

minsoit

An Indra company

Quick Start Pack

Dynamics 365 Sales



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01



Minsait, your
technological
Partner

Who we are

Indra is currently the **leading technology in Spain** and one of the **main in Europe and Latin America**

Business Consulting

Technology

Digital Solutions

3.043 M€ sales

+49.000 Professionals

Projects in +140 countries

Local presence in 46 countries

50% sales abroad

(2020 Data)



16%
Energy and Industry

11%
Telecom and Media

17%
Financial services

18%
AA.PP. and Health

17%
Security and Defense

21%
Transport and Traffic

Business Management Systems

- ERP Solutions
- Payroll and Human Capital
- Consolidation and budgeting

Advanced Technologies

- Business Consulting
- Technology
- Digital Solutions

Outsourcing y BPO

- User Management
- Application Maintenance
- Infrastructure Management

Paradigma

- Agile Projects

Cybersecurity



- Digital Risk
- CyberSec Services & Solutions
- Digital Identity and Signature



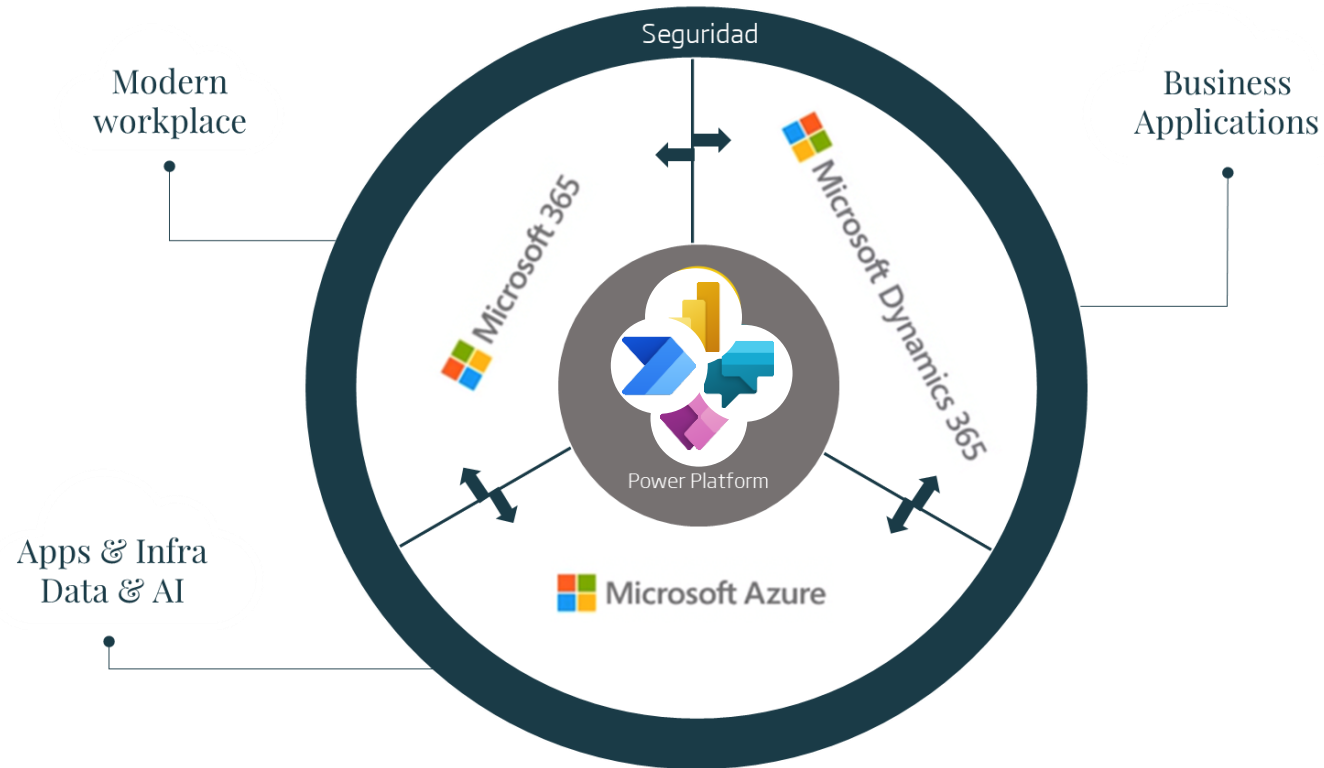
02



Our vision and
capabilities

Our vision and capabilities

Committed to thinking about the world through platforms and ecosystems



We approach our projects with a holistic and integral vision of the Microsoft Platform, with the perspective of Dynamics 365 as a core system but using the entire ecosystem of **Microsoft solutions as a platform to extend its capabilities**



Modern workplace

Productivity
Collaboration
Communication
Culture



Business Applications

Value creation
Efficiency
Profitability
Scalability



Apps & Infra Data & AI

Proactivity
Creativity
Competitiveness
Adaptation

Our vision and capabilities

We ensure the quality of the service thanks to the certifications that accredit us...



Partner of the year 2021
Data&AI Power Platform

Advanced Low Code
Specialization



+1.000

Professionals with
specialized knowledge



+250

Data & Analytics Experts



+300

CRM & ERP experts



+230

Experts in Infra & Apps



+120

Power Platform
Experts



+15

Professionals accredited
as Microsoft Certified
Trainer



+100

Digital Workplace & M365



+1.000

Projects

+500

Clients

+12

Geographies



+300

Digital transformation projects
in progress

**Microsoft Azure Advanced
Specialization: Windows Server and
SQL Server Migration**

Demonstrate our expertise in migrating and
optimizing Windows Server and SQL Server-
based production workloads to Azure.



+20

Years of experience



03



Quick Start pack
Dynamics 365 Sales

3.1 Our approach

Why you might need a Quick Start Pack?

Dynamics 365 Sales is a solution with enormous potential and many functionalities. But if your company does not need all the capacity to start the path of digital selling, then an approach “first adopt, then scale” will be your best ally in digital transformation.

We propose a rapid implementation of the standard functionalities slightly adapted to your business needs to achieve an agile digitization of the commercial process ensuring a scalable solution aligned with product innovation

Quick Start Pack Key Benefits

1

Goals
Oriented

We **consider** your **context** and **changing needs** of your business to take advantage of the transforming power of the business itself, making **common objectives** between the project and business team

2

Keep it simple!

To grant a **rapid deployment** we keep focus on **simplicity** and **efficiency** for all aspects of the project, identifying short-term **quickwins** that will define the roadmap of your solution

3

Embrace
innovation

A **successful implementation** capable of scaling **aligned** with **product innovation roadmap**, guarantees the **quality** of the technical approach and minimizes the impact of changes

Dynamics 365 Sales full overview

At Minsait, we help companies build relationships at **scale** and **make decisions** based on the **value of data**

Success Sales
by Minsait 

Business impact

Increased sales

Increase in the number of Leads and **conversion** rates in customers



ROI

Achieve the **expected return on investment** in sales operations



Time to market

Improve control of the opportunity cycle by **shortening sales cycles**



Productivity

Connect teams through a **single workspace** that **improves collaboration**



Planning

Generate **savings** and **optimization** in the management of agendas, trading activity and forecasting



Loyalty

Creating **lasting relationships** with clients who generate **recurrence** and seek **recommendation**



Features

Business cycle management

Lead, clients, Contacts, Accounts, Opportunities...

Forecasting

Predictive sales forecasts, scoring and next best action

Pipeline Management

Review of sales cycle opportunities and offers

Product Catalog

Product management and price lists

Sales Accelerator

Recommended guidelines and processes

360 Customer Vision

With built-in AI for upselling and crossselling creation

Linkedin

Native integration for lead generation

Teams, Outlook...

