Dynamics + Analytics

# SALES Analytics within Dynamics Dashboards – Macro insights

1. Click on the “SALES” Dashboards (Sales should be Default)
2. The next step has a dependency on the Spring 2020 release being enabled in the environment.
   1. If you have the Spring 2020 release enabled, the dashboard will open into a modal (floating) window like this:  
      A screenshot of a computer

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   2. *Alternatively*, if you DON’T yet have the Spring 2020 features enabled, Click on a tile and immediately click on the “Open Power BI Report” icon. (Note that this is different from the “Open in Power BI” button.)  
      A screenshot of a cell phone

      Description automatically generated  
        
      It will open inside the frame:  
      A screenshot of a cell phone

      Description automatically generated

## Opportunity Pipeline

1. Choose “North America” to filter the results – Note the rest of the report responds –
2. Point out the list of users on the right – and how some have a check-mark meaning they will meet or exceed their goals for the period.

However, this assumes the users win all that they have forecasted – A manager may want to adjust the overall forecast and see what would happen if the forecast is less than accurate.

Change the slider to -30 to change the assumption to include only 70% of the ‘open’ opportunities in the forecast. – Note how some users can still reach their goals even with the reduced forecast, but more users are now ‘at-risk’.

## Opportunity Health

1. Change tabs to Opportunity Health

Show the opportunities, by # of days, by the % probability of winning, and the size of the bubble represents the relative value of opportunity in $

1. Select a product to filter the chart
2. Click on a single bubble to filter the list of opportunities in the list.

Managers can use this to quickly identify high value / High Risk opportunities that are nearing their deadline and intervene if needed.

## Sales – Analysis (Influence on Win/Loss Ratios)

1. “Key Influencers” allows you to look across a number of categories and find the specific individual factors, (such as a specific owner, or a range of discounts, or a recent marketing campaign) that has the most impact on the likely outcome we’re testing for.
2. With drag-and-drop simplicity, We can analyze many factors and run statistical regressions to find very specific areas of strength to highlight and weaknesses to address.
3. For instance, we can see that overall if the discount is raised by 2%, the opportunity is more than Twice as likely to be Won
4. Scroll down and see other factors and click on them to see how they have influence on the likelihood of winning.
5. However, rather than just looking at the ‘overall’ factors, we can select an individual product (Choose Design Apps) - and see that for that product, the most impactful (or predictive) factor is one of five opportunity owners. – it’s not until the sixth most impactful factor do we see ‘Discount’ making a difference for this product.
6. Un-select the product (so all products are considered)
7. Click on “Top Segments” at the top of the page – Now we can consider not just ***one*** factor at a time, but rather “Segments” or clusters of several factors in combination.
8. Click on different values and you’ll see the impact of combinations of factors.

This may help identify users who have specific strengths (or weaknesses) when it comes to a product or industry or territory.

## Optional: Click on “Sales - Discounting Analysis” and/or “Sales – Days to Close Analysis”

Show how we can analyze other ‘outcomes’ just like we did with the previous dashboard – In this case we could analyze a discount or incentive added to a loan or other sale – and identify which factors or employees or industries etc. result in higher or lower discounting. – Or look at which combinations of factors result in an extended sales cycle and which result in a faster time to close.

It’s important to point out that Power BI is great at COMBINING data from within Dynamics and data from the bank’s back-end systems AND/OR data from external sources. – The opportunity to synthesize this data into insights is a great competitive advantage for customers who are taking advantage of it, and a weakness of competitive systems that require all the data to be loaded into the

This is just an example of the flexibility and insights possible when combining Power BI with the Common Data Service / Power Platform.

# Analytics at the Micro level – Customer Focused Insights

## Accounts

1. Open the list of Accounts and open the record for “A. Datum Corporation (sample)” (other records will work, it’s just that this one has more variety in the data.
2. Click on the Analytics tab, you’ll see PowerBI report tabs for both SALES AND SERVICE filtered to just this record - This is an opportunity to give the user a better view of how to serve the customer.
3. It’s essential to note that this can include data from BOTH Dynamics AND other internal - or even external - data sources. – This extends the 360 view to a very rich source of information.

# SERVICE Analytics within Dynamics Dashboards – Macro insights

1. Click on the “SERVICE” Dashboard.
2. Click on any chart tile to refresh the page.
3. The dashboard can pull in quick charts and summaries from a number of reports – this gives the manager the quick view of what’s happening around the team.
4. Service success can be managed by careful attention to KPIs such as the trend of case volume (“Numero de casos en los ultimos 30 dias”)

Or measures against a goal or target – such as any that are Red or Green – showing how the current KPI compares to the company goal of escalations, or customer satisfaction.

Let’s drill a bit further into look at how Customer Service can be measured and reported to the team.

## Services - KPI Summary

1. Rich visuals and advanced analytics helps give context to the simpler KPIs and help a manager identify areas to focus their attention to maximize the improvements.
2. This page looks at the cases created over the last 30 days and groups them by the Product and the subject area and then helps us see the underlying numbers and trends.

We can see the percentage of compliance with SLAs to help us identify products or subjects that are exceeding our expected resolution time – or in the chart below – we can see the impact of some products and topics on the overall customer satisfaction scores. – The Red-Green bar represents how much an individual topic impacts the overall average, either positively or negatively – we can use this to focus our attention on what is working well and what needs improvement.

1. We can use the drop-down to filter to a specific product (“Design App”) and focus all the metrics and charts on the performance of the service team for that product.

## Services - Analysis

1. Click on the Services – Analysis tab
2. We can use the Key Influencer AI tools to run a statistical regression across our service cases and find the Factors that lead to either a Higher or Lower Customer Satisfaction score. – Note how elements such as the product, the subject, the agent and even the channel are compared to find subtle trends or influences on the overall score – Strengths can be enhanced and weaknesses addressed

## Ad-Hoc Query

The Ad Hoc Query tab empowers any user to ask questions in plain English and get answers – and more importantly it allows the user to explore alternative questions to determine areas of focus.

Try “Show me case count for the last week” – it should return a single number, then add “ by Owner” and it will break the chart out into a graph. – Change “Owner” to “Product” - Then change “Product” to “Country”