



Njoo Tuinue viwango!

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EAST AFRICA





From Transactions to Intelligence: Leveraging D365 Sales Insights & AI for Smarter Customer Engagement





From Transactions to Intelligence:

**Leveraging D365 Sales Insights & AI for Smarter
Customer Engagement**





Discussion

How many deals have slipped through your fingers — not because the lead was cold, but because we lacked the right insight at the right time?”

“How many of you are in a serious relationship with your CRM?”
(Pause for laughs)

- A. It’s complicated
- B. We only talk during month-end
- C. I ghosted it after Q1
- D. I love it — when someone else fills it in

“When you hear ‘AI in Sales,’ what comes to mind?”

- A. Robot stealing my commission
- B. Siri, but with a tie
- C. Something IT promised last year
- D. A gift from the gods of productivity

“This session is about moving beyond logging customer interactions — and into predicting, guiding, and responding to them with intelligence.”





Discussion

“How do you currently prioritize leads?”

- A. Eenie-meenie-miney-mo
- B. Whoever calls back first
- C. My gut. And sometimes my gut is hungry.
- D. What do you mean 'prioritize'?

“Which of these sales activities would you gladly outsource to AI?”

- A. Logging calls
- B. Writing follow-up emails
- C. Forecasting that's always 'optimistic'
- D. Explaining what CRM stands for. Again.

“What's your current AI strategy?”

- A. Pray and refresh the dashboard
- B. Let the intern handle it
- C. Read about it on LinkedIn
- D. Pretend I'm using it when my boss asks

“This session is about moving beyond logging customer interactions — and into predicting, guiding, and responding to them with intelligence.”



The Problem

Too much manual
data entry → rep
burnout

Leads not prioritized
→ missed
opportunities

Reps reactive, not
proactive

CRM becomes a
logbook, not a
strategic tool



AI_The Game Changer

Sales Copilot &
predictive insights

Smart reminders and
lead scoring

Conversational
intelligence and
follow-up prompts





Misconceptions & Change Management

AI isn't perfect — but it's powerful if trained right

You still need empathy and storytelling — AI gives you time to do that

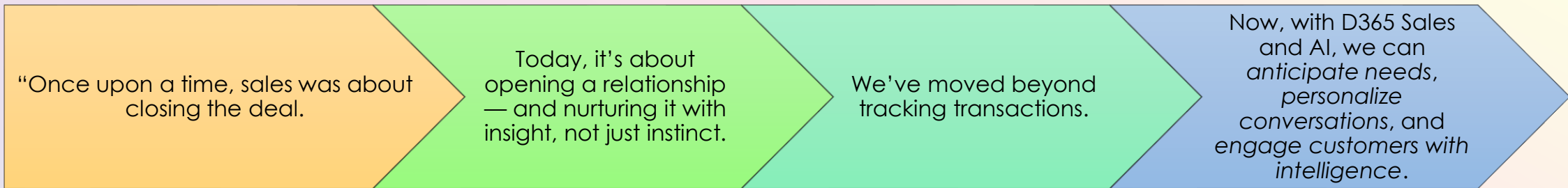
Start small: one use case, one workflow

“What AI Can't (Yet) Replace: Trust, Connection, Curiosity”





Therefore



“AI isn’t here to take your job... unless your job is to forget follow-ups, misread leads, and manually type call notes.”





In Conclusion

“The future of sales isn’t artificial — it’s *augmented*. Intelligence doesn’t remove the human touch, it refines it.

So as we walk away today, don’t just ask ‘What can AI do?’

Ask: ‘*What can I do now that AI is handling the grunt work?*’
That’s your edge.”

“AI won’t make you a better salesperson. But it will free you to become one.”





THANK YOU

“The best salespeople will be part-human, part-machine — and 100% customer-centric.”

Donvin Oguda



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THANK YOU

“The goal is not to speak tech fluently—it’s to
speak value fluently.”

Donvin Oguda



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AI: The Game Changer

"If you automate a bad process, you just get bad results faster."





Old Ways vs New Ways

Old Way (Transactions)

Leads in spreadsheets

Follow-ups based on memory

Gut-feel forecasts

Manual activity logging

New Way (Intelligence)

AI-scored and prioritized

Copilot-generated reminders

Predictive analytics

Automatic call summaries

"AI isn't here to take your job... unless your job is to forget follow-ups, misread leads, and manually type call notes."





