



nordic.  
summit

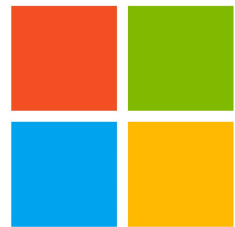
Making sense of Dynamics 365 Sales Insights

DIAMOND SPONSOR



The Digital  
**Neighborhood**

PLATINUM SPONSOR



Microsoft

## GOLD SPONSORS



## SILVER SPONSORS



## BRONZE SPONSORS





Feridun Kadir

Principal Consultant

Making sense of Dynamics

365 Sales Insights



# Feridun Kadir

Freelance Consultant, Expert CRM Services Ltd

First CRM exam was "Microsoft CRM Customization v1.2" in October 2003 – nearly 20 years ago!



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@fkcrm



[www.expertcrm.co.uk](http://www.expertcrm.co.uk)

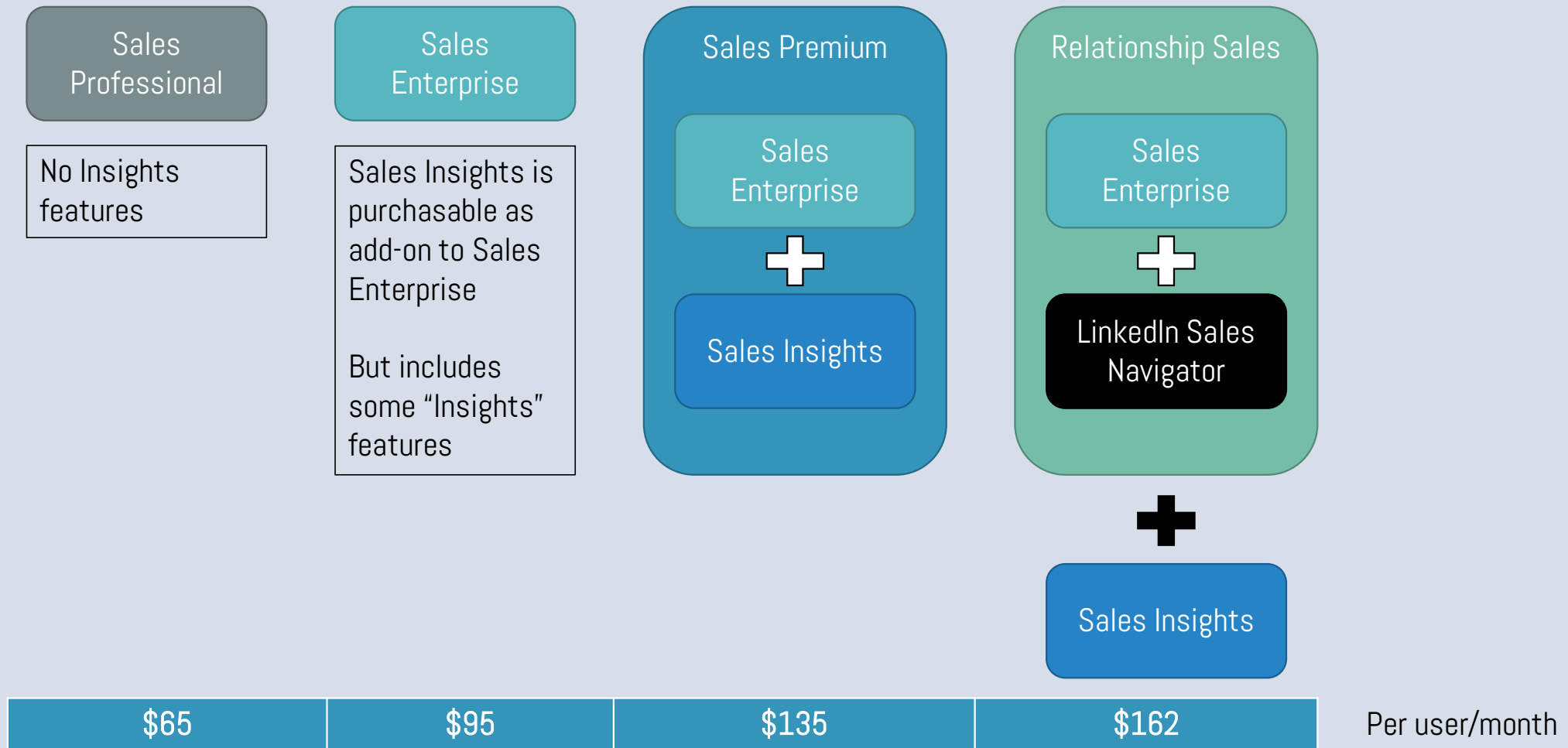


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## Agenda

- *Very* quick overview of licensing
- Feature comparison – Sales Enterprise and Premium
- Feature tour

# Dynamics 365 Sales Licenses



# Features by license

Area	Feature	Sales Enterprise	Sales Premium
Sales Accelerator	Workspace, Sequences, Segments, Assignment Rules	✓	✓ <sup>1</sup>
Assistant	Insight cards	✓	✓ <sup>2</sup>
Productivity	Conversation intelligence	✓	✓
	Auto capture, Email engagement	✓	✓
	Notes Analysis	✗	✓
Relationship insights	Analytics and health	✓	✓ <sup>2</sup>
	Basic Who knows whom	✓	✓
	Enhanced Who knows whom	✗	✓
Predictive models	Lead scoring, Opportunity scoring	✓	✓ <sup>1</sup>
	Premium forecasting	✗	✓

