

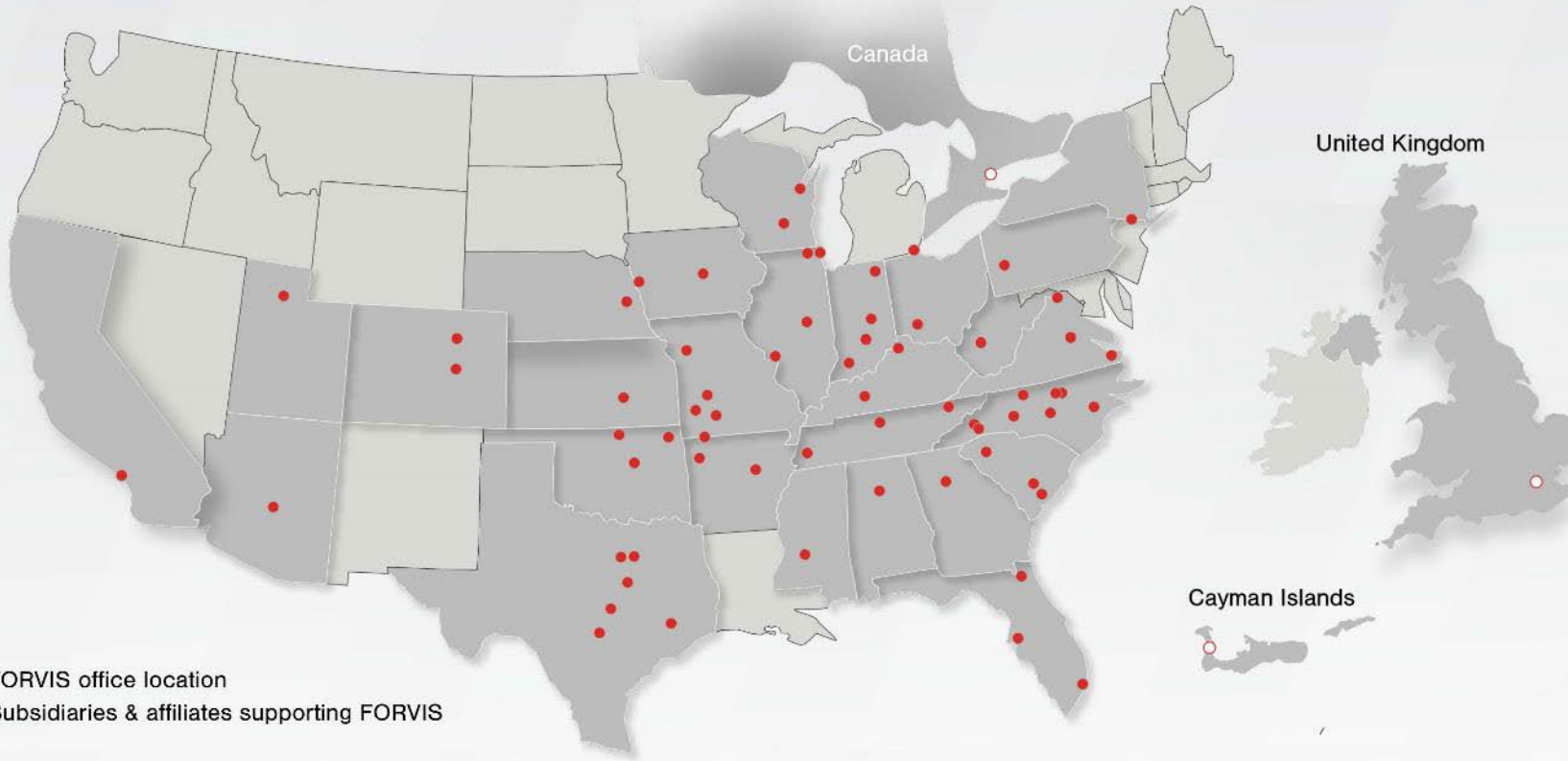
FORVIS[®]

Boosting Sales With Microsoft Dynamics 365

April 17, 2024



Global Presence & Reach



- FORVIS office location
- Subsidiaries & affiliates supporting FORVIS

Subsidiaries & Affiliates Supporting FORVIS

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**FORVIS was ranked number eight on Inside Public Accounting's 2022 annual ranking of accounting firms by revenue.

By the Numbers

Top 10
U.S. Public Accounting Firm *

27
States + Canada, U.K., & **
Cayman Islands

10+
Industries

68
Markets

500+
Partners & Principals

6,000+
Team Members



FORVIS is a member of Praxity™, an international alliance of independent accounting firms that offers multinational clients access to resources around the world.

**Services outside the United States are provided through our subsidiaries and/or affiliates supporting FORVIS.

Business Technology Solutions

FORVIS provides enterprise resource planning (ERP) and customer relationship management (CRM) platform analysis, design, implementation, upgrade, training, and support services.

Microsoft Partner

In addition, our Insights & Automation team provides business intelligence (BI) and robotic process automation (RPA) services. Our Marketing Consulting team provides marketing automation platform and marketing campaign support services.

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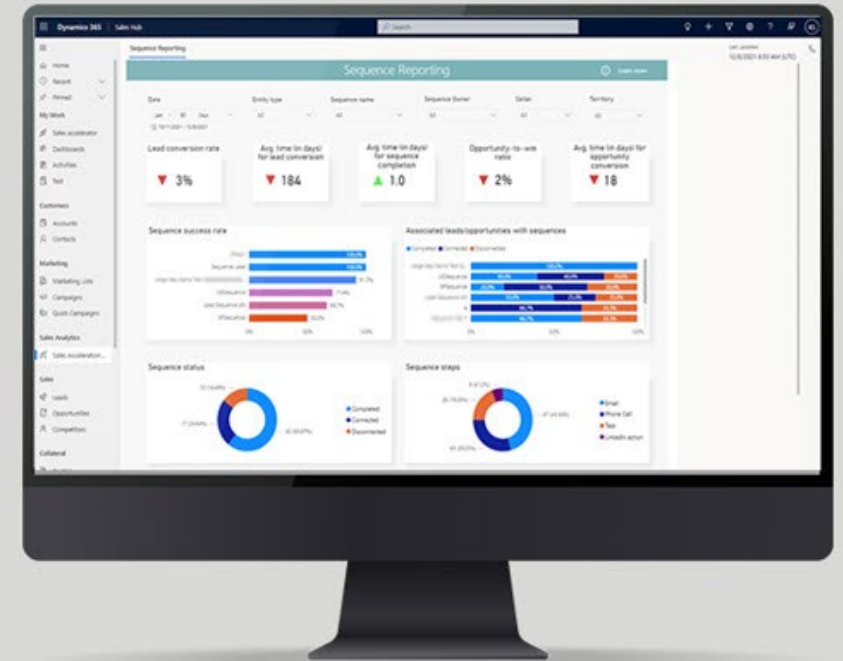
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Microsoft
Partner

Sage Partner

ORACLE
NETSUITE
Solution Provider

salesforce
PARTNER



From sales forecasting to financial reporting,
learn what CRM and ERP technologies can do.

