

# 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



Forecast Adjustment

0

Slider bar

\$2.2M  
Revenue W...

\$2.5M  
Revenue In ...

\$3M  
Owner Goal

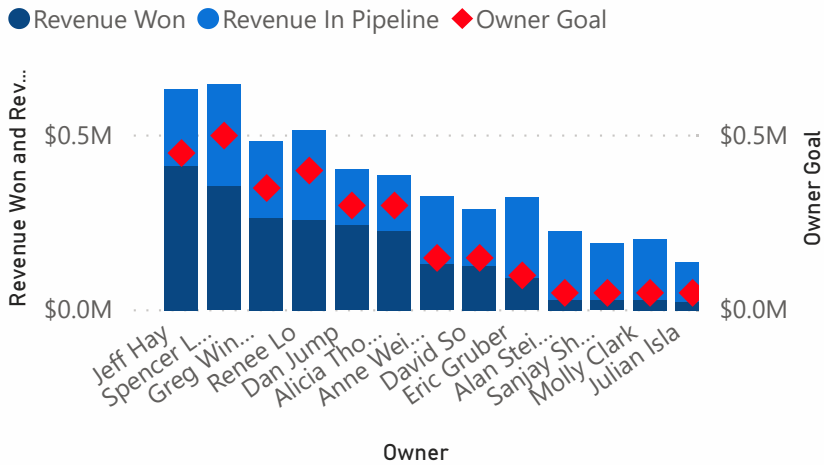
159%  
Forecast %

- Region
- ☐ APAC
  - ☐ EMEA
  - ☐ LATAM
  - ☐ North America

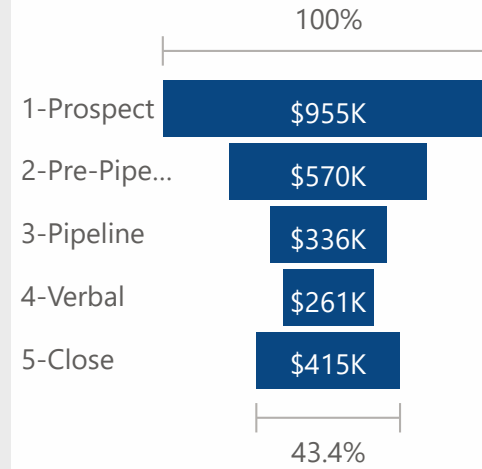
- Manager
- ☐ Low, Spencer
  - ☐ Weiler, Anne

- Owner
- ☐ Alan Steiner
  - ☐ Alicia Thomber
  - ☐ Anne Weiler
  - ☐ Dan Jump
  - ☐ David So
  - ☐ Eric Gruber
  - ☐ Greg Winston
  - ☐ Jeff Hay
  - ☐ Julian Isla

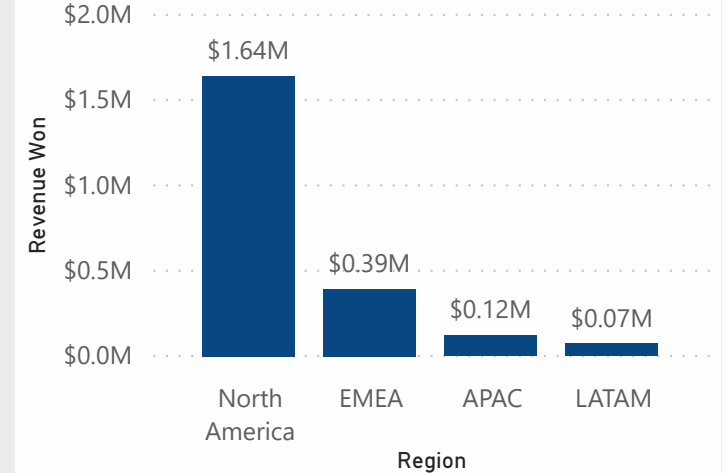
Revenue Won, Revenue In Pipeline and Owner Goal...