<sup>1</sup> extends capacity

<sup>2</sup> additional features



# Features with capacity limits

Feature	Unit	Sales Enterprise capacity	Sales Premium capacity	Purchasing Additional capacity
Business Card Reader	Scans per user/month <i>(pooled at tenant level)</i>	10	200	Additional user license
Conversation intelligence	<del>Hours per user/month <i>(pooled at tenant level)</i></del> As of March 2023 – unlimited hours	<del>3</del>	<del>10</del>	<del>Add-on: 1000 hours per tenant/month</del>
Sales Accelerator	Records connected to a sequence per environment/month	1,500	No limit	
Lead and Opportunity scoring	Records scored per environment/month	1,500	No limit	

## Features with capacity limits - rollover

- As per the licensing guide, capacity licenses require a minimum of a one-year subscription
- Monthly allotment is effectively an annual allowance
- For example:
  - Scoring capacity is 1,500 records/month/environment
  - This provides an annual allowance of 18,000 records
  - The annual allowance can be used at any rate – even all in one month
  - After the year, the allowance expires, and unused capacity is lost

# Enable Premium

The screenshot shows the Dynamics 365 Sales Hub interface. On the left, the 'Global settings' menu is expanded, showing options like Overview, Sales accelerator, Workspace, Sequences, Segments, Assignment rules, Assistant studio, Insight cards, Productivity, Conversation intelligence, Auto capture, and Email engagement. The main content area is titled 'Supercharge your sales with Premium'. It includes a description of premium capabilities, a checkbox for agreeing to terms and conditions, and buttons for 'Try Premium' and 'Contact us'. A red arrow points to the checkbox area with the text 'Check the box'.

**Supercharge your sales with Premium**

Accelerate sales, build stronger relationships, predict outcomes, and boost seller productivity with our full suite of premium capabilities. [Learn more](#)

Some premium features require sharing data with other Microsoft and Dynamics 365 services. Your use may require compliance with various laws and regulations. Data imported from other Microsoft services is subject to our [privacy statement](#).

☐ I agree to the [terms and conditions](#)

[Try Premium](#) [Contact us](#)

**Assistant (premium)**  
Customize, prioritize, and create new insight cards for your organization with the assistant studio. [Learn more](#)

**Notes analysis**  
Notes analysis suggests actions that sellers can perform based on interactions with customers. [Learn more](#)

**Relationship analytics**  
Prioritize customers using machine learning signals from Office 365 and Dynamics 365. [Learn more](#)

**Predictive lead scoring**  
Increase conversions by finding and prioritizing prospects who are most likely to buy. [Learn more](#)

**You're all set!**

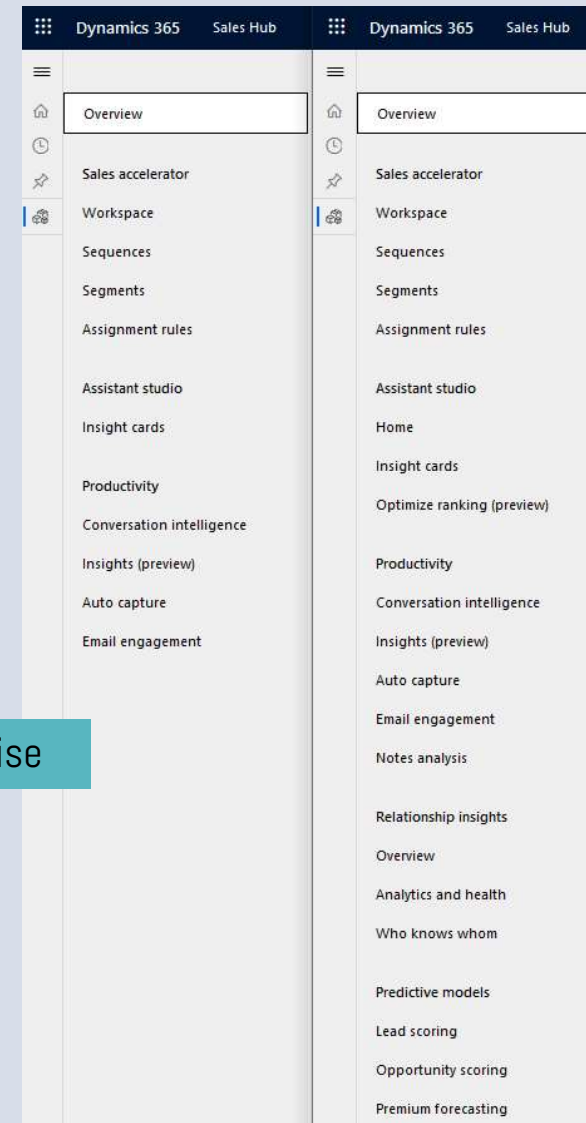
Start accelerating sales, building stronger relationships, predicting outcomes, and boosting productivity with our full suite of premium capabilities. [Learn more](#)

[Get started](#)

# Use Sales Insights features

Area	Feature	To Enable
Sales Accelerator	Workspace, Sequences, Segments, Assignment Rules	Configure
Assistant	Insight cards	Configure cards
Productivity	Conversation intelligence	Configure Teams and call storage locations
	Auto capture, Email engagement	Turn on
	Notes Analysis	Turn on
Relationship insights	Analytics and health	Turn on and configure
Predictive models	Lead scoring, Opportunity scoring, premium forecasting	Configure
	Connection Insights - Who knows whom	Configure

