POWER UP YOUR SALES ANALYTICS USING RSM'S POWER BI ACCELERATOR

March 2019
Faisal Muhammed
Boston, MA
Manager,
Technology & Management Consulting
Phone: 857-364-7606
Faisal.Muhammed@rsmus.com

Faisal Muhammed, Manager of Business Intelligence and Analytics, has over 11 years of technology experience in a wide variety of roles including Business Intelligence Consultant, Data Architect, Project Manager and more.

Faisal is our business Intelligence lead for the Northeast region.

**Subject Matter Expertise**

- Business Intelligence – assessments and strategies
- Data foundation
- Reporting and analytics
- Predictive modeling

- Data integration
- Database development
- Database administration
- Project management
Discussion Topics

• Introduction to Power BI
• RSM’s Sales Accelerator for Dynamics 365 CE
• Sales Accelerator Demonstration
• Power BI Pricing
• Summary & Next Steps
• Q&A
Power BI Introduction

Power BI is a stack of two “companion” applications

- **Power BI Desktop** is a free, standalone self-service BI application
- **Power BI Service** is a SaaS application that provides a simple, interactive, and user-friendly interface to create, view, share dashboards/visualizations, interact with the data and collaborate across the organization. Users interact with the service using a web browser or a mobile application.
Power BI Service – Natural Language Query

- Type questions in plain language – examples:
  - Filter: “city with gross margin is less than 20000 this year”
  - Sort: “Show city with stores sorted by store count descending”
  - Aggregate: “sales by fiscal month as card chart”

- Modify the type of visualization
- Add or remove fields
- Add filters
- Pin the answers to your dashboard
- Set up data models with natural key phrasing for best results
Power BI Service – Content Packs

• Get started with pre-built content packs for popular SaaS solutions or for your organization

• Content packs include
  – Pre-configured dashboards
  – Reports
  – Data models
  – Embedded queries

• Available with Power BI Free

• Limitations of content packs
  – Generic
  – Lack of extensibility

• Organizational content packs
  – Package up and share your own dashboard, reports, and datasets with your coworkers
  – Requires Power BI Pro license
RSM’s Sales Accelerator for Dynamics 365 CE

Key principles of a successful sales operation

- The ability to measure performance
- Obtain effective metrics to predict outcomes
- Keeping the sales team aligned with the goals of the organization

Microsoft Dynamics 365 CE built-in sales dashboard limitations

- Users quickly realize the need for additional analytics
- Lacks advanced analysis capabilities – drilldown, advanced filtering, self service analytics
- Limited customization/extensibility

To address these limitations, RSM has built a Sales Accelerator

- Built using Power BI, leader in Business Intelligence and Analytics platform
- Leverages CRM data in real time
- Full filtering and drill down capabilities, allows natural language querying
- Dashboards reside natively in Dynamics 365
- Provides a foundation for Self Service Analytics with drag-and-drop capability
SALES ACCELERATOR DEMONSTRATION
Power BI – Pricing

There are two types of licenses in Power BI

- Power BI Free: Lacks some advanced features
- Power BI Pro: Subscription based; $9.99 per user per month

Let’s revisit the two Power BI applications and check their license types

- **Power BI Desktop** is free
- For **Power BI Service**, if a user is consuming “pro content”, then Power BI pro is required else the free version will suffice.

Pro content is mainly based on the following 3 factors:

1. Data refresh
   - Refreshing on-premises data sources automatically
   - Querying on-premises data sources live
2. Collaboration
   - Group Workspace, Organizational Content Packs
3. Security
   - Row-level security
Summary & Next Steps

Summary

• Power BI is a platform that makes data and analytics accessible by expanding access to business intelligence and supporting a culture of data-driven decision making

• RSM’s Sales Accelerator utilizes Power BI to provide enhanced and meaningful insights into sales operations

Next steps

• If you haven’t already, sign up for Power BI by visiting http://powerbi.com

• Use Power BI Desktop to import data from your data sources, transform data, create visuals

• Publish your reports to Power BI Service and interact using browser and your mobile device

• If you have any questions on our Sales Accelerator for Dynamics 365 CE or on how to get started with Power BI, feel free to contact faisal.muhammed@rsmus.com
QUESTIONS AND ANSWERS?