Quick User Manual

NUTBASER Sales Intelligence Cockpit

for Dynamics CRM

SIC Version 8.x EN

Inhaltsverzeichnis

1. »Sales Intelligence Cockpit« Overview

This User Guide is provided to understand and navigate through »**NUTBASER Sales Intelligence Cockpit for Dynamics CRM v8.x.x**« ("SIC").

For the use of the tool sopme basic, company-specific default settings should be made before.

The options for the following items are to be provided by your „administrator“ before use:

1. Content for „Solutions“ and herewith „Ideal Customer Criteria“
2. Threshold values of the entity „Solutions“
3. Customer groups
4. Authorizations

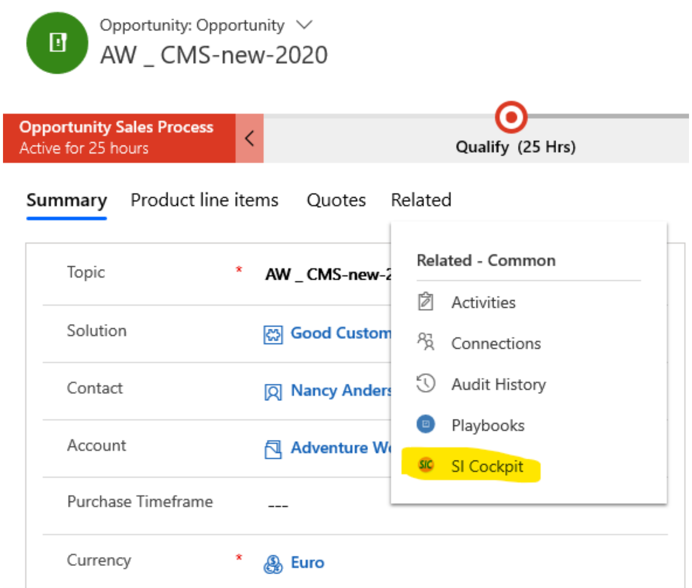
2. Your starting point: the opportunity

Opportunities are created in Microsoft Dynamics CRM. All basic information can be entered here.

The opportunity is the basis working with SIC.

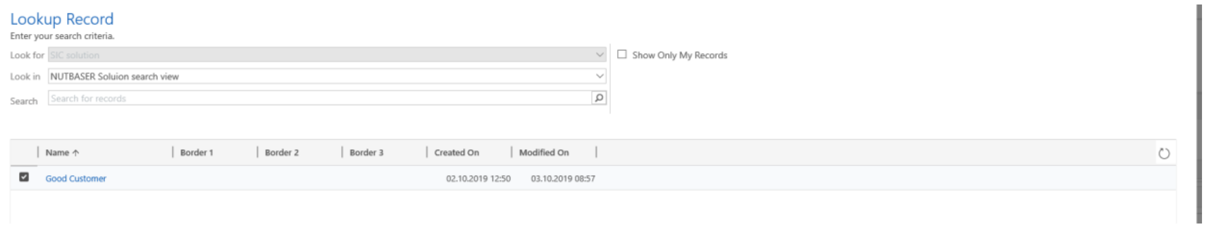
From here you are going to invoke the NUTABSER Cockpit.

When you are working e.g. in the standard view oft he opportunity, you can directly access »SIC« " via the "related" selection:

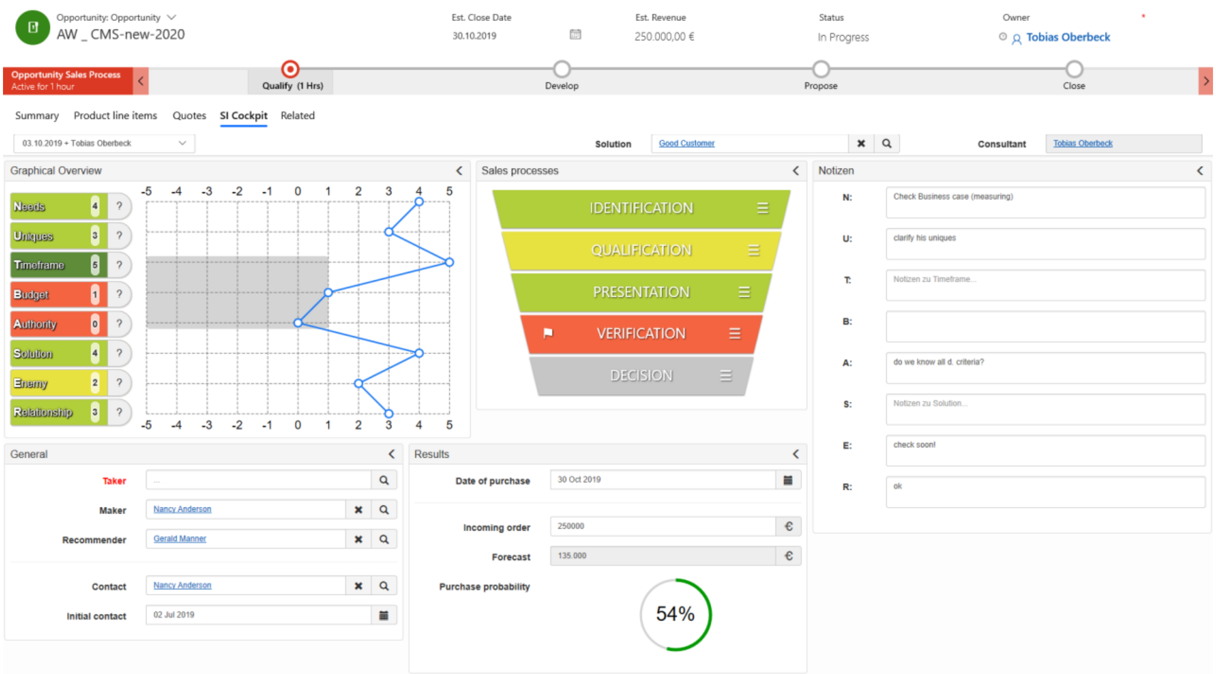


Now the cockpit is goping tob e opened …

If the cockpit is opened within the opportunity for the first time, you ake asked to assign a „solution“:



After that the cockpit is ready:

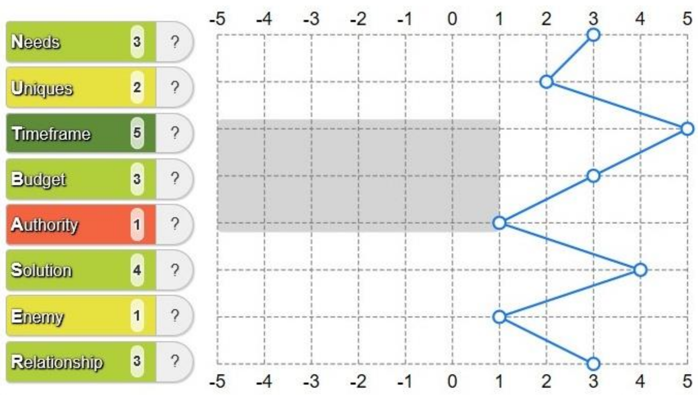


3. Evaluate the opportunity

Evaluating an opportunity is typically an ongoing process. After a customer activity (visit, telephone call, presentation) our information status or the confirmations of the customers changed. This can cause a new valuation of the opportunity each time.

You can make any number of evaluations for each opportunity (changing the criteria and saving afterwards).

3.1. NUTBASER Kriterien bearbeiten



At the beginning all NUTBASER criteria and the graphic line are set to "0".