# Sales Insights setting in Sales Hub



Enterprise

Premium

Enterprise and  
Premium

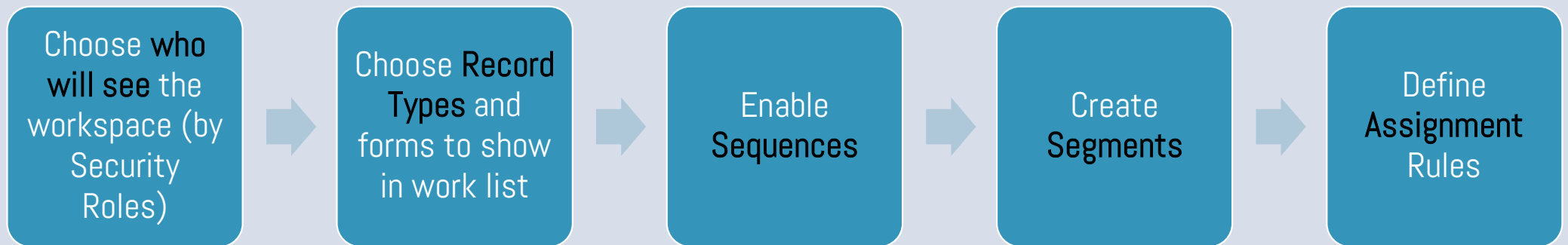
# Sales Accelerator

# What is Sales Accelerator?

- A workspace to view a prioritized list of tasks
- Help sales staff determine the next best customer to reach out to

The screenshot displays the Microsoft Dynamics 365 Sales Accelerator interface. On the left is a navigation pane with sections: 'My Work' (containing Home, Recent, Pinned, and Sales accelerator), 'Customers' (containing Accounts and Contacts), and 'Sales' (containing Leads, Opportunities, and Competitors). The 'Sales accelerator' option is selected. The main area is titled 'My work list' and shows a list of tasks for Wednesday, totaling 10. The tasks are: Kenya Brady (Store Manager at Consolidated Messenger, score 90) with an 'Introduction mail' due 8/30/2023 8:18 AM; Reuben Kidd (Cafeteria Manager at Proseware Inc., score 75) with an 'Introduction mail' due 8/30/2023 8:18 AM; Winford Asher (Cafeteria Manager at Fabrikam, Inc., score 90) with an 'Introduction mail' due 8/30/2023 8:18 AM; Harriet Parrish (Cafeteria Manager at Lucerne Publishing, score 62) with an 'Introduction mail' due 8/30/2023 8:18 AM; and Ivan Cashin (score 88). The right pane shows a detailed view for 'Kenya Brady - Saved' (Lead - Sales Trial). It features a progress bar for 'Lead to Opportunity Sale...' (Active for 54 hours) and a 'Qualify (54 Hrs)' stage. Below this are tabs for 'Summary', 'Details', 'Relationship Analytics', and 'Related'. The 'Summary' tab shows 'Up next' with a sequence 'New lead nurturing'. It lists 'Introduction mail' as Step 1, due by 8/30/2023 8:18 AM, with a description: 'Thank for the interest and take the opportunity to share details about the company, the product/services and the team'. Action buttons for 'Email' and 'Mark complete' are present. A 'Wait 5 days' timer is shown. Below this is 'Reminder email' as Step 2.

# Sales Accelerator needs to be configured





# Connect sequences to records

- Manually in a view or form

The screenshot shows the Salesforce interface for a lead record. The lead is named "John John" and is in the "Lead" stage. The lead source is "Lead Source". The lead is currently in the "Qualify" stage, which is highlighted in blue. The "Qualify" stage has a duration of "< 1 Min". The "Qualify" stage is followed by the "Develop" stage, which is currently active. The "Develop" stage is followed by the "Propose" stage. The "Connect sequence" button is highlighted in the top right corner of the interface.

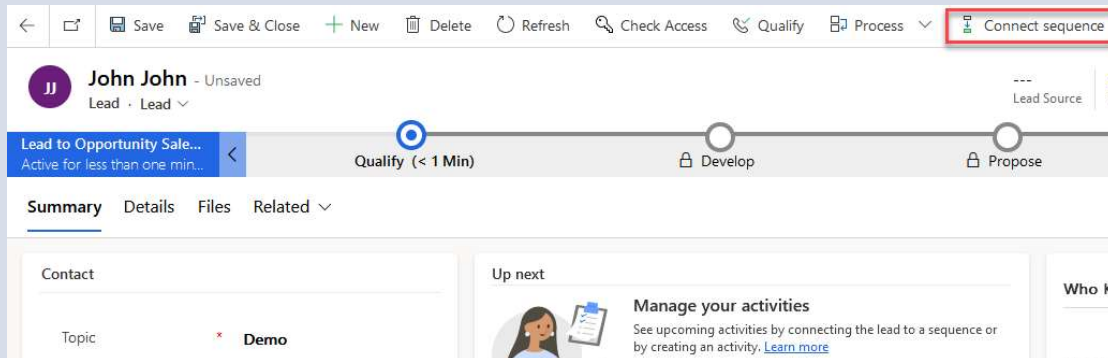
**Connect lead to sequence**

Select the sequence that you want to connect to the lead.

Name	Record type	Max...	Owner	Last modified	Modified by	Tags
<input checked="" type="checkbox"/> New lead nurturing Nurture outreach series for...	Lead	5	FK Feridun ...	8/30/2023 8:23 AM	Feridun Kadir	

# Connect sequences to records

- Manually in a view or form
- Automatically to records in a **segment** (set of records that match conditions)
  - Define segment
  - Link sequence to segment



# Assignment rules

Automatically assign  
leads and opportunities to  
sellers or teams

Allows for more complex  
assignment scenarios  
than workflows

### Create assignment rule

Set rule conditions to automatically assign leads or opportunities to the relevant sellers or teams. [Learn more](#)

1

**Rule name \***

2

**Select eligible leads for this rule** ⓘ  

☒ All incoming leads  
☐ Specific leads

3

**Assign these leads to sellers or a team** ⓘ

4

**Distribute leads by** ⓘ  

☐ Round robin ☒ Load balancing

☒ Consider seller work schedule ⓘ  
Assign new records to available seller within  after a record is created.

