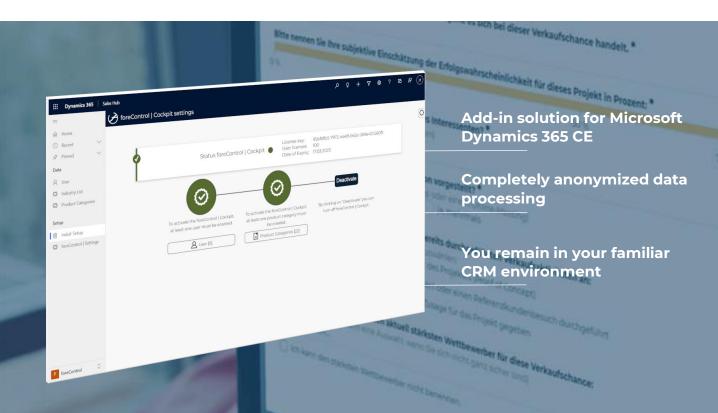


Product Flyer for **Microsoft Dynamics 365 CE**

Add-In solution for predicting and managing opportunities in complex B2B sales

B2B Sales Excellence in Opportunity Management



The combination of a psychometric questionnaire with the AI-based forecasting model achieves a **hit rate** of **82%**.

By measuring success factors, the **gut feeling** becomes **transparent** and traceable.

The solution optimizes the entire sales process and increases the win rate of your pipeline.

Challenges in complex B2B sales

In B2B sales, predicting the probability of success is accompanied by numerous cognitive biases. The gut feeling distorts the picture of the sales situation and leads to win rates that are regularly below 50%.

To predict the **probability of success** for opportunities and control the sales process proactively, you need to know the relevant success factors. The "Sales Forecast 4.0" study has been the first empirical research to identify these success factors and develop a short **psychometric questionnaire** to measure them.

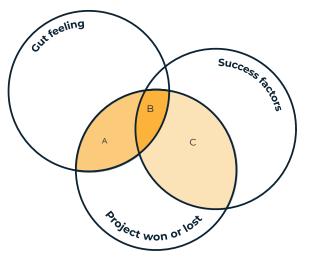
- **1.** The success factor **Relationship & Commitment** reflects various aspects of the relationship with the prospect (7 questions).
- **2. Competitiveness** considers the relative strength of the strongest competition (5 questions).
- 3. The factor **Requirements & Ideas** shows to which extent the solution matches the requirements and ideas (4 questions).

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Dynamics 365	29.05.2022 New Addon add	Fabrikam, Inc. PROSPECT	Develop SALES STAGE	€340,000.00 EST.RIVEMJE	The questionnaire takes about 3 to 5 minutes to answer
Content Conte	Compared to our strongest competitor (Semens), on this opportunity of the better references. the better offer for the prospect more unique selling points. the better relationship with the prospect.		e e e e e e e e e e e e e e e e e e e	ee ager	The sales team rates the questions on a 5-point Likert scale
A counts Contacts Contacts Contacts Contacts Competitions Competition				O O O O O O O O O O O O O O O O O O O	The success factors are measured reliably and validly
 Prognou- Forecast Accuracy Forecasts Hitrates Sales 					

The AI-based forecasting model

To achieve the best **prediction accuracy**, the Albased forecasting model uses only information from the intersections of the circles (Area A, B, and C). The reason is that only this information has a correlation with the purchase decision.

This AI approach makes it possible to "filter out" information like **unwanted influences** such as the pressure to succeed or bad moods.



Keeping track of sales process with forecast details

With each response to the questionnaire, the salesperson gets a realistic picture of the current sales situation. Based on the **rated success factors**, the sales team can manage the sales process in a targeted manner. In addition, success factors provide an overview of the problem areas of each opportunity. The **history** shows where the probability of success increases, the sales process stagnates, or the deal might start to fail.

Contacts Opp Activ des Sur	W Automation Lin sortunity · Opportunity ortunity Sales Process e for 19 days	<	0			0		Close
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Sur Sur	Francisc Deti	ails Product Lie		iles Related				
Opportunities	Forecast det	tails	Verification	AI-PROG	Relation	Competition	Requirements	Timing 3.6 3.6 3.6 2.8
R Competitors	Date S	UB-PROG 70 % 43 %	89 % 43 %	89 % 36 % 13 %	***** 3.4	***** 3.7 ***** 2.7 ***** 3.3		30 36
Prognosis Statistics	13.05.22	43 % 56 % 44 % 25 %	9% 15% 6%	15 % 4 %	***** 30	***** 23		
Collateral								
Quotes Orders								
Invoices Products								
Sales Literature								
Marketing B Marketing Lists								

Rated success factors on a scale from 1 to 5

AI-PROG: Probability of success according to forecasting model

Checking the gut feeling for plausibility

Verification of the expected closing date

Optimized sales process through simulation

With the help of simulation, you can change the relevant answers from the last prediction and recalculate the probability of success. These "What If scenarios" can be used to derive **recommendations for action** to close the deal faster.

	III Dynamics 365 Sales	Hub		्र स्व १ ७ ९
Top 3 recommended actions to improve the probability of success	Accounts Accounts Contacts Sales Ve Leads Opportunities	New Automation	C34000000 to revease ★★★★★ 40 Moorebees Moorebees	Simulation: AI-PAOC Compared to the progroups, you have increased by 3%.
Benchmarking of the rated success factors	Competitors foreControl Prognosis Statistics Prognosis Statistics Forecast Accuracy Forecasts Hitrates Colleteral	Compared and and any first competitor (Semendi we have	• •	disagree neutral Litathur 4.5
Simulation of the probability of success based on the last prediction	Cuotes Codes Code	- more unique saling ponts.		
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Demonstration of prediction quality and hit rate

The solution uses ROC curves (Receiver Operating Characteristics) to evaluate the accuracy of predictions. The area under the curve is a commonly accepted **indicator** of **prediction quality**. Comparing the gut feeling with the forecasting model shows the more accurate prediction quality. The difference between the two AUCs demonstrates the **ROI** of the solution.



Benchmarking of prediction quality and hit rate across all companies

Presentation of prediction quality in comparison to gut feeling

Calculation of the optimal cut-off value (at which point is the opportunity safe)

The advantages at a glance

- ✓ The more accurate prediction of expected revenues gives executives more planning reliability.
- ✓ Sales management can make the most of limited resources and gain more control over expected order income.
- ✓ The sales team controls its sales activities based on objective success factors.
- ✓ By measuring the success factors, the gut feeling becomes transparent and traceable.
- ✓ The solution provides recommended actions to improve the probability of success.
- ✓ The solution optimizes the entire sales process and increases the win rate of your pipeline.

Try out our solution for free!

We will be happy to advise you on the benefits and possible applications.