

## SALES JOURNEY ASSISTANT for Microsoft Dynamics 365/CRM



# Support your sales forces during all stages of the sales process

A face to face contact with customers remains a must to succeed in most industries. Having a direct contact with your customer will open the way to more and better deals. Organizing recurring visits to customers is not always easy and requires a thorough follow-up. Frequency depends on several criteria such as the yearly turnover, turnover increase, customer segmentation, etc.

Sales Journey Assistant helps sales forces organize these visits. From preparation over visit execution, automatic feedback to reporting, Sales Journey Assistant helps your sales to have more success with their sales visits and focus on the right contacts.

### QUALIFY

During the first stage of the process – the qualification stage - Sales Journey Assistant will suggest to salesmen which companies should be visited, based on previously defined rules. The user can then select one or more results to prepare his journey.

### PREPARE

- During the preparation stage, the user selects the customers he wants to visit on his next journey. The selection can be done starting from the list suggested by the system or customers can be freely selected by the user.
- Based on that list, Sales Journey Assistant generates a visual overview of his road trip. If the user wants to, he can ask the system to optimize the itinerary.
- With the consolidated appointment view, the user immediately gets a summary of his customer, visit history and subjects to be discussed during the visit. A new visit report is automatically prefilled with those topics. The list of topics to be discussed can be extended manually.

### VISIT

During the visit stage, the user can take notes and define action points. He also has the possibility to provide unstructured notes. Sales Journey Assistant provides an excellent user experience

for users with mobile devices, which is particularly important in this stage.

### DEBRIEF

- After the customer visit, the user completes the visit report. Follow-up actions (such as phone calls, other activities or automated nurture emails) can very easily be defined based on the information in the report.
- When the visit report is finalized, an automated validation mechanism can be put in place. It includes an escalation process with reminder emails or tasks when the validation process is not completed in time.
- Once validated, the follow-up actions specified in the visit report are automatically generated. Finally the visit report is added to the customer record.

### REPORT

- The reporting stage covers the entire process lifetime: it allows to print out reports before and after the visit.
- Reports can be generated for both internal use (to share with your team) and for external use (to share with your customer).
- Statistics are also available (visit report status, escalation report status etc.)

SALES PLAN : INFORMATION  
27/10/2015 8:00 - Appointment - John Davies

Date\* 10/27/2015 8:00 AM Activity Type\* Appointment  
Visit Report Owner\* John Davies Default Duration\* 1.50 hours  
Template\* Sales New Business Round time to nearest: Do Not Round

Generate Break   
Generate Travel

**Plan appointments**

**Prepare visits**

**Add Discussion Points**

**Optimize Route**

**Travel Overview**

**Preparation**

**Visit Reports**

Customer	Template	Actual Start	Actual End	Status Reason
Europa Ziekenhuizen	Sales New Business	8:00	9:30	In Progress
Adventure Works (sample)	Sales New Business	10:03	11:33	In Progress
Hôpital General	Sales New Business	11:50	13:20	In Progress
Alpine Ski House (sample)	Sales New Business	13:48	15:18	In Progress
Clini	Sales New Business	15:32	17:02	In Progress

**Discussion Points**

New product release Pharma  
New infrastructure proposal  
New KCI system: PolyMem, Microdacyn, Nanova  
New infrastructure proposal

**Map**

COMPUTE TRAVEL OPTIMIZE TRAVEL

**Planning**

**Sales Plan Members**

Customer	Travel Duration	Activity Start Time	Activity Duration	Break Duration	Exception Template
Europa Ziekenhuizen		8:00	90	0	
Adventure Works (sample)	00:33	10:03	90	0	
Hôpital General	00:17	11:50	90	0	
Alpine Ski House (sample)	00:28	13:48	90	0	
Clini	00:14	15:32	90	0	

## System requirements

Natively built into Microsoft Dynamics 365/CRM.

### SUPPORTED VERSIONS:

- Dynamics 365 (v. 8 & 9)
- Dynamics CRM 2016
- Dynamics CRM 2015
- Dynamics CRM 2013

### SUPPORTED DYN365 PLANS & APPS:

works with **Sales App & Service App** (part of Dynamics 365 Plan, Customer Engagement Plan or separate apps)

### SUPPORTED PLATFORMS:

- Dynamics 365 Online
- Dynamics 365 on premise
- Partner Hosted
- Cross-browser



## EASY TO USE:

From a functional point of view, the Sales journey assistant can be applied to accounts, contacts, and leads.

**No coding required:** Sales Journey Assistant has been designed to be used:

- by Power Users
- without any help from developers.

## INTERESTED ?

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