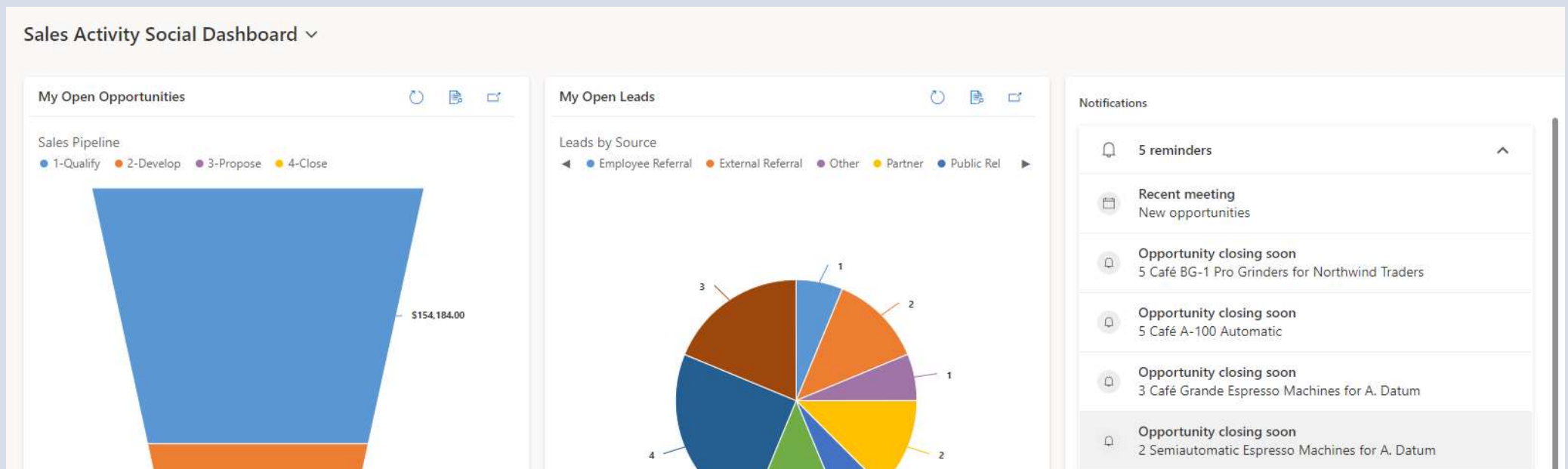
☒ Consider seller capacity ⓘ

Enterprise and  
Premium

# Assistant Studio

# Assistant

- Shows Insight Cards on records and on dashboard



# Assistant Studio

## Standard

- Includes out-the-box cards
- Administrator can turn cards on and off
- User can turn cards off

## Premium – adds features

- Create custom cards
- Set High Priority
- Optimize card ranking using conditions (deprecated)
- Assign cards to users by security roles
- Edit card flow in Power Automate
- View card usage

Enterprise and  
Premium

# Conversation Intelligence

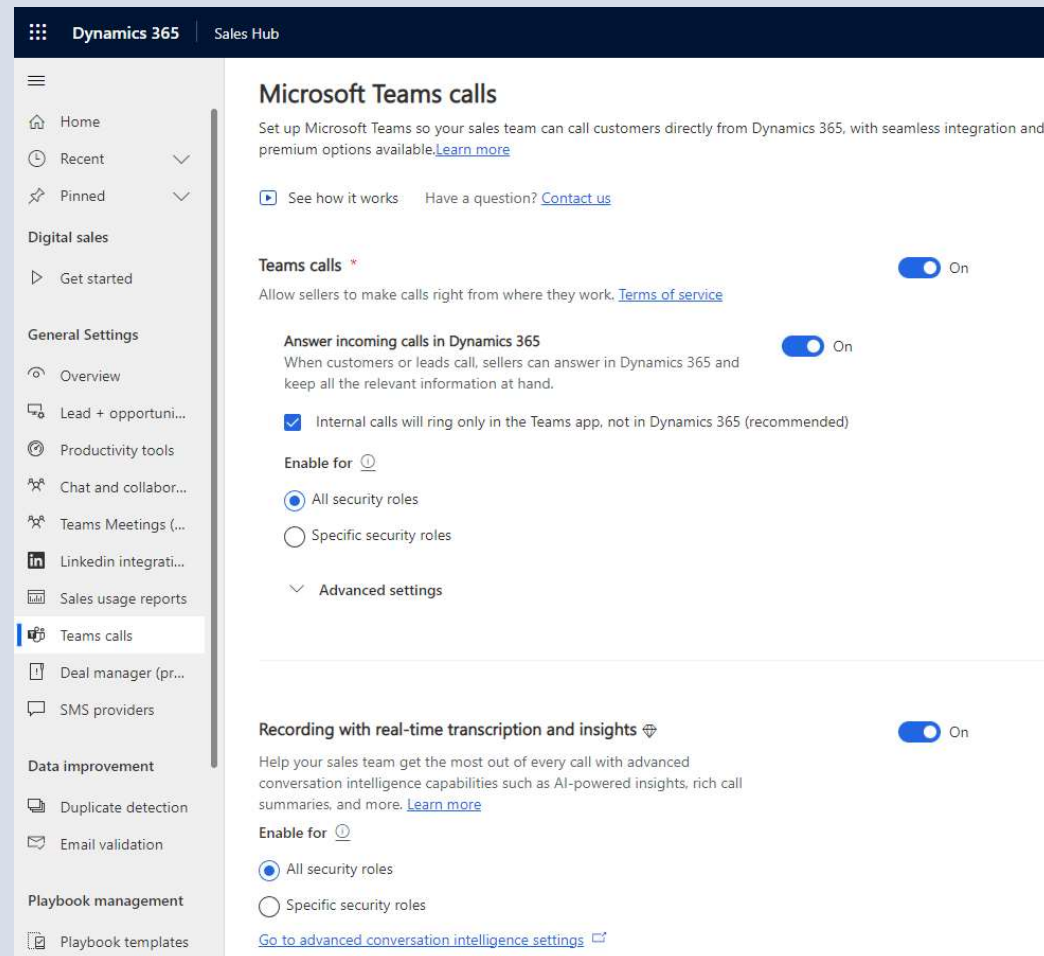
## Conversation Intelligence...