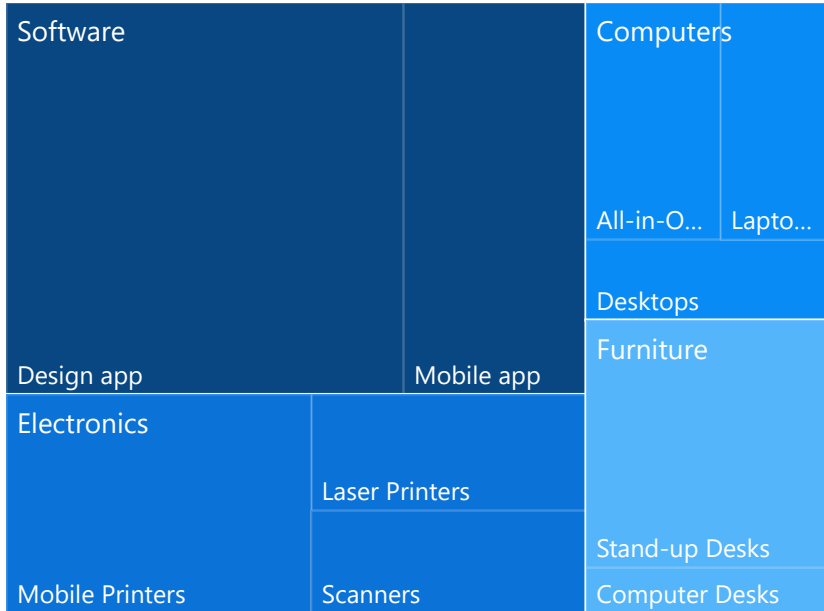
Value by PipelineStep



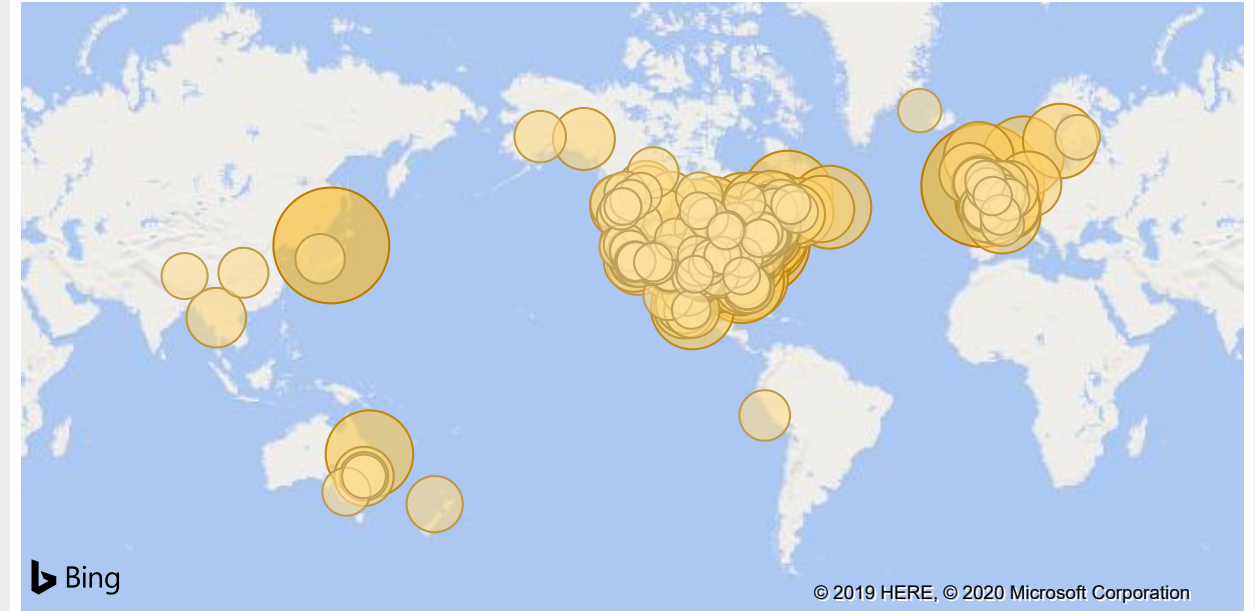
Revenue Won by Region



Opportunity Count In Pipeline and Opportunity Cou...



Revenue by Location





# Opportunity Health

988

Open Opportunities

\$3M

Total Value

17.48

Avg Days Remaining

\$2.5M

Value In Pipeline

Region

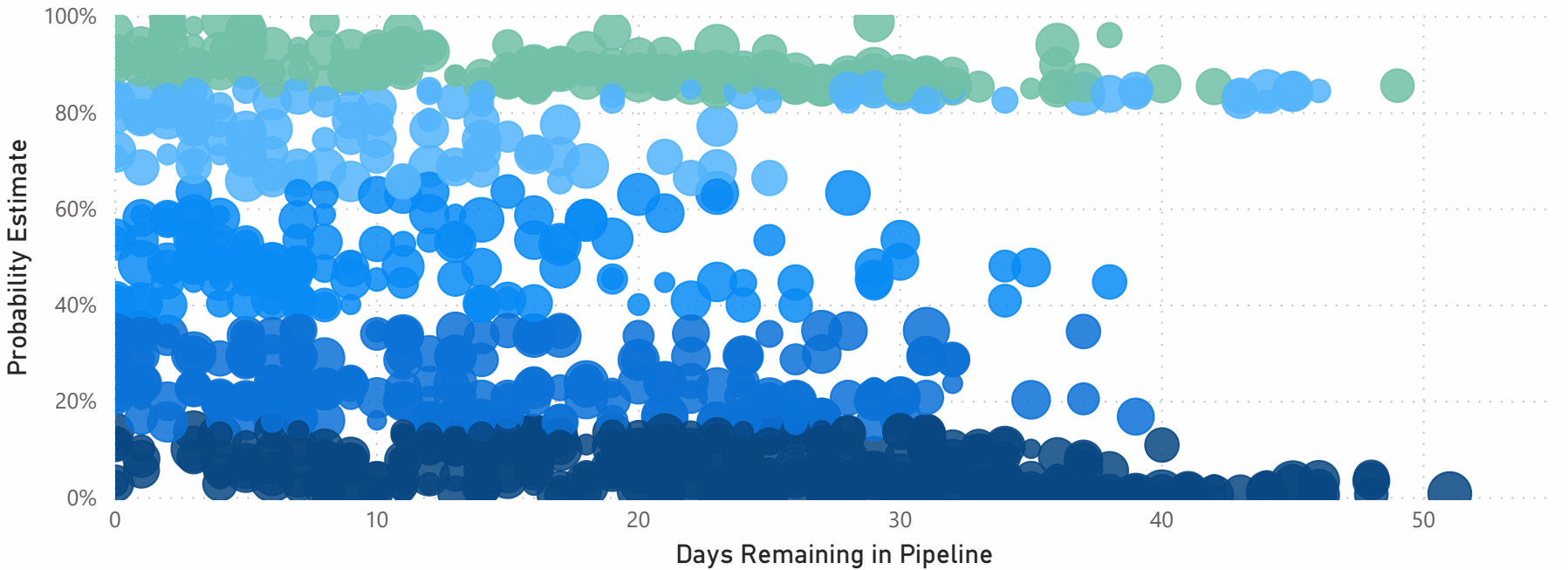
- ☐ Select all
- ☐ APAC
- ☐ EMEA
- ☐ LATAM
- ☐ North America

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 OpportunitySe...

PipelineStep ● 1-Prospect ● 2-Pre-Pipeline ● 3-Pipeline ● 4-Verbal ● 5-Close

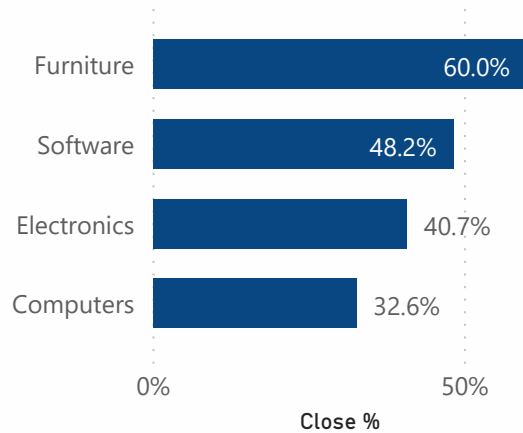


CloseDate	Account Name	Owner	Product	Value	Topic
2/7/2020	Altenwerth and Sons	Eric Gruber	Design app	\$3,000	Universal multimedia Design app forecast
2/7/2020	Bahringer-Schmeler	Jeff Hay	Design app	\$3,800	Organic intermediate Design app encryption
2/7/2020	Bayer-Heaney	Dan Jump	Mobile Printers	\$900	Reverse-engineered homogeneous Mobile Printers i...
2/7/2020	Beatty, Mann and Hackett	Eric Gruber	All-in-One	\$3,800	Persevering zero All-in-One administration Graphical...
2/7/2020	Beatty-Weissnat	Anne Weiler	Laptops	\$3,800	Fully-configurable 24 Laptops hour task-force
2/7/2020	Best Buy	Spencer Low	Mobile Printers	\$900	Upgradable tertiary Mobile Printers knowledge user
2/7/2020	Carter-Bernier	Eric Gruber	Laser Printers	\$1,000	Universal client-server Laser Printers model
2/7/2020	D'Amore-Gleason	Greg Winston	Mobile app	\$3,300	Operative systemic Mobile app moderator
2/7/2020	Feest, Olson and Goodwin	Molly Clark	Laser Printers	\$1,100	Cross-platform 5th Laser Printers generation focus gr...
2/7/2020	Gaylord and Sons	Dan Jump	Laptops	\$4,600	Progressive national Laptops adapter

