Microsoft Dynamics 365

Dynamics 365 Sales Premium features available for enterprise customers

Dynamics 365 FastTrack Architecture Insights

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Agenda

- New Digital sales features available
- Digital Sales Setup
- Sales Accelerator Components
- Prioritized Work List & Up next widget
- Sequences & Segments
- Lead & Opportunity Scoring
- Assignment Rules
- Resources

New Digital sales features available

New Features Available

Starting with Jan 2022, Microsoft has made available four Digital sales features for Dynamics 365 Sales Enterprise (CE and MRSs) customers.

Feature	Functionality	Licensing options
Sales accelerator with Sequences	Ensure no follow up is missed. Work a prioritized pipeline, offering context, and surfacing automated recommendations to speed up the sales process.	1500 sequence-connected records per month. Manual activities not connected to a sequence will also be displayed without a capacity limit. For more, upgrade to Dynamics 365 Sales Premium.
Lead and Opportunity Scoring	Help sellers prioritize who to contact next. Predictive scoring uses machine learning models to calculate a score for open leads and opportunities .	1,500 scored records per month. If you need to score more than 1,500 records per month, upgrade to Dynamics 365 Sales Premium.
Microsoft Teams call with conversation intelligence	Capture and analyse call recordings from Microsoft Teams in real time to generate insight and automate notes and action capture	No limit on the number of calls made through Microsoft Teams. 3 hours of conversation intelligence per month. For more than three hours of conversation intelligence per month, upgrade to Dynamics 365 Sales Premium.
Teams Collaboration	Enable sellers to work on deals with colleagues and customers in real-time using Microsoft 365 productivity and collaboration tools.	n/a

Digital Sales Setup

Prerequisites and recommendation

Prerequisites

Dynamics 365 Sales Enterprise (Customer Engagement or Microsoft Relationship Sales plan) or Dynamics 365 Sales Premium and Sales Hub app installed

Learn more about Digital Selling https://docs.microsoft.com/en-us/dynamics365/sales/digital-selling

Setup

From Sales hub app, navigate to App Settings, and then Get started with digital sales.

Digital Sales quick setup allows for choosing security roles to enable for and record types.

Digital Sales advanced setup is available via link from quick setup window or via Sales Insights Settings, and then Sales Accelerator e.g., of advanced features are sequences, segments, team settings and assignment rules

(Optional) For the best experience of the sales accelerator, as part of digital selling setup, enable and configure predictive lead scoring and predictive opportunity scoring to display predictive scores for each record in the work list.

Learn more about advanced setup of Sales Accelerator

https://docs.microsoft.com/en-us/dynamics365/sales/enable-configure-sales-accelerator#set-up-the-sales-accelerator

Sales Accelerator Components

Sales Accelerator Building Blocks

Understand the components of Sales Accelerator

Prioritized work list

Next up widget

Provides tailored experience to sellers and it allows them to minimize time spent on the best customer to reach and next best task.

Sequences

Lead and opportunity scoring

Segments

Assignment rules GA in Feb 2022

Team settings

Building blocks for generating automatically activities and for automatic record assignment.

Monitoring usage in all regions by March 2022

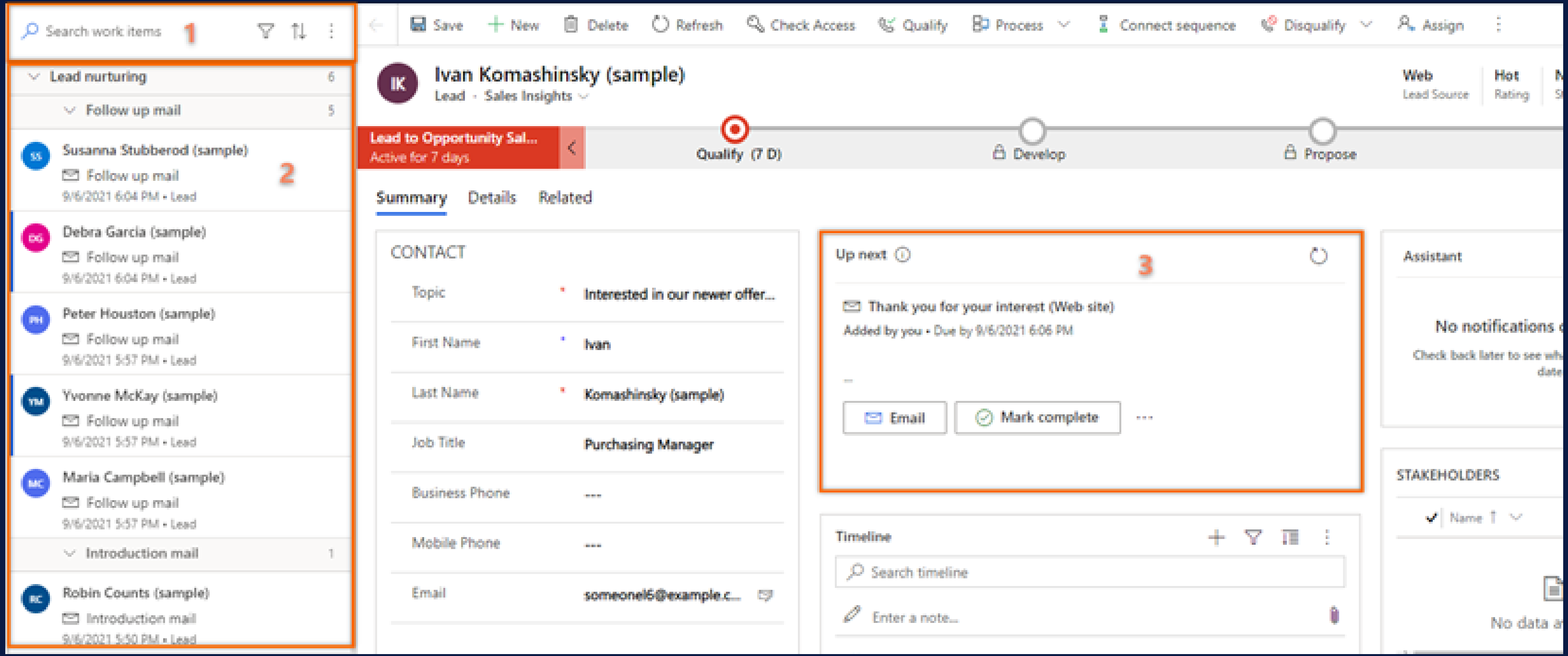
Monitors the number of records connected to sequences over a period of 7 moths.