- Uses analytics and data science to gather data from sellers' call recordings and Dynamics 365 Sales
- Analyses the data to provide information and insights to intelligently manage your sales team and proactively coach sellers
- Displays relevant key performance indicators (KPIs) and intelligent call data KPIs by team, seller, and call
- Uses Microsoft Teams or third-party dialler (requires integration)



# Pre-requisites to configure

- A Microsoft Teams Calling plan
- Configure Teams Calls in App Settings in Sales Hub
- Teams calling requires Edge or Chrome



# Configure Conversation intelligence

**Conversation intelligence**

Enable your sales team to access powerful call insights and analysis, drill down into their customer interactions and get real-time call transcripts and summaries. [Learn more](#)

- Microsoft Teams call recordings**  
Enable your sellers to make call recordings with [Microsoft Teams calls](#), which will be used by conversation intelligence to provide insights and analysis for those calls.  
☒ Enabled
- Call recording storage**  
Define call recording storage location and retention.  
☒ Microsoft storage ☐
- Business settings**  
☒ Tracking 2 competitors ☒ Tracking 1 keywords ☒ 29 languages selected
- Data consent and privacy**  
Set your organization's privacy and data consent options and waive individual user consent
- New and upcoming features**  
Be the first to try out new and upcoming features before they're rolled out to all our customers.

Configure Teams calling – requires Teams, Phone System and calling Plan

Where calls are saved – Microsoft managed or your own Azure storage

Names of competitors, keywords, summaries and languages

Allow Microsoft read access to data

# Video

- <https://www.microsoft.com/en-us/videoplayer/embed/RE4Ub4r?postJsIIMsg=true>

## Conversation Intelligence app

- <https://sales.ai.dynamics.com/>
- Before Conversation Intelligence is configured sample data is shown

Enterprise and  
Premium

# Auto Capture

# Auto capture

- Provides suggestions for emails and meetings in Outlook to “capture” into D365.
- Nothing to configure – just turn on

## Auto capture

Capture emails and meetings from Outlook to simplify data entry for your sellers. [Learn more](#)

To use auto capture

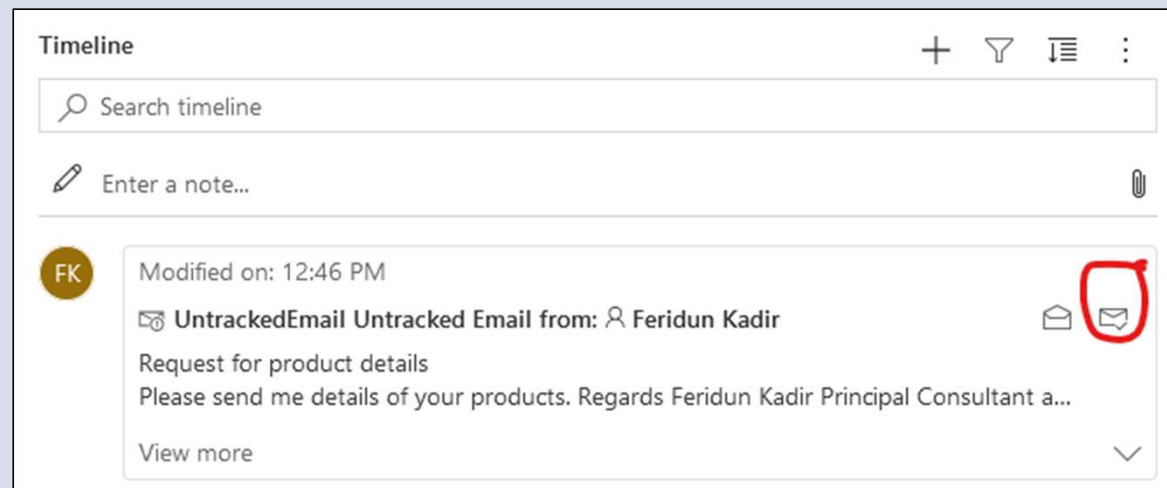
- [Connect Dynamics 365 to Exchange Online](#) (server-side sync)
- [Approve each user's email address](#) manually (requires Dynamics 365 system admin and Office 365 global admin or Exchange admin permissions)



Basic auto capture enabled

## Auto capture

- Items from user's mailbox show in the timeline with option to track



## Auto capture

- <https://learn.microsoft.com/en-gb/dynamics365/sales/free-auto-capture#which-activities-are-captured> describes how email addresses are matched



Enterprise and  
Premium

# Email Engagement

# Email engagement

- Nothing to configure – just turn on
- But to use followed attachments – OneDrive for Business and Document Management is required
- Enable Bing Maps to turn on delivery-time recommendations