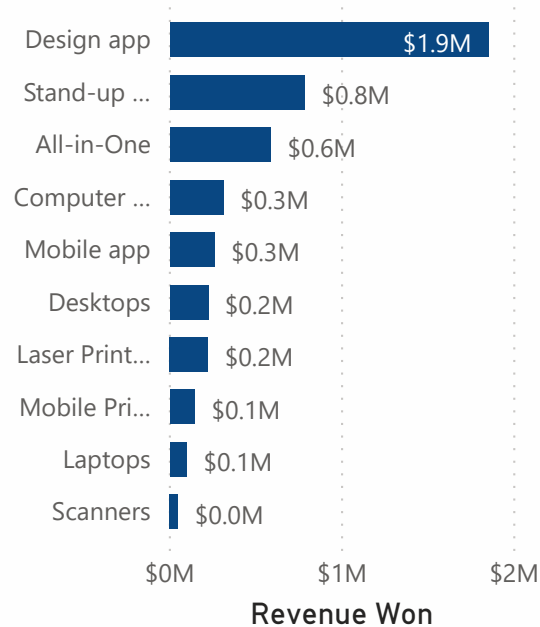


# Influence on Opportunity Win/Loss Ratio

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

2.47x

Owner is Jeff Hay

2.04x

Owner is Dan Jump

1.95x

Owner is Greg Winston

1.89x

Industry is EDP Services

1.60x

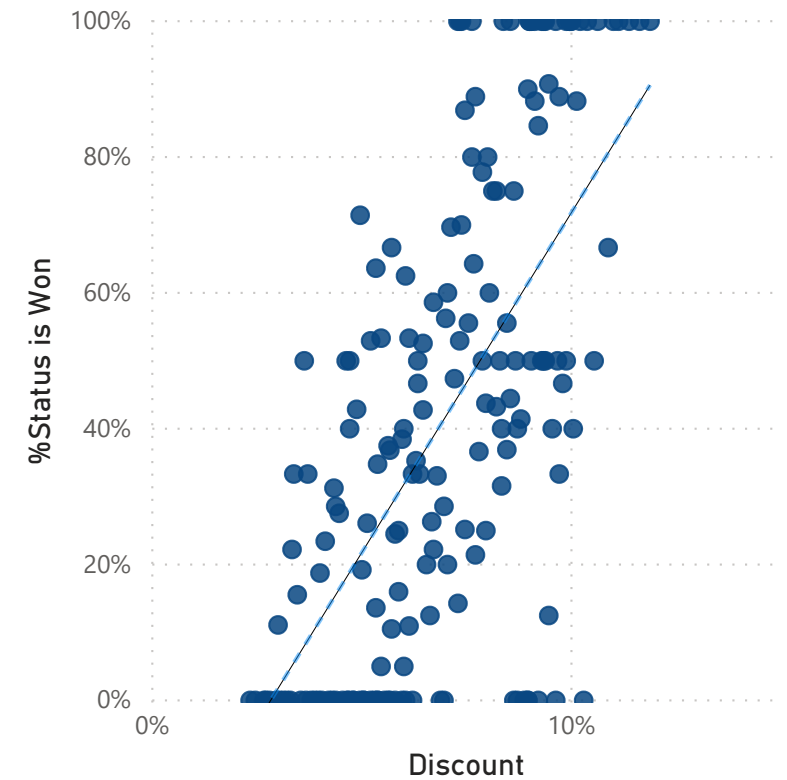
Industry is Medical/Dental Instruments

1.55x

Owner is Alicia Thomber  
Sort by: Impact Count

1.52x

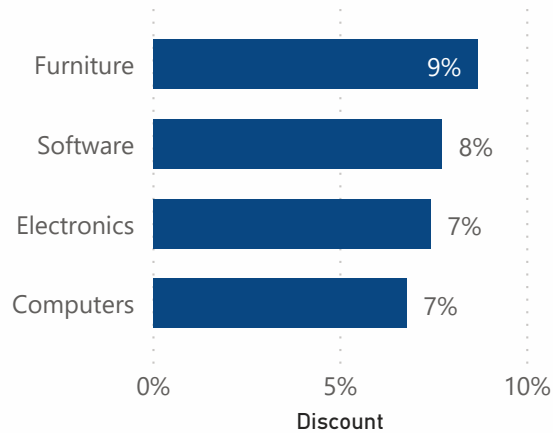
← On average when Discount increases, the likelihood of Status being Won increases.



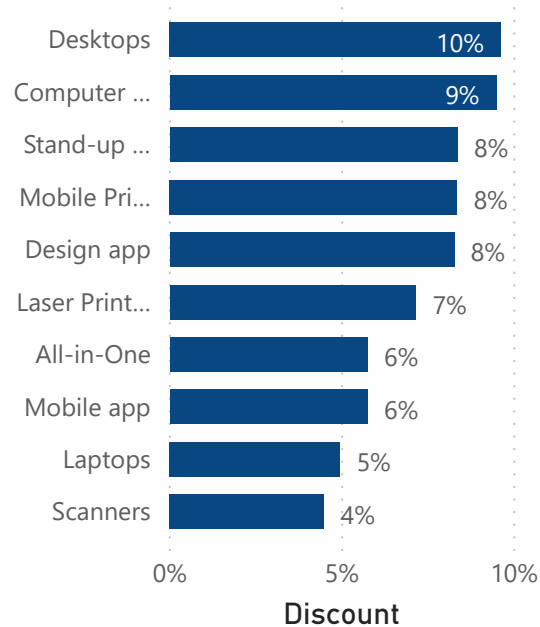


# Influence on Sales Discount Offered

Discount by Product LOB



Discount by Product



## Key influencers Top segments

What influences Discount to  ?

When...