Learn more on Sales Accelerator : https://docs.microsoft.com/en-us/dynamics365/sales/sales-accelerator-intro

Prioritized work list and next up widget

Prioritized Work List

Understanding features of prioritized work list



#	Feature	Description
1	Search, filter, sort, group records and send bulk email.	You can search, filter, sort, and group the records that you want to view in the list to quickly identify the customers to contact.
2	Records list	Displays a list of records that are assigned to you created manually or automatically from sequences. The following actions are possible: complete, skip, snooze, follow/unfollow, skip wait time, read/unread.
3	Up next widget	Displays the next best action you can perform on a record for the given date. Shows sequence activities or manually created timeline activities (visible for all sellers with access to the record).

Prioritized Work List

Understanding capabilities of prioritized work list

The work list displays a list of records such as opportunities, leads with related activities

- ✓ Types of records visible in the list are configurable and can include custom entities (by default opportunity, lead, account and contact)
- ✓ The record card visible in the list is aware of the activity type and allows for activity completion easily e.g., send emails or complete tasks
- ✓ List can be sorted by score, activity type, due date, record type and filtered by due by, record type, activity type, status opened or followed
- ✓ Can be included in custom model driven apps
- ✓ Personalization options auto advance when completing or skipping a step

Learn more on how to add prioritized work list to a custom app
https://docs.microsoft.com/en-us/dynamics365/sales/faqs-sales-insights#how-to-add-work-list-site-map-to-your-custom-app

Related activities

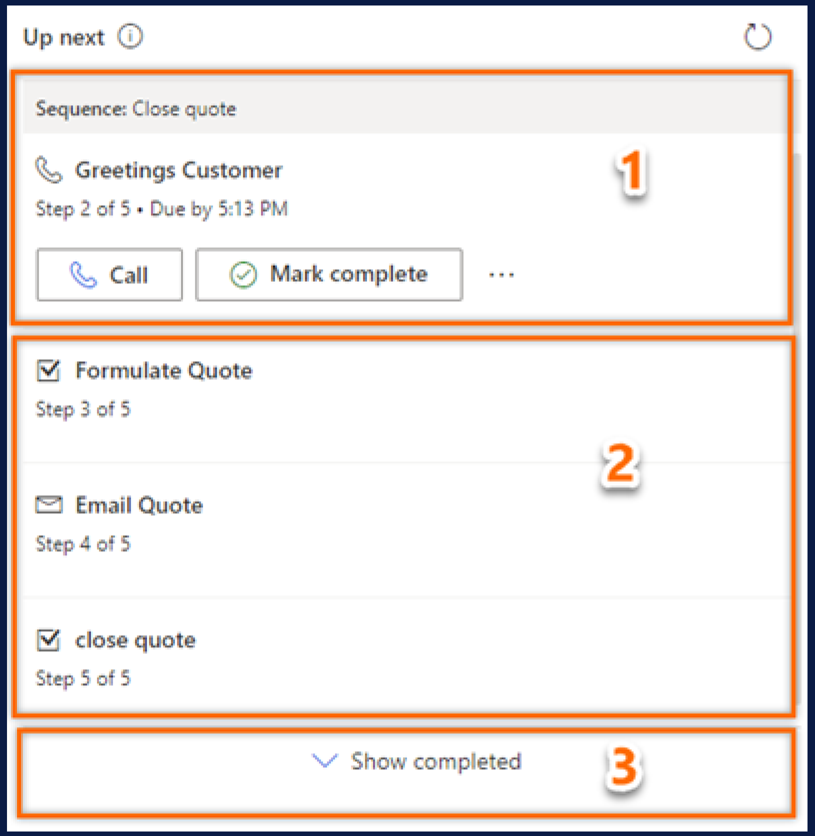
- ✓ Supported activities are email, phone call, LinkedIn, meeting and task
- ✓ Activities can be added manually via the timelines of records or automatically via sequences
- ✓ Instant or scheduled bulk emails can be sent

Learn more on prioritized work list capabilities
https://docs.microsoft.com/en-us/dynamics365/sales/prioritize-sales-pipeline-through-work-list

Up next widget

Understand the features of Up next widget

#	Feature	Description
1	Current activity	The current activity is a task that you must complete or skip to go to the next activity, which moves the record closer to completion. To perform an action such as making a phone call or sending an email, select the action icon displayed in the activity. Activity can be skipped it not relevant to the record.
2	Upcoming activity	The upcoming activity is view-only, and you can't perform an action. The upcoming activity is displayed so you know what activity will appear next when you complete the current activity.
3	Completed activities	The completed activities are the activities that are marked as complete or skipped for a record. To view the completed activities list, select Show completed. The section expands to display the list of completed activities with details such as whether the activity was completed or was it skipped, with date and time. You can't perform any actions on these tasks; they're view-only.