## Email engagement


Enable read receipts and follow-up reminders to help sellers keep track of engagement with customers. [Learn more](#)





Enable email engagement

# Options when composing email


**Email Engagement**


 Recipient Activity will be followed ⓘ  
[Do Not Follow](#)


 Schedule email to be sent at a later time.  
[Send Later](#)

 Set a reminder to follow up on this email.  
[Set a Reminder](#)

**Email Engagement**

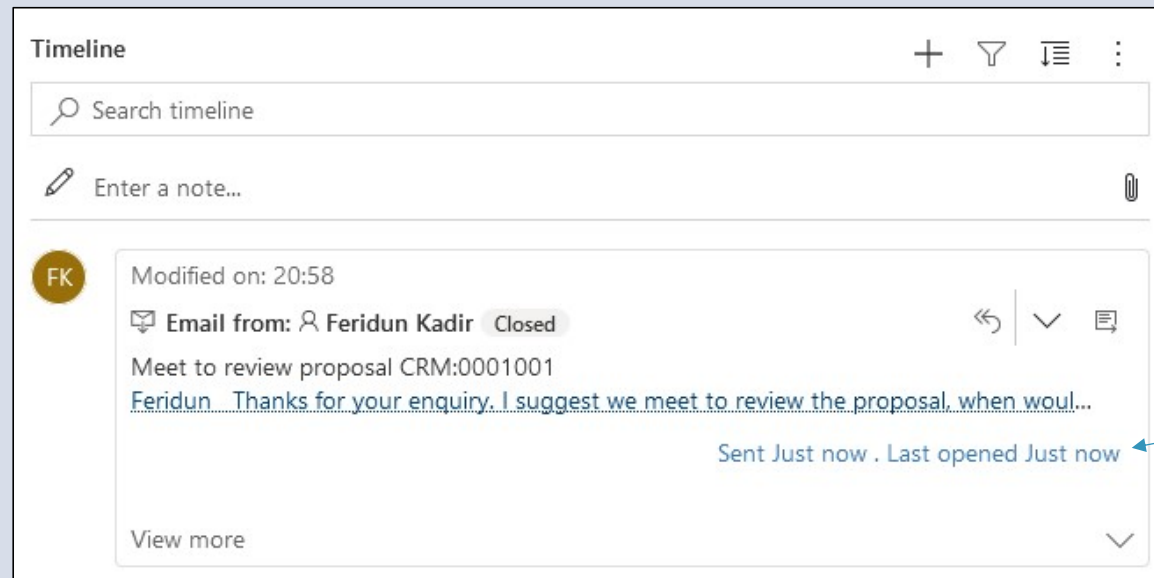
 Recipient Activity will be followed ⓘ  
[Do Not Follow](#)

 It is outside business hours for Feridun Kadir. We suggest you send this email on 06/03/2023 08:00 your time.  
[Delay Send](#)

 Set a reminder to follow up on this email.  
[Set a Reminder](#)

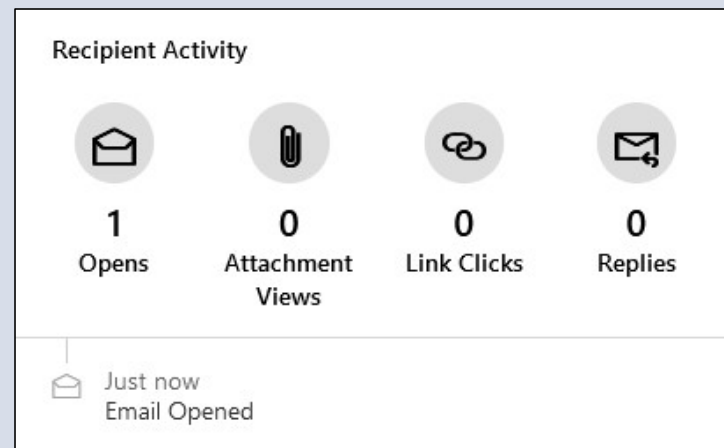
# Email engagement – where to see

- Timeline



# Email engagement – where to see

- On the Email



# Email engagement – where to see

- In All Followed Emails activity view

All Followed Emails

Due

All

Edit columns

Edit filters

Filter by keyword

	Subject	From	To	Regarding	Priority	Status Rea...	Modified On	Last Opened Time	Open Count	Attachment Open Co...	Links Clicked C...	Reply Count
	Meet to review proposal CRM:000...	<div><div>FK</div>Feridun Kadir</div>	<div><div>FK</div>Feridun Kadir</div>	Feridun K...	Normal	Sent	05/03/2023 2...	05/03/2023 20:56	1	0	0	

# Notes Analysis

# Notes Analysis

- Nothing to configure – just turn on

## Notes analysis

Notes analysis suggests actions that sellers can perform based on interactions with customers. [Learn more](#)

