The Digital Day of a Sales Representative

Microsoft

Challenge

As the accounts' experience is changing, companies need an instrument to help their sales rep to boost their productivity, to accelerate their selling performances and to sell smarter by building trusted relationship with accounts and by being proactive.

Solution

Power Platform offers an easy, rapid and effective way to build solutions in few days, to address the need of having more effective sales rep on site.
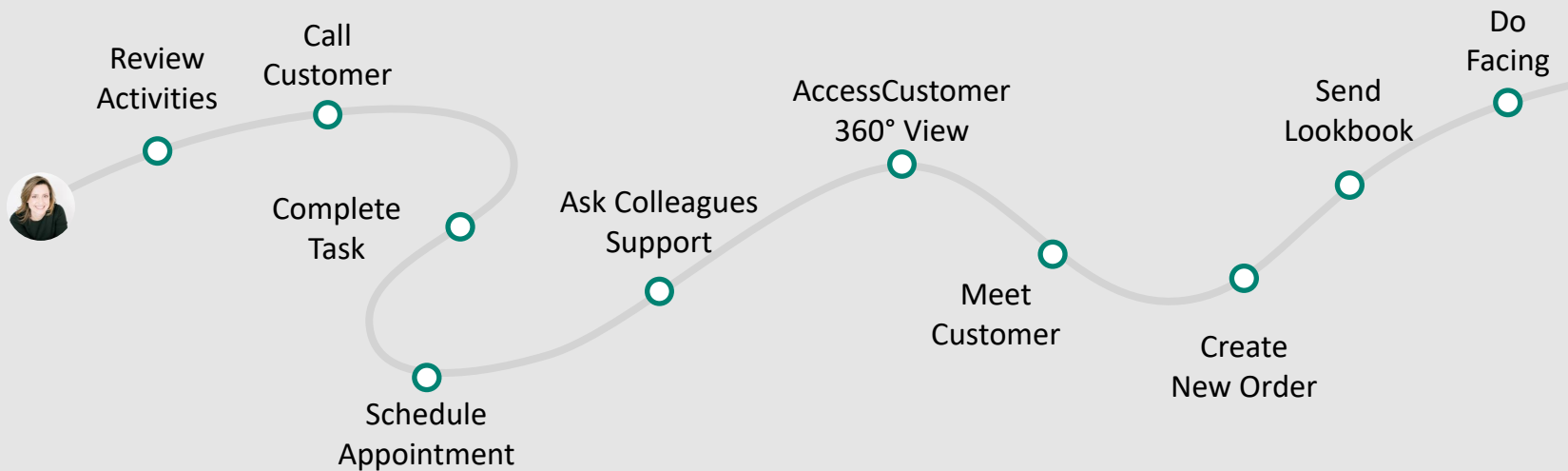
Results

A "ready to use" solution that enables sales rep:

- to manage their daily tasks
- to view accounts profiles and perform actions over customers
- to see campaigns and products' catalogues
- to get help from colleagues

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Use Case
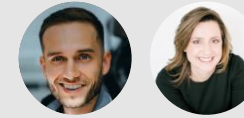
Description: Alicia, the sales rep, manages her daily activities, asks support to her colleagues and meets Andrea, the main contact of an account assigned to her.

Review Activities

Call Customer

Complete Task

Schedule Appointment

Ask Colleagues Support

AccessCustomer 360° View

Meet Customer

Create New Order

Send Lookbook

Do Facing

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Home Page

Users will have a summary home page where they will be able to access the following sections:
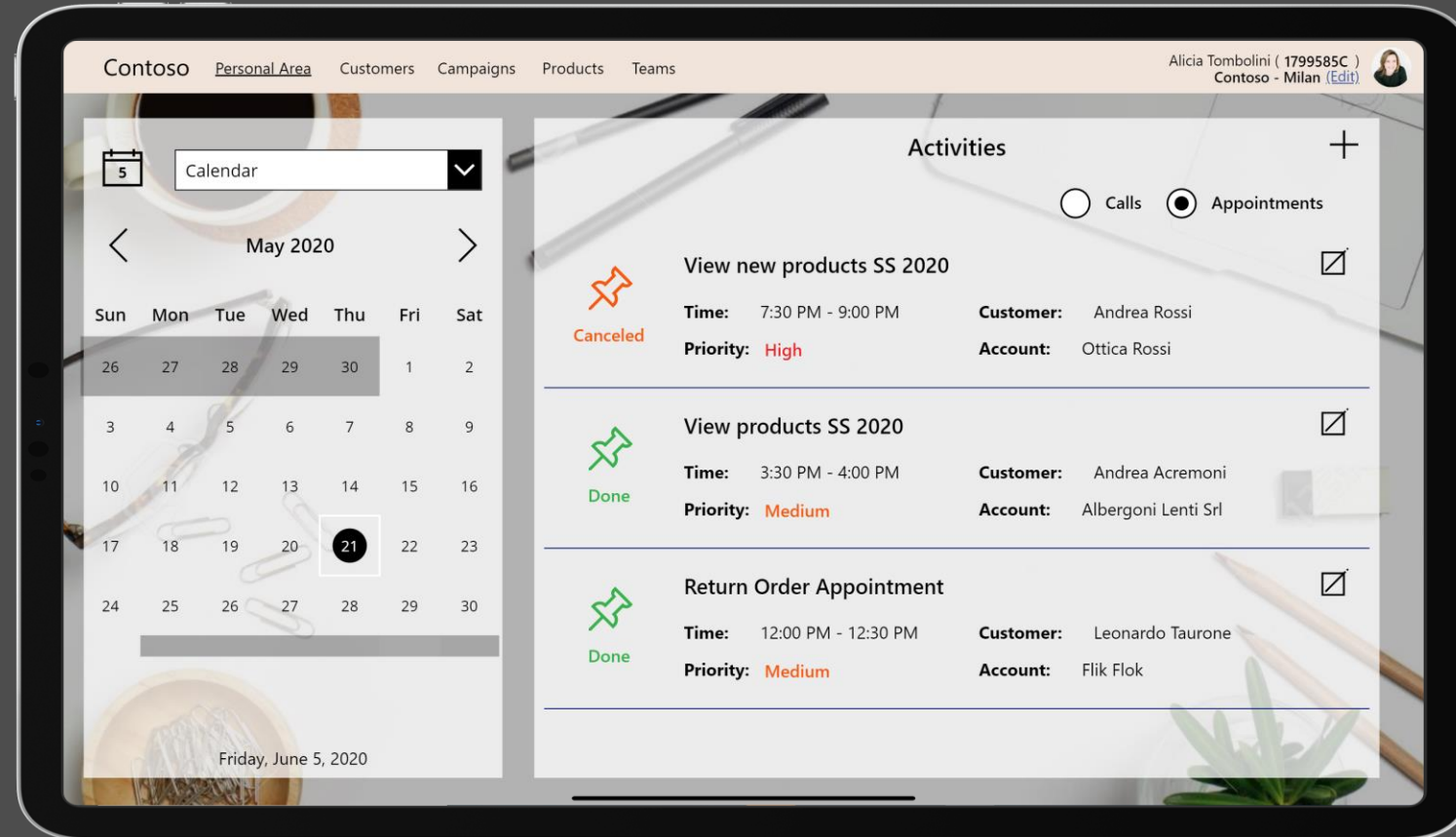
- Personal Area
- Customers
- Campaigns
- Products
- Teams