Up next widget

Connect with customers using up next widget

With the up next widget activities can be completed without switching context

- ✓ Make phone call using widget or worklist card 💡 Can use Teams calls (in preview) or external phone service
- ✓ Send email using widget or worklist card
- ✓ Teams meeting can be joined using widget or worklist card
- ✓ Activities can be skipped or snoozed
- ✓ Will display activities created from sequences or manual activities sorted by due date

Learn more on connect with customers using up next widget
https://docs.microsoft.com/en-us/dynamics365/sales/connect-with-customers

Add the up next widget to a custom form

- ✓ By default, the widget is available in sales insights, lead and opportunity forms
- ✓ The widget can be added to custom forms

Learn more on how to add up next widget to a custom form
https://docs.microsoft.com/en-us/dynamics365/sales/add-upnext-widget-form

Sequences and Segments

Sequences

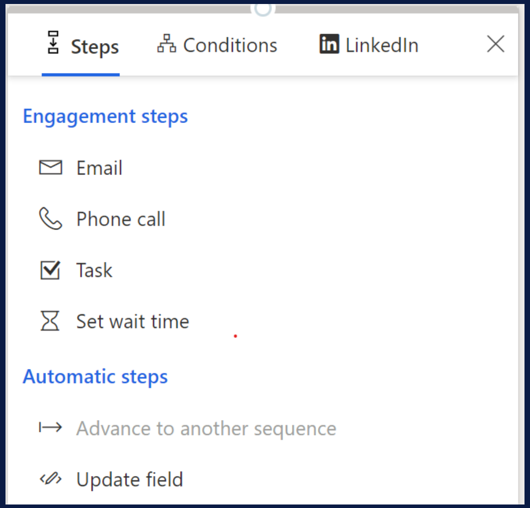
Understand benefits and how to manage sequences

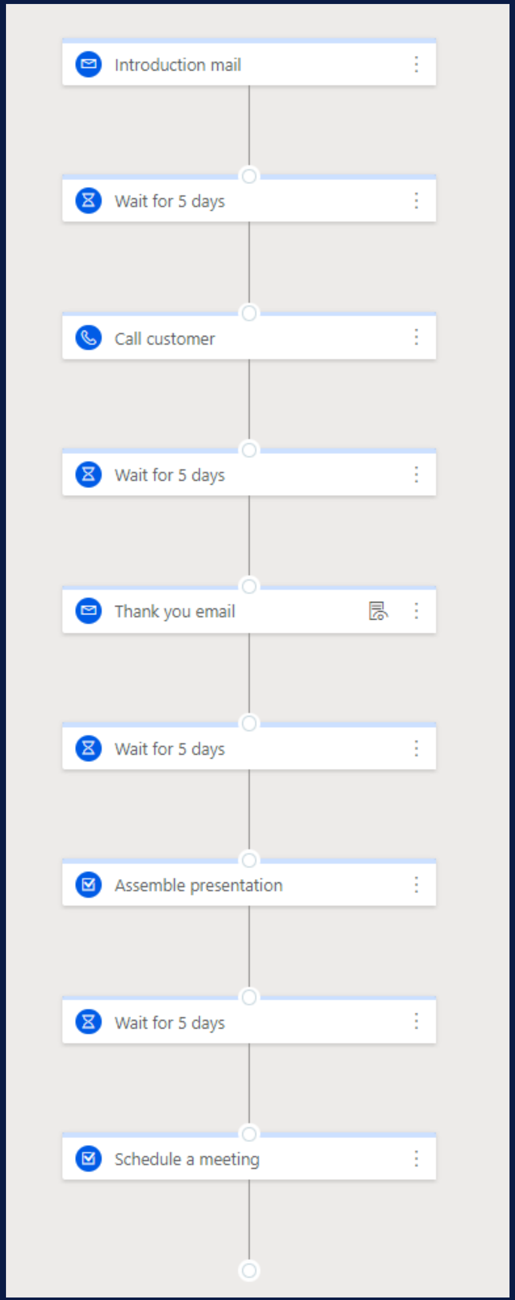
Overcome inconsistencies and enforce best practices

- With a sequence we define the activities the sellers should perform and the order to perform them in

Sequence Designer

- Create/activate/clone/edit/delete sequences
- Associate with tags for easy filtering
- Connect a sequence to existing records
- View records connected to sequences





Learn more on how to manage sequences: https://docs.microsoft.com/en-us/dynamics365/sales/create-manage-sequences

Sequence

Understand sequences steps and conditions

Use the Sequence Designer to create and manage sequences

- ✓ Security role of sys admin or sales manager needed
- ✓ Can include emails and make use of email templates
- ✓ Adaptive sequences can have wait time, conditions, switch to another sequence and update records
- ✓ Branching conditions can be email opened, recipient replied, link was clicked, advanced email conditions, simple or complex entity criteria and business process flow stage criteria
  - Make sure Sales Insights Adaptive sequence timeout flow is enabled for using conditions
  - Make sure Email engagement is enabled for using email conditions
- ✓ Use sequence stats to asses sequence success rates and avg duration

Learn more on how to create a sequence
https://docs.microsoft.com/en-us/dynamics365/sales/create-and-activate-a-sequence

Learn more on how to enable conditions in sequences
https://docs.microsoft.com/en-us/dynamics365/sales/adaptive-sequence

Segments

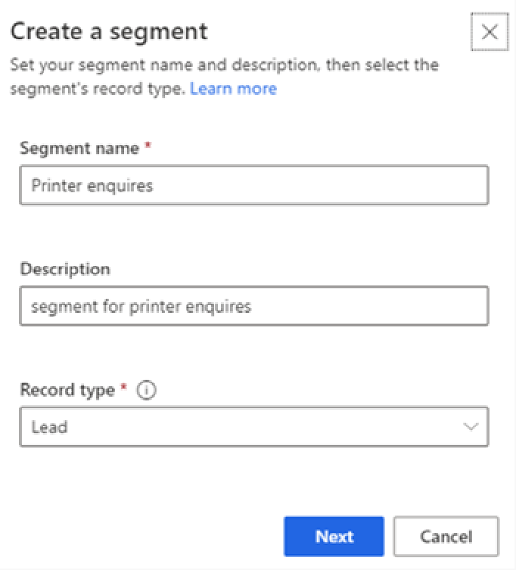
Understand benefits of segments

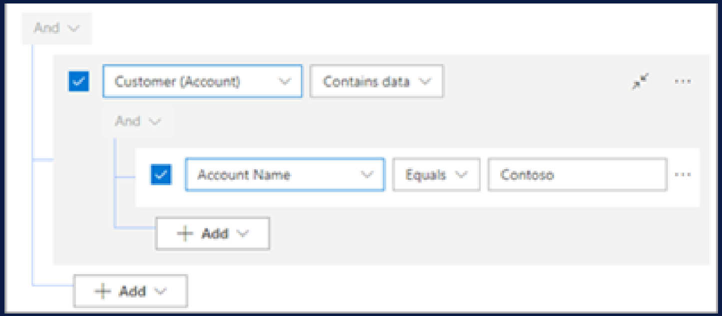
Group records based on conditions

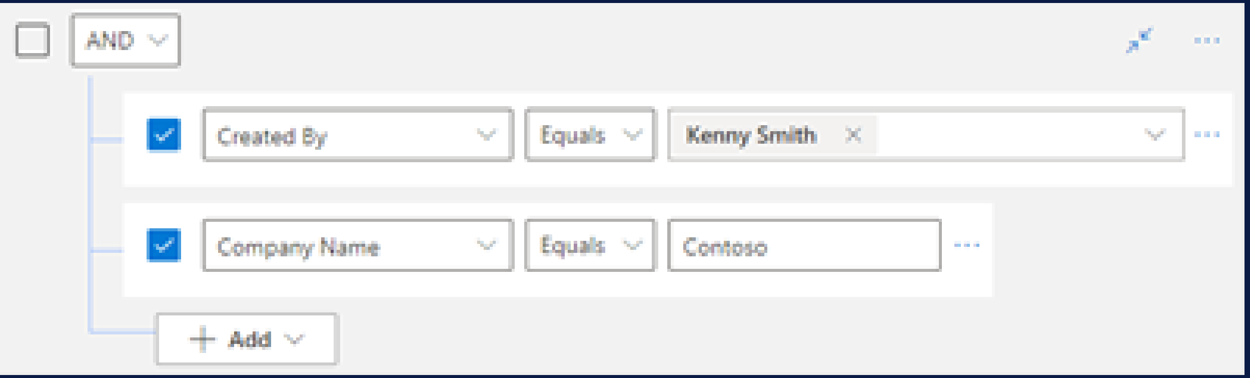
- With a segment we define a collection of records using a filtering criteria. e.g., leads with country being France

Segment Designer

- Define simple or complex criteria
- Create/activate/deactivate/edit/delete sequences
- Connect a segment to a sequence
- Connect a segment to an assignment rule
- Simulate segment criteria results







Learn more on how to manage segments: https://docs.microsoft.com/en-us/dynamics365/sales/create-and-activate-a-segment

Segments

Understand segments criteria

Use the segments designer to create and manage segments

✓ Security role of sys admin or sequence manager needed
✓ Available record types to group in segments are those configured during setup of sales accelerator
✓ Segment criteria can use related entities and groups with and/or operator
✓ Simulate displays records that currently fulfil the criteria segments apply to future created records

Connect segments with sequences

✓ Once the segment is activated, it can be associated with sequences
✓ A sequence should be activated before associating it with a segment
✓ A segment can only be connected with one sequence while a sequence can connect to multiple segments

Learn more on how to manage segments
https://docs.microsoft.com/en-us/dynamics365/sales/create-and-activate-a-sequence