...the average of Discount increases by

Product is Desktops

2.07%

Product is Computer Desks

1.93%

Product LOB is Furniture

1.25%

Owner is Renee Lo

1.03%

Product is Design app

0.88%

Owner is Alicia Thomber

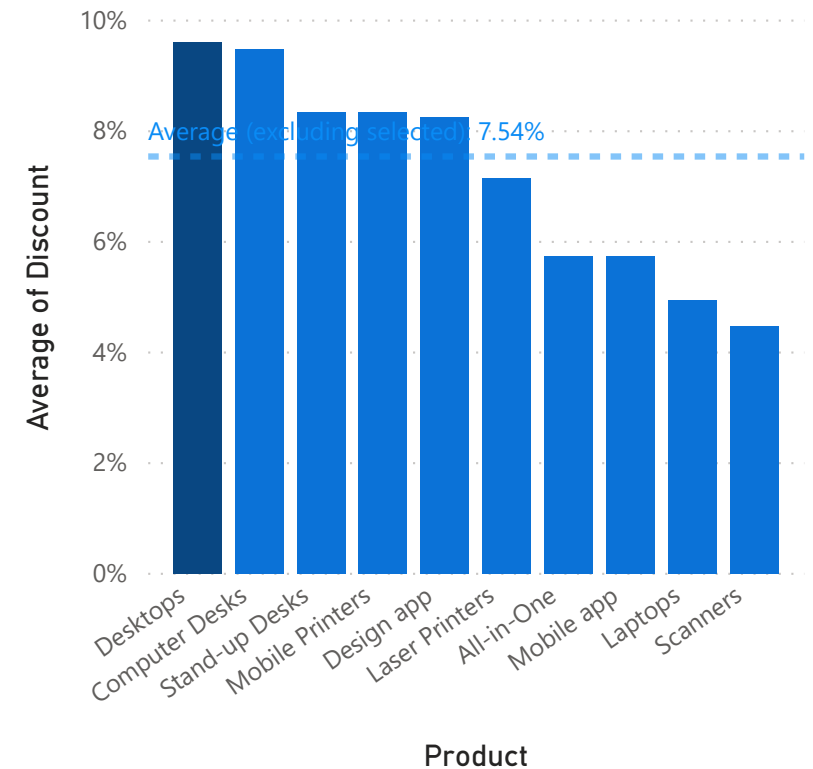
0.86%

Product is Mobile Printers

0.78%

Sort by: Impact Count

← Discount is more likely to increase when Product is Desktops than otherwise (on average).

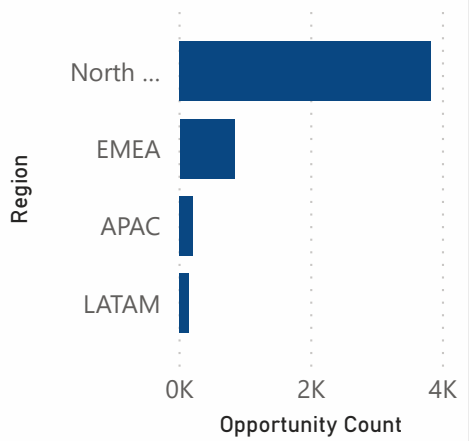


☐ Only show values that are influencers

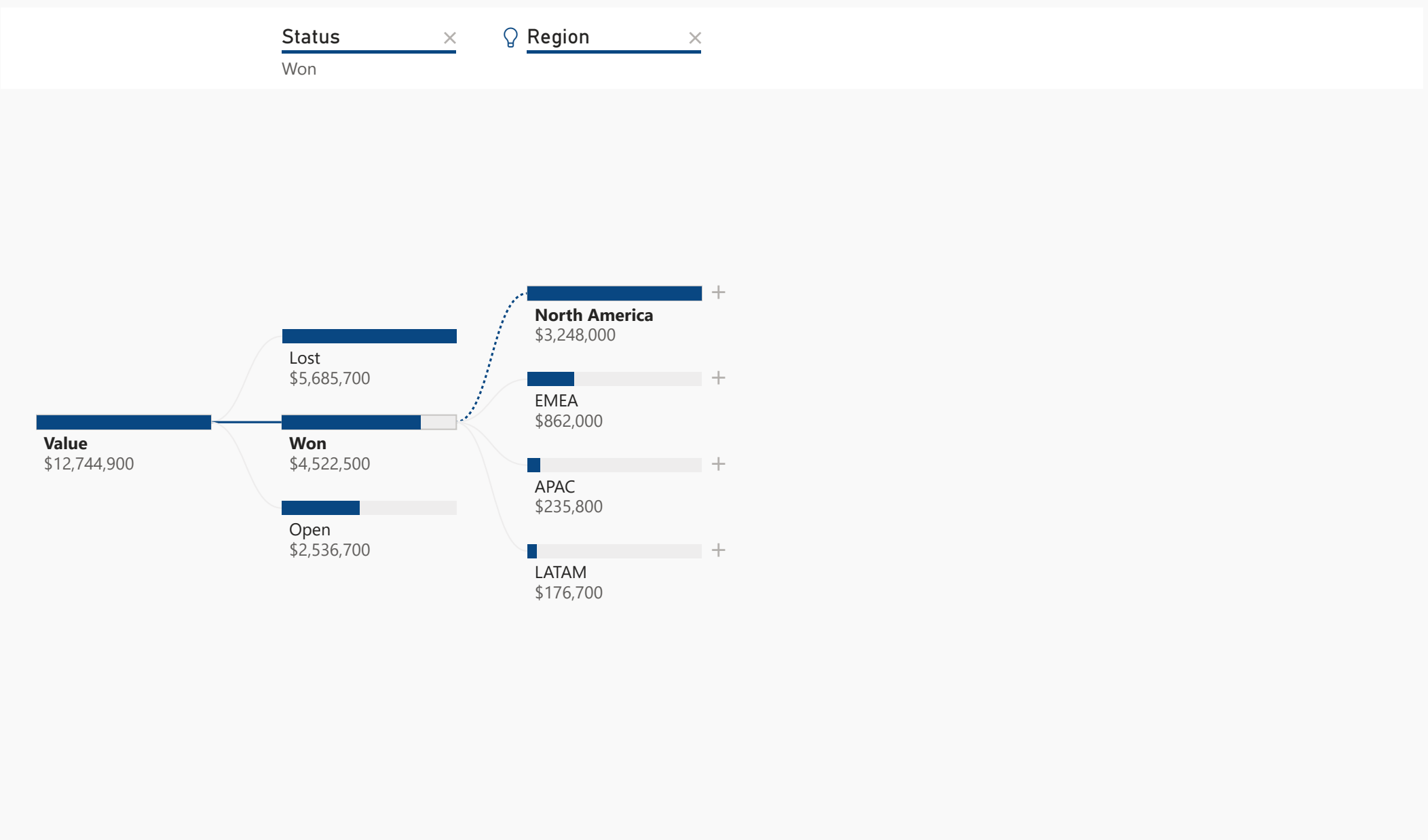
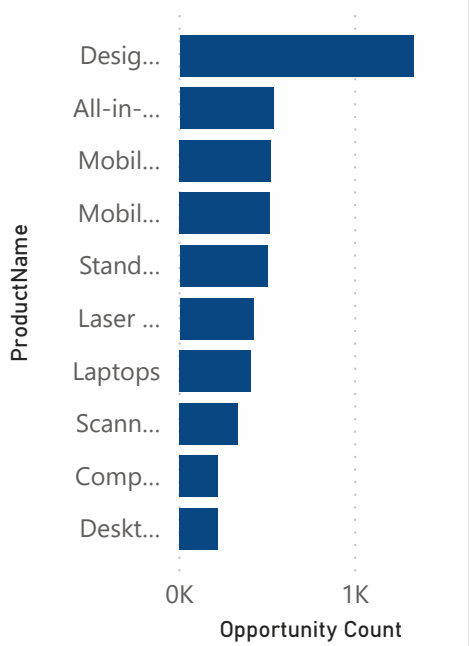


