

UNLOCK YOUR CUSTOMER DATA

CRM & POWER PLATFORM CUSTOMER DAY 2023

Sales Features You May Not Know
Much About



Hi!

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What we'll cover

1. Sales Accelerator
2. Relationship Analytics
3. Notes Analysis
4. Conversation Intelligence
5. Lead Scoring
6. Who Knows Whom
7. Auto Capture



**But before we start, there's
something to mention**

AI is here...
and it's not stopping

Don't just take my word for it

Go to YouTube and look up:

- “Tom Scott AI”
- “Microsoft Copilot”
- “Tecman Talks Dynamics”

Sales Accelerator

My Work List

- The list of tasks where there's something to do
- They are not Activities
- Shows the record to work on

Things you'll recognise

- The Timeline
- The Details tab
- Sub-grids

Things you may not

- 'Up next'
- Relationship strength
- Lead score
- Who knows whom
- Sequences

Lead scoring

- Create a model that covers what's important
- Can add your own metrics
- Needs to be trained from your data
- 40 qualified and 40 disqualified Leads and/or Opportunities needed

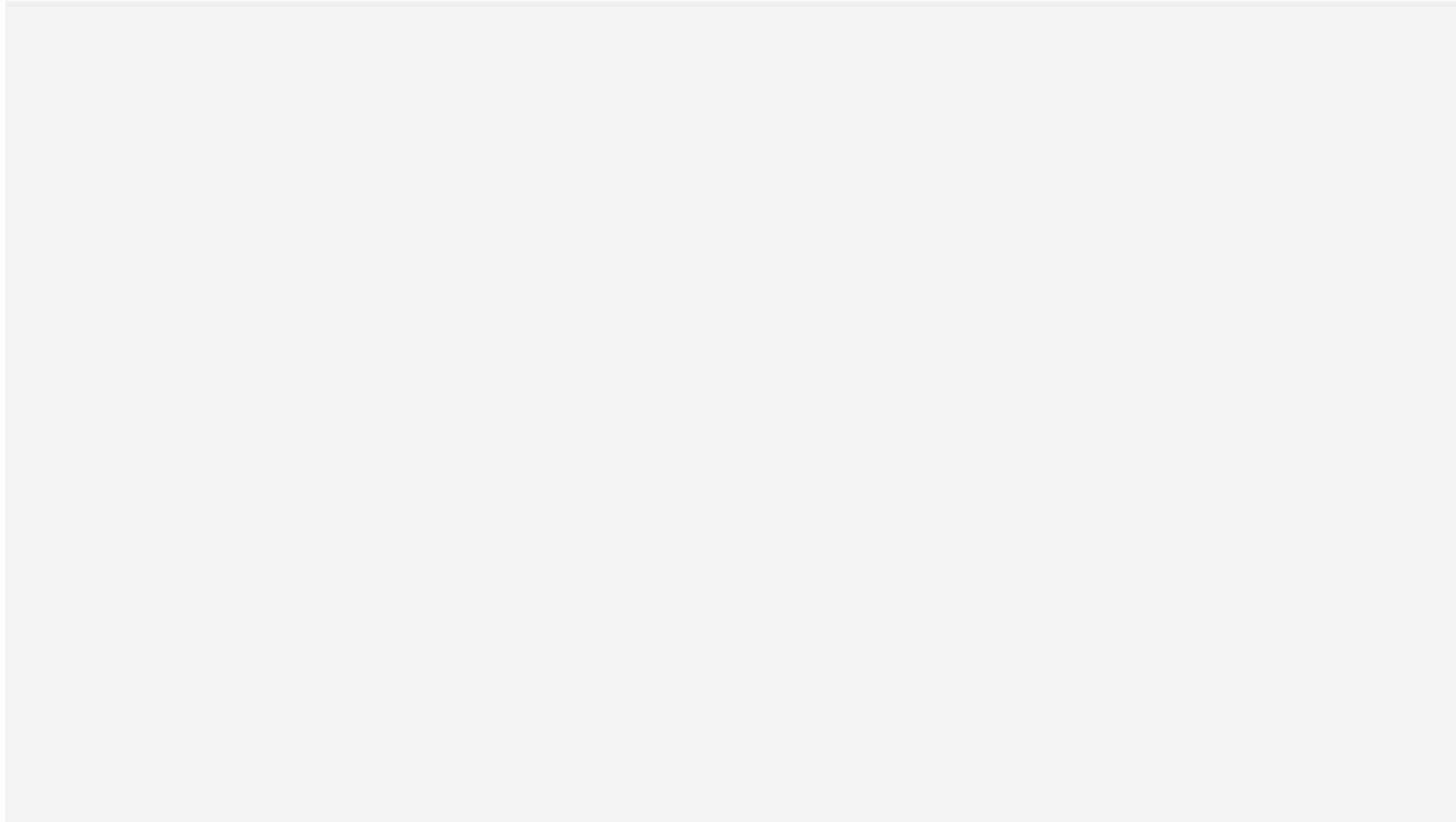
Who knows whom

- Examines emails, phone calls and meetings
- Shows up to 5 suggestions based on the strongest interactions
- Available to selected data centres
- You can opt out for your data

Auto capture (standard)

- Scans emails in Outlook to analyse interactions
- Scans the user's emails as well as all tracked emails
- Sorts items in the Timeline to push the most relevant to the top

Conversation Intelligence



Thank you.

