

Use Case: Streamlining the Presales Process with Proposal Builder

Scenario Name

Creating and Managing Proposals and Estimations for a Presales Opportunity

Overview

Proposal Builder is a Power Apps model-driven app that facilitates efficient proposal creation and estimation management. This use case highlights how a presales consultant uses Proposal Builder to streamline their workflow, ensuring accuracy and consistency while managing proposals for a sales opportunity.

Actors

- **Presales Consultant:** Responsible for creating proposals and estimations.
 - **Sales Representative:** Provides client information and project requirements.
 - **Approval Manager / Deal Manager:** Reviews and approves the final proposal.
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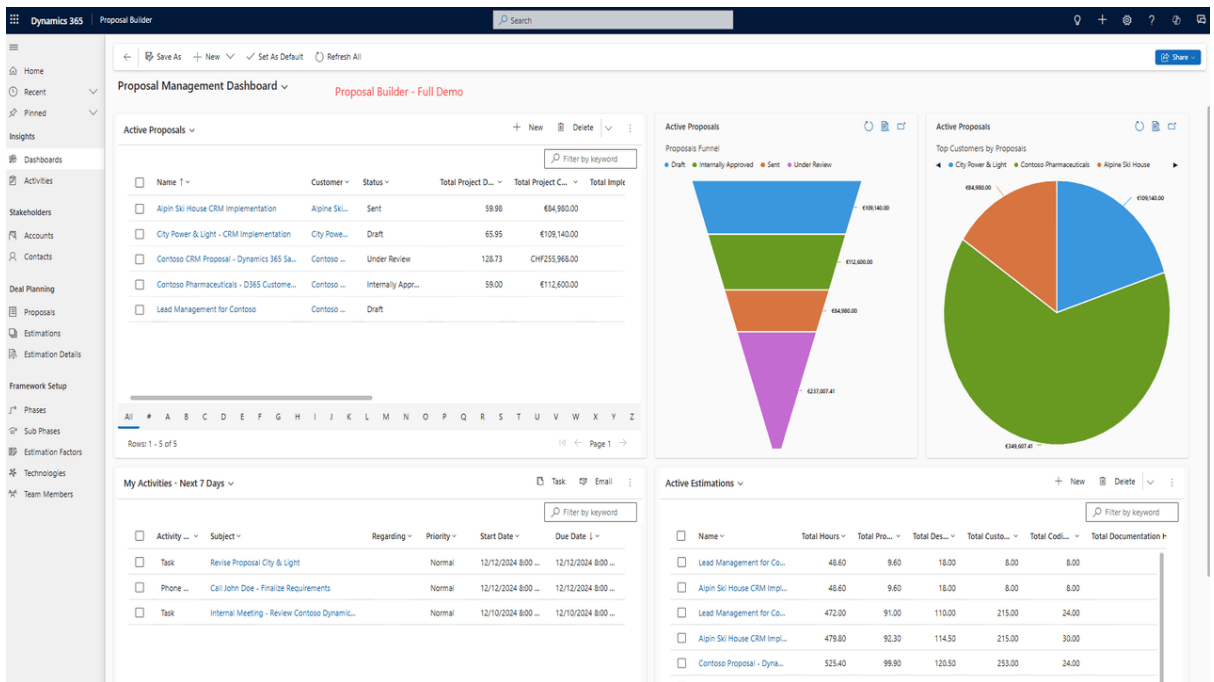
Preconditions

- Proposal Builder is deployed in the organization's Power Apps / Dynamics 365 Customer Engagement environment.
 - The presales consultant has access to the Proposal Builder app (model-driven)
 - Required client information and project details are available.
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Steps

