

## SALES JOURNEY ASSISTANT for Microsoft Dynamics 365/CRM

### Sales team support in all stages of the sales journey

Face-to-face customer visits continue to be key for end-to-end sales journeys to succeed in most industries. Having a direct contact with your customer will pave the way to more win-win agreements, better deals and improved customer experience. Organizing and managing recurring customer visits is far from easy, requiring thorough planning and structured follow-up. Frequency depends on several criteria such as yearly turnover, turnover increase, customer segmentation, etc.

Sales Journey Assistant helps sales teams structure, organize, manage and document these customer visits. From qualifying to preparation up to visit execution, automatic feedback to visit reporting,...Sales Journey Assistant helps your sales teams to have more success with their sales visits and focusing on the right contacts.

#### QUALIFY

During the qualification-stage, the first stage of the process, Sales Journey Assistant will advise salespeople which companies should be visited, based on previously defined rules. Any sales person or user can select one or more outcomes to prepare his sales journey and customer visits.

#### PREPARE

- Within the preparation stage, the user selects the customers he wants to visit on his next journey. The selection can leverage the customer list suggested by the system or customers can be freely selected by the user.
- Based on the sequence of that list, Sales Journey Assistant computes and visualizes travel routes, leveraging cloud navigation and traffic services (Google Maps), while taking travel and break times into account. If needed, the system optimizes the travel routes between start and end location of the sales person's itinerary.
- The consolidated appointment overview provides users instantly with a summary of his customer, visit history and subjects to be discussed during the visit. New visit reports are automatically prefilled with those topics and the list of discussion points can be extended manually.

#### VISIT

Throughout the visit-stage, the user can take notes, define action points or provide additionally free-text unstructured notes.

Sales Journey Assistant provides users with an excellent user experience on diverse types of mobile devices (laptops, tablets, ...), extremely important in this stage.

#### DEBRIEF

- Following the customer visits, the user completes his visit reports. Follow-up actions (e.g. phone calls, other activities or automated nurture emails) can be defined effortlessly based on the information in the report.
- After finalizing visit reports, an automated validation mechanism can be exploited to invoke an escalation process including reminder emails or tasks when the validation process is not completed in time.
- Once validated, the generation of the follow-up actions specified in the visit report can be automated. Finally, visit reports are added to the related customer records.

#### REPORT

- The reporting stage encompasses the lifetime of the entire process, and allows to print out reports pre- and post-visit.
- Reports can be generated for both internal use (to share with your sales team) and for external use (to share with your customers).
- Statistics and insights (visit report status, escalation report status,...) are made available through dashboards.

**Plan Sales Journeys** → **Generate Visit Reports based on Templates**

4/04/2020 – Appointment – John Davies  
Sales Plan

Planification Status Reason John Davies Owner

General Planning Related

Date: 4/4/2020 8:00 AM  
Activity Type: Appointment  
Include Existing Appointments:   
Default Duration: 1 hour  
Round time to nearest: Do Not Round

Generate Break:   
Generate Travel:

Visit Report Owner: John Davies  
Template: Annual Broker visit

**Prepare Visits**

Preparation

**Visit Reports**

Customer	Template	Actual Start	Actual End	Status Reason
Clemico Brokers Belgium	Annual budget review	08:00:00	09:00:00	In Progress
Clemico Brokers Belgium	Annual budget review	09:47:00	10:47:00	In Progress
Clemico Brokers Belgium	Annual budget review	11:06:00	12:06:00	In Progress

**Add Discussion Points**

**Discussion Points**

Budget: invitation for the yearly customer event  
Hospitality:

**Journey Planning**

Planning

**Sales Plan Members**

Customer	Travel Duration	Activity Start	Activity Duration	Break Duration	Opt
Clemico Brokers Belgium - Antwerp		08:00:00	90	30	
Clemico Brokers Belgium	00:47	10:47:00	60	30	
Clemico Brokers Belgium - Ghent	00:19	12:36:00	60	45	
Lars Clark	00:45	15:06:00	480	0	

**Travel, Activity & Break duration**

**Compute & Optimize Travel**

Map

COMPUTE TRAVEL OPTIMIZE TRAVEL

Map Satellite

The success and value of such customer visits are directly linked to accuracy and completeness of content and discussion points of those customer encounters.

Qualifying and preparing upfront, timely accomplishing customer visits, enabling salespeople to ask adequate questions while documenting pertinent outcomes, capturing and communicating all relevant feedback for both the salesperson and customers is crucial to open new opportunities, improve customer experience and loyalty while boosting salespeople's efficiency.

## System requirements

Built as an add-on on top of Microsoft Dynamics 365 / CRM platform.

Works with Sales App & Service App.

### SUPPORTED PLATFORMS:

Dynamics 365 8.2+ & 9.0+

(Online, On-Premise, Partner Hosted)

### CROSS-BROWSER SUPPORT:

Chrome, Edge, Internet Explorer, Firefox, Safari

## INTERESTED ?

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## TOP BENEFITS & TIME-SAVING FEATURES:

- Process-led customer visit execution
- Structured Visit Reports with templates for visit topics
- Efficient planning and orchestration of customers visit
- Prepare, manage, document and share discussion points
- Follow-up efficiently with automated feedback & reporting

## 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.