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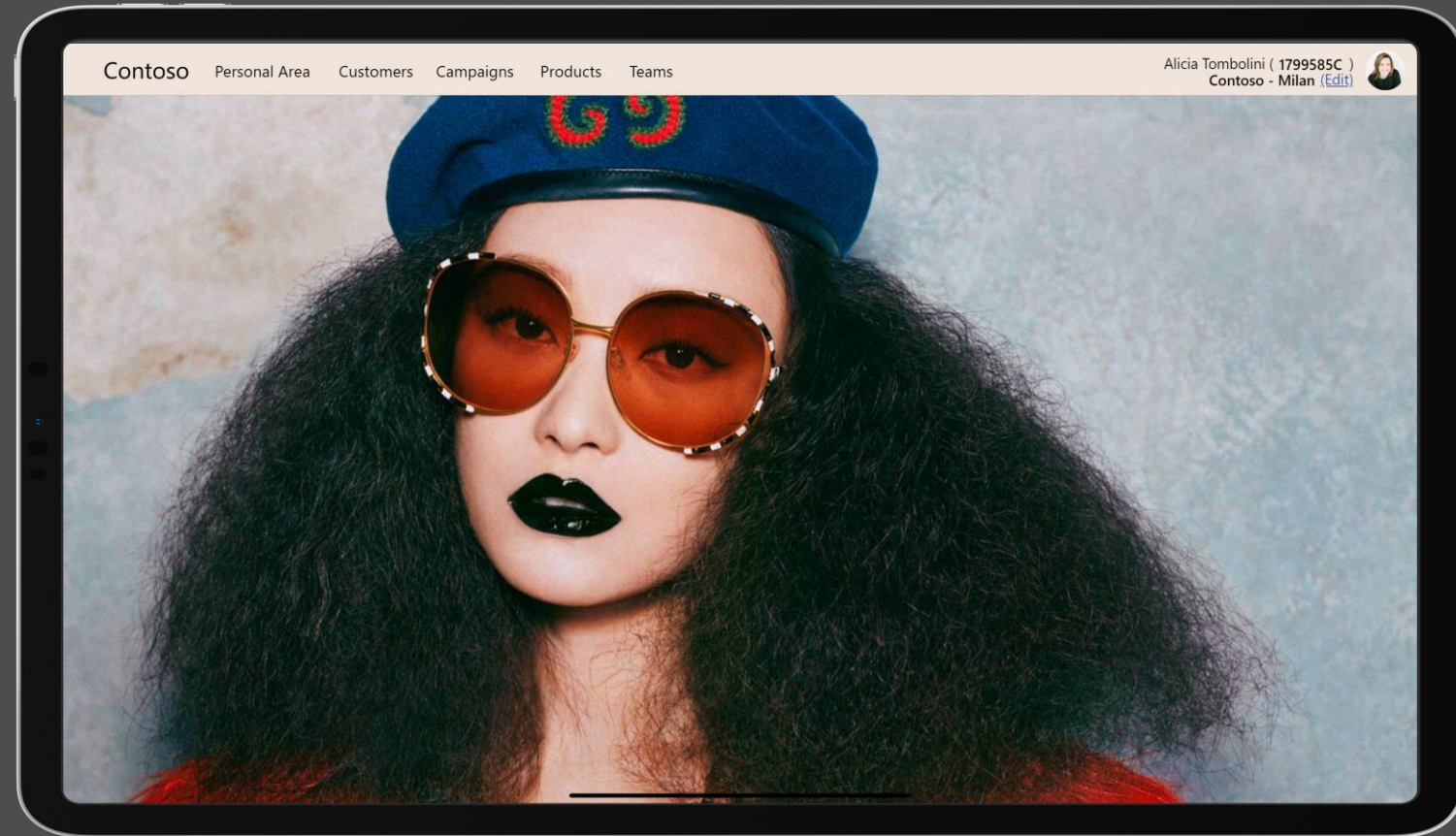
Personal Area