Meet the Presenters



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Agenda

- Key actions to help drive user adoption
- Customization options to tailor CRM to your organizational needs
- Automation & insights in CRM
- Sales pipeline progression
- Questions

User Adoption & Implementation Success

- Clearly defined 'what' & clearly articulated 'why'
- Leadership engagement from top down that's very visible to users
- Define specific use cases & the personal/business value
- Make the CRM system part of daily activities
- Find early adopters & leverage them
- Prioritize & require user training
- Gradually evolve & enhance the system after the foundational/initial launch

User Adoption & Implementation Success

- Provide resources specific to your Dynamics 365 system for users to reference
- Work with an experienced advisor to continue to enhance the system over time

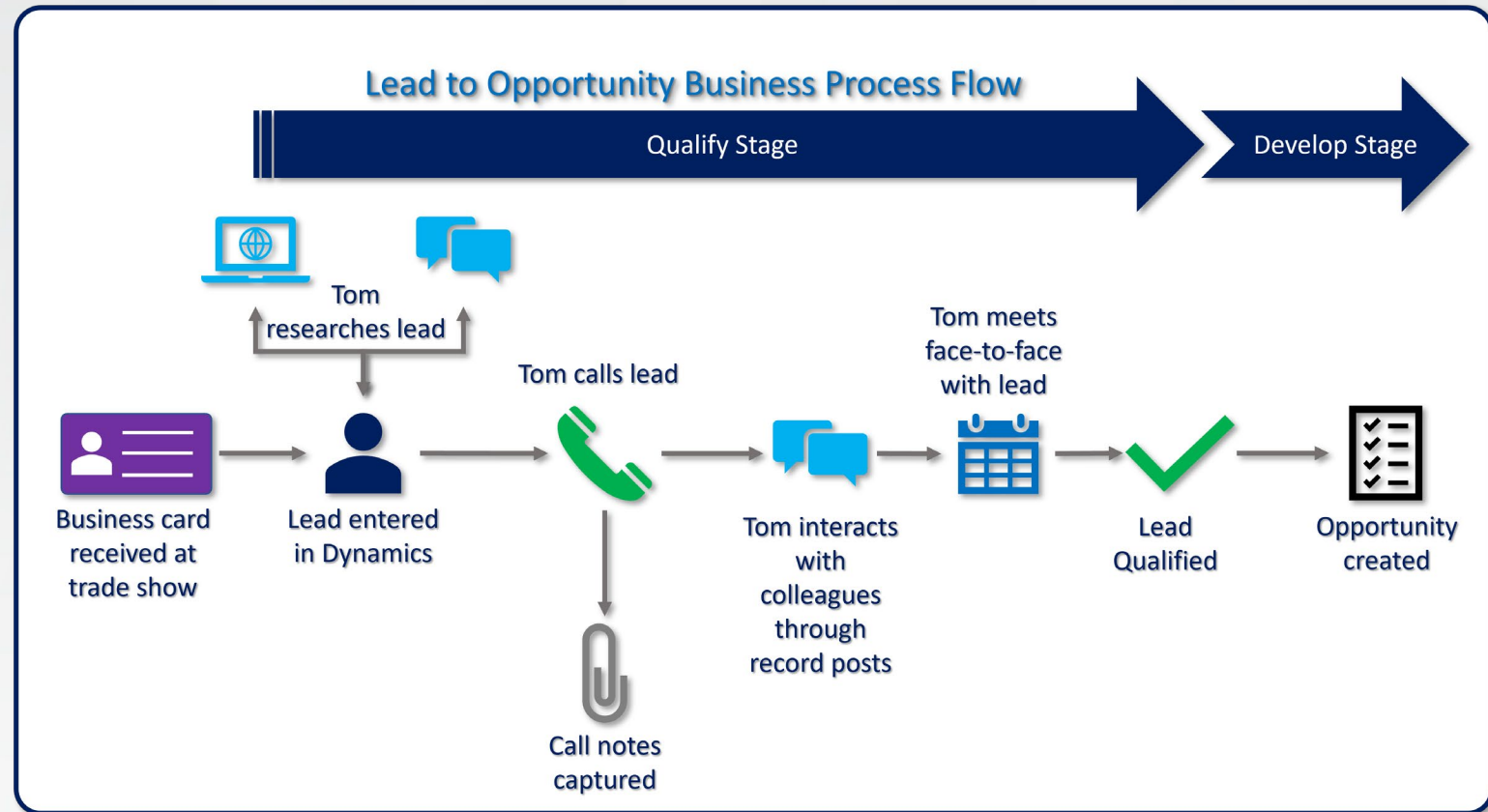


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Sales Process

- Create Leads
- Convert Leads into revenue generating Opportunities
- Close Opportunity as Won
- Sales reporting along the way



Lead

- Potential customers who have shown interest in your products or services
 - Expressed interest by requesting more information on your website
 - Started following your organization on social media
 - Responded to an advertising or email campaign
- An existing client or someone you've never done business with before
- The first step in the sales process

New Lead - Unsaved
Lead · Lead

Lead to Opportunity Sal...
Active for less than one mi...

Qualify (< 1 Min)

Develop

Propose

Trade Show Lead Source

Warm Rating

New Status

Summary Details Files

Contact

Topic	* Interested in purchasing ...
First Name	+ Steve
Last Name	* Campbell
Job Title	President
Business Phone	701 555-2819
Mobile Phone	701 555-2947
Email	steve@example.com

Up next

Upcoming activities will appear here

Assistant

Notifications

This record hasn't enable this conten

Almost there

Select Save to see your timeline.

Lead source can be used for reporting and strategic decisions

Capturing as much information as possible on the lead assists in qualification and future record creation

Lead Management Tools

- Duplicate detection rules
- Custom fields specific to your sales process
- Activities to track your communication with the lead

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Duplicate records found ✕

Merge to an existing record by choosing a record from matched list and clicking merge. To proceed without merging, click Ignore and save. [Learn more](#)

Current record

<input checked="" type="checkbox"/> Account Name ▾	Email ▾	Primary Contact ▾	Main Phone ▾	Website ▾
A Datum Comp...			425-555-0158	

Duplicates found: Account (1)

<input checked="" type="checkbox"/> Account Name ▾	Modified On ▾	Main Phone ▾	Website ▾
A. Datum Corporation	8/12/2023 6:12 PM	425-555-0158	http://www.adatum....