Sequences & Segments

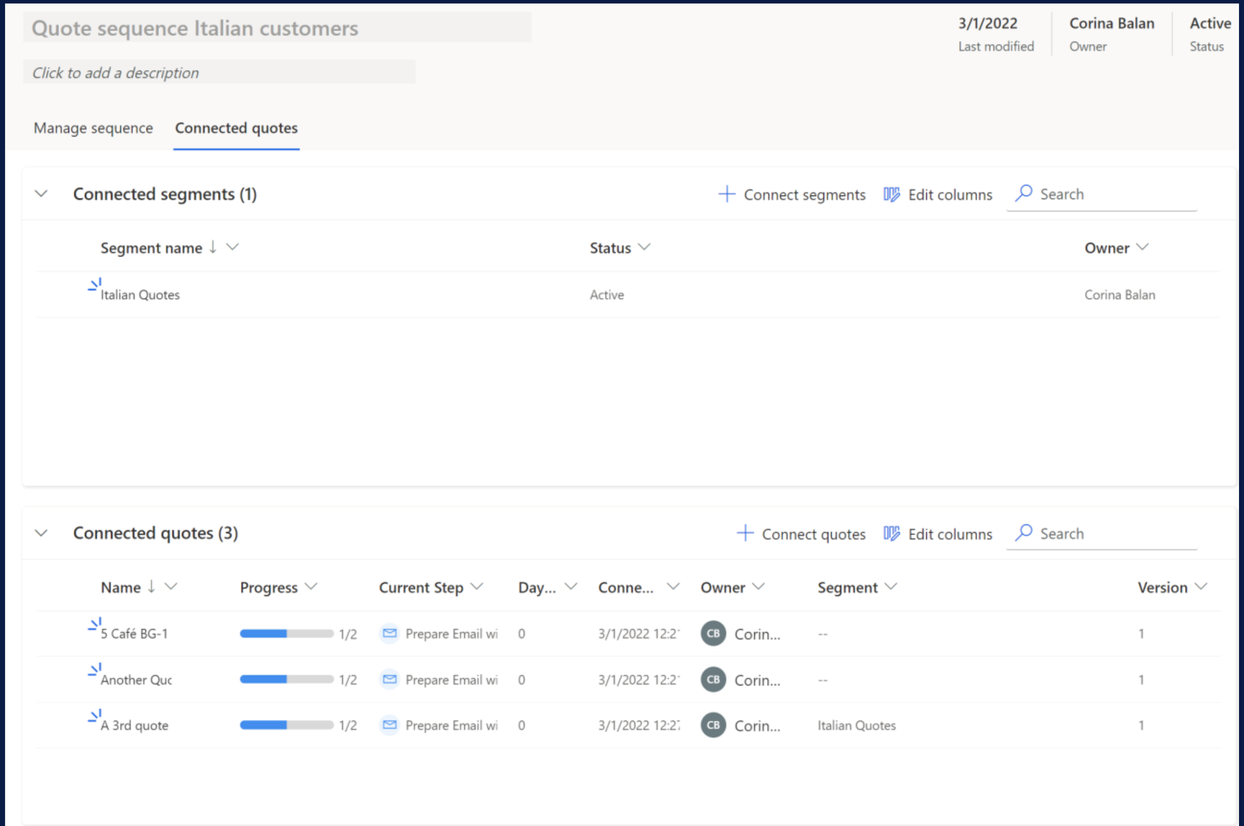
Connect sequences to records using segments

Connect records to sequences automatically by using Segments or Power Automate

e.g., all leads from France are associated with a sequence that start with an introduction email followed by a meeting

e.g., leads from Italy are associated with a sequence that starts with a phone call followed by an email. Leads from France and leads from Italy are 2 different segments.

Connect records to sequences manually individually or in bulk by using the sequence designer or through the forms and views of records e.g. lead or opportunity views or forms



Learn more on how to connect sequences to records: https://docs.microsoft.com/en-us/dynamics365/sales/connect-a-sequence-to-records