Users will be able to manege thier working day within the Personal Area. In particular they can:

- See their activities, divided between Calls and Appointments
- See activities' details
- Change activities' status and add notes
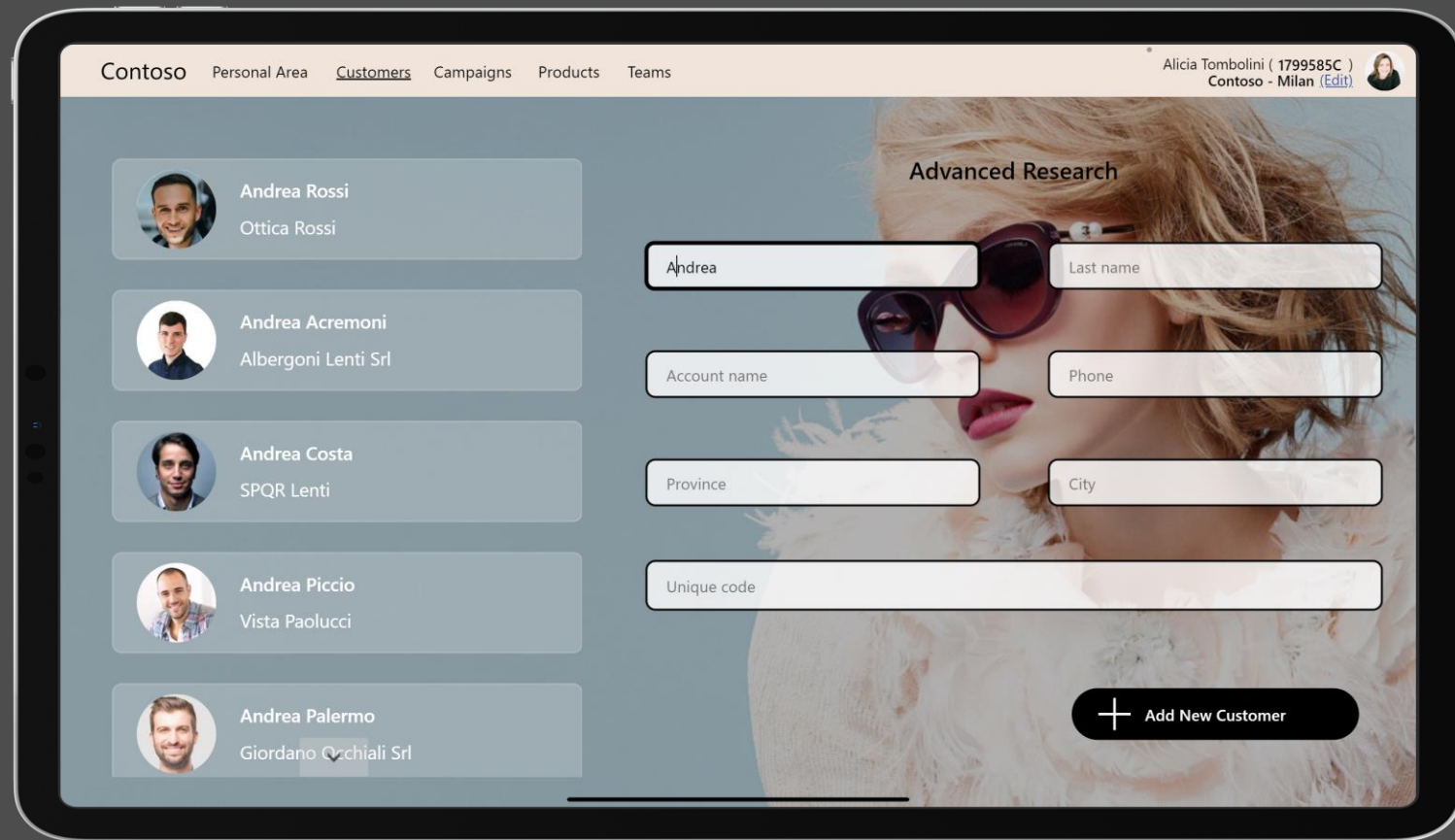- Add new activities

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Customers

Within Customers users can:

- See customers assigned to them
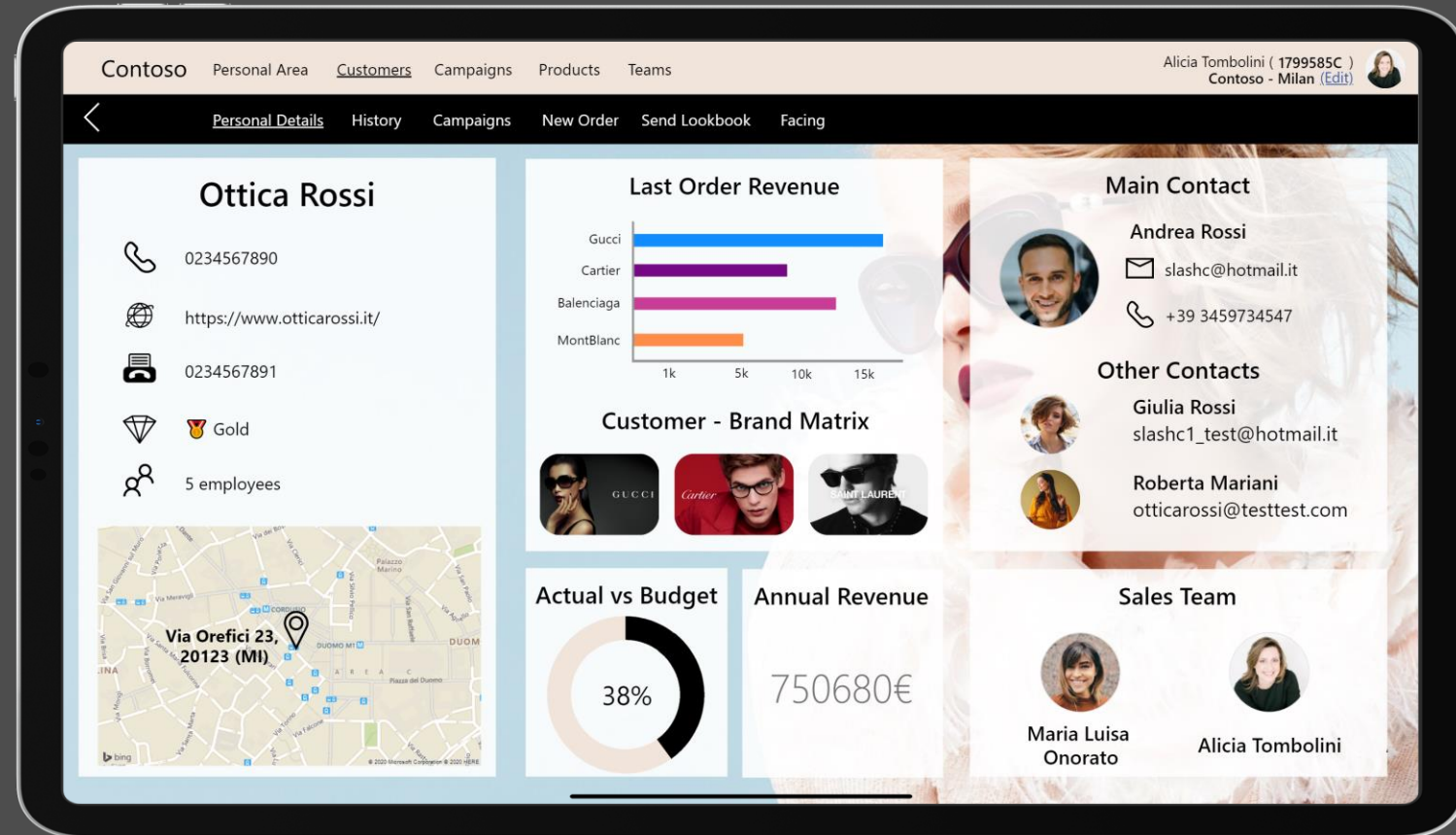- Do advanced searches
- Add new customers

Once a customer has been selected, users will be able to access the following sections:

- Personal Details
- History
- Campaigns
- New Order
- Send Lookbook
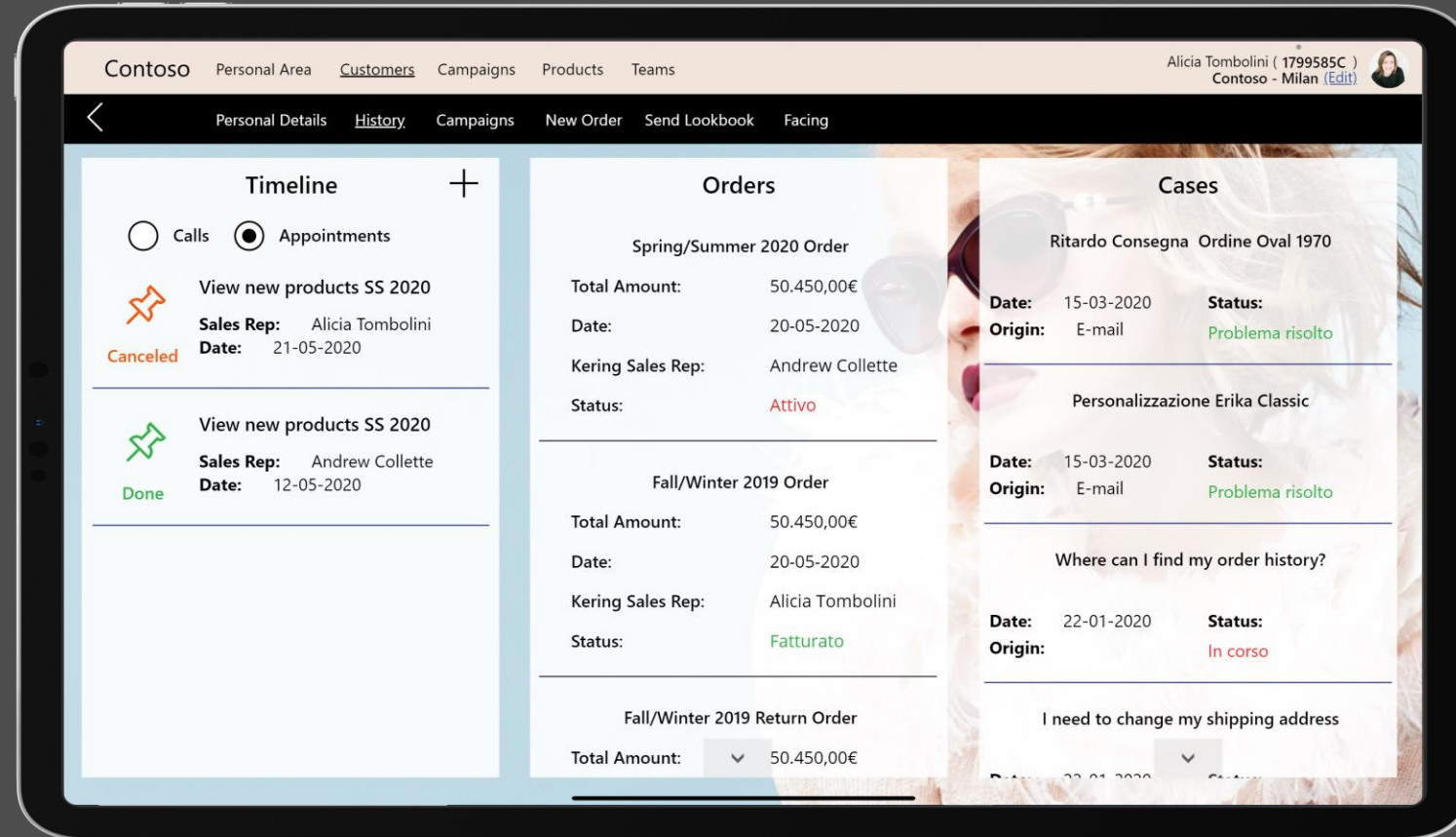- Facing

