# Improve Sales with AI

@stefanotempesta
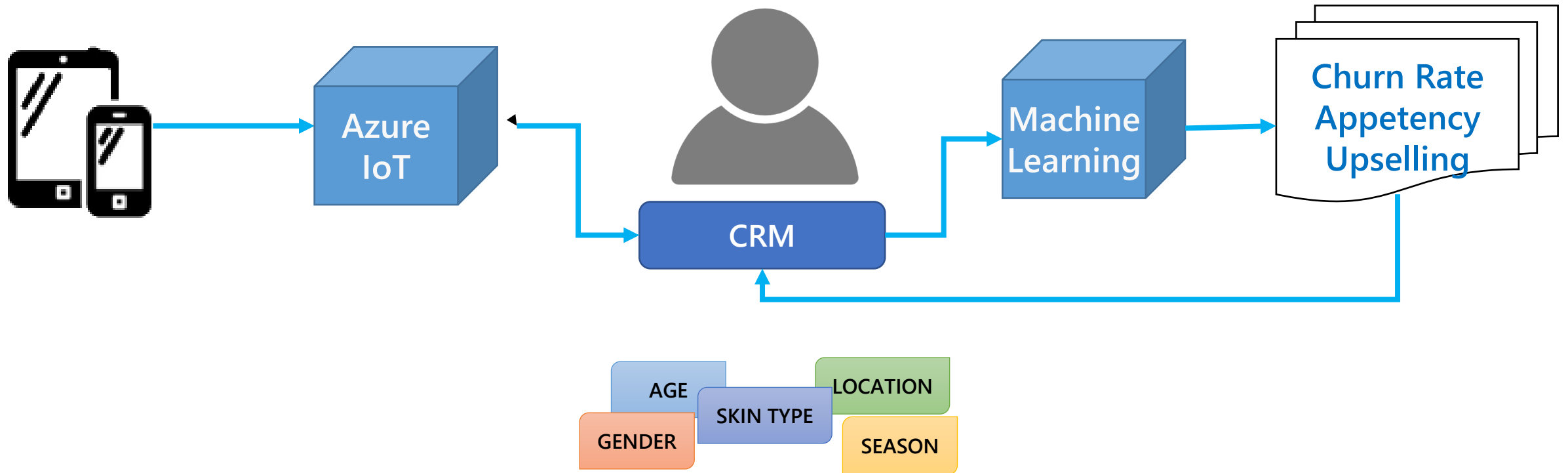
**MSDW**
**MSDynamicsWorld**

