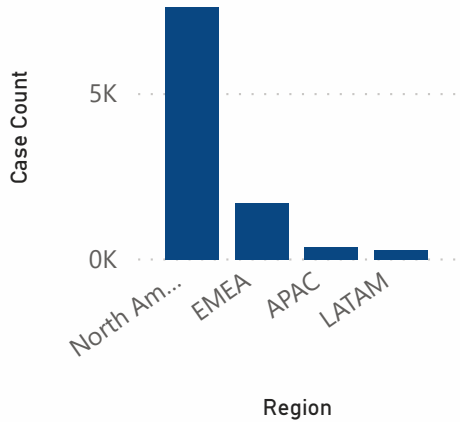


☐ Only show values that are influencers



Case Count Decomposition Tree

Case Count by Region



Case Count by Product