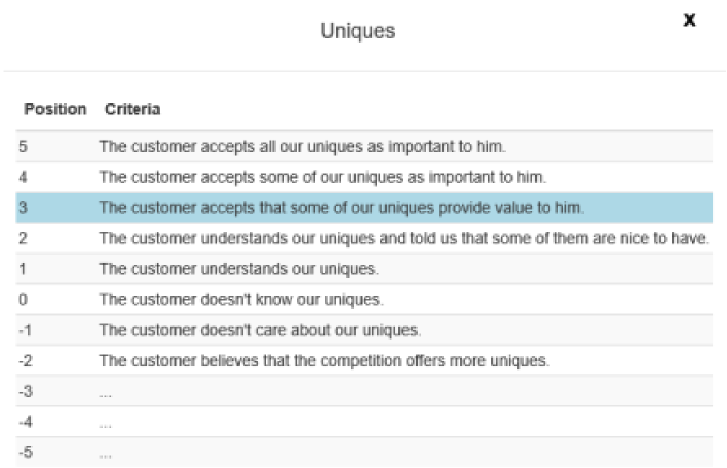
The criteria are shown as buttons. These can be used to call up the selection of the criteria texts by clicking. Criteria are shown in color depending on the respective rating (traffic light principle).

Beispiel: **„UNIQUES“:**

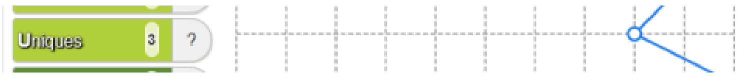
Now select by clicking on the appropriate condition which completely corresponds to the current situation of your opportunity.

So the whole condition should be true - otherwise choose the next lower one.

In this example, the condition with the value "2" is selected. Now the background color of the criterion changes from red to green. The reference point in the graphic is also changed accordingly:

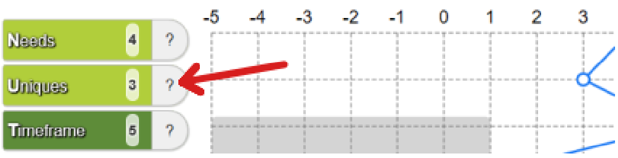

Uniques

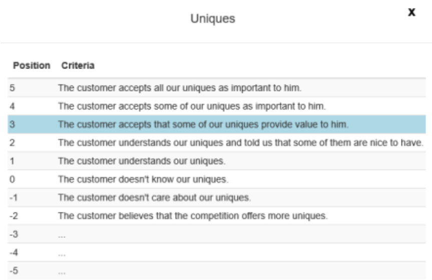
Position	Criteria
5	The customer accepts all our uniques as important to him.
4	The customer accepts some of our uniques as important to him.
3	The customer accepts that some of our uniques provide value to him.
2	The customer understands our uniques and told us that some of them are nice to have.
1	The customer understands our uniques.
0	The customer doesn't know our uniques.
-1	The customer doesn't care about our uniques.
-2	The customer believes that the competition offers more uniques.
-3	...
-4	...
-5	...



Questioning ideas for the the respective criterion

This "Help" function is available by clicking on the (?) Symbol to the right of the appropriate criterion..



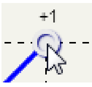

Uniques x

Position	Criteria
5	The customer accepts all our uniques as important to him.
4	The customer accepts some of our uniques as important to him.
3	The customer accepts that some of our uniques provide value to him.
2	The customer understands our uniques and told us that some of them are nice to have.
1	The customer understands our uniques.
0	The customer doesn't know our uniques.
-1	The customer doesn't care about our uniques.
-2	The customer believes that the competition offers more uniques.
-3	...
-4	...
-5	...

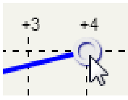
For each criterion you will receive a selection of typical questions for use in communication with the customer. You should receive further information from your contacts about one or the other suitable question. The help questions are intended as a collection of ideas for you.

Just close the window by clicking the "x".

Note: If you already know the content of the respective rating level well, you can make changes directly.

