

# **POWER BI & DYNAMICS 365**

HIGHLIGHT THE VALUE OF  
DYNAMICS BIZ APPS WITH ANALYTICS

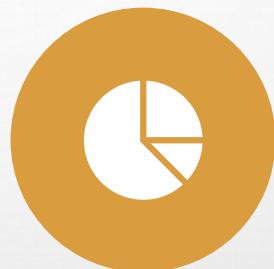
# ENGAGE BUSINESS DECISION MAKERS WITH DYNAMICS 365 ANALYTICS



THE OBJECTIVE IS TO  
SELL THE VALUE OF  
DYNAMICS



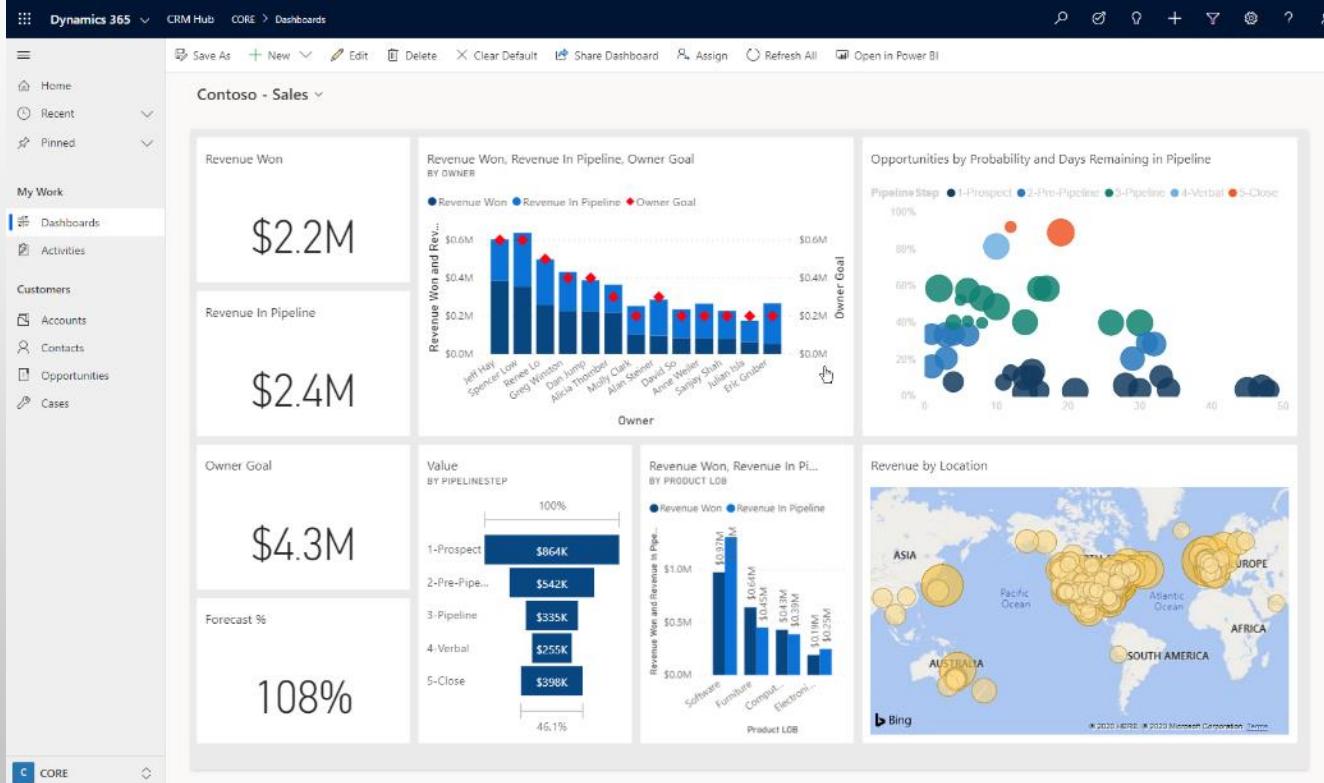
POWERBI GIVES US  
AN UNFAIR  
ADVANTAGE