Lead Analytics

- Lead Views
- Lead Assignment
- Lead Focused View
- Activities to track your communication with the lead

The screenshot displays the Microsoft Dynamics 365 Lead Analytics interface. On the left, a list titled 'My Open Leads' shows several leads with their names, roles, and scores. The lead 'Jabex Parker' is highlighted. On the right, the detailed view for 'Jabex Parker' is shown, including contact information, a lead score of 96 (Grade A, Improving), and a sales process timeline with steps: Qualify, Develop, Propose, and Close. The 'Up next' section lists activities like 'Introduction call' and 'Share product details'. The 'Timeline' section shows recent communications, including an email from Harry Brown and an appointment from Hannah Anderson.

Name	Score
Jabex Parker Sales Manager • Proseware Inc	98
Winford Asher Cafeteria Manager • Fabrikam Inc.	95
Kenya Brady Store Manager • Consolidated Me...	94
Gerald Stephens Cafeteria Manager • Alpine Ski House	92
Ivan Cashin Purchase Specialist • Northwind Traders	91
Hale Griffiths Facility Manager • Northwind Traders	90
Harriet Parrish Cafeteria Manager • Lucerne Publish...	88
Rachel Michael Purchasing Director • Alpine Ski Ho...	86
Hillary Reyes	84

Jabex Parker
Lead - Lead

8/29/2022 Est. Close Date | \$15,000.00 Est. Revenue | In progress Status | Daisy Phillips ... Owner

Lead sales process: Active for 4 days

Qualify (checked) | Develop | Propose | Close

Contact Information

First Name	Jabex
Last Name	Parker
Job Title	Sales Manager
Account Name	Proseware Inc
Email	jabexparker@prosewareinc.com
Business Phone	(252) 555-0126
Mobile Phone	(+1) 555-0124-339

Lead score

96 Grade A Improving

- ▲ Security is a strong industry
- ▼ Budget is lower than average
- ▲ Intent to buy was detected in a recent email

Up next

- Sequence: New deals proposal for prospects coming from ...
- Introduction call (Step 1) • Due by 8/22/2022 by 10:30 AM
- Share product details (Step 2)
- Create a task (Step 3)

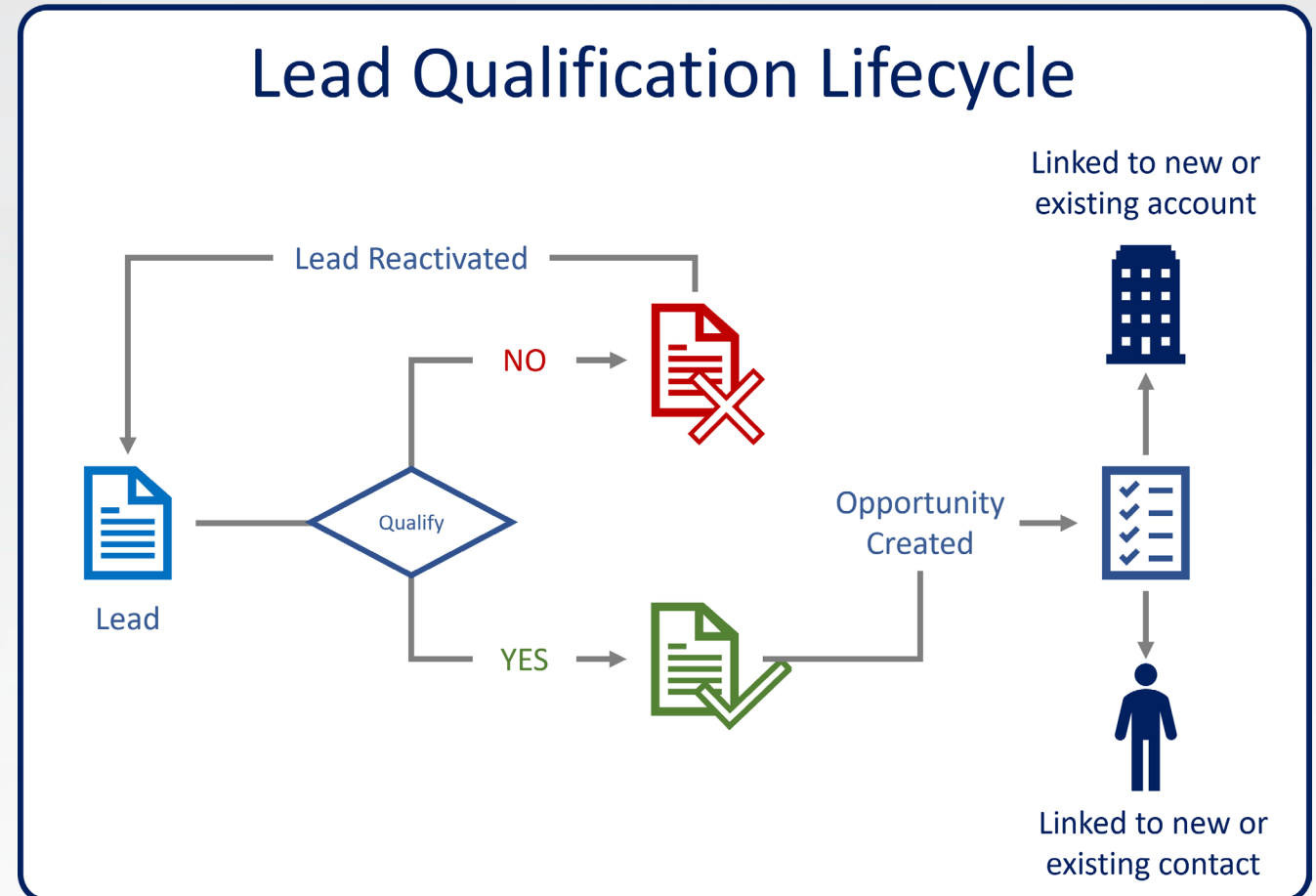
Timeline

- Email from Harry Brown: Verify meeting next week (8/20/2022 2:11 PM)
- Appointment from Hannah Anderson

Lead to Opportunity

- After a lead meets your organization's qualification criteria, the record can be qualified as an Opportunity. If the criteria isn't met, the record can be disqualified with the ability to reopen later if needed
- **Opportunities** in Dynamics 365 must be associated with an Account or a Contact
- Companies are created in Dynamics 365 as **Account** records
- Individual people are created in Dynamics 365 as **Contact** records