# Revenue Decomposition Tree

Opportunity Count by Region



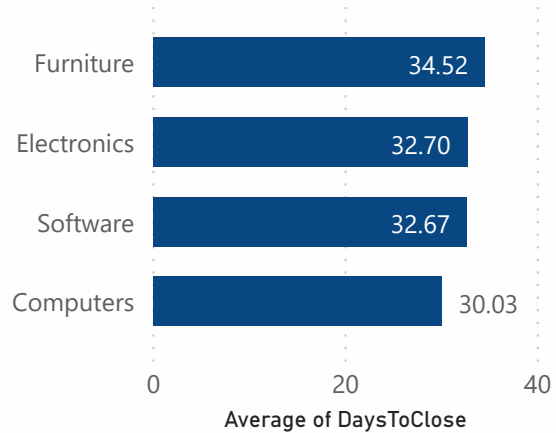
Opportunity Count by Product



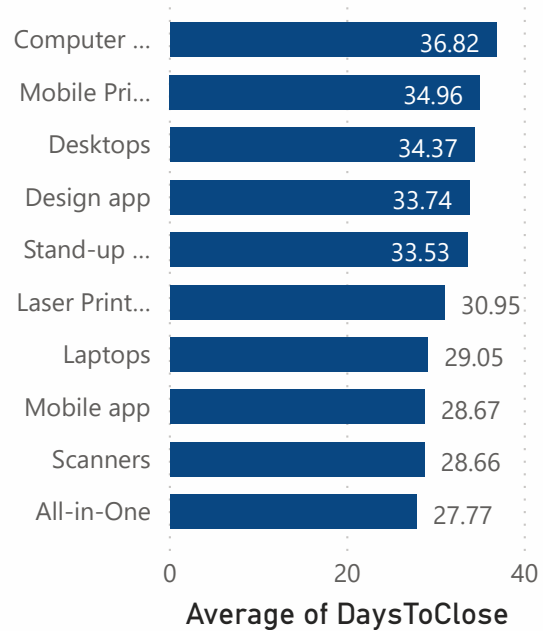


# Influence on Sales Days to Close

Average of DaysToClose by Produ...

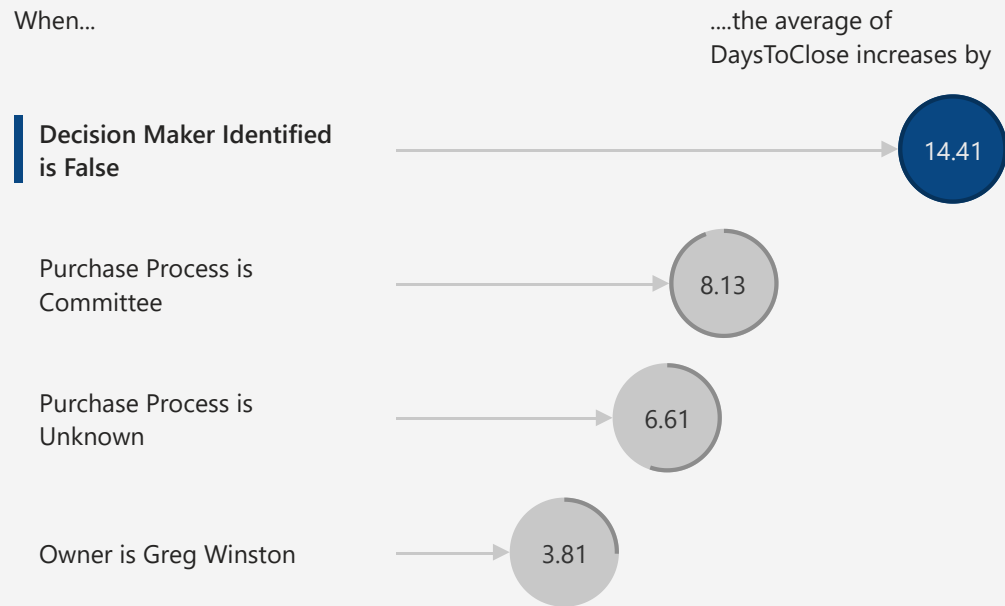


Average of DaysToClose by Produ...



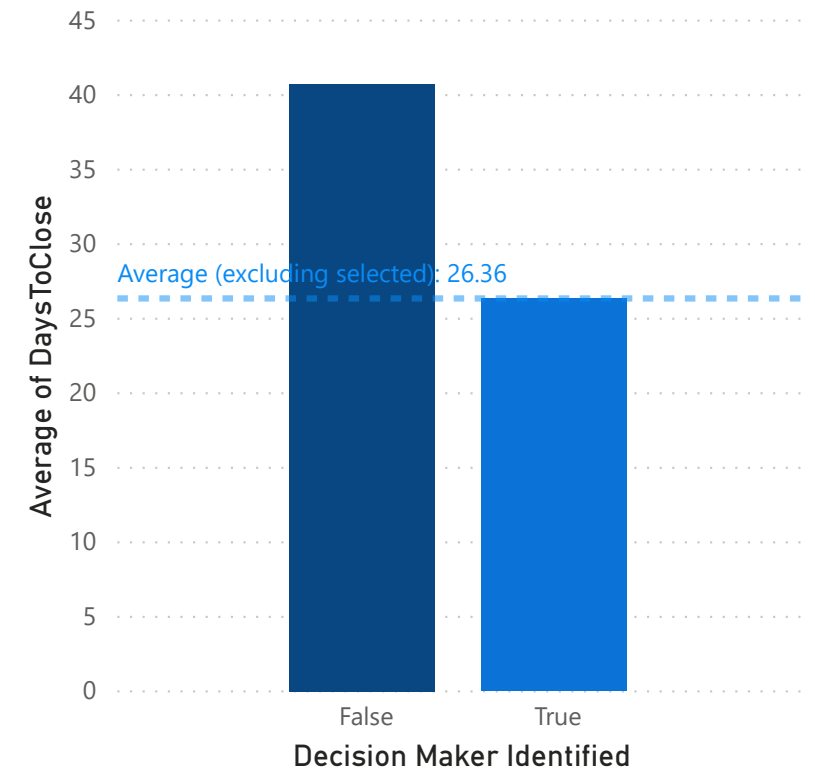
## Key influencers Top segments

What influences DaysToClose to  ?