ANALYTICS IS MORE  
THAN PIE CHARTS AND  
GRAPHS



ANALYTICS CAPTURES  
THE IMAGINATION OF  
THE BDM



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Interactive Visualizations

What-If Exploration

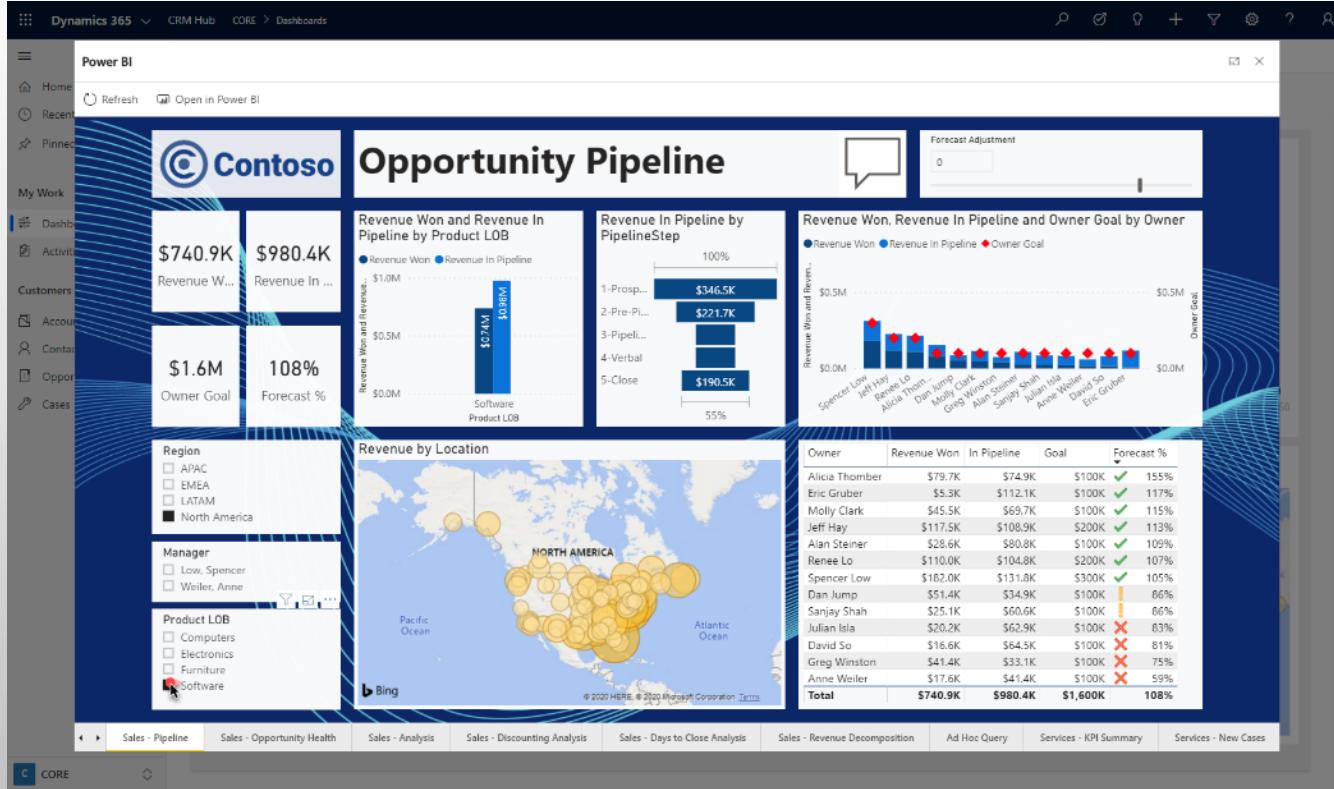