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Opportunity

- An existing client or someone you've never done business with before
- The Opportunity is created when your lead or existing client is almost ready to buy
- Opportunities are the second step in the sales process. As a result, Opportunities allow you to track more specific details than Leads

The screenshot displays a CRM interface for an Opportunity record titled "5 Café BG-1 Pro Grinders". The record is in the "Qualify (18 D)" stage of a sales process. The interface includes a top navigation bar with actions like Save, New, Refresh, and Assign. A red callout box at the top center states: "Business Process Flow provides guidance throughout the sales life-cycle." Below this, a horizontal timeline shows stages: Qualify (18 D), Develop, and Propose. A second red callout box on the right says: "Assistant provides reminders on related events." Below the timeline, a "Summary" section lists fields like Topic, Contact, Account, and Currency, with a "Next Stage" button highlighted in blue. A third red callout box at the bottom center reads: "Each stage in the business process flow contains steps to be completed that assist in closing the opportunity." To the right, a "Timeline" section shows recent events such as a meeting and a task. At the bottom right, an "Assistant" panel shows a notification: "Opportunity's close date has passed 5 Café BG-1 Pro Grinders for Northwind Traders".

Opportunity Management

- Track activities such as client communication & internal action items using the **Timeline**
- Use the **Assistant** to get a summary of what's going on with the Opportunity upon navigating to the record
- Close Opportunity as Lost if the sale doesn't continue. Otherwise, the Opportunity can be closed as Won so you can proceed with the sales process

The screenshot shows the 'Timeline' section of an opportunity record. It includes a search bar, a note entry field, and a list of activities. A dropdown menu is open, showing options like 'Activity', 'Email', 'Meeting', 'Phone Call', 'Task', 'Customer Voice alert', 'Session', 'Note', and 'OneNote'. A red arrow points from a red callout box to the 'Email' option in the menu.

Adding activities are a great way to track interactions and/or tasks related to the Opportunity.

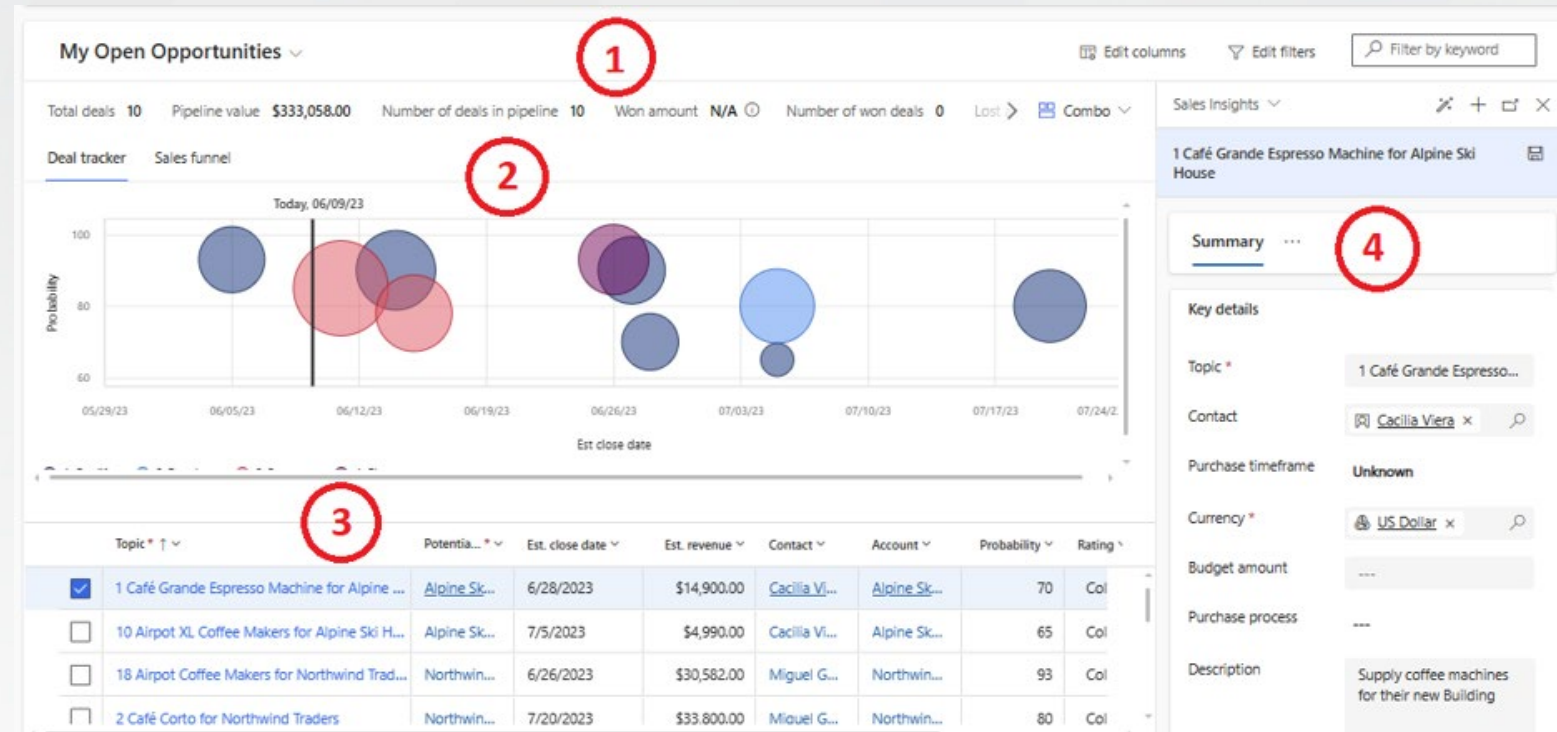
Assistant provides reminders on related events.

The screenshot shows the 'Assistant' notifications panel. It displays a notification titled '1 reminder' with a bell icon. Below it, a detailed notification states: 'Opportunity's close date has passed' and '5 Café BG-1 Pro Grinders for Northwind Traders'. A red box highlights the entire notification area, with a red arrow pointing from the callout box above.

The screenshot shows the top part of an opportunity record. It includes buttons for '+ New', 'Refresh', 'Close as Won', and 'Close as Lost'. Below these is the 'Lync subscription' header, followed by 'Opportunity Sales Process' (Active for 5 days) and 'Qualify (5 D)'. A red circle highlights the 'Qualify (5 D)' status. At the bottom, there are tabs for 'Summary', 'Product line items', 'Quotes', 'Files', and 'Related'. The 'Summary' tab is active, showing 'Topic: Lync subscription' and 'Contact: Maria Campbel'.

