

# Dynamics 365 Sales Insights

2020 release wave 1  
April-September 2020

In this guide, you will be able to learn the most important things about this release wave.

## Top things to know

### New capability highlights

The 2020 release wave 1, brings to market significant new services and capabilities to enable digital transformation for businesses. For Dynamics 365 Sales Insights, these new capabilities include:

#### Conversation intelligence

##### Better understand customers with advanced conversation insights

- Emotion detection
- Deeper topic analysis
- Updates to insights details page

##### Boost seller productivity with conversation insights inside Dynamics 365 Sales

- Easy access to conversations
- Access to conversational insights and highlights
- Create the next best actions and highlighted information

#### Dynamics 365 Assistant

##### Benefit from enhanced insights

- Improved user interface
- Group insights by sections
- Drill down to receive more context

#### Advanced forecasting and pipeline intelligence

##### Remove the guesswork with predictive forecasting

- Explore historical evidence
- Leverage your existing data

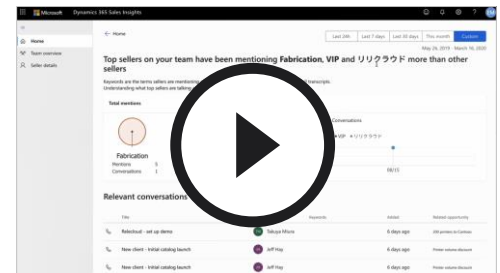
##### Uncover hidden insights in your forecasts

- Take advantage of snapshots
- View snapshot history
- Benefit from deal-flow and snapshot visualization
- Take advantage of cumulative trend chart

### Watch the release overview video

Learn about the key capabilities and features in the release wave.

Visit: [aka.ms/Overview/2020RW1/SalesInsights](https://aka.ms/Overview/2020RW1/SalesInsights)



### Read the release plan

Explore the entire set of new capabilities planned for 2020 release wave 1.

Visit: [aka.ms/Plan/2020RW1/SalesInsights](https://aka.ms/Plan/2020RW1/SalesInsights)



### Join the Dynamics 365 community

Engage with experts and peers.

Visit: [aka.ms/Community/SalesInsights](https://aka.ms/Community/SalesInsights)

### Help us improve

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## Release summary

Everything we do at work creates data. This data sits at the center of the organization, powering processes, generating archives, and informing decisions. As organizations grow and expand, so does their data footprint, which in turn ignites the need to accelerate processes and enhance decision-making through digital transformation. Organizations that embrace digital transformation show significant improvements to profit margins, increasing revenue while also reducing costs.

For sales organizations, transformation means making sales data go further to help sell smarter and faster as well as to outsmart competition. Deeper customer knowledge and accelerated intelligence can guide organizations to proactively pursue opportunities at the right time and with the right context. Furthermore, coaching and learning can be tailored to each organization, so your business is always moving forward.

Dynamics 365 Sales Insights leverages the power of the Microsoft cloud to bring together sales information via Dynamics 365, communications via Office 365, relationships via LinkedIn, and the power of Microsoft AI to transform selling. Sales organizations gain a 360-degree view of their customer engagements to offer agility, adapting to rapid market changes while adhering to business strategy and accommodating specific business requirements and guidelines.

We do this by democratizing sales intelligence. Dynamics 365 Sales Insights is designed to empower everyone in the sales organization to be more productive, more agile, and more customer focused—ultimately closing more deals, faster:

Sales leaders can improve sales team efficiency and impact, manage pipelines more intelligently, and enhance customer relationships with actionable insights and relevant recommendations. Intelligence is drawn from all forms of communication to deliver a coherent and current state of the business.

Sellers, whether in the field or at call centers, can spend more time on selling activities, with automation of mundane tasks, and better prioritize pipelines with timely sales guidance, benefiting from relevant insights tailored to meet specific context and individual performance.

Sales enablement professionals, who help to operationalize selling, can become more agile with simpler discovery of winning strategies, develop more meaningful guidance with deeper understanding of sales performance, and broadcast the right information at the right time with streamlined dissemination across the sales team. All this, while adhering to and enforcing business strategies with powerful tools that augment sales guidance.