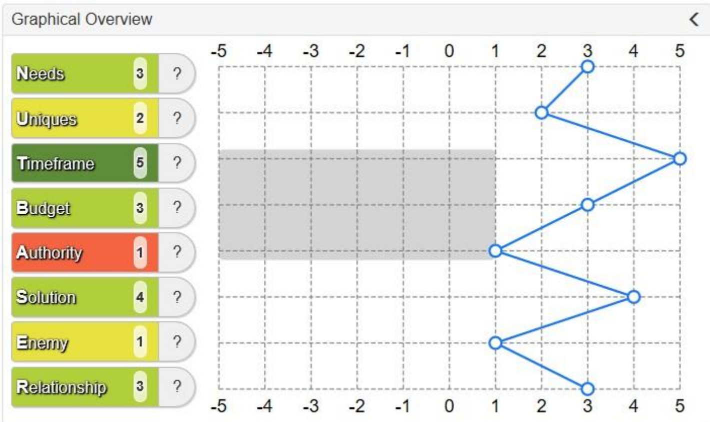


To do this, move the reference point in the graphic by moving it to the left or right with the mouse button held down. The blue graphic line will be adjusted with every "click" on the grid.



4. Cockpit areas

So that you can quickly identify all the essential information about the status of an opportunity, the cockpit is divided into different areas:



Graphical Overview

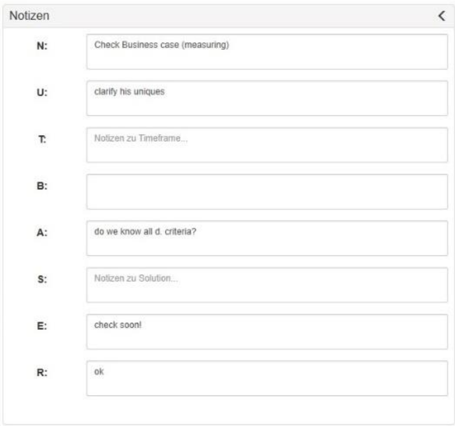
This area is the most important for the content assessment and objective assessment of the opportunity.

You can set the criteria according to the current situation.

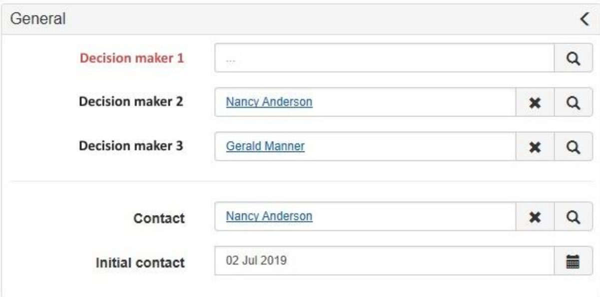
Notes

The notes to the right of the graphic are best used for hints and important information about your project status:

As the opportunity is processed multiple times over a longer period of time, the notes can change over and over again. If necessary, you can follow the "history" by viewing the snapshots (feature maybe not yet implemented).



General



The project-specific information about the customer and the opportunity is displayed here.

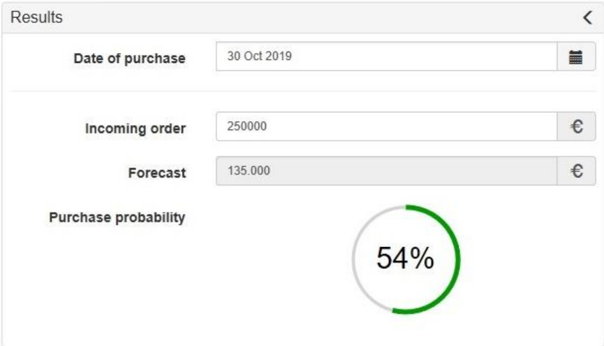
Above all, the links of the decision-making contacts are important.

Sales process

The phases of an opportunity are displayed in the cockpit via the sales funnel. Depending on the purchase probability, the phases are typically activated automatically.

The current project phase can also be specified by the user at any time with a double click.

Results



The further project-specific data for the opportunity are displayed here.

In addition to the purchase date, in particular the expected order intake (taken from the opportunity itself) can be adjusted.

The forecast (evaluated order value) is only calculated and displayed when the threshold value (for example 50%) is exceeded.

The probability of purchase is calculated automatically, exclusively from the evaluation according to the eight NUTBASER criteria.

5. Compliance with the ideal customer profile

Mit der Auswahl einer „Lösung" beim erstmaligen Öffnen von SIC in einer Opportunity, legen Sie auch das zugehörige Idealkundenprofil fest.

By selecting a "solution" when opening SIC in an opportunity for the first time, you also define the corresponding ideal customer profile.

Die erste Phase „Identifizierung" zeigt mit den unterschiedlichen Farben den Grad der Übereinstimmung mit dem Idealkundenprofil an.

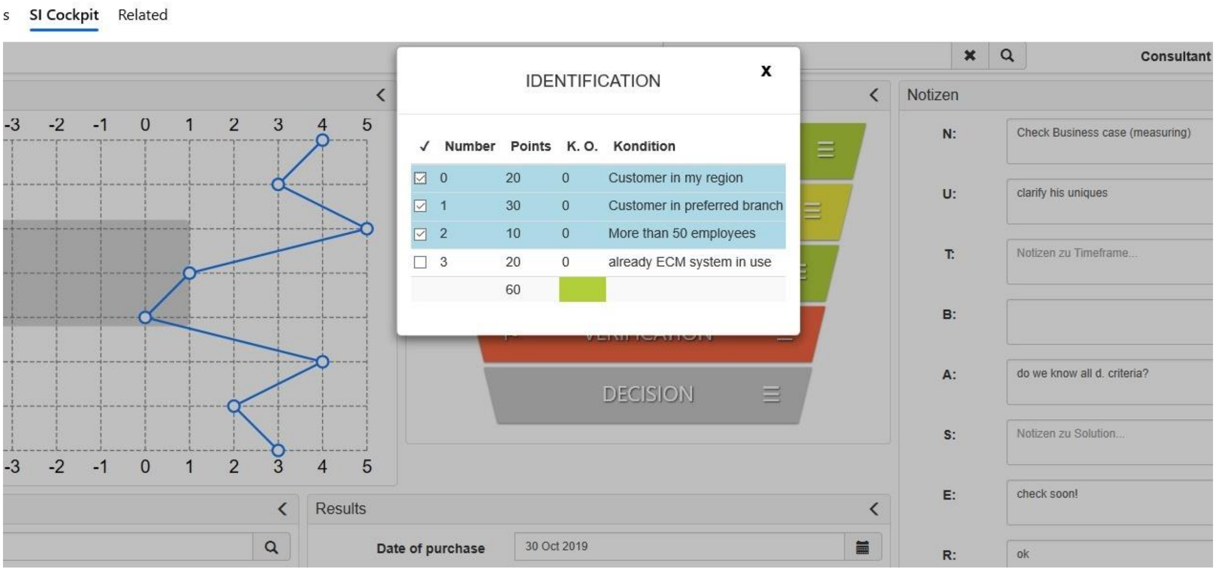
The first phase "Identification" shows with the different colors the degree of correspondence with the ideal customer profile.

Sie können jederzeit mit einem Klick auf das Menü-Symbol dieser Phase die Einordnung vornehmen.

You can make the classification at any time by clicking on the menu icon of this phase.

Hier legen Sie also fest, wie gut Ihr Kunde / Ihre Opportunity zu Ihren Idealvorstellungen (‚Beuteschema') passen. Klicken Sie zutreffende Kriterien an (☑). Nur für die gewählten Kriterien werden Punkte summiert, um eine Gesamtwertung zu erhalten:

Here you determine how well your customer / your opportunity fits your ideals ('prey scheme'). Click on applicable criteria. Only for the selected criteria will points be summed to get an overall rating:


SI Cockpit
Related
Consultant
IDENTIFICATION
x
✓ Number Points K. O. Kondition
0 20 0 Customer in my region
1 30 0 Customer in preferred branch
2 10 0 More than 50 employees
3 20 0 already ECM system in use
60
DECISION
Notizen
N: Check Business case (measuring)
U: clarify his uniques
T: Notizen zu Timeframe...
B:
A: do we know all d. criteria?
S: Notizen zu Solution...
E: check soon!
R: ok
Results
Date of purchase
30 Oct 2019