No Code AI

Ask Questions, Get Answers

KPIs and Time Series Charts

Analytics on Entity forms

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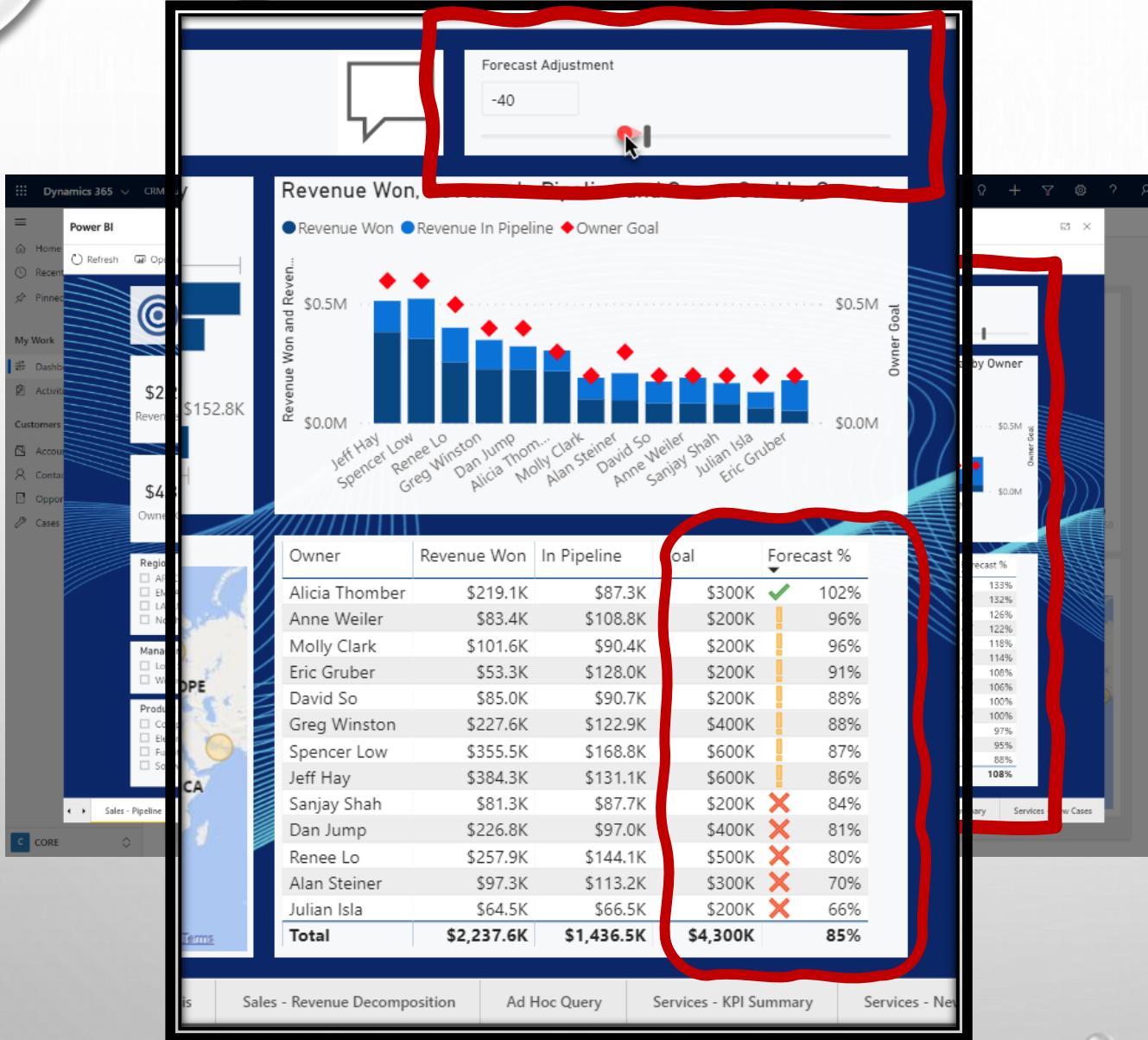
Interactive Visualizations