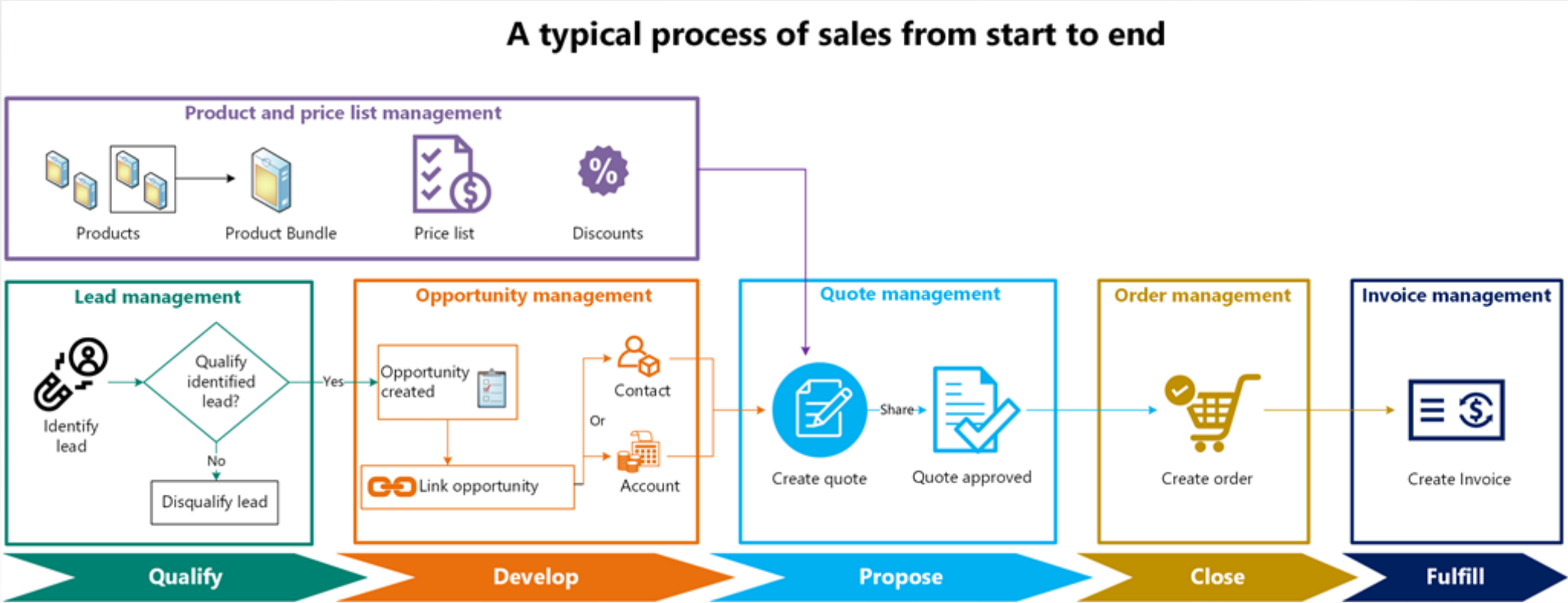
Sales Reporting

- Dashboards, Views, Export to Excel
- Opportunity Pipeline View: Opportunity score, estimated or actual close date, estimated or actual revenue, opportunity grade or pipeline phase
- Metrics, Charts, Inline Editing, & Summary Preview



Sales Process Continued

A typical process of sales from start to end



Dynamics CRM Automation Tools



Business Rules/
JavaScript



Dynamics CRM
Workflows



Power Automate
Cloud Flows



Custom
Development
(Code)

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Business Rules

- Low code alternative to JavaScript
- Runs when user opens form or changes a field value
- Can show, hide, change requirement level, & do more on a field

Account: New business rule

Condition
New Condition

Show Error Message
New Action

Show Error Message
New Action

Business Rule (Text View)

IF
THEN

Account Name equals "Jones"

Components Properties

Condition

Display Name
New Condition

Entity
Account

Rules + New

Rule 1

Source
Entity

Field
Account Name

Operator
Equals

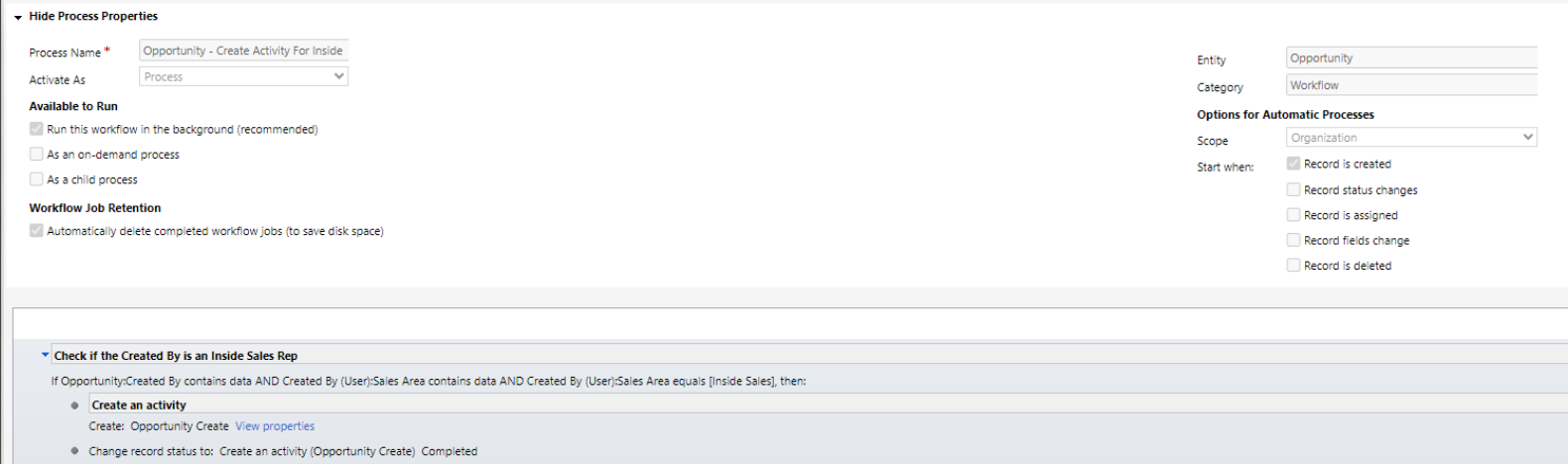
Type

Business Cases

- If the expected close of an Opportunity is in the past, recommend to the user they update the value while on the form
- If an Opportunity has a value over \$50,000, show a manager approval field & make it required