Microsoft Regional Director

**MVP** Microsoft Most Valuable Professional

# TODAY'S AGENDA

- **Machine Learning for...**
  Stock optimization
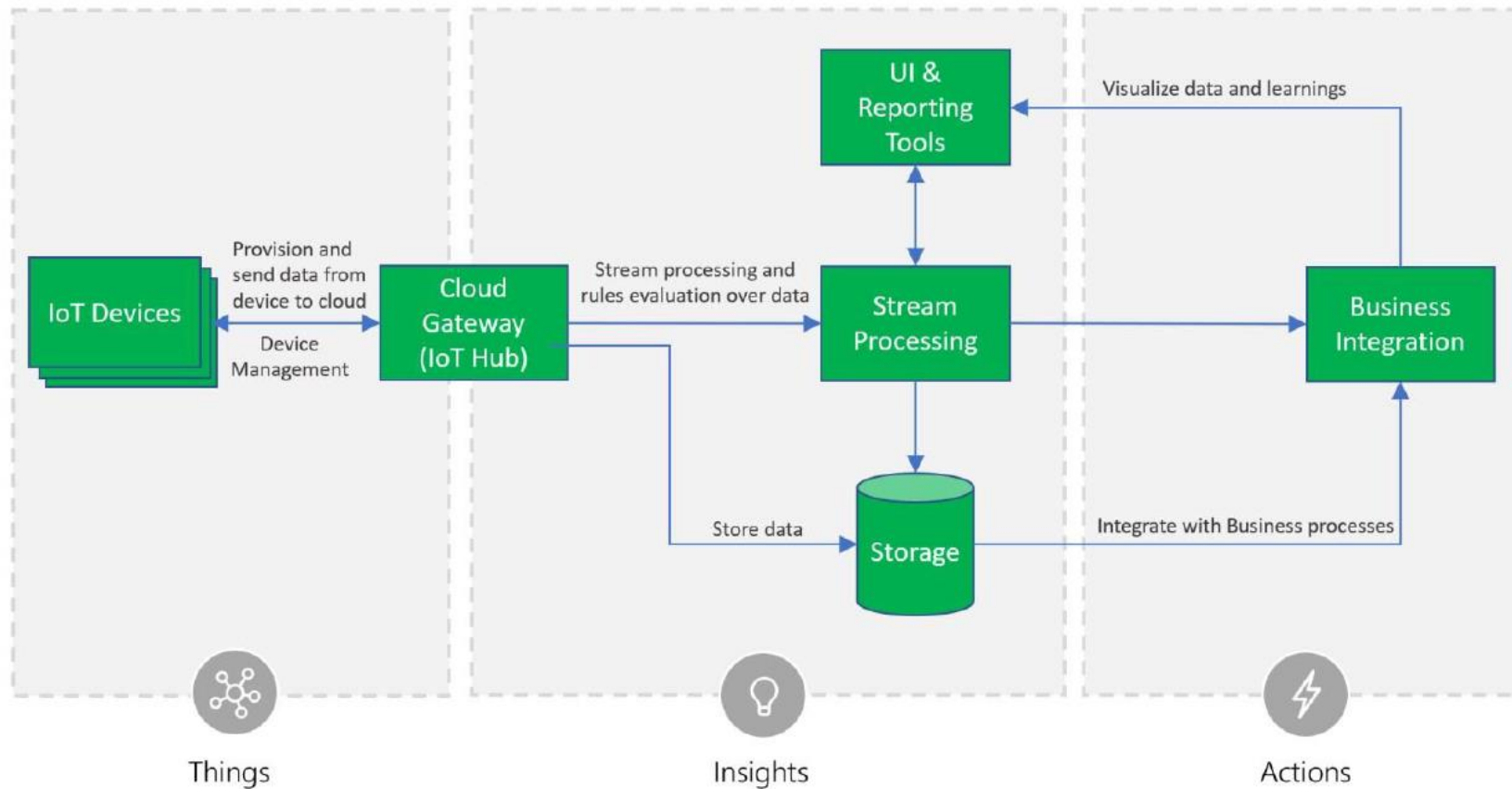
  Lead ranking