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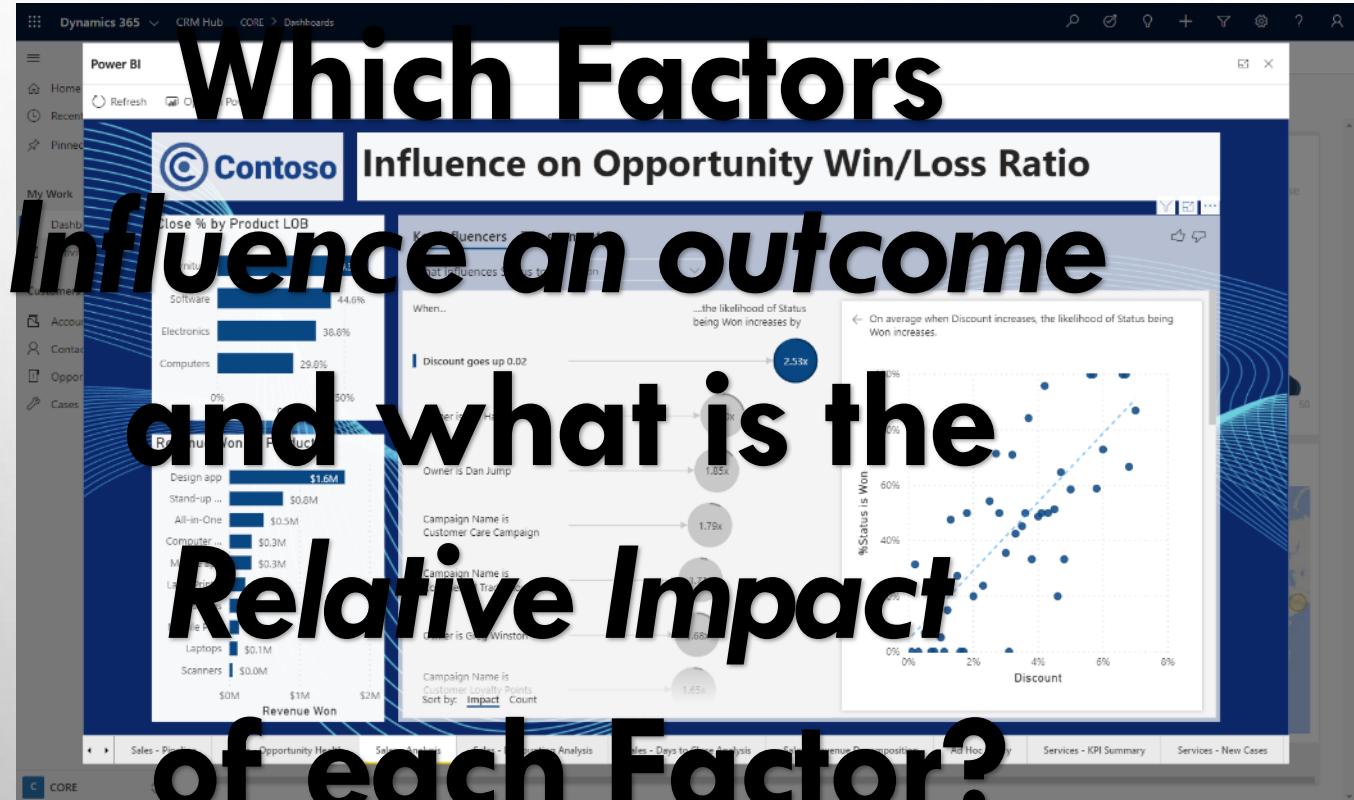
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Which Factors  
Influence an outcome  
and what is the  
Relative Impact  
of each Factor?  
Competitor

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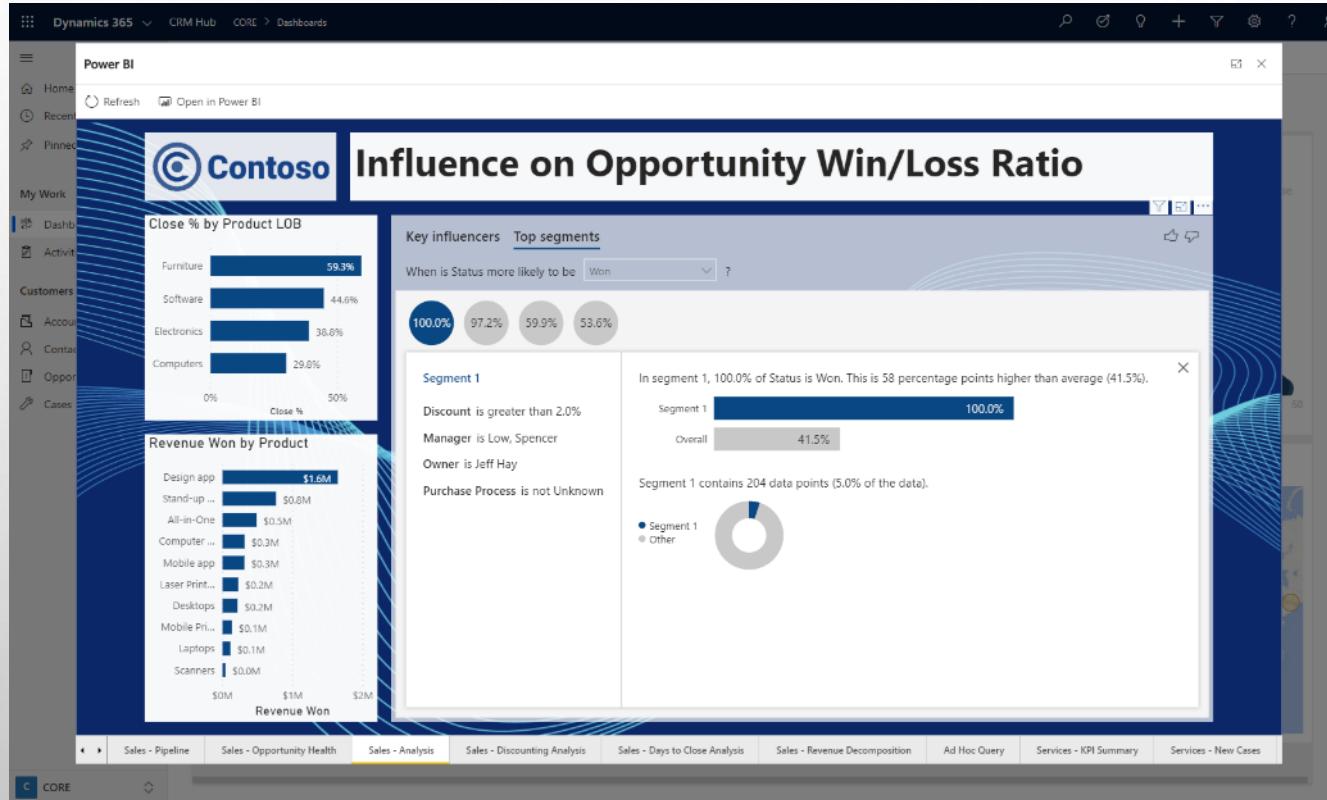
What-If Exploration