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Customer: Personal Details

Within Personal Area, users will access general information and KPIs related to the customer's account.

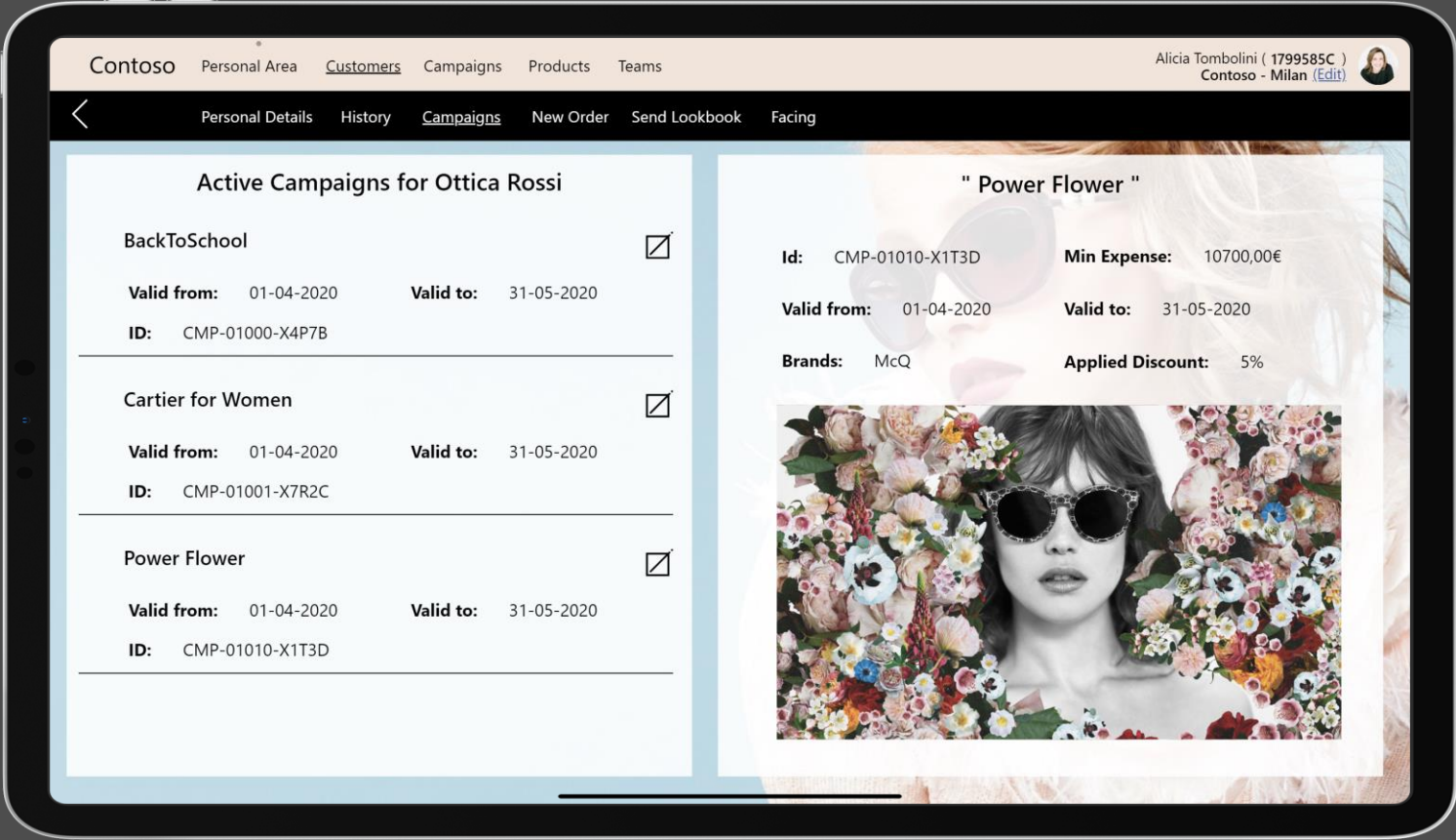Microsoft

Customers: History

Within History users can:

- See all activities performed with the customer by the active sales team
- Get access to all return and non-return orders
- See all opened tickets

Customer: Campaigns

Within Campaigns users will be able to see all campaigns that are active over the customer.