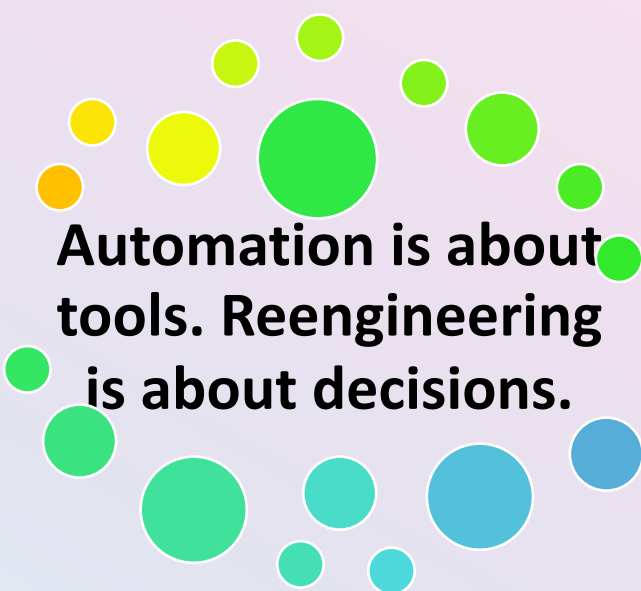
BPR Vs Continuous Improvement




“Kaizen is fixing the plane while flying; BPR is redesigning the plane altogether.”



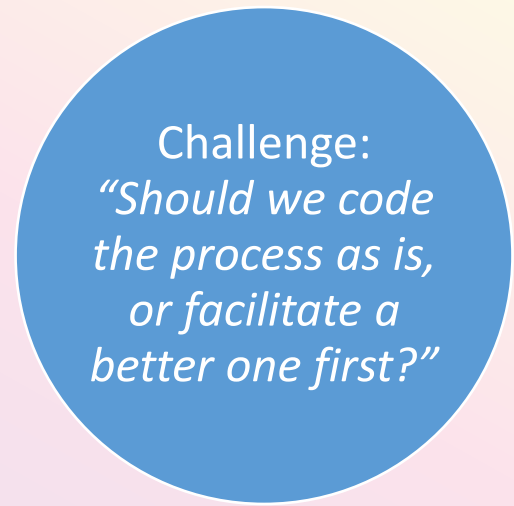

How to deal with an implementation where processes are Brocken/bad?



Automation is about tools. Reengineering is about decisions.



As developers, ask: *“Is this feature request asking for speed — or for a rethink?”*



Challenge:
“Should we code the process as is, or facilitate a better one first?”



How-Step 1: Don't Blame the System — Surface the Process

Start by shifting the mindset:

“The system didn't fail — it exposed broken processes.”

Use this moment to:

Facilitate a *process mapping* session with users.

Ask: “What are you trying to achieve here?” rather than “What button are you pressing?”



How-Step 2: Educate Users on the Purpose of the System

Many users try to force old workflows into new systems. You can say:

“The ERP isn’t a faster version of your spreadsheet — it’s a new way to work.”

Bridge understanding by:

Demonstrating **how the system supports good practices**.

Showing **what doesn’t work** and why (e.g. approvals, double data entry).





How-Step 3: Initiate 'Mini-Reengineering' Cycles

You may not be able to overhaul everything at once. But you can:

Identify **quick wins** – e.g. removing an unnecessary manual step.

Co-create **revised workflows** with users (especially power users).

Focus on **one department or process** at a time for deeper improvement.



How-Step 4: Build Cross-Functional Teams

Bad processes often cross departments.

Form small taskforces with IT + users + process owners to:

Trace pain points.

Redesign small workflows.

Agree on changes that the ERP can reinforce.



How-Step 5: Build Cross-Functional Teams

Ask users what workarounds they're using (e.g. manual logs, Excel outside the system).

Treat these as clues to process misalignment.

Work with leadership to reengineer the actual process.



How-Step 6: Involve Leadership for Accountability

Leadership must own the process redesign.

Present data on delays, duplication, or compliance risks to get buy-in.

Use KPIs (time saved, errors reduced) to make your case.