No Code AI – Key Influencer

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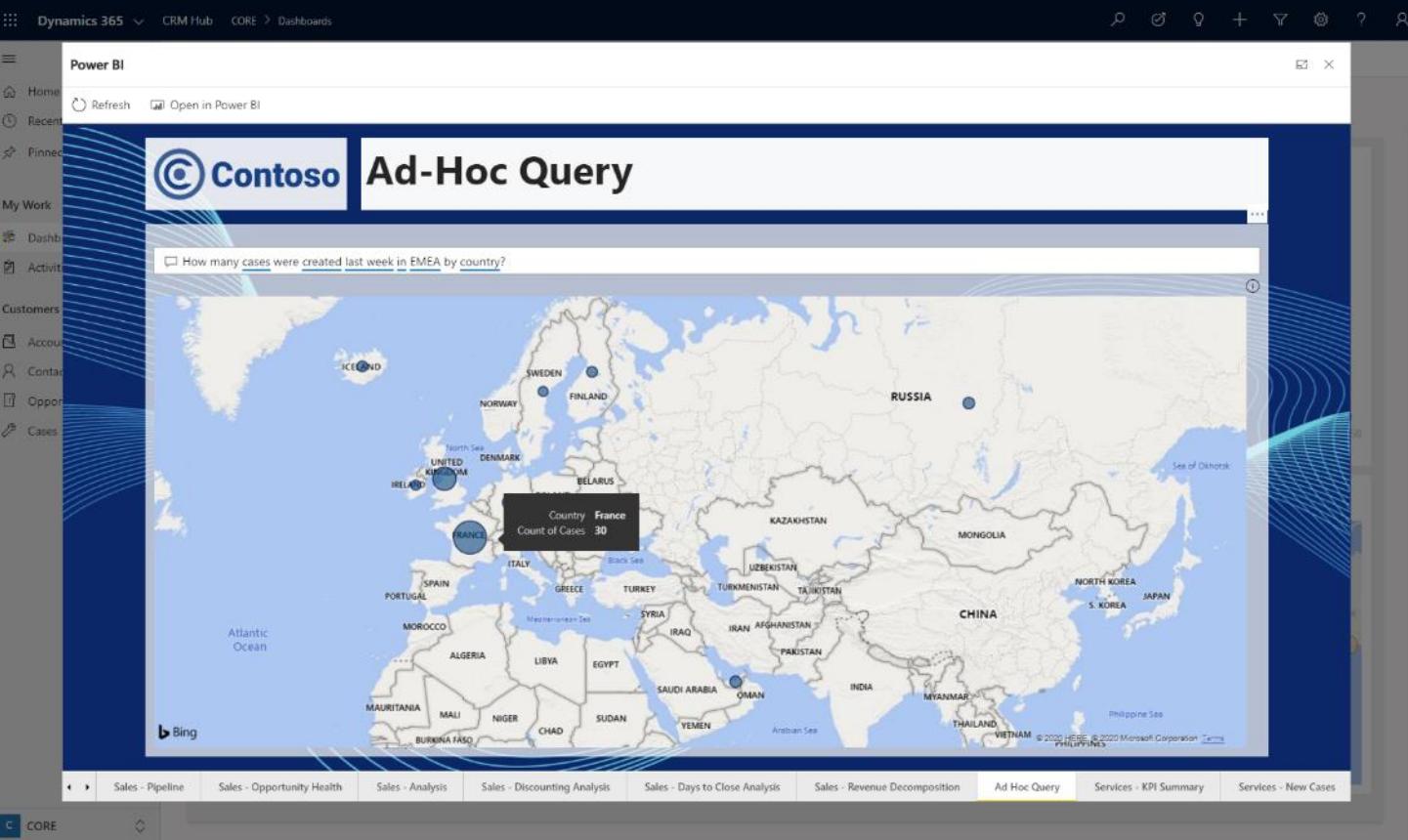
What-If Exploration