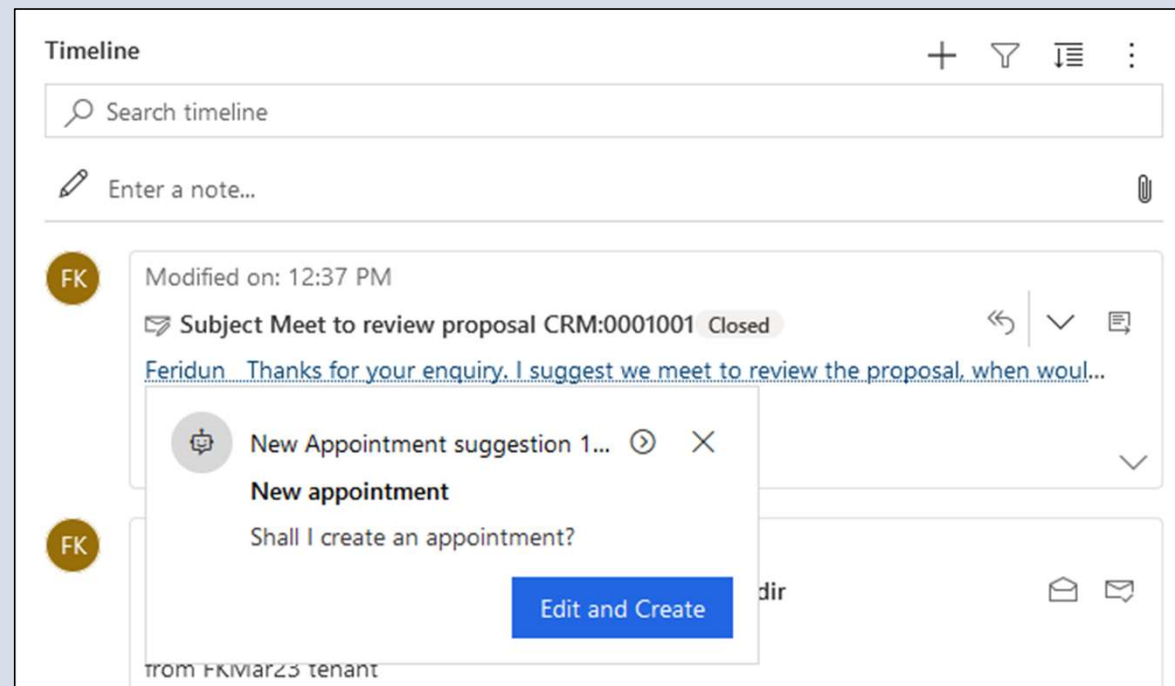


Notes analysis enabled



# Notes Analysis

- Provides suggestions for actions based on activities in the timeline



Premium only

# Relationship Insights

## Relationship insights

- Enable on Overview page
- Provide consent to use data – M365 admin center (see <https://learn.microsoft.com/en-gb/dynamics365/sales/ms365-consent-types>)
- Features
  - Analytics and health
  - Enhanced Who knows whom

## Analytics and health

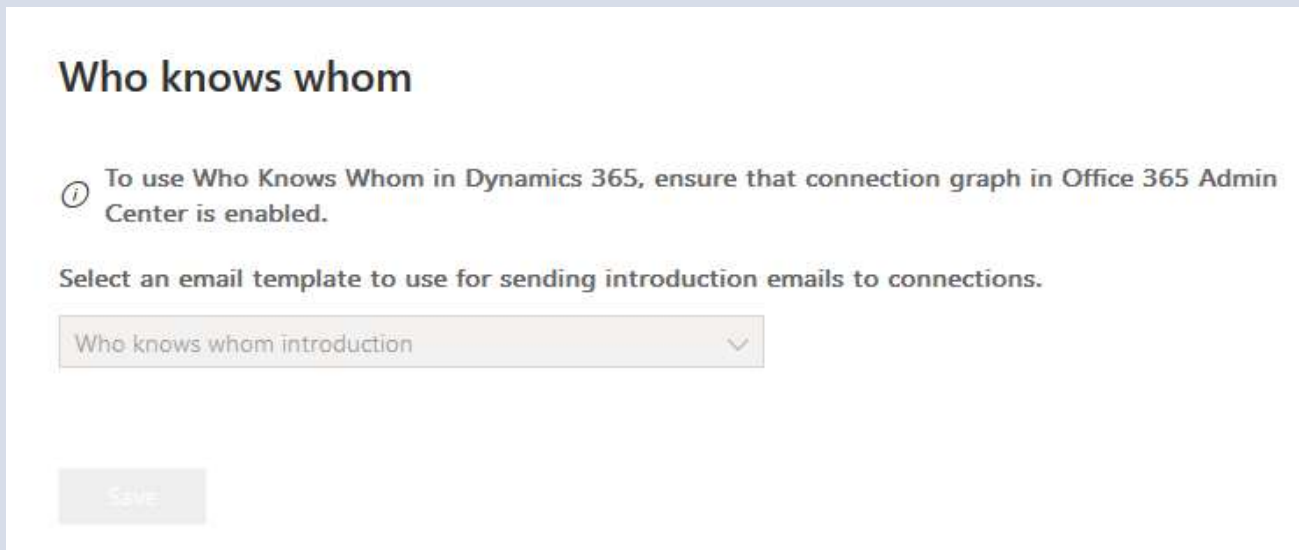
- Configure Activity influence and grading bands
- Shows on forms:
  - Relationship Analytics tab on opportunity Sales Insights form
  - Also a Relationship Health component on Summary tab
- Views
  - My Open Opportunities by Relationship

## Who knows whom

- Identifies **colleagues** who can introduce you to leads or contacts, based on their interactions through emails and meetings
- Basic – uses data in Dataverse, no configuration available in Enterprise
- Enhanced – uses data in Exchange, available in Premium

## Enhanced Who knows whom

- Enable integration with Exchange using Microsoft Graph in Microsoft 365 admin centre
- In Sales Insights, select an email template to use for introductions



**Who knows whom**

*i* To use Who Knows Whom in Dynamics 365, ensure that connection graph in Office 365 Admin Center is enabled.


Select an email template to use for sending introduction emails to connections.

