Sales Professional

FIXED PRICE DISCOVERY

Our fixed price discovery package will take you through guided workshops to establish the requirements that need to be delivered and the effort to deliver them.

Overview

Microsoft Dynamics 365 Sales allows organisations to track their whole sales lifecycle from capturing your leads through to qualification, opportunity and quote management, orders, and invoices. It allows users transparency of what has gone on with each customer and shows the activities undertaken.

The Discovery Workshop

In our fixed price discovery workshops we'll talk through your whole sales process in detail to give us a full understanding. These will be captured as requirements and allows us to then provide you with an estimate to deliver the full project for you.

Scope definition
We'll hold an initial high level workshop to discuss the outline of your customer service processes. This will then form the basis of the agendas for the detailed session.

Requirements gathering workshops
These should be attended by users from various levels across the team from operations director, team leads and end users. This ensures we get a balanced perspective and requirements from across the whole process.

Detailed process mapping
We'll walk through your processes step by step. We'll document this as the starting point to ensure that they are fully understood.

Design To Be processes
We'll discuss any pain points and also be devil's advocate and then ways in which your processes could be improved to agree your To Be processes

MOSCOW
No, we don't mean the capital of Russia! MOSCOW is a process of prioritising requirements for projects. It allows organisations to manage costs whilst still ensuring that key functionality is delivered in the early phases. Anything that is of a lesser priority can then be considered as part of a later phase.

Why do you need it?

By having a fixed cost for this of the process it allows you to gain a full understanding of what will be required to fulfil your end vision at a fixed price. It does happen that these workshops generate requirements that were perhaps not considered originally or may lead to an implementation that requires more effort than originally estimated. By going through this process we can ensure that requirements are fully formed and understood by all and that the priorities for the initial delivery are agreed.

Costs

Sales Professional - Leads - Opportunities - Quotes - Orders - Accounts and contacts - Account Management - Products and Pricelists	**£3000**
Sales Enterprise - Includes all items in Sales Professional plus: - Forecasting - AI to better help drive better decision making and improve customer satisfaction - LinkedIn Integration - Insight cards	**£5000**

Sales Premium
- Includes all items in Sales Professional plus:
- Sales Insights
  - Predictive Lead Scoring
  - Relationship Analytics
	£5000

The deliverables

At the end of the process we will have documented your requirements and agreed the scope for what will need to be delivered. This will require input from you and teams to both to identify the key priorities that need to be delivered and also to ensure that the requirements are accurate and that you have defined how you will measure that the requirement has been successfully delivered.

How long will it take?

Sales Professional - 6 days	Sales Enterprise - 9 days

Please note that this is effort and not necessarily elapsed days!

Timeline

MONDAY

	Us	You
Project Kick Off Call	✓	✓

We'll start with a call with you and your project manager to talk through the detail of what will happen and when over the coming days.

TUESDAY

	Us	You
Sales team overview	✓	✓
OOTB Demo	✓	✓
Identify key processes	✓	✓
Capture As Is process	✓	✓
Identify pain points	✓	✓
Design To Be process	✓	✓

We'll start with introductions followed by a brief demonstration of an out of the box Dynamics 365 Sales application to give you and your teams a flavour of the application.

We'll identify the key processes that we'll need to address during the day before moving on to mapping the As Is process. As prat of the mapping process we'll identify any pain points that we need to consider when we map the To Be processes

WEDNESDAY

	Us	You
Document indicative design	✓	
Estimate	✓	

We'll take the requirements captured during the workshops and document those. We'll give you access so that you can review them. We will give you access so that you can review and approve them.

We will document an indicative design along with the effort to build it where required.

THURSDAY

	Us	You
Review requirements	✓	✓
MOSCOW and capture acceptance criteria		✓

We ask you to review the requirements both to ensure that we have documented everything required and also to ensure that they reflect your needs. Well also ask you to add the acceptance criteria by which you will confirm that the requirement has been successfully delivered.

FRIDAY

	Us	You
Internal Review	✓	
Present proposal	✓	✓

We'll prepare and review our proposal to you for the implementation of your requirements. This may include phasing or removing items of scope following discussion with you

MONDAY

	Us	You
Proposal Review		✓
Sign Off	✓	✓

You'll review the proposal and let us know if you have any questions. After that it just needs to be signed off.

* If using Sales Enterprise or Sales Premium additional workshops will be conducted covering elements such as forecasting, LinkedIn integration, goals, AI.

What do we need from you?

We'll need to talk to your key people about what how they work and how Dynamics can support them. Ideally workshops would be attended by users from various levels across the team from sales director, team leads and end users. This ensures we get a balanced perspective and requirements from across the whole process.