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The screenshot shows the Dynamics 365 CRM Hub interface for the Accounts module. The main page displays analytics for the account "Titanic Vacations". Key metrics shown include Annual Revenue (\$16,000,000), Number of Employees (6,000), and Owner (Spencer Low). The navigation bar includes Save, Save & Close, New, Open Org Chart, Deactivate, Connect, Add to Marketing List, Assign, Email a Link, Delete, Refresh, and Process.

The left sidebar shows "My Work" sections for Dashboards, Activities, Customers, Accounts (selected), Contacts, Opportunities, and Cases. The main content area features several interactive visualizations:

- Contoso Summary:** A dashboard with four cards: Count (30), Close % (61.1%), Count of Won (11), and Value (\$29K).
- Titanic Vacations:** A title card.
- Revenue Won by YEAR MONTH and Product LOB:** A stacked bar chart showing revenue won from September 2019 to February 2020 across different product lines.
- Revenue Won by Product LOB and Product:** A treemap visualization showing the distribution of revenue won by Product Line (Furniture, Software, Computers) and specific products (Laptops, Desktops, Electronics, Laser Printers, Design app, Stand-up Desks, Mobile app, Scanners, Design app, Computer Desks, Laser Printers, Laptops, Mobile Printers, All-in-One, Desktops).
- Value by PipelineStep:** A stacked bar chart showing the value of opportunities at different pipeline stages: 1-Prospect, 2-Pre-Pipeline, 3-Pipeline, and 5-Close.
- Close % by YEAR MONTH:** A line chart showing the close percentage over time.

Below the visualizations, there are tabs for Sales and Service, and a CORE section. The bottom part of the screen shows a partial view of another entity form.