- **AI for...**
  Sales Insights

# Stock optimisation

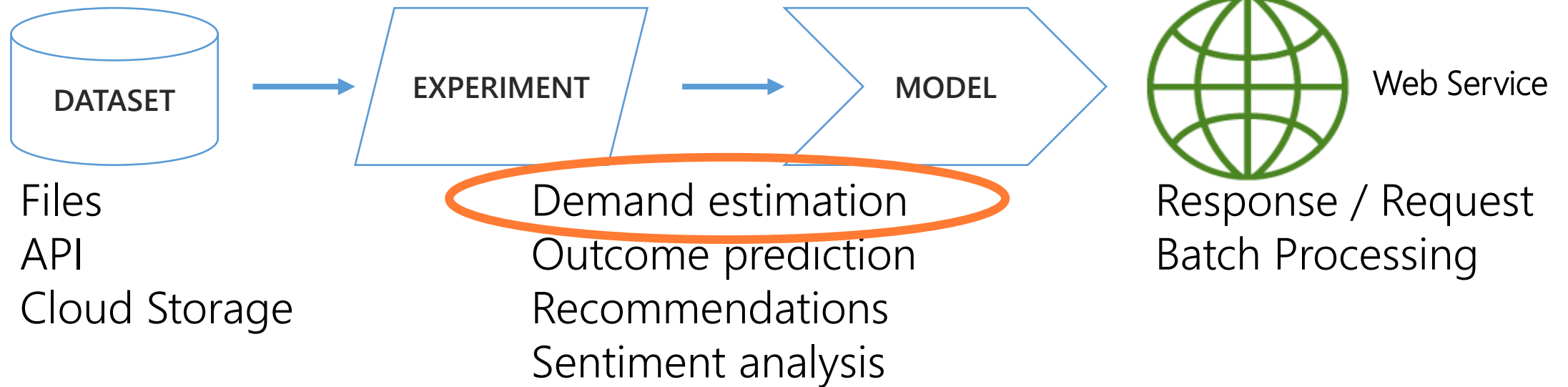# Optimize products in stock

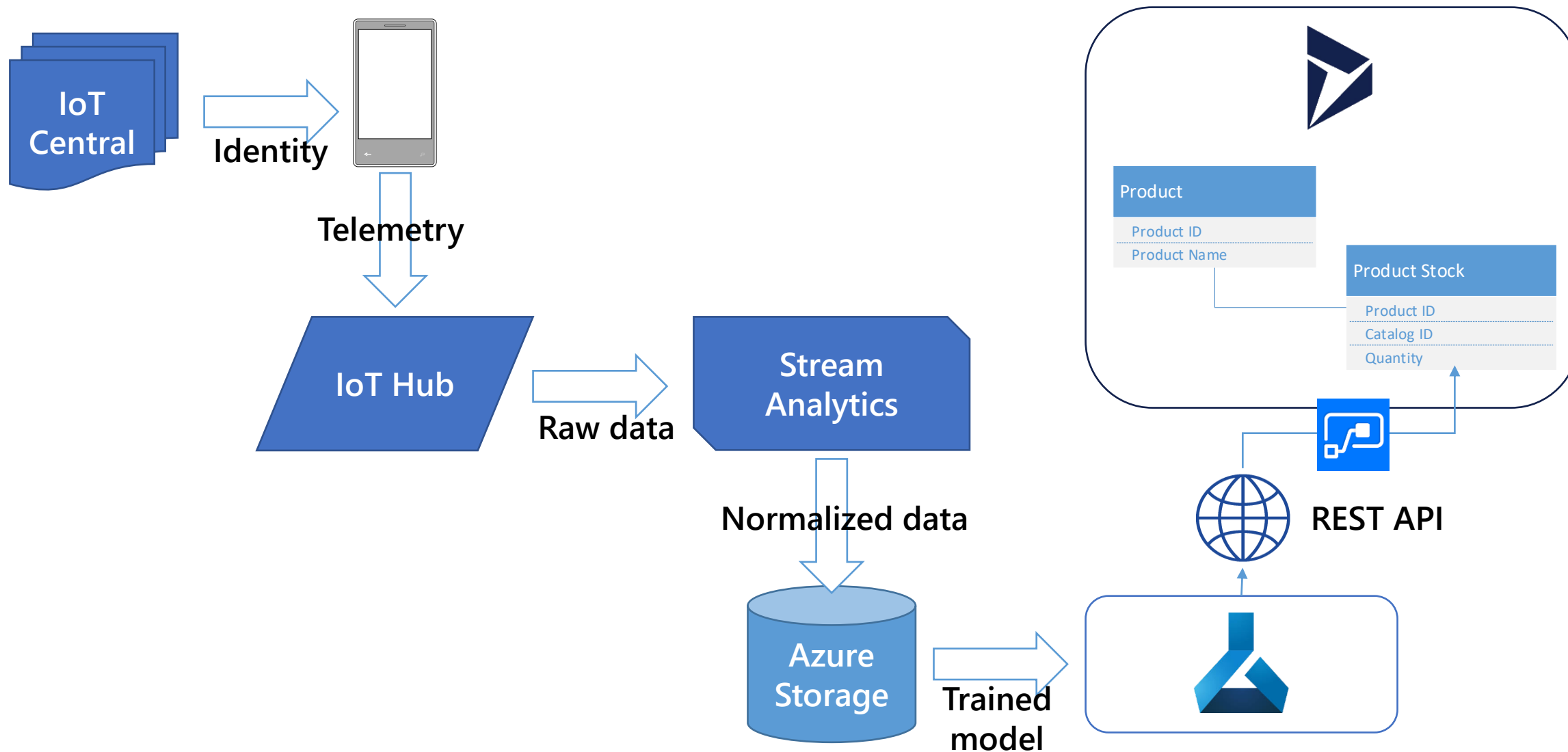# Azure IoT Reference Architecture

# Azure Machine Learning



DATASET → EXPERIMENT → MODEL → Web Service

Files
API
Cloud Storage

Demand estimation
Outcome prediction
Recommendations
Sentiment analysis

Response / Request
Batch Processing

# DEMO

Azure Machine Learning Studio

https://studio.azureml.net/

# End-to-end Integration Process

# Lead ranking

# CRM Leads collection
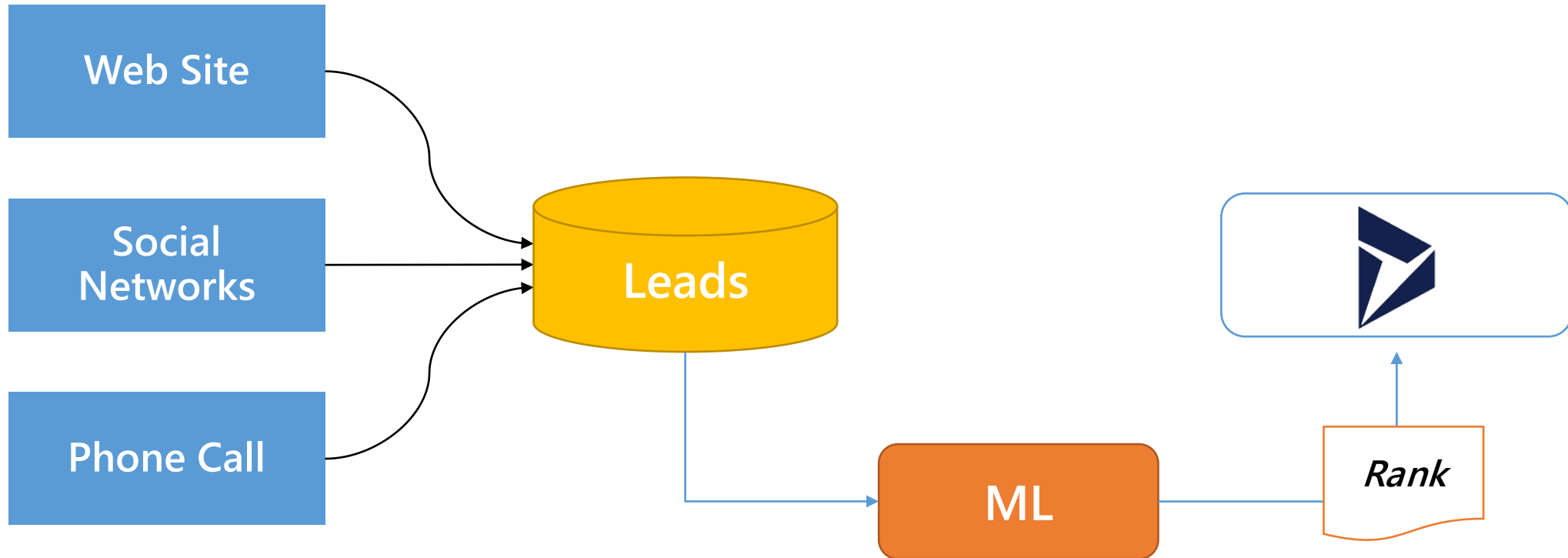
# CRM Leads criteria

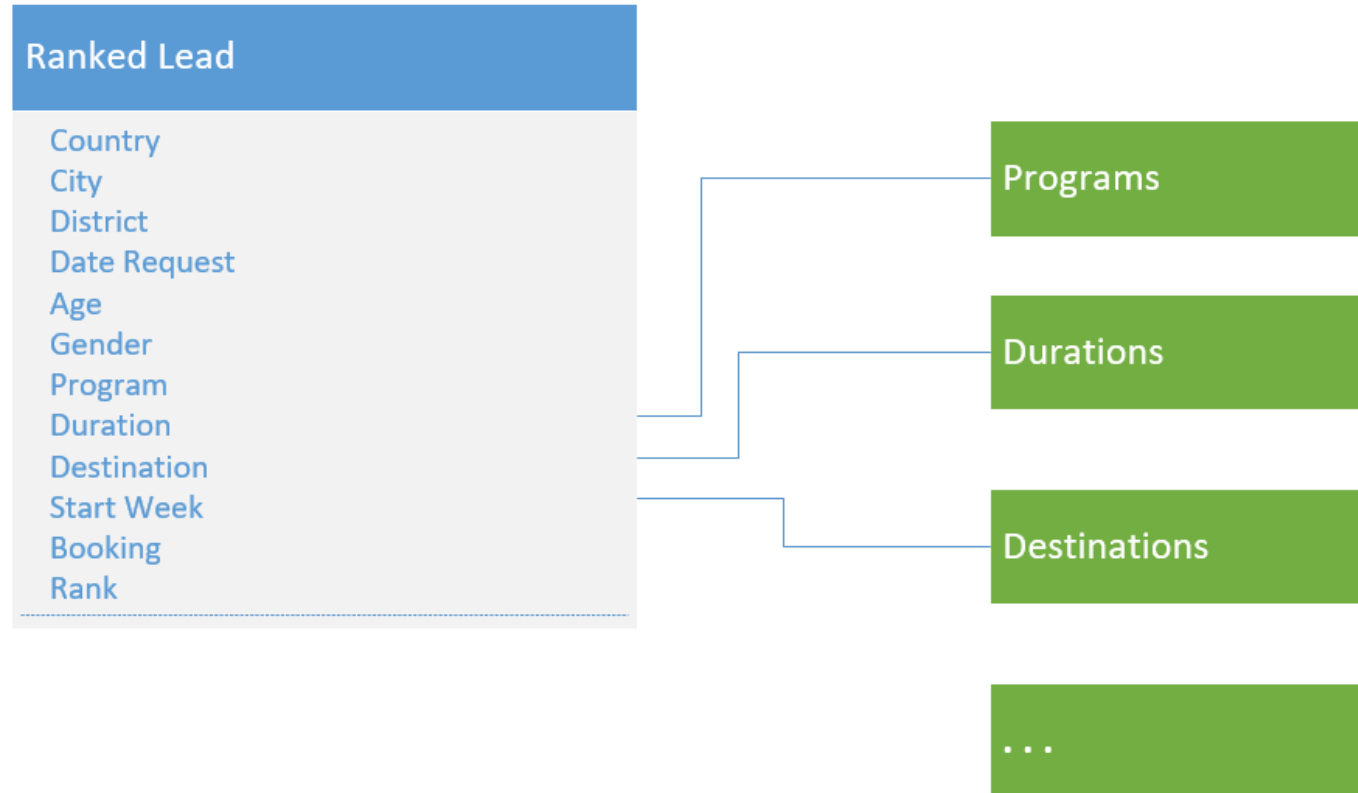| LOCATION | DESTINATION | GENDER | INTEREST |
| --- | --- | --- | --- |
| HISTORY | AGE | CHANNEL | TIME SPENT |