Who knows whom introduction ▼


Save


# Control on Contact form

**Who Knows Whom**





**Alan Steiner**  
alans@contoso.com  
[Get Introduced](#)






**Allie Bellew**  
allieb@contoso.com  
[Get Introduced](#)








**Diane Prescott**  
dianep@contoso.com  
[Get Introduced](#)



**Who Knows Whom**



**Alan Steiner**  
Strong Connection Strength  
  
 alans@contoso.com  
[Get Introduced](#)

Enterprise and  
Premium only

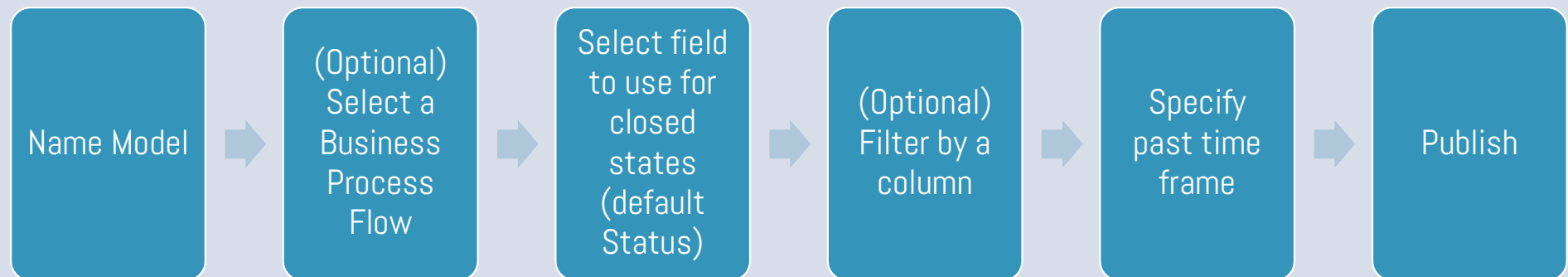
# Lead and Opportunity Scoring



## Scoring Models

- Both lead and opportunity scoring use predictive machine learning to calculate scores for open records based on historical data
- Higher scored records have a higher predicted chance of conversion
- Up to 10 models – for different sets of leads/opportunities
- Requires a minimum of 40 qualified and 40 disqualified leads OR 40 won and 40 lost opportunities created in the past 2 years

# Configure scoring for lead and opportunity



# Scoring in Enterprise in App Settings

The screenshot shows the Dynamics 365 Sales Hub interface. The left sidebar contains a navigation menu with the following items: Home, Recent, Pinned, Digital sales (expanded), Get started, General Settings (expanded), Overview, Lead + opportunity..., Productivity tools, Chat and collabor..., Teams Meetings (...), LinkedIn integration, Sales usage reports, Teams calls, Opportunity pipeli..., SMS providers, Data improvement, Duplicate detection, Email validation, Playbook management, Playbook templates, and App Settings (highlighted with a red box). The main content area displays the 'Get started with digital sales' section, which includes a 'Sales accelerator' and 'Microsoft Teams collaboration' sections. The 'Lead and opportunity scoring' section is highlighted with a red box and contains the following text: 'Harness the power of AI to get insights into which deals are most likely to close so your team can prioritize better.' Below this text is a 'Quick setup' button and a link to 'See how it works'. At the bottom of the page, the URL 'www.nordicsummit.no' is visible.

## Opportunity scoring – Per Stage model

- A per stage model calculates the influence of attributes at each stage of the business process flow based on past data
- After enabling and training, can refine the model to select which stages are relevant

## FYI: Change in 2020 release wave 2

- Before
  - scoring data was stored on the lead and opportunity tables
- Now
  - stored in `msdyn_predictivescore` table (for lead and opportunity)

# Lead and Opportunity score control

- Available by default on Sales Insight form
- Can add control to other forms

The screenshot shows the 'New Opportunity' form in Dynamics 365. On the left, the 'Components' pane is open, displaying a list of available components. The 'Predictive score' component is highlighted with a yellow background. The main form area on the right shows the 'New Opportunity' form with tabs for 'Summary', 'Products', 'Quotes', 'Files', 'New Tab', and 'Related'. The 'New Section' is visible, containing a 'Predictive score' field with a help icon. Below the field, there is a text box with the heading 'Prioritize smarter with opportunity scores' and a subtext: 'Get insights into which opportunities are most likely to be won. Ask your admin to set up predictive opportunity scores.'

# Lead and Opportunity score controls

Lead score ⓘ

...

89

Grade A

↗ Improving

▲ Purchase timeframe is this quarter ⓘ

▲ Decision maker identified ⓘ

▲ Estimated budget is \$40,000.00 ⓘ

[Details](#)

This lead was scored on 11/13/2020 8:00 AM. ⓘ

Opportunity score ⓘ

...

75

Grade B

→ Steady

▲ Decision maker is identified ⓘ

▼ Purchase timeframe is unknown ⓘ

▼ Purchase process is unknown ⓘ

[Details](#)

This opportunity was scored on 8/30/2023 8:20 AM. ⓘ

Premium only

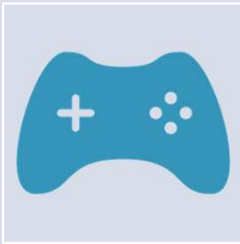
# Premium Forecasting



## Premium forecasting

- Forecast feature (included in Enterprise) helps track sales performance against targets
- Forecasts are based on actual values in opportunity records
- Premium forecasting *extends* forecast feature by using AI-driven models to predict sales based on historical data and the current sales pipeline

## In Summary



Lots of features to play  
with



Set up a trial to test



Train users



nordic.  
summit

# Q&A



nordic.  
summit

# THANK YOU!