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Interactive Visualizations

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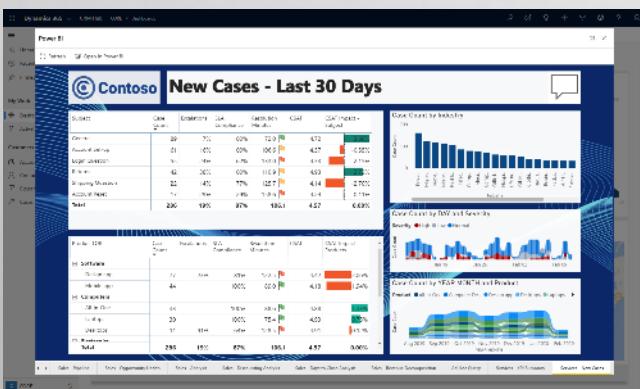
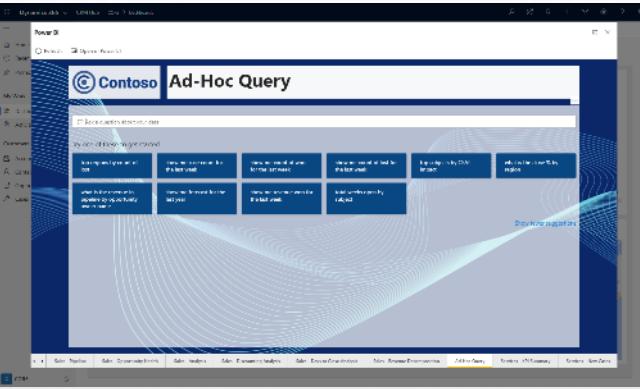
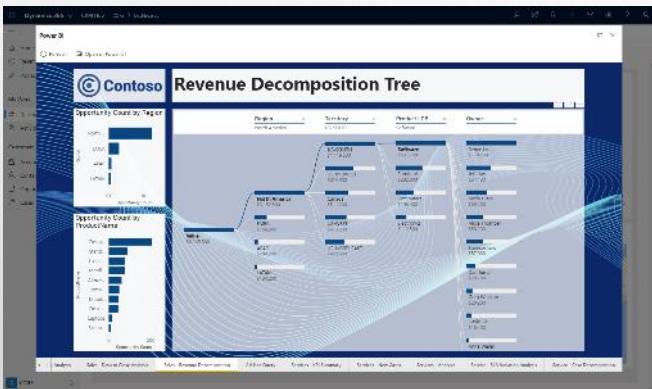
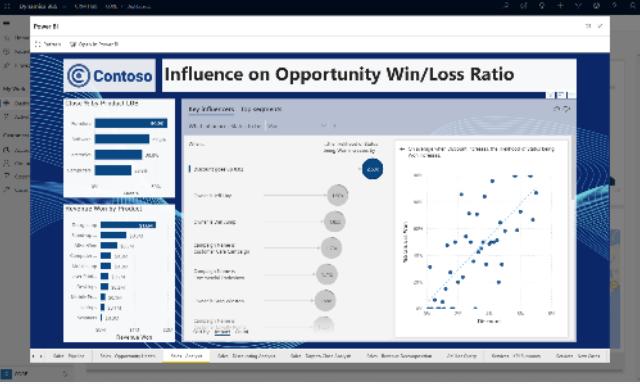
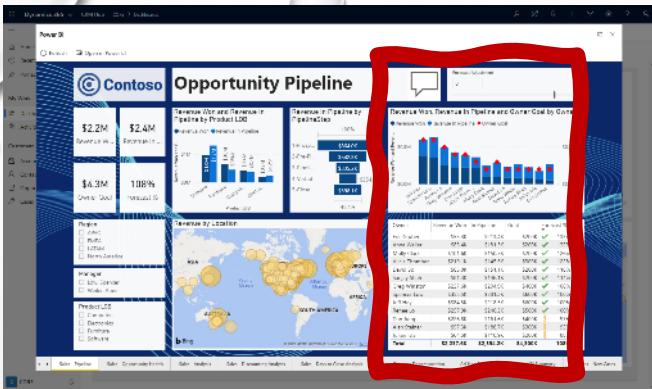
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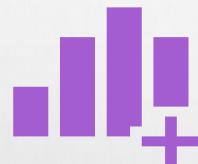
Analytics on Entity forms

# CHALLENGES FOR DYNAMICS TECHNICAL SPECIALISTS

- Limited time for builds
- Focus is on Dynamics products
- Building a realistic dataset is a challenge
  - Volume
  - Variety
  - Interrelatedness
- Reloading data in volume is a waste of time



# POWERBI DEMO ASSETS FOR DYNAMICS TECHNICAL SPECIALISTS



## Customizable Templates

Re-skin and add Customer Logos  
Add/Remove Reports or Visuals  
Re-label with Customer's Terms