Workflows

- Run in the Dynamics 365 environment
- Triggered by record creation, deletion, or field updates
- Can create or update records & perform other actions, like sending emails



The screenshot shows the configuration interface for a workflow in Dynamics 365. The main section is titled "Hide Process Properties" and contains the following fields and options:

- Process Name ***: Opportunity - Create Activity For Inside
- Activate As**: Process
- Available to Run**:
 - Run this workflow in the background (recommended)
 - As an on-demand process
 - As a child process
- Workflow Job Retention**:
 - Automatically delete completed workflow jobs (to save disk space)

On the right side, there are additional settings:

- Entity**: Opportunity
- Category**: Workflow
- Options for Automatic Processes**:
 - Scope**: Organization
 - Start when:**
 - Record is created
 - Record status changes
 - Record is assigned
 - Record fields change
 - Record is deleted

Below these settings, a condition is defined:

- Check if the Created By is an Inside Sales Rep**
 - If Opportunity:Created By contains data AND Created By (User):Sales Area contains data AND Created By (User):Sales Area equals [Inside Sales], then:
 - Create an activity**
 - Create: Opportunity Create [View properties](#)
 - Change record status to: Create an activity (Opportunity Create) Completed

Business Cases

- When an Opportunity has been won, update the related account to “Customer” if they weren’t already
- When a Time Off Request is added to the system, automatically notify the user’s manager of the request with a link to the record

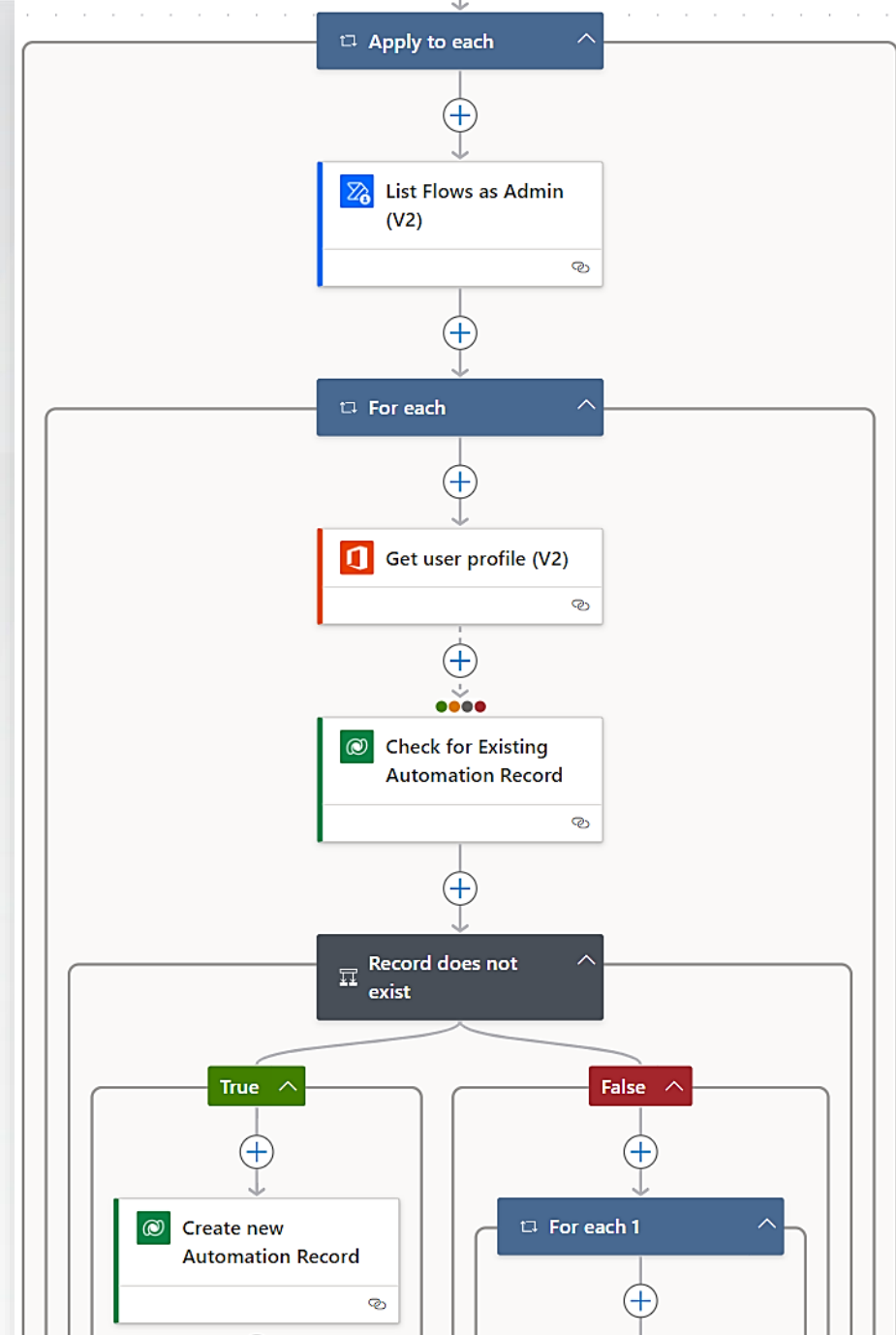
Cloud Flows

- Run in Power Platform & always in the background
- Can connect with multiple services, including external ones, & allow for more complex logic
- Can be run on a schedule or triggered from a Dataverse action
- Can access more tables & data than a Dynamics 365 workflow