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



Microsoft

# Ad-Hoc Query

 Ask a question about your data



Try one of these to get started

what is the count of lost  
by region

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 rating by close %

top origins by escalations

[Show all suggestions](#)





# KPI Summary - Last 30 Days



Product

All

Topic	Case Count	Resolution Minutes	Escalations	SLA Compliance
Design app   Payment...	102	104.3	18%	94% <span>★</span>
Design app   Returns	102	96.8	21%	100% <span>★</span>
Mobile app   General	102	65.6		100% <span>★</span>
All-in-One   General	82	64.4		100% <span>★</span>
Mobile app   Payment...	77	111.9		84% <span>★</span>
Laptops   General	68	55.8		100% <span>★</span>
Design app   Login Q...	67	111.3	19%	82% <span>★</span>
Design app   General	66	84.0	8%	100% <span>★</span>
Total	1,696	94.0	15%	90%

Topic	Case Count	Cases MoM%	CSAT	CSAT Impact
Design app   Payment...	102	-16.4% <span>↓</span>	4.23	-0.90% <span>■</span>
Design app   Returns	102	0.0% <span>↓</span>	4.95	0.80% <span>■</span>
Mobile app   General	102	-1.9% <span>↓</span>	4.30	-0.09% <span>■</span>
All-in-One   General	82	-4.7% <span>↓</span>	5.00	0.80% <span>■</span>
Mobile app   Payment...	77	6.9% <span>↓</span>	3.81	-1.80% <span>■</span>
Laptops   General	68	-8.1% <span>↓</span>	5.00	0.73% <span>■</span>
Design app   Login Q...	67	-2.9% <span>↓</span>	4.51	-0.33% <span>■</span>
Design app   General	66	4.8% <span>↓</span>	4.92	0.49% <span>■</span>
Total	1,696	-3.7%	4.59	0.00%

Case Count by R...

1,696

Escalations and ...

15%✓

Goal: 20% (+26.89%)

SLA Compliance ...

90%✓

Goal: 90% (+0.3%)

Avg Resolution T...

94.0!

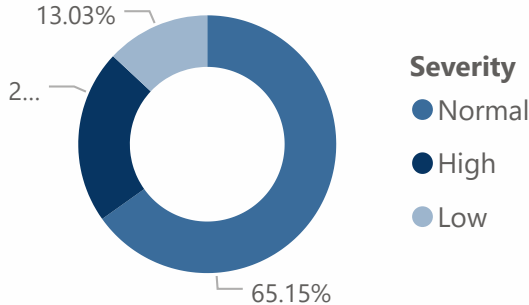
Goal: 60.00 (-56.7%)

CSAT and CSAT ...

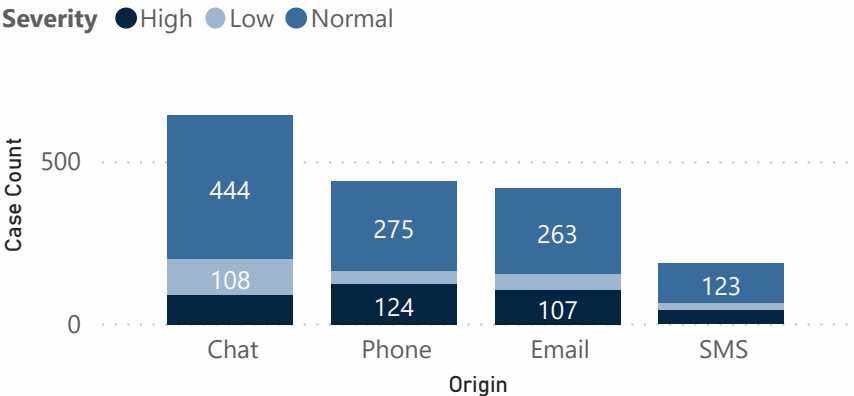
4.59✓

Goal: 3.75 (+22.5%)