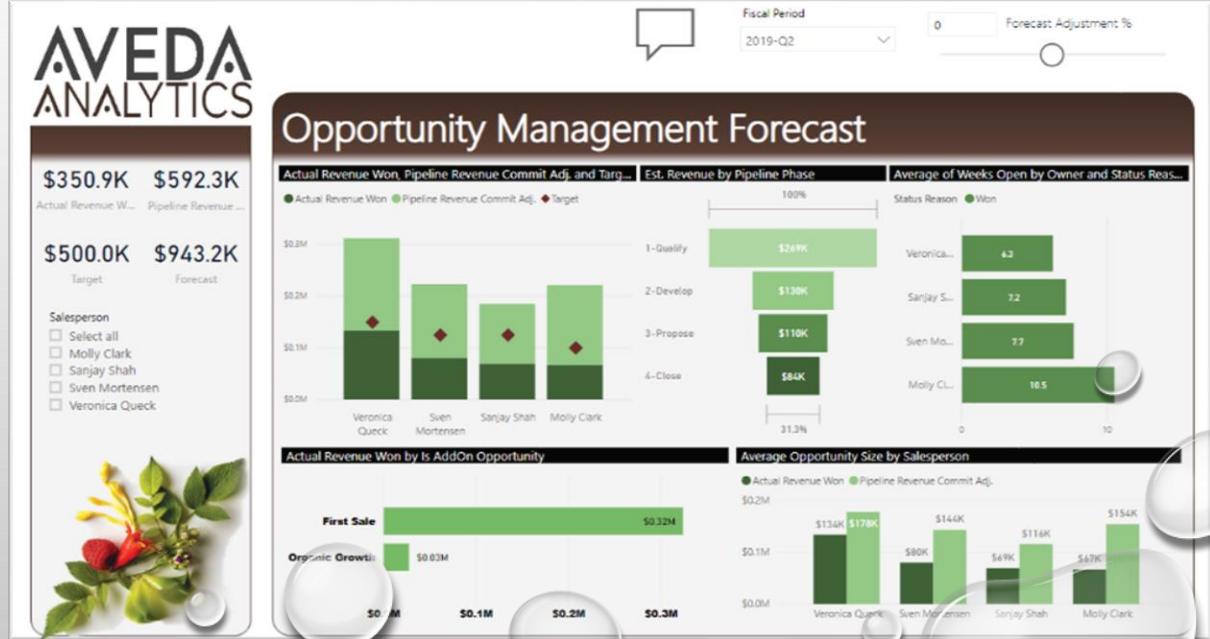
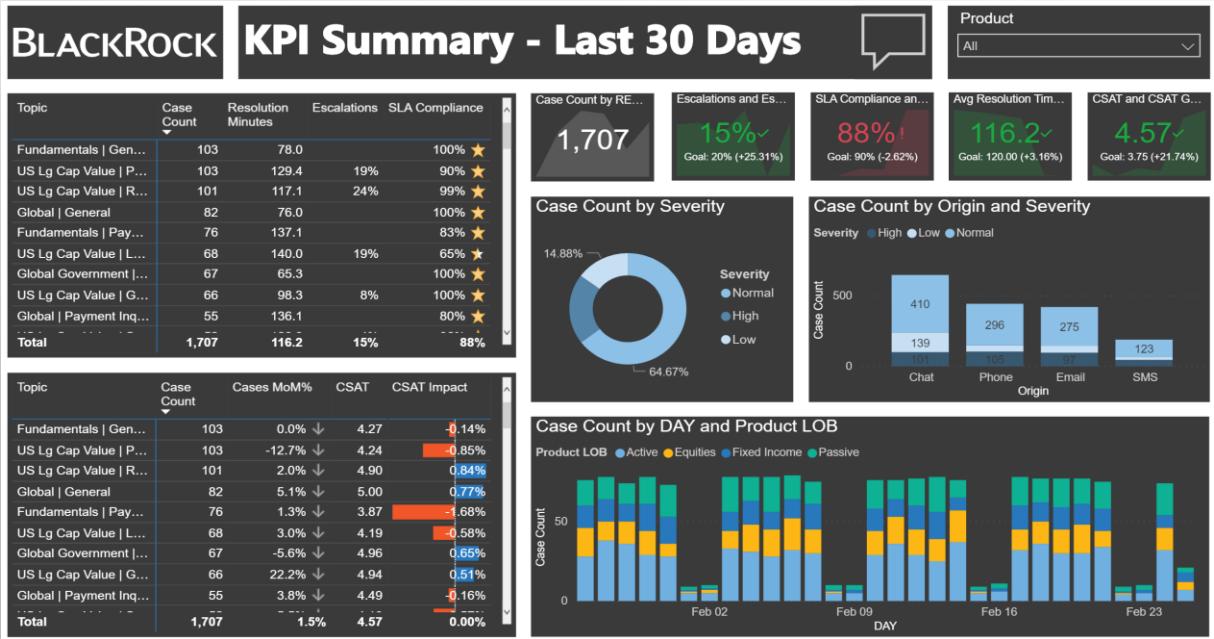
## 14 Pre-Built Reports

6 Sales Reports  
5 Customer Service Reports  
1 Natural Language Query Report  
2 Contextual Reports for Accounts



## Excel Demo Data File

Modeled on CDS data structure  
Formula Driven for Flexibility  
Accounts  
Contacts  
5,000 Opportunities  
10,000 Service Cases  
+ Campaigns, Products, Users, Industries, Territories, etc.



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Pre-Sales versions of PowerBI reports for dynamics 365, the value of machine learning over RDS storage, data

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Scott Sewell Updates for Ray's Call

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