Business Cases

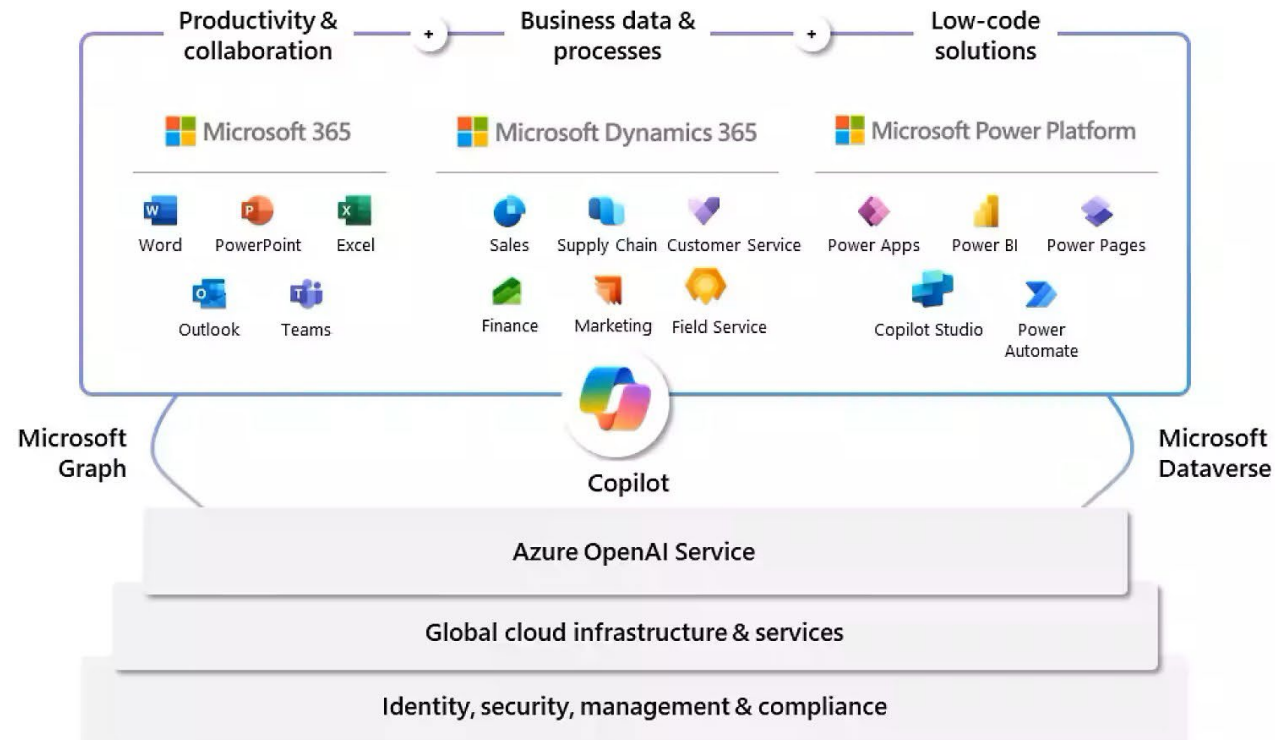
- Run a flow weekly that identifies overdue, open Opportunities for a user & sends them an email with an embedded table & links
- When an Opportunity is won, list out product categories from the catalog & associate them with the customer for future reporting
- When a new user is licensed, automatically assign them a base security role in CRM

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Microsoft Copilot

The blueprint for cross-organization impact



Copilot Email Insights

- Suggested email draft available directly in Outlook
- Summarize email chains & add notes to CRM records
- Identify customers & companies through email

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Key email info ⓘ

- **Kenny Smith** inquired about purchasing 10 coffee machines and requested the best price and any available discounts. 1 1
- Logan Edwards offered a 10% discount for bulk orders, bringing the total cost for 10 machines to \$900. 2
- **Kenny Smith** accepted the offer and requested information on the payment process and estimated delivery time. 3

✦ Ask Copilot to...

Draft an email ▾ ... 2 3

AI generated—please review 👍 👎

 Copilot

Chat Email (preview)

←




Draft with Copilot ⓘ

Write an email to thank Kenny Smith for showing interest in Contoso 3D printers

Dear Kenny Smith,

Thank you for expressing interest in Contoso 3D printers. We appreciate your consideration and are delighted to have the opportunity to assist you.

At Contoso, we pride ourselves on delivering high-quality 3D printers that are designed to meet the needs of our customers. Our printers are known for their reliability, precision, and ease of use. We offer a range of models to suit different budgets and requirements, ensuring that you can find the perfect solution for your business.

Add to email   

Copilot Record Summaries

- Uses the CRM audit history to identify recent changes to the record
- Identifies key fields & metrics that are helpful for the salesperson to know

Here is the opportunity summary for "[5 Café Lite Espresso Machines for A. Datum](#)":

- [Microsoft](#) is a new customer.
- We are actively discussing with [Heriberto Martin](#) about a new opportunity worth \$50,000.00 for [Airpot](#).
- The deal is at Develop stage and is estimated to close by 10/27/2023.



AI-generated content may be incorrect



Get latest news related to account

Call Insights

- Transcript automatically added to call identifying speakers
- Sentiment analysis to determine positive, negative, or neutral statements
- Suggested summary, notes, & action items
- Team & agent metrics to better understand trends

Call to Ivan Cashin - Gym membership

Overview **Notes** Action items Mentions

Transcript Search

Copy to clipboard

10 minutes ago NW

Executive summary:

- discovery call
- Interested in 100 licenses

Call minutes:

- Customer wants to use his free pass
- Customer is trying to shed 15 to 20 pounds
- Agent educated customer that we have programs designed for weight loss
- Customer wants to know how to achieve his goal of losing weight by the summer

Suggested notes Preview

Call highlights

- Customer wants to use his free pass
+ Add · 00:00
- Customer is trying to shed 15 to 20 pounds
+ Add · 00:18

See all

Action items

- Nancy Warner to send email about "some helpful information" to +353892678274.
+ Add · 02:17

Transcript

00:04 Nancy Warner: Hello **Ivan**, this is **Nancy** from **Dynamic fitness**.

00:08 Ivan Cashin: Oh hi.

00:10 Nancy Warner: I'm calling you **today** to find out if you've had a chance to use your **free pass** yet.

00:15 Ivan Cashin: No, not yet.

00:17 Nancy Warner: OK, that's no problem.

Request and complaint

00:18 Nancy Warner: Let me ask you what made you decide to download our **free pass**.