Customers: New Order

Within New Order users can:

- Create new return or non-return orders
- Go to products' catalogue and add them to the order
- Edit or delete order's rows
- Submit the order

Customer: Send Lookbook

Within Send Lookbook users can:

- Send 1:1 communications via different channels
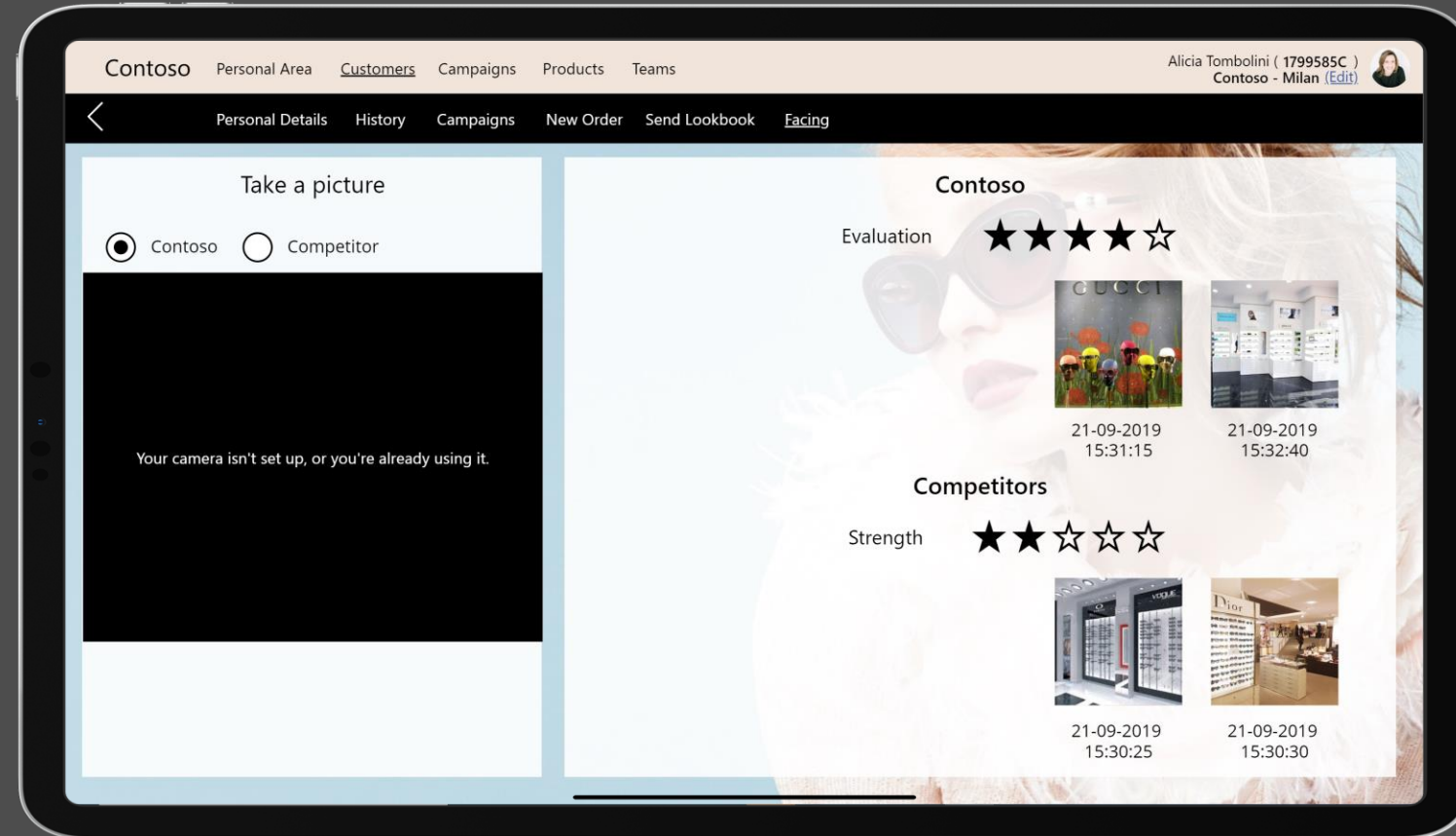- Select products to add into the lookbook's templete
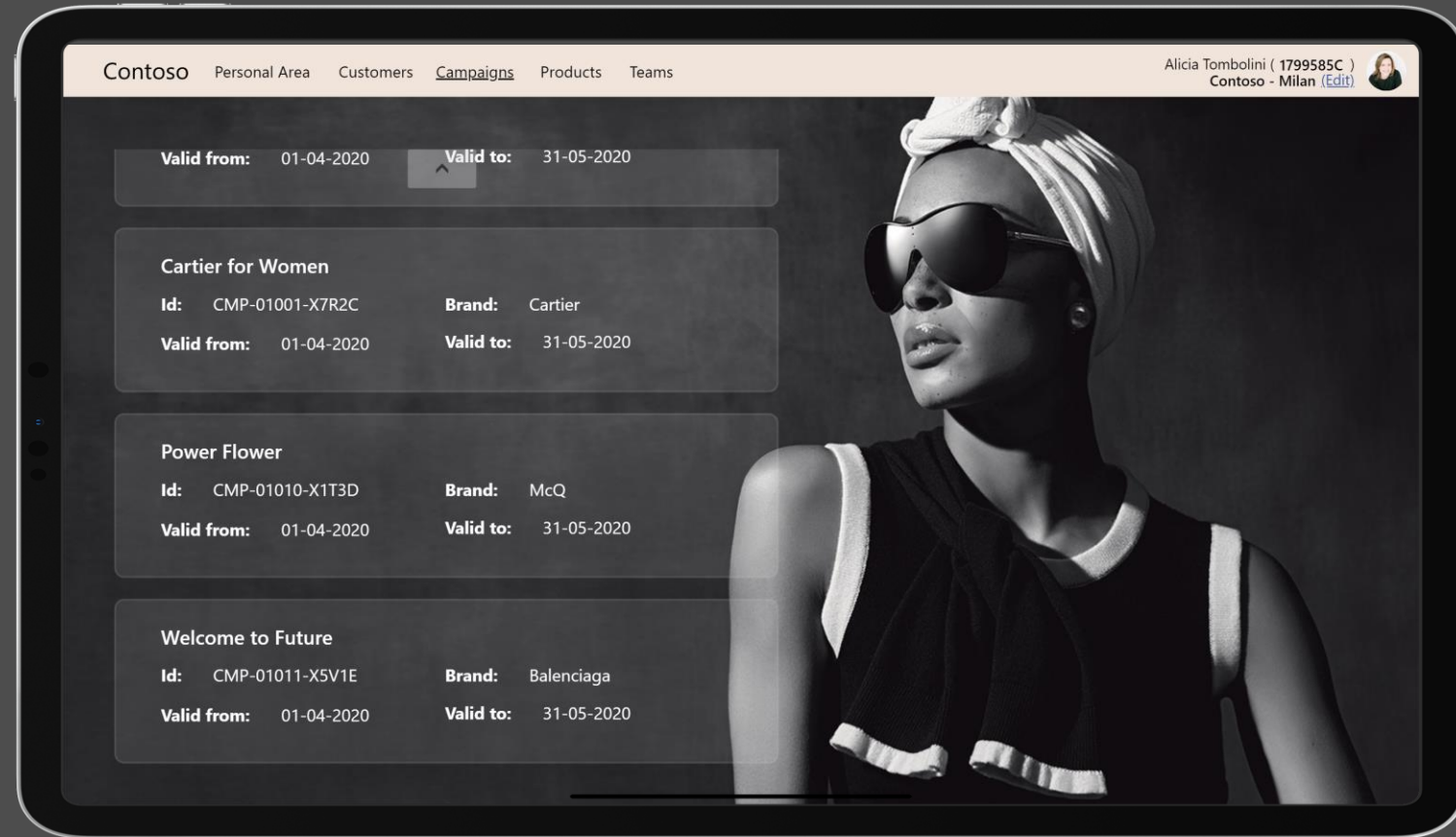- See lookbook's preview
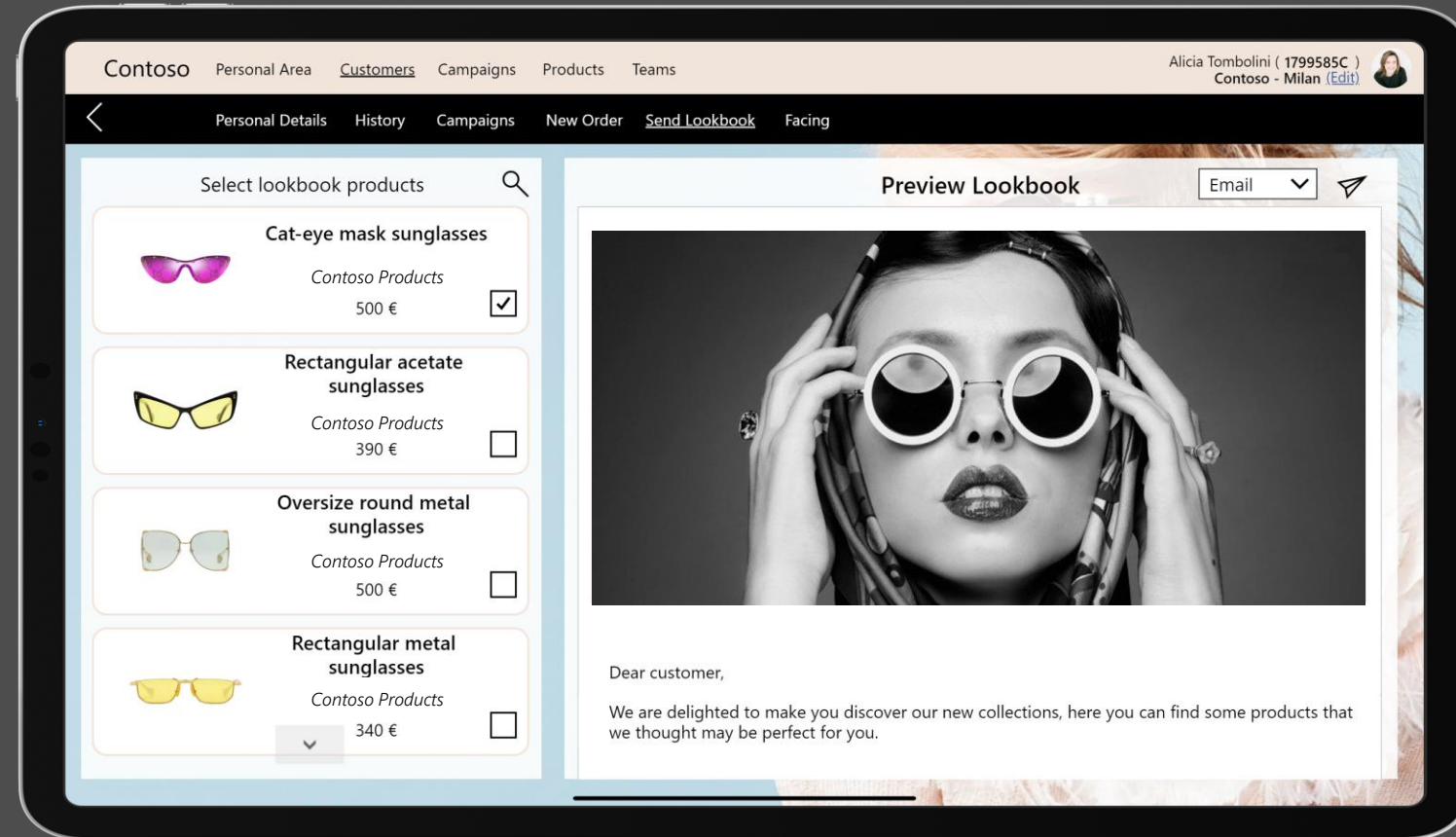
Customer: Facing