Assignment Rules

Assignment Rules

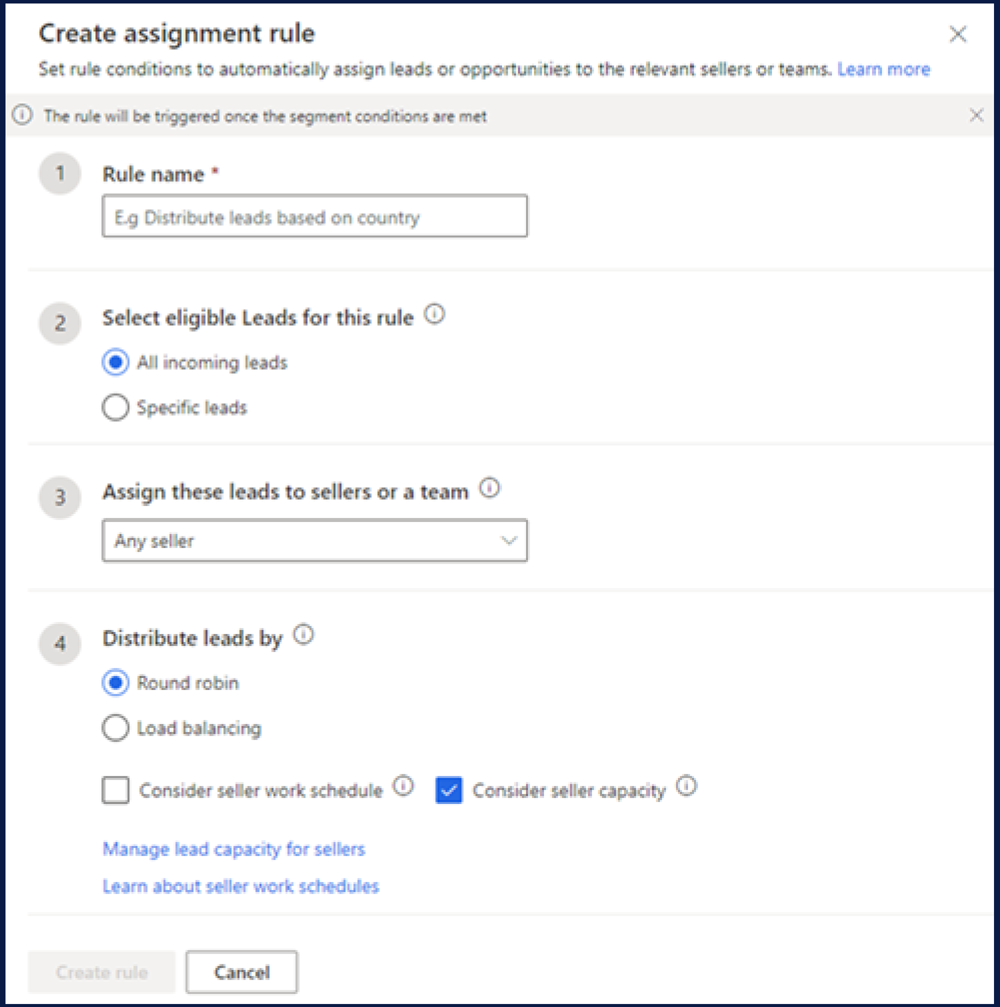
Understand benefits of assignment rules

Assign new leads or opportunities automatically

- With an assignment rule we define a criteria for new records, to whom to assign these (seller or teams) by using a round robin or load balancing distribution. e.g., new leads with country being France should be assigned in a load balancing distribution to the sellers with territory France

Assignment Rules Designer

- Create/activate/deactivate/edit/delete assignment rules
- Segments and custom criteria can be applied
- Manage sales teams
- Manage seller attributes
- Consider seller schedule (Outlook or CRM calendar) and capacity



Learn more on how to get started with predictive models: https://docs.microsoft.com/en-us/dynamics365/sales/digital-selling#lead-and-opportunity-scoring

Assignment Rules

Understand how to use assignment rules for routing

Manage sales teams

- ✓ For assignment one or multiple specific sellers can be selected or a specific team
- ✓ Sellers can be shortlisted through simple or complex criteria using user data or attributes that can be used only as an assignment criteria 💡 Common attributes are based on territory/Geography, on specialization, product interest and score
- ✓ Choose eligible roles for record assignment and use advanced filters to bulk associate or remove attributes to sellers
- ✓ Seller capacity can be defined across leads and opportunities e.g., max 10 leads and opportunities can be assigned to a seller at any given time. 💡 Unassigned leads or opportunities are available via Monitoring tab in the assignment rules designer

Learn more on managing sales team https://docs.microsoft.com/en-us/dynamics365/sales/manage-sales-teams

Round robin distribution

- ✓ Assigns the record to the matched seller that was assigned a lead least recently

Learn more on round robin distribution https://docs.microsoft.com/en-us/dynamics365/sales/understand-lead-distributions-assignment-rules

Load balancing

- ✓ Assigns the record to the matched seller with maximum available capacity

Learn more on load balancing distribution https://docs.microsoft.com/en-us/dynamics365/sales/understand-lead-distributions-assignment-rules#load-balancing

Lead and Opportunity Scoring

Lead & Opportunity Scoring

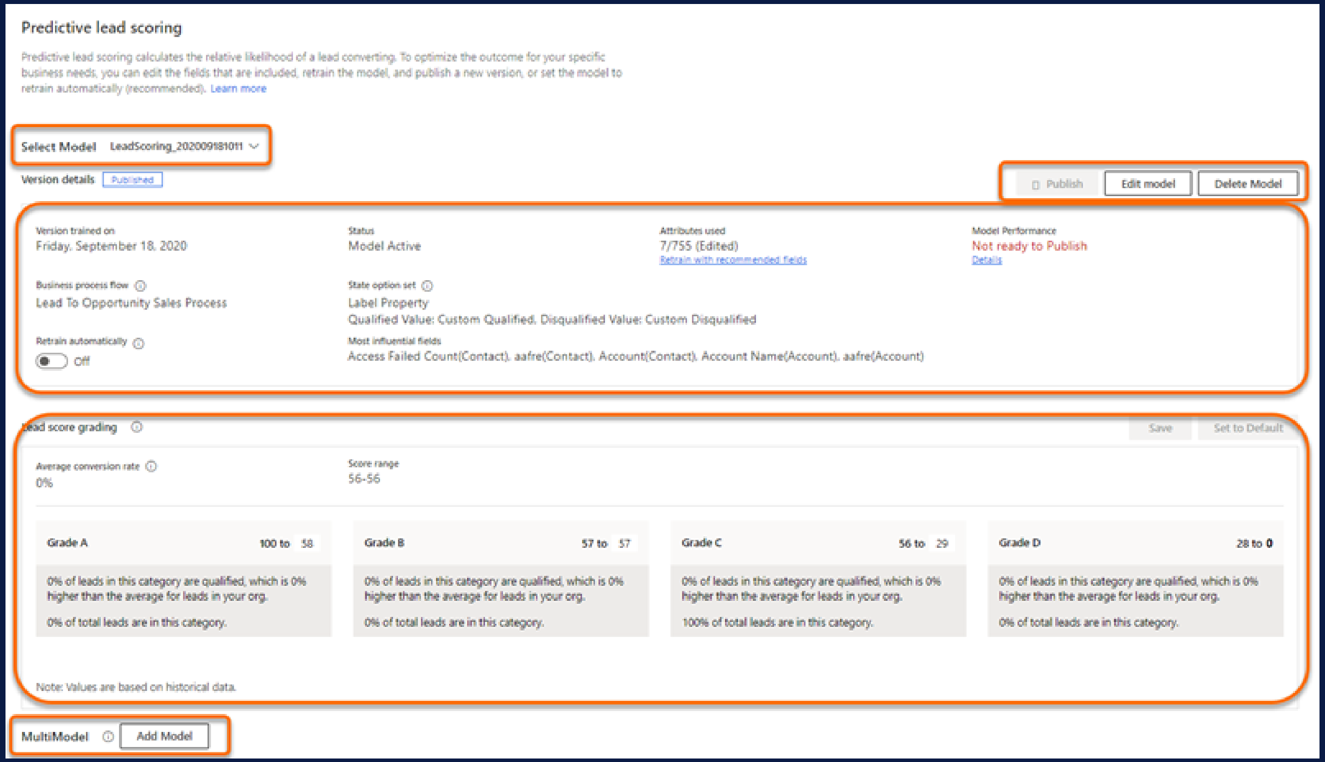
Understand benefits of predictive model

Benefits

The score applied to leads and opportunities by predictive machine learning models, helps sellers prioritize leads to achieve higher qualification rates and prioritize opportunities with the highest chance of win. The scores are visible in views including prioritized work list and forms.

Requirements to get started

- Minimum 40 qualified and 40 disqualified leads within the past 18 months
- Minimum 40 won and 40 lost opportunities within the past 18 months
- For testing purposes, the sample data can be added (it includes scored leads and opportunities)

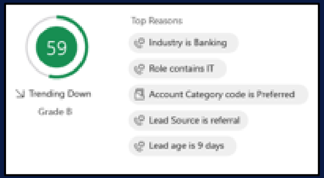


Learn more on how to setup predictive scoring: https://docs.microsoft.com/en-us/dynamics365/sales/digital-selling#set-up-lead-and-opportunity-scoring