We deliver on this vision by infusing artificial intelligence (AI), machine learning, and advanced technologies into ongoing sales processes. Powered by data across Dynamics 365, Office 365, and LinkedIn and built on top of Microsoft Power Platform to easily integrate external data sources, Dynamics 365 Sales Insights offers a wide breadth of actionable insights tailored to meet specific business needs. Altogether, it can empower sales organizations to close more deals, forecast more accurately, and meet sales quotas, while maximizing selling potential through deeper customer relationships.

Our product offering includes:

**Dynamics 365 Assistant:** Dynamics 365 Assistant offers sellers just-in-time intelligence, automating mundane tasks and surfacing the right information, at the right time, in the right context. The assistant aggregates data and insights across multiple systems to offer a frictionless way for sellers to excel.

In previous releases, the assistant offered relationship insights in Dynamics 365 Sales alongside daily planning and meeting assistance via the Teams mobile app. Now we are bringing all insights together, while enhancing with more actions and context. Furthermore, we are making assistance available wherever selling happens, across new surfaces.



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**Sales Studio for AI guided selling:** Sales Studio empowers sales organizations to build AI-driven insights and sales guidance that align with and help to enforce business strategies and best practices, unique to every sales organization. This helps ensure that sellers and sales managers are well-informed and empowered to sell smarter and faster.

In previous releases, Sales Studio introduced the opportunity to build sales guidance, made available via the Relationship Assistant. Now we are combining all sales guidance under the Dynamics 365 Assistant, so guidance built via the studio will be surfaced to sellers across surfaces. Furthermore, enhanced capabilities and simplified experiences empower sales enablement managers to build actionable insights, with full context, while monitoring engagement to always learn and improve sales guidance.

**Advanced forecasting and pipeline intelligence:** Focusing on the right leads and opportunities helps ensure valuable time is spent on those customers that are most likely to move to the next stage.

In this release, we will introduce advanced forecasting capabilities powered by cutting-edge machine learning models that empower organizations to more accurately predict their forecasts and more easily identify anomalies across opportunities. Pipeline intelligence is an enhancement to previous releases, introducing significant model improvements to capture more information, across a broader set of dimensions.

**Relationship analytics and Auto capture:** Relationship analytics helps form trusted customer relationships that power long-term sales engagements and lead to repeat selling. Objective measures spark attention when needed, so no lead is left behind, and no opportunity overlooked. Auto capture ensures consistent information, so models and insights are powered by meaningful data. Combining reliable data with top quality AI models offers accurate and valuable understanding that enhances productivity and provides visibility to inspire alignment across the sales team.

In this release, we capture a wider set of signals and offer flexibility to adapt models to specific business needs so relationship health understanding is more accurate. At the same time, we incorporated Natural Language Processing (NLP) to identify contact information updates and detect action items within captured activities, all while continuing to focus on capturing more sales information with minimal effort and improving the accuracy and consistency of the data captured.

**Conversation intelligence:** Conversation intelligence offers a unique opportunity to monitor all customer conversations and extract valuable insights that can help sales organizations move forward faster and smarter. Sales managers can easily identify "rock star" sellers and winning strategies, as well as potential gaps, to inform coaching and propagate positive behaviors across the team. Sellers benefit from the opportunity to self-reflect and learn.

In this release, we introduce new ways to easily onboard the organization so everyone can benefit from Conversation intelligence. We offer deeper analysis, with emotion detection, to help tune in to those behaviors that drive successful outcomes. With real-time insights, we ensure that sellers are empowered with the information they need, when they need it.