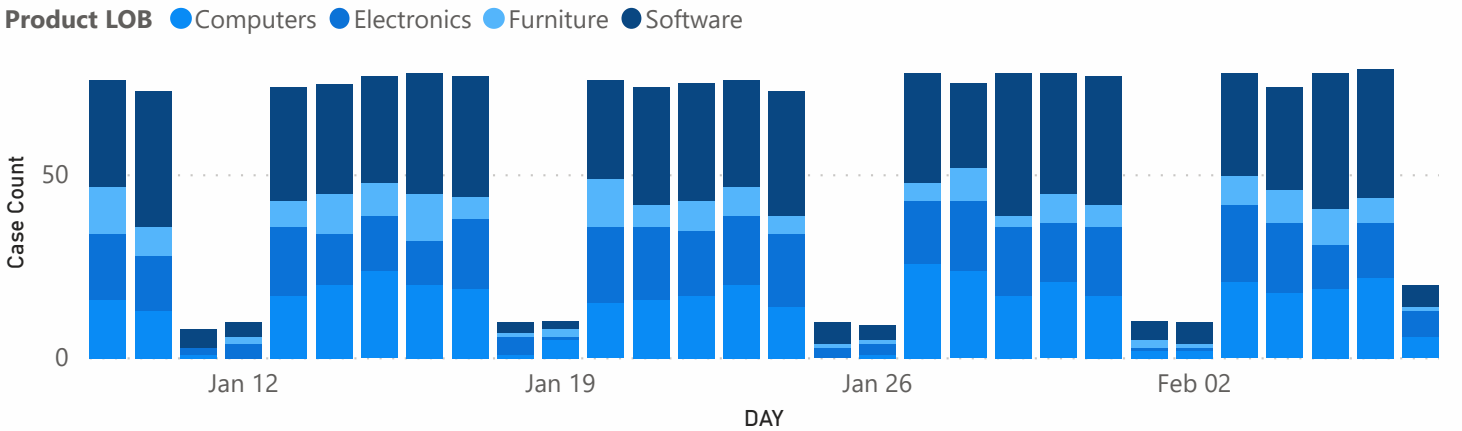
Case Count by Severity



Case Count by Origin and Severity



Case Count by DAY and Product LOB

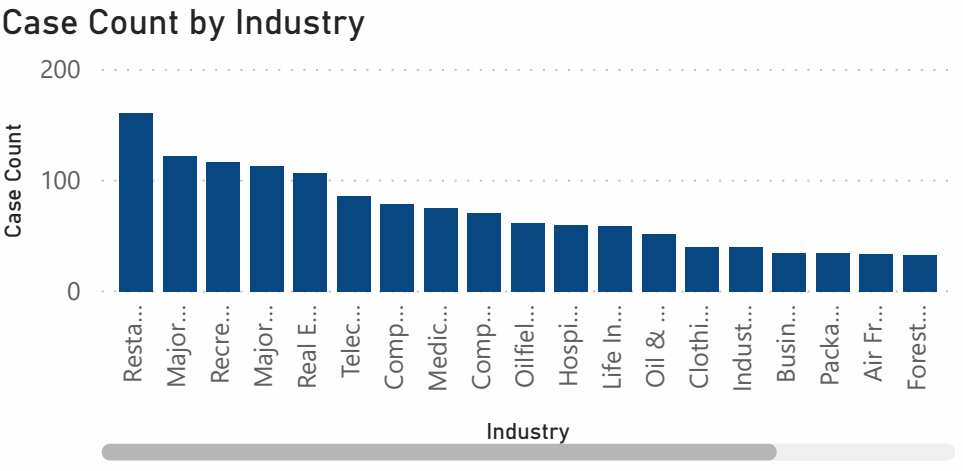




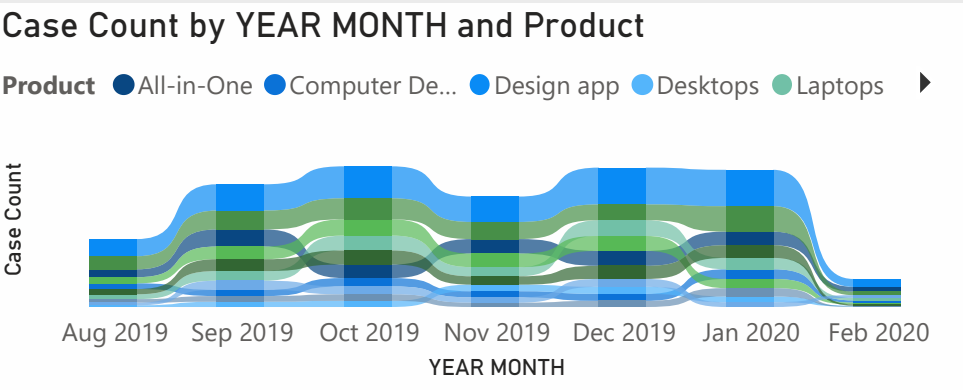
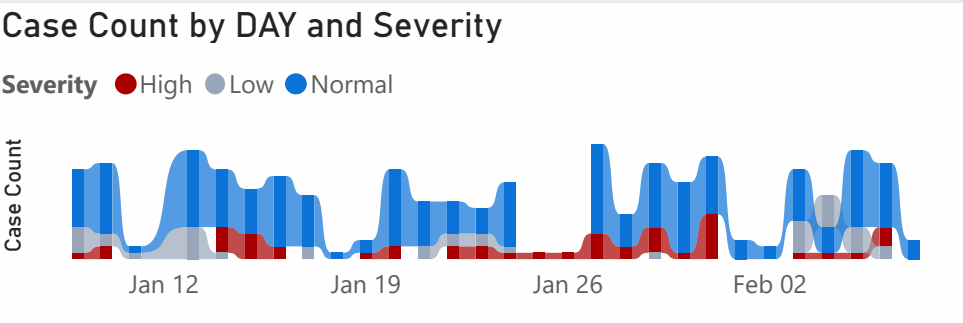
# New Cases - Last 30 Days



Subject	Case Count	Escalations	SLA Compliance	Resolution Minutes	CSAT	CSAT Impact - Subject
Payment Inquiry	74	18%	81%	106.4	4.34	-3.71%
General	72	8%	100%	68.2	4.81	3.75%
Login Question	42	24%	76%	109.0	4.60	-0.46%
Returns	42	38%	100%	94.6	4.93	2.60%
Shipping Question	22	14%	95%	102.5	4.36	-1.86%
Account Reset	17	29%	35%	125.5	4.35	0.11%
Account Set-up	17		100%	88.4	4.35	-0.21%
Total	286	19%	87%	95.2	4.58	0.00%



Product LOB	Case Count	Escalations	SLA Compliance	Resolution Minutes	CSAT	CSAT Impact - Products
<b>Software</b>						
Design app	77	23%	86%	106.2	4.49	-1.10%
Mobile app	44		93%	89.1	4.02	-3.03%
<b>Computers</b>						
All-in-One	33		88%	91.4	4.64	0.76%
Laptops	30		100%	67.7	4.97	1.04%
Desktops	11	91%	55%	112.9	5.00	-0.12%
<b>Electronics</b>						
Total	286	19%	87%	95.2	4.58	0.00%

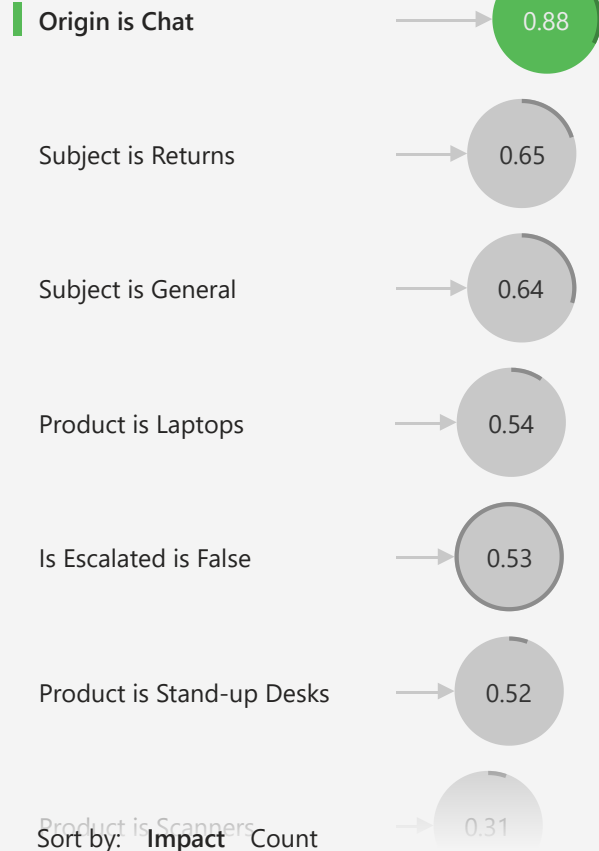


# Influence on Customer Satisfaction Scores

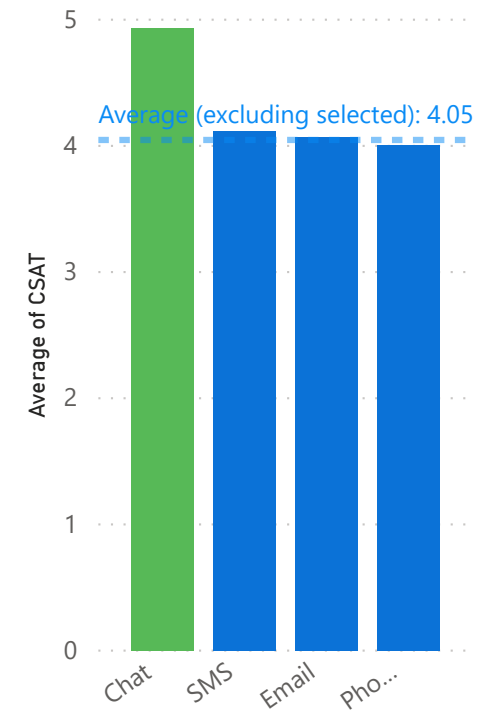
## Key influencers Top segments

What influences CSAT to Increase ?