| PROGRAM | DURATION | CONVERSION | EVALUATION |

# Ranked Lead | Data Model

**Ranked Lead**

Country
City
District
Date Request
Age
Gender
Program
Duration
Destination
Start Week
Booking
Rank

Programs

Durations

Destinations

…

# Ranked Lead | Dataset

| Country | City | District | Date Request | Age | Gender | Program | Duration | Destination | Start Week | Booking |
|---------|------|----------|--------------|-----|--------|---------|----------|-------------|------------|---------|
| IT | Florence | Galluzzo | Wednesday, 1 February 2017 | 18 | M | EN-2 | 2W | Cambridge | 1730 | Yes |
| FR | Nice | Port | Wednesday, 1 February 2017 | 12 | M | EN-1 | 2W | Cambridge | 1730 | Yes |
| DE | Konstanz | Egg | Wednesday, 1 February 2017 | 14 | F | EN-1 | 1W | Malta | 1731 | No |
| ES | Valencia | Marina | Wednesday, 1 February 2017 | 17 | F | EN-2 | 1W | Sydney | 1732 | Yes |
| IT | Pisa | Borgo Stretto | Thursday, 2 February 2017 | 18 | F | EN-2 | 4W | Oxford | 1730 | No |
| FR | Lille | Seclin | Thursday, 2 February 2017 | 21 | F | EN-3 | 2W | Cambridge | 1732 | Yes |
| IT | Rome | Centocelle | Thursday, 2 February 2017 | 15 | F | EN-1 | 1W | Oxford | 1732 | Yes |
| IT | Florence | Galluzzo | Friday, 3 February 2017 | 13 | M | EN-2 | 2W | Cambridge | 1730 | Yes |
| FR | Nice | Port | Friday, 3 February 2017 | 15 | F | EN-2 | 2W | Cambridge | 1730 | Yes |
| DE | Konstanz | Egg | Friday, 3 February 2017 | 19 | F | EN-3 | 1W | Malta | 1731 | No |

Range

- ☐ Adults (19+)
- ☐ Teens (15 - 18)
- ☐ Young (10 - 14)