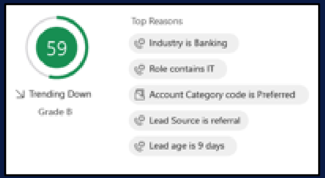
Lead & Opportunity Scoring

Understand benefits of predictive model

Predictive Lead Scoring
Prioritize your leads

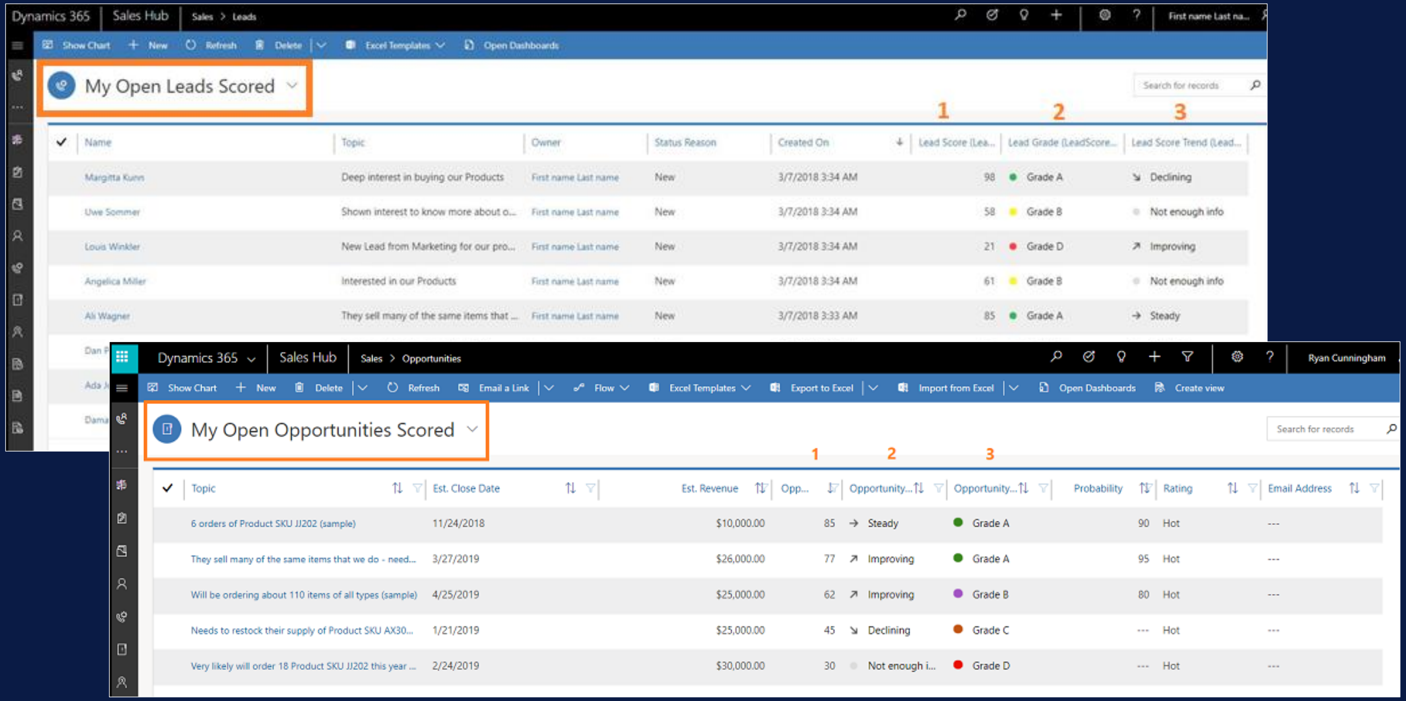


Predictive Opportunity Scoring
Prioritize your opportunities



Predictive lead scoring provides a list of leads and opportunities with different parameters including score, grade, and score trend.

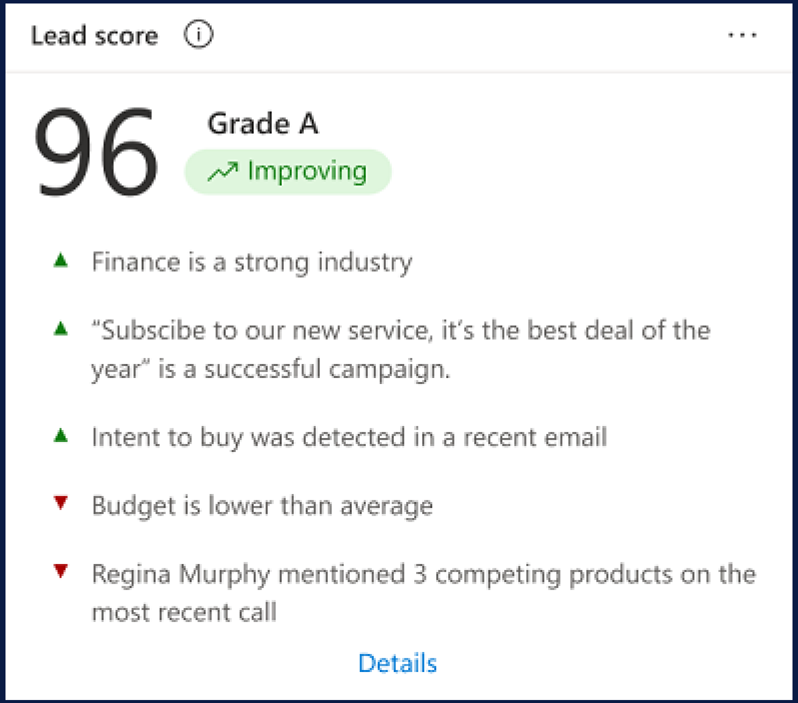
The score card displays the scoring model parameters that influenced the score calculation by the AI predictive model.



Learn more on how to setup predictive scoring: https://docs.microsoft.com/en-us/dynamics365/sales/digital-selling#set-up-lead-and-opportunity-scoring

Predictive Lead & Opportunity Scoring

Understand how to use assignment rules for routing



Predictive model

- ✓ Uses predictive machine learning to calculate scores for all open leads
- ✓ Scores 0-100 are divided in editable ranges and grades e.g., grade A is 100 to 60 but can be changed from 100 to 51
- ✓ Models can be retrained automatically or manually either to use fields (more) relevant for the organization or when the model gets old
- ✓ Up to 10 models can be applied with associated filtering criteria

Learn more on how to retrain the model
https://docs.microsoft.com/en-us/dynamics365/sales/configure-predictive-lead-scoring#edit-and-retrain-a-model

Score card widget

✓ Once the model is published, lead score and opportunity score widgets are added to the Sales insights forms. Can be added to custom forms.

Learn more on how to add a score widget to a form https://docs.microsoft.com/en-us/dynamics365/sales/configure-predictive-lead-scoring#add-the-lead-scoring-widget-to-a-form

Resources

Resources

Digital selling capabilities in Sales Enterprise

Useful to review to understand capabilities available for enterprise customers and limits

https://docs.microsoft.com/en-us/dynamics365/sales/digital-selling

Dynamics 365 Sales Premium

Useful to review to understand all the features available for premium customers

https://docs.microsoft.com/en-us/dynamics365/sales/overview#dynamics-365-sales-premium

Sales Accelerator Videos

Make sure you don't miss the brand-new setup videos shared with customers here: Digital selling | Microsoft Docs

Overview: https://www.microsoft.com/en-us/videoplayer/embed/RWQCj0

Sales accelerator setup: https://www.microsoft.com/en-us/videoplayer/embed/RWQCjf

Teams collaboration setup: https://www.microsoft.com/en-us/videoplayer/embed/RWQEPI

Conversation intelligence setup: https://www.microsoft.com/en-us/videoplayer/embed/RWQzQI

Lead and opportunity scoring setup: https://www.microsoft.com/en-us/videoplayer/embed/RWQjwl

Thank you