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



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



☐ Only show values that are influencers

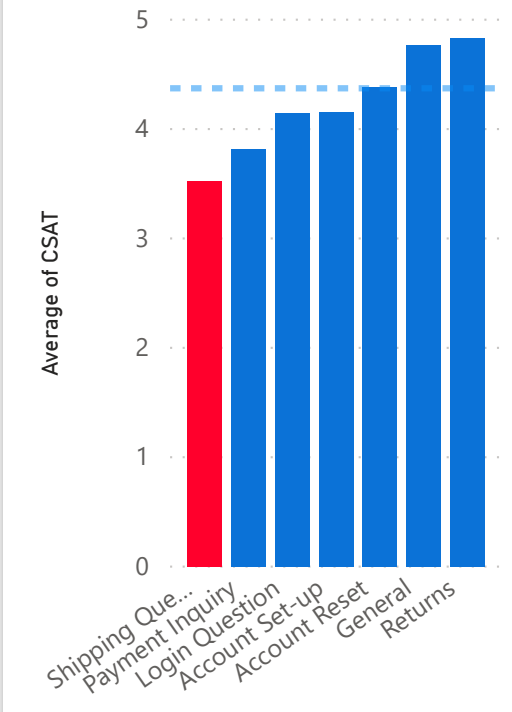
## Key influencers Top segments

What influences CSAT to Decrease ?

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



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

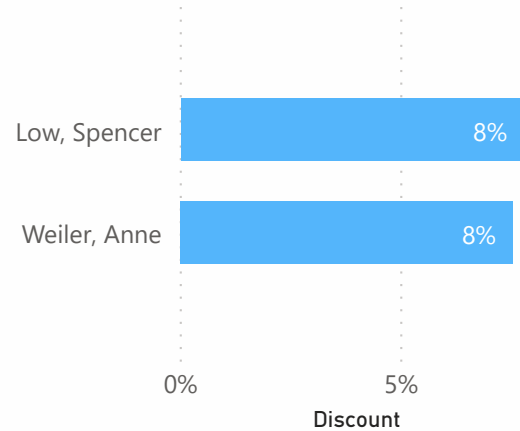


☐ Only show values that are influencers

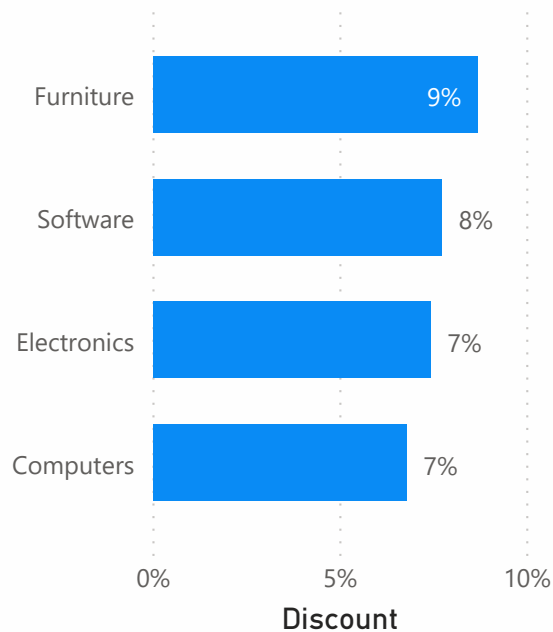


# Influence on SLA Violation Frequency

## By Manager



## By Region



## Key influencers Top segments

What influences Is SLA Violation to be  ?

When...

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

Subject is Account Reset

3.35x

Is Escalated is True

2.96x

Product is Computer Desks

2.73x

Product is Desktops

2.71x

City is Duluth

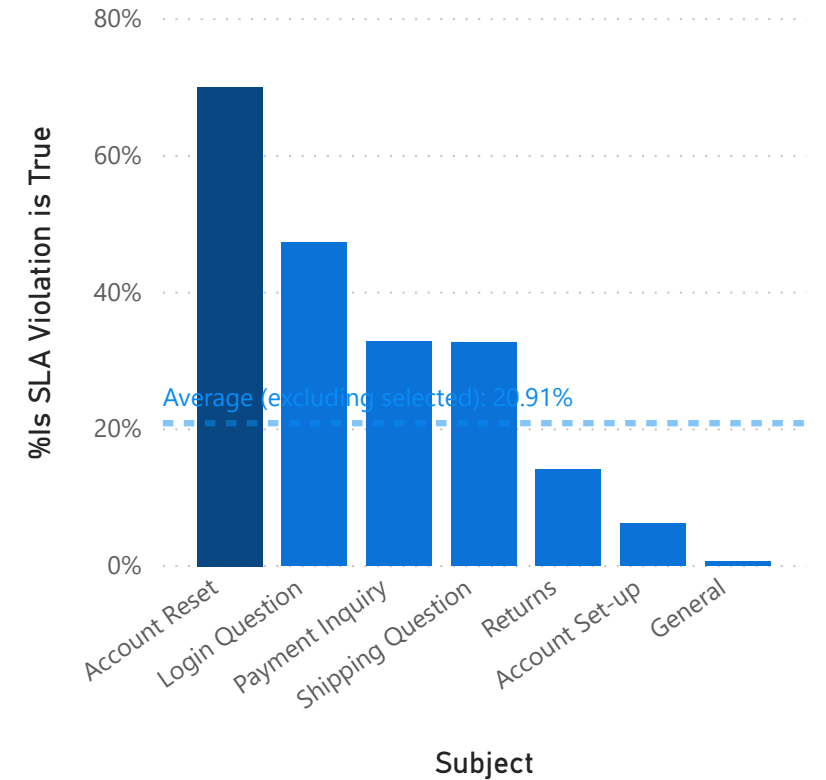
2.70x

City is Belfast

2.43x

Sort by: Impact Count

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

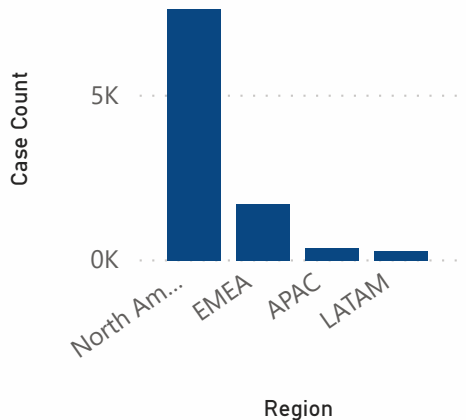


☐ Only show values that are influencers



# Case Count Decomposition Tree

Case Count by Region



Case Count by Product