Gender

- ☐ F
- ☐ M

Bookings by Country

Age by Destination

# DEMO

Visual Studio 2019 Solution

https://github.com/stefanotempesta/MachineLearning

# Sales Insights

# Fast forward...

2017 → 2020
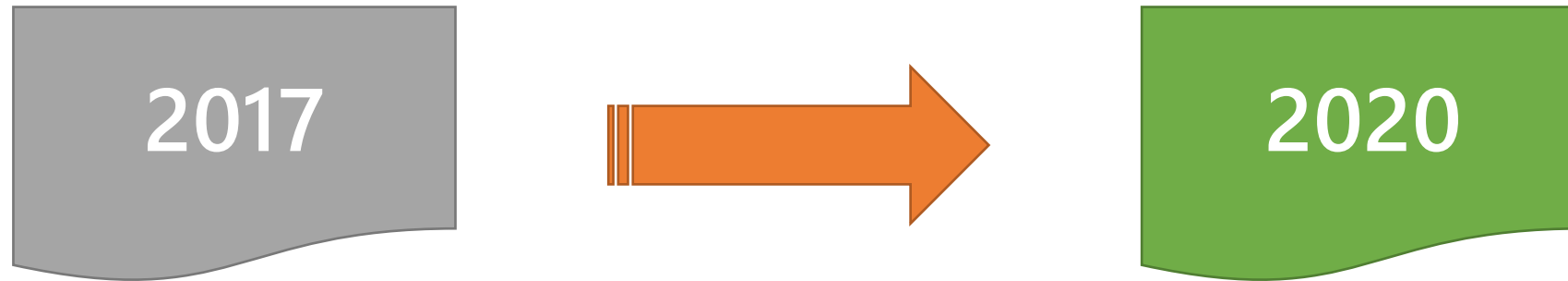
msdynamicsworld.com/story/sales-effectiveness-dynamics-crm-azure-iot-and-machine-learning-part-i

msdynamicsworld.com/story/ranking-crm-leads-azure-machine-learning

# Dynamics 365 Sales Insights

- Assistant
- Auto capture
- Email engagement
- Relationship analytics
- Premium forecasting
- Notes analysis
- Predictive Lead and Opportunity Scoring

# Predictive Lead and Opportunity Scoring

# Lead score grading

# Lead score fields

- **Lead Score:** The closer it is to 100 the better the chance it will convert.

- **Lead Score Trend:** Identifies how the lead is trending, whether it's declining, steady or improving.

- **Lead Grade:** This is the same as the lead score, just represented through a letter.

# Enabling Sales Insights

- Asia Pacific (APJ)
- Canada (CAN)
- Europe, the Middle East, and Africa (EMEA)
- Great Britain (GBR)
- India (IND)
- Japan (JPN)
- North America (NAM)
- Oceania (OCE)

*2020 release wave 1*

# Dynamics 365 Sales Insights 2020 release wave 1

- Not available on the Government Community Cloud (GCC)

- Some features are available for free
https://docs.microsoft.com/dynamics365-release-plan/2020wave1/

- Each feature can be enabled or disabled separately

- Use the out-of-the-box entities (Account, Contact, Lead, Opportunity) in Dynamics 365 Sales

# DEMO

**Dynamics 365 Sales Insights** <span style="color:orange">2020 Release Wave 1</span>

Auto capture

Conversation intelligence

🖉 NEW ACTIVITY ▾     ➕ NEW RECORD ▾     🖶 IMPORT DATA

A new version of Sales Insights is available. Update now     ✕

Overview

**Assistant studio**

Insight cards

**Productivity intelligence**

Auto capture

Email engagement

Notes analysis

**Connection insights**

Relationship analytics

Talking points

Who knows whom

**Predictive models**

Lead scoring

Opportunity scoring

# Sales Insights settings

Help your sellers focus on the deals that matter most, and guide them to success, with our full suite of intelligent features. Learn more

Note: Sales Insights capabilities that aren't marked as "free" or "preview" require a Sales Insights license.

**Assistant (full capabilities)**
Customize, prioritize, and create new insight cards for your organization with the assistant studio. Learn more

Manage ›

**Auto capture (free)**
Capture emails and meetings automatically, to simplify data entry for your team.
Learn more

Manage ›

**Email engagement (free)**
Enable read receipts and follow-up reminders to help sellers keep track of engagement with customers. Learn more

Set up ›

**Notes analysis**
Notes analysis suggests actions that sellers can perform based on interactions with customers. Learn more

Set up ›

**Relationship analytics**
Prioritize customers using machine learning signals from Office 365 and Dynamics 365.
Learn more

Set up ›

**Talking points**
Help your team be prepared for sales conversations with personalized ice breakers and talking points from past correspondence. Learn more

Set up ›

🗪 Share your ideas

📖 Check out our blog

❓ Learn about Sales Insights

# THANK YOU!

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