Native integration for automatic record creation and collaboration enhancement

Process management

Automation and customization of business flow



Sales

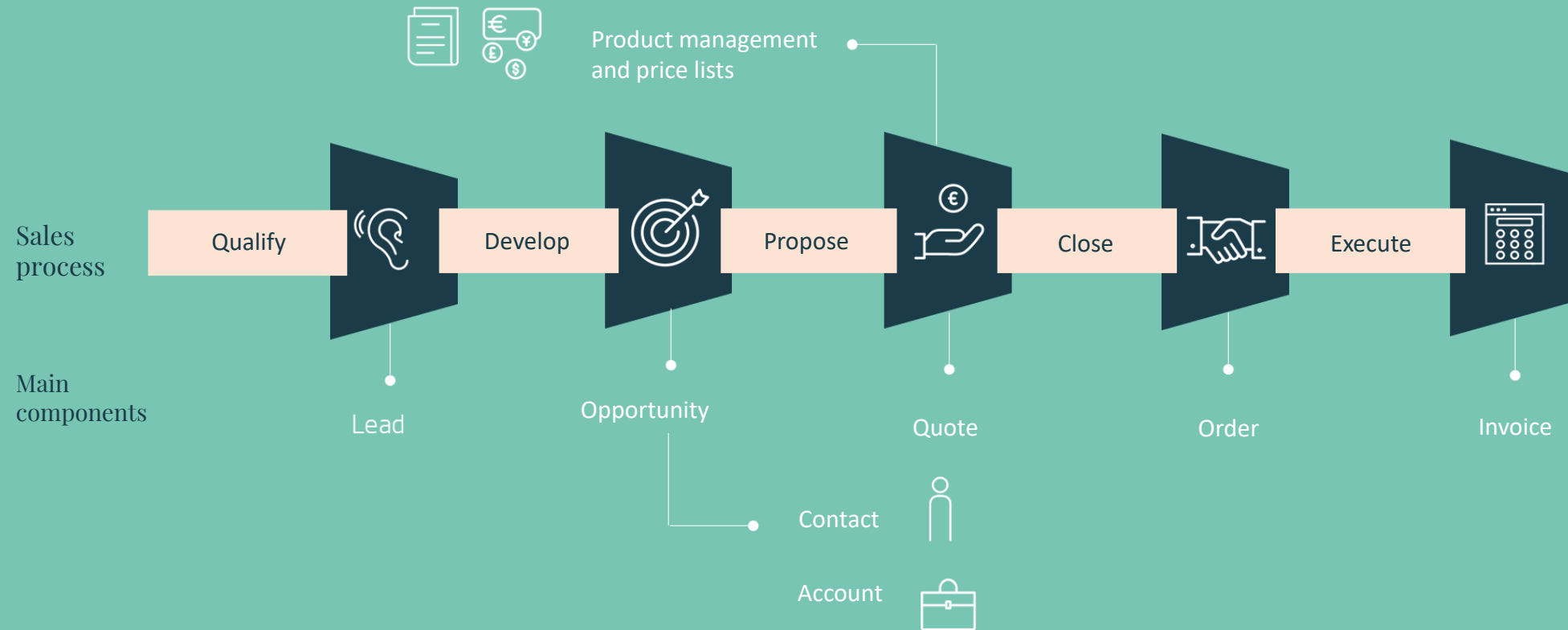


Sales Insights



Social Selling

The standard End-to-end D365 Sales Cycle



Guide and automate the sales process with tools to improve selling experience and build lasting relationships with customers

What is the scope of a D365 Sales Quick Start Pack?



Duration: 8 weeks

Total Amount: 32,000 €

Initial configuration



Within the scope of the project, the parameterization of the entity Contact, Potential Client, Account, Opportunity, Activities, Offer, Product Catalog and Price Lists will be carried out, customizing the existing fields, forms and views based on the needs collected during the analysis phase.

Up to 6 master tables and 5 custom tables will be created and customized.

Dashboards



- The following dashboards are included in the scope of the project:
- Standard platform dashboards
- Creation and customization of three basic dashboards that include:
- Data listings
- Up to 3 standard graphics
- Up to 3 iframes supported by the standard
-

Flows



4 Business Process Flows configurable through the standard or 2 Power Automates that extend the no-code application will be configured.

Users, roles, & applications



Create users in Azure Active Directory.
Creation, configuration and assignment of up to 3 additional user roles to the standard ones.
Creation and configuration of 2 multi-device user applications.

Initial migration



The initial data load will be performed from the Lead, Accounts, Contacts, Product Catalog, Price Lists, Master Entities, and Custom Tables tables. The data upload will be carried out through .csv files that Minsait will provide and must be completed in the same format. The quality of the data is the responsibility of the customer.

Training



There will be 3 training sessions (workshops) of 4 hours with the Key Users, in which the following contents will be addressed:

- General navigation through the platform
- Use document templates to create standardized documents
- Product catalog management
- Price lists
- Customer Management
- Contact person management
- Communications management
- Sales cycle
- Searches
- Import and export of records

Documentation



At the end of the project, the following documents will be delivered:

- Analysis document
- User Manual
- Project Closure Document

3.2 Project Blueprint

How do we work?

Our methodology raises **4 workstreams** that cover all the necessary activities to ensure the success of the implementation

Line A | Analysis, design and implementation



We propose an implementation strategy supported by workshops to **validate the approach and build an incremental solution**

Line C | Change management



At Minsait we have our own change management methodology under adaptive methodologies

Line B | User validation



The **participation and commitment** of the client is key to ensure an implementation that meets expectations. To comply with these Minsait will generate a **test plan and UATs** that the client must execute to validate the implemented solution.

Line D | Strategy and governance

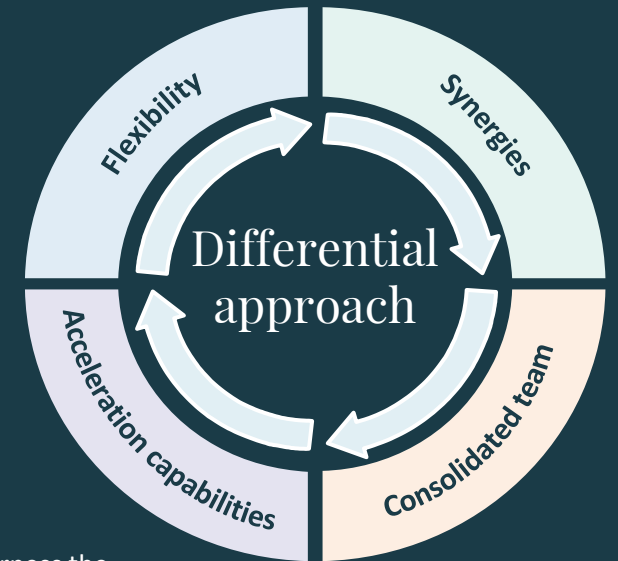


A successful implementation requires a **deep knowledge of the client's needs** and an **evolution strategy**

What sets us apart

The teams and skills involved will be adapted according to the priorities of the moment

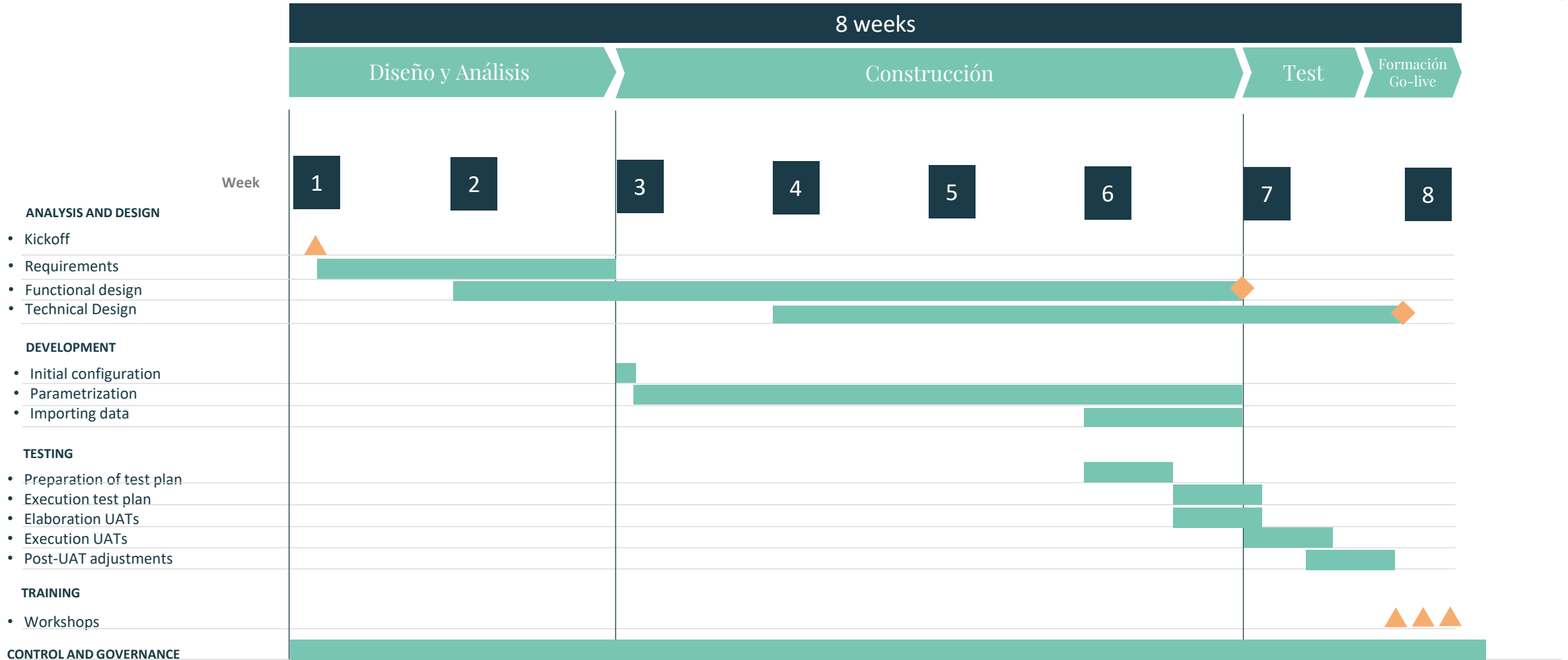
We take advantage of working with different technologies and industries



We harness the transformative power of the business itself

Specialized teams that collaborate in a multidisciplinary way

The 4 workstreams flow in a coordinated way to ensure the success of the project



Thanks!

minsait

Mark Making the way forward

An Indra company