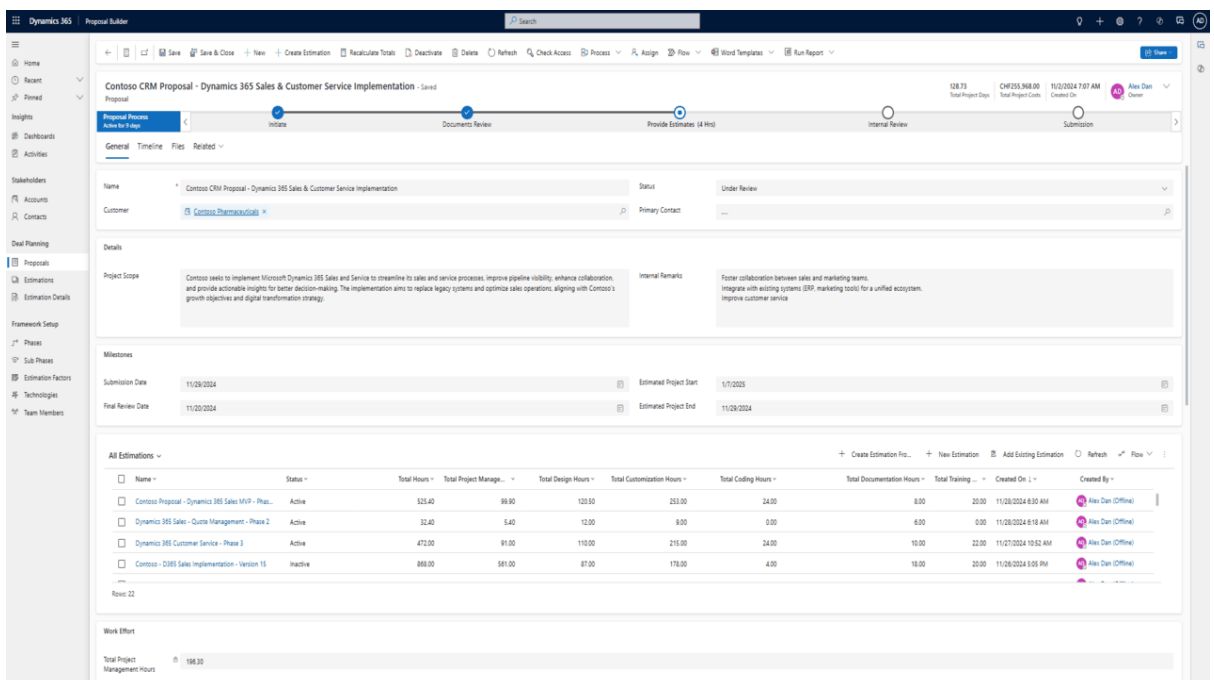
1. Accessing the Proposal Management Dashboard

- The presales consultant logs in to the Power Apps environment and navigates to the Proposal Builder app.
- From the **Proposal Management Dashboard**, the consultant reviews the list of active proposals to track progress and identify priorities.
- A visual funnel shows the proposal's current phase, helping the consultant understand the status and next steps.



2. Creating a New Proposal

- The consultant opens a **Proposal Form** from the dashboard and enters key details such as:
 - Client Information:** Name, contact details, and business context.
 - Proposal Title:** Descriptive title for the sales opportunity.
 - Project Scope:** High-level overview of the project's objectives and deliverables.
- The app provides a structured checklist to ensure all necessary fields are completed.
- Once the details are entered, the consultant reviews the proposal for accuracy and submits it for internal approval.



3. Creating Estimations

- Using the **Estimation Creation** feature, the consultant selects a pre-built **Estimation Template** to generate work effort estimates for key deliverables like:
 - Project management
 - Coding
 - Customization
- Estimation Factors (defined by the organization) are applied to ensure consistency and adherence to organizational standards.

The screenshot displays the Dynamics 365 Proposal Builder interface. The top navigation bar includes a search bar and a toolbar with buttons for Save, Save & Close, New, Create Estimation (highlighted with a red box), Recalculate, Deactivate, Delete, Refresh, Check Access, Process, Assign, Flow, Word Templates, and Share. The left sidebar shows a navigation menu with options like Home, Recent, Pinned, Insights, Dashboards, Activities, Stakeholders, Accounts, Contacts, Deal Planning, Proposals, Estimations, Estimation Details, Framework Setup, Phases, Sub Phases, Estimation Factors, Technologies, and Team Members. The main content area is titled 'Dynamics 365 Sales (Template) - Saved' and shows the 'General' tab. The 'General Information' section includes fields for Name (Dynamics 365 Sales (Template)), Is Template (Yes), Original Estimation, and Description. The 'Estimation Details' section shows a table with columns for Estimation Detail, Phase (Esti...), Sub Phase (Estim...), Total Estimation De..., Project M..., PM Pe..., P..., Design Ho..., Custo..., Coding Ho..., Documentation H..., Training Ho..., and Created On. The table lists several estimation details, including 'WS Prep Customer Journey Mapping', 'WS Prep Business Requirements Gather...', 'Analysis Effort', 'WS Prep Data Migration Planning', 'Create Run Book (Checklist)', and 'Backlog Definition (User Stories)'. Each row shows the associated phase, sub-phase, and various effort estimates.