Within Facing users can:

- Take pictures of the store
- See pictures taken during past activities
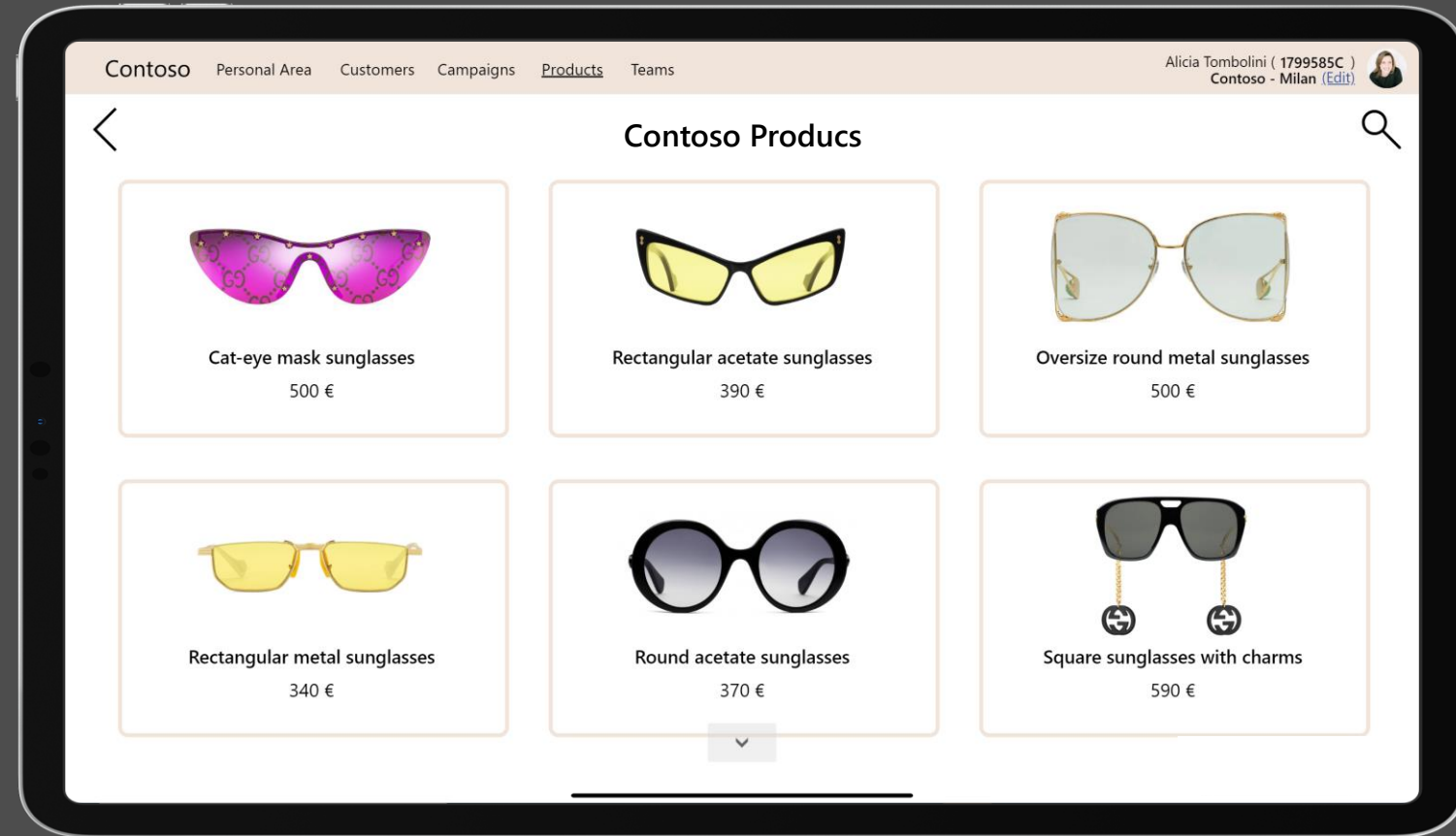- Evaluate the brand positioning with respect to competitors

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Campaigns

Within Campaigns users will be able to see a calogue with all active campaigns.

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Products

Within Products users will be able to see a calogue with all products that they can sell and their details.

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Teams

Thanks to the integration with our collaboration platfrom **T**eams, users will be able to access different channels for different customers and they'll be able to:

- Work with other colleagues
- Have access to a common repository

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