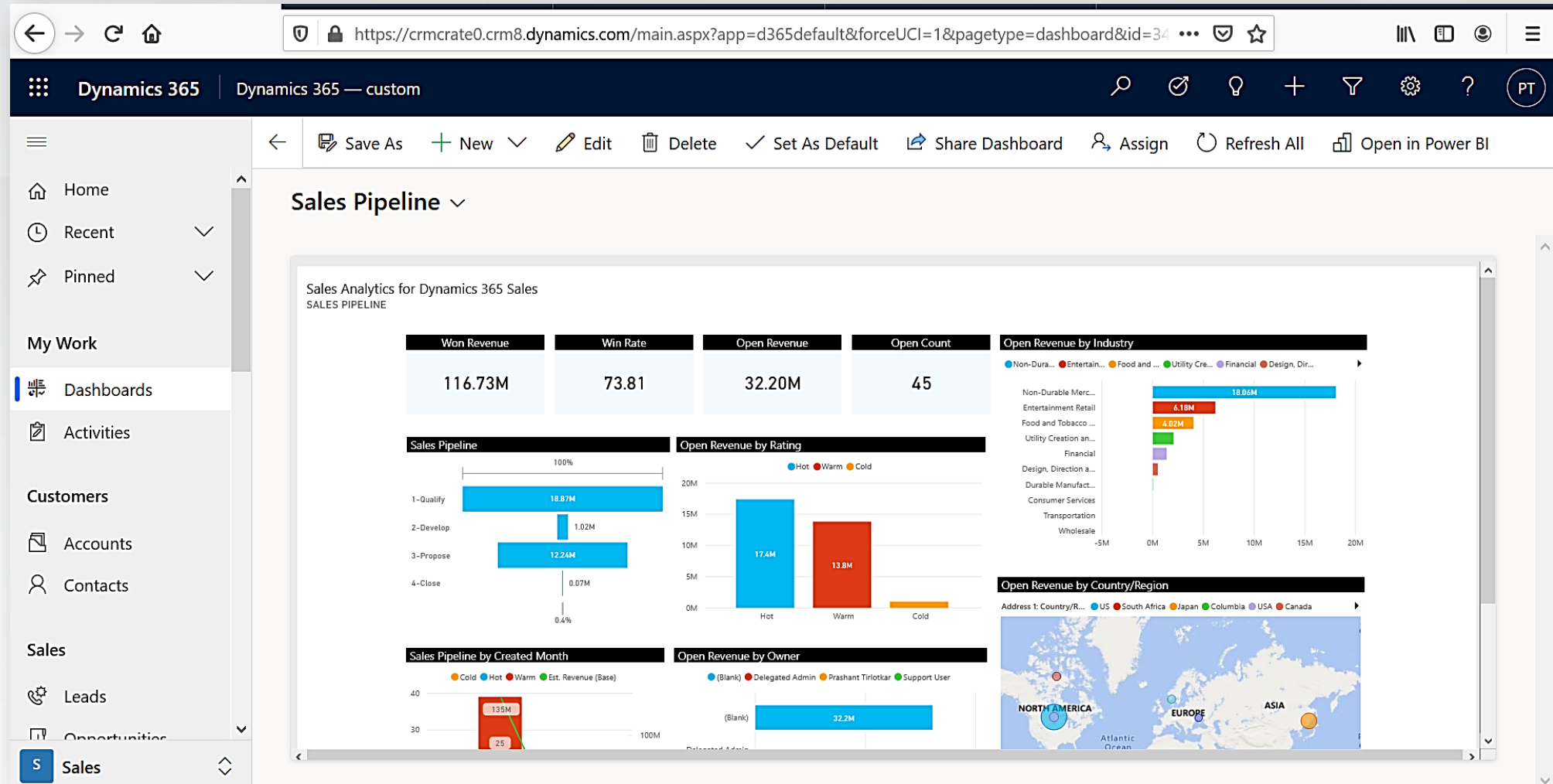
00:00 Greetings and in... Request and com... Closing

Nancy War... Ivan Cashin

Sentiment Positive Neutral Negative Comments (0)

00:00 / 02:40

Power BI Reporting





How to Choose Your CRM Partner Wisely

Software • November 17, 2022

Get tips on how to choose your CRM partner wisely. A reliable CRM partner can help you deliver successful business outcomes.



Microsoft Dynamics 365 Sales 101

Software • January 08, 2024

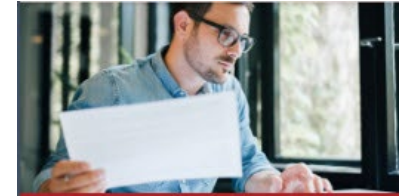
Watch this video for an overview and helpful tips for Microsoft Dynamics 365 Sales.



CRM Dashboards: A Modern Fortune-Telling Tool

Software • March 25, 2024

Discover how CRM dashboards can empower you to make informed decisions faster.



10 Tips to Help Improve CRM User Adoption

Software • January 11, 2023

Adopting a CRM system can help your organization create improved business development processes. Read on for tips to help improve CRM user adoption.



Are You Ready to Use CRM & Marketing Automation Together?

Software • October 07, 2022

Discover how using CRM and marketing automation together may benefit your organization.



How to Create a Dynamics 365 Sales Trial

Software • May 10, 2023

Learn how to create a Microsoft Dynamics 365 Sales trial in just a few simple steps. Also, explore the two trial types along with best practices.

Additional Resources

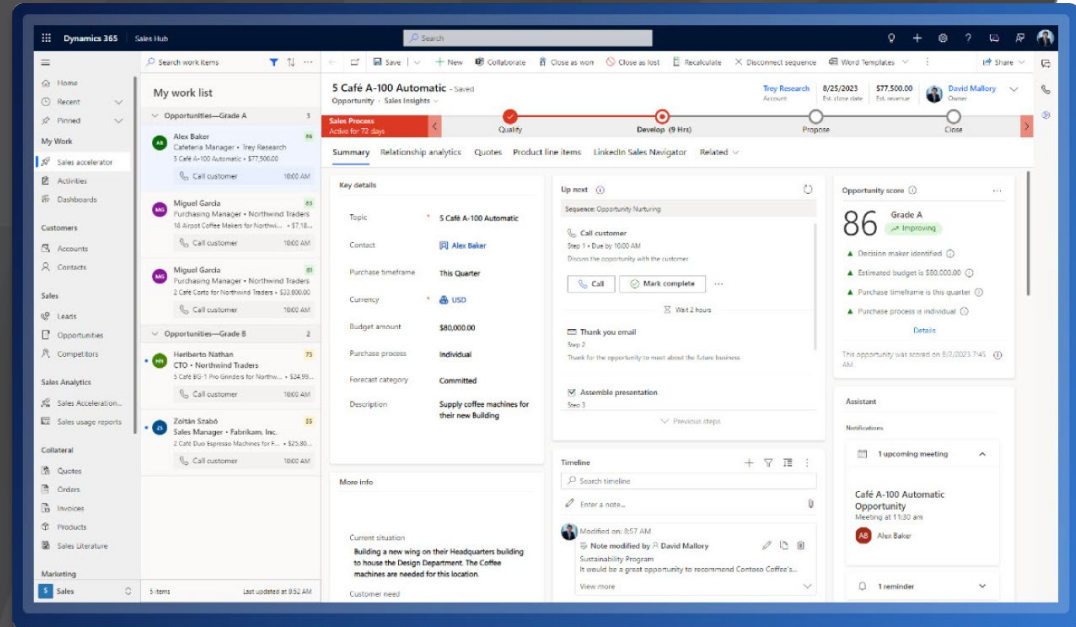


Questions?

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Assurance / Tax / Consulting