Estimation Detail	Phase (Esti...)	Sub Phase (Estim...)	Total Estimation De...	Project M...	PM Pe...	P...	Design Ho...	Custo...	Coding Ho...	Documentation H...	Training Ho...	Created On
WS Prep Customer Journey Mapping	1 - Discovery	Customer Journey ...	8.00	4.00	0.00	4...	4.00	0.00	0.00	0.00	0.00	11/1/2024
WS Prep Business Requirements Gather...	1 - Discovery	Business Requirem...	6.00	2.00	0.00	2...	2.00	2.00	0.00	0.00	0.00	11/1/2024
Analysis Effort	1 - Discovery	Current System As...	4.80	0.80	20.00	0...	4.00	0.00	0.00	0.00	0.00	11/1/2024
WS Prep Data Migration Planning	2 - Planning	Data Migration Pla...	2.40	0.40	20.00	0...	2.00	0.00	0.00	0.00	0.00	11/1/2024
Create Run Book (Checklist)	2 - Planning	Project Scope Defi...	8.00	4.00	0.00	4...	4.00	0.00	0.00	0.00	0.00	11/1/2024
Backlog Definition (User Stories)	2 - Planning	Budget and Cost E...	14.40	2.40	20.00	0...	8.00	4.00	0.00	0.00	0.00	11/1/2024

4. Refining Estimations with Cloning (Versioning)

- If changes are required, the consultant uses the **Estimation Cloning** feature to create a new version of the existing estimation.
- Updates are made to reflect revised requirements or additional deliverables, ensuring transparency in changes and decision-making.
- The version history allows the consultant to revert to previous versions if needed.

City Power & Light - CRM Implementation - Version 2 - Saved

Active Status 12/7/2024 9:11 AM Alex Dan Owner

General Information

Name: City Power & Light - CRM Implementation - Version 2

Proposal: City Power & Light - CRM Implementation

Final Review Date: 12/27/2024

Submission Date: 12/12/2024

Estimated Project Start: 1/15/2025

Estimated Project End: 1/30/2025

Versioning

Version Status: Draft Estimation Version Number: 2 Is Last Version: Yes

Estimation Details

Estimation Detail	Phase (Estimat...	Sub Phase (Estimat...	Total Estimation Detail	Project Man...	PM Perc...	P...	Design Hours	Custo...	Coding Hours	Documentation Hours	Training Hours	Created On
WS Prep Customer Journey Mapping	1 - Discovery	Customer Journey Ma...	8.00	4.00	0.00	4...	4.00	0.00	0.00	0.00	0.00	12/7/2024 9:11 ...
WS Prep Business Requirements Gathering	1 - Discovery	Business Requirement...	6.00	2.00	0.00	2...	2.00	2.00	0.00	0.00	0.00	12/7/2024 9:11 ...
Analysis Effort	1 - Discovery	Current System Assess...	12.00	3.00	0.00	3...	8.00	0.00	0.00	1.00	0.00	12/7/2024 9:11 ...
WS Prep Data Migration Planning	2 - Planning	Data Migration Planni...	7.20	1.20	20.00	0...	6.00	0.00	0.00	0.00	0.00	12/7/2024 9:11 ...

5. Finalizing and Submitting the Proposal

- The consultant reviews the completed proposal and associated estimations for accuracy.
- Once approved internally, the proposal is submitted to the client for review.

Postconditions

- The client receives a structured, accurate proposal with clear estimations.
- The organization tracks the proposal's progress (Business Process Flow phases) and milestones in the Proposal Builder app.

Benefits

- Efficiency:** Streamlined process for creating proposals and estimations using reusable templates.
- Accuracy:** Consistency in estimations through pre-defined Estimation Factors.
- Version Control:** Easy tracking and refinement of estimations via cloning/versioning.
- Transparency:** Visual funnel and dashboard ensure clear tracking of proposal status and milestones.

Key Features Highlighted

- Proposal Management Dashboard:** Central hub for tracking active proposals and tasks.
- Structured Proposal Creation:** Ensures consistent documentation with a guided process.

- **Automate Estimations creation based on Estimation Templates with effort estimates (Estimation Details, Estimation Factors):** Simplify work effort estimation.
- **Versioning:** Enables tracking and managing multiple estimation versions.

This use case illustrates how Proposal Builder enhances efficiency and accuracy in the presales process, delivering better outcomes for both the organization and its clients.