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## New capability highlights

The following capabilities demonstrate our continued investment to power digital transformation for our customers and partners. To learn more about the entire set of capabilities being delivered during this release wave, visit: [aka.ms/Plan/2020RW1/SalesInsights](https://aka.ms/Plan/2020RW1/SalesInsights)

## Conversation intelligence

### Better understand customers with advanced conversation insights

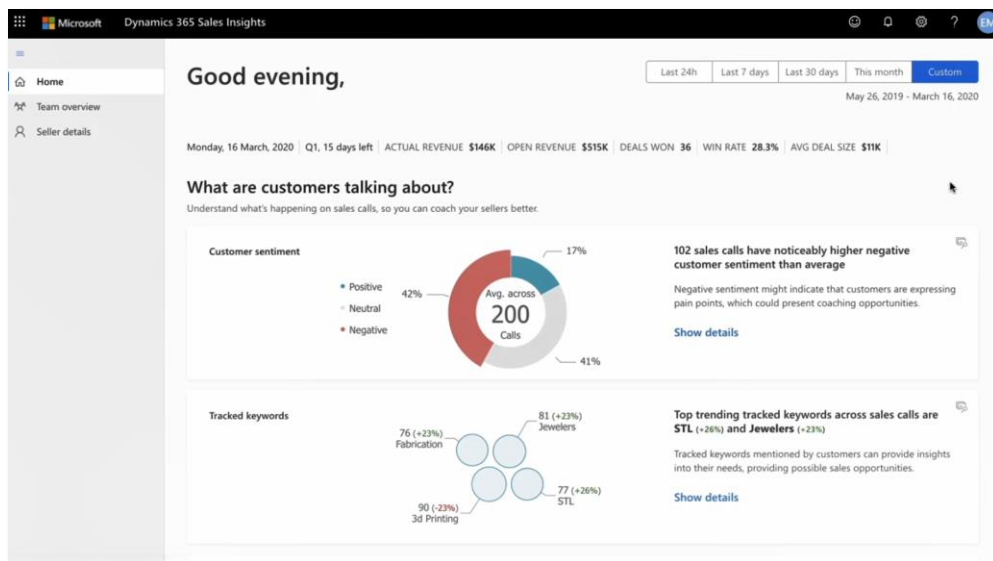
In today's world, organizations must be able to quickly understand customer needs and sentiment toward business brands. Understanding vocal patterns and the nuances of a customer tone can help to determine the potential for success or failure of a deal.

With advancements to Conversation intelligence, sales managers and sellers will be able to better understand customer attitudes and discern potential approaches for handling competitive threats at a deeper level. Providing organizations with emotion analysis based on vocal tones, topic analysis of key discussion points in the conversation, and easy drill-down into relevant conversations that inferred specific insights, all offer greater ability to take appropriate action to move deals forward faster.

Feature details:

- **Emotion detection:** This feature includes an AI model and conversation review experience enhancement.
- **Deeper topic analysis:** Explore communication patterns and important topics that lead to successful conversations.
- **Updates to insights details page:** Create faster drill-downs into conversations that led to the insights.

▶ Watch the overview video: [aka.ms/Overview/2020RW1/SalesInsights/AdvancedConversationInsights](https://aka.ms/Overview/2020RW1/SalesInsights/AdvancedConversationInsights)



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## Boost seller productivity with conversation insights inside Dynamics 365 Sales

Sellers spend an average of 8 minutes after every customer call summarizing what they learned and the next steps. Often these learnings are not captured within Dynamics 365 Sales. When multiple sellers are jointly working on a shared opportunity, it is critical that everyone has exposure to all customer conversations.

In 2020 release wave 1, a complete call summary including action items, topics discussed, and call playback, are available directly within Dynamics 365 Sales phone call activity logs. Capturing these learnings automatically with Conversational Intelligence enables a seller to focus their time on customer needs. Additionally, sales enablement managers can create sales guidance and insights for sellers using Sales Studio.

Feature details:

- **Easy access to conversations:** View call summary within Dynamics 365 Sales phone call activity including playback, transcript, action items, topics, keywords, brand mentions, conversation KPIs, and sentiment analyses.
- **Access to conversational insights and highlights:** Easily view playback, keywords, sentiment, compete mentions, conversational KPIs, and action items.
- **Create the next best actions and highlighted information:** Conversational data available within Dynamics 365 Sales is easily accessible via Dynamics 365 Assistant Studio.

▶ Watch the overview video:  
[aka.ms/Overview/2020RW1/SalesInsights/ConversationInsights](https://aka.ms/Overview/2020RW1/SalesInsights/ConversationInsights)

The screenshot displays the Dynamics 365 Sales interface for a 'Follow up on proposal' activity. The interface includes a navigation pane on the left with sections like Home, Recent, Pinned, My Work, and various business entities. The main content area shows a 'Phone Call' activity with a 'Call Summary' tab selected. Key performance indicators (KPIs) are displayed, including 'Seller talk-to-listen ratio' at 46/54%, 'Seller talking speed' at 118 wpm, 'Switches per call' at 12, 'Avg seller pause before speaking' at 300 ms, and 'Longest customer monologue' at 8 sec. Below the KPIs is a call playback timeline with a play button and a 0:06 duration. A transcript on the right shows a conversation between Elizabeth Moore (EM) and a customer, with sentiment indicators (Positive, Neutral, Negative) at the bottom.

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## Dynamics 365 Assistant

### Benefit from enhanced insights

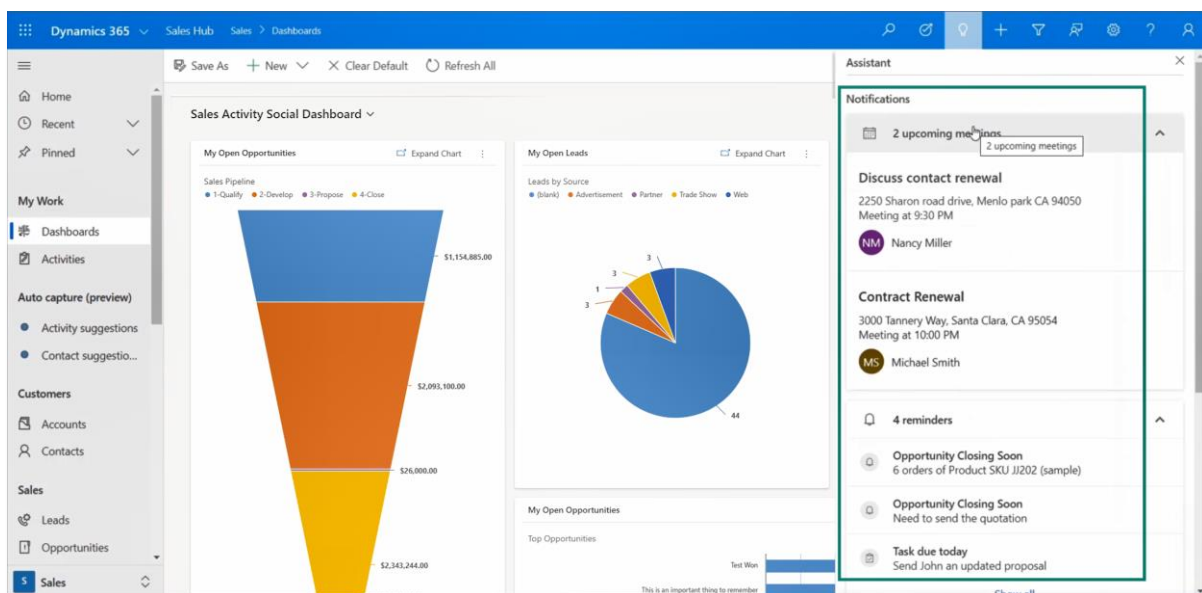
Companies deliver guided selling to keep sellers on track and to enforce successful selling strategies. Sellers often struggle to get the information they need to achieve successful outcomes. This means valuable steps that are key to achieving success might be overlooked. Sales Studio empowers sales enablement managers to surface sales guidance at the right time and in the right context, so no step is skipped and no relevant information untapped.

In previous releases, we introduced next-best-action recommendations. As part of our commitment to make our AI-driven experiences better, we are continually introducing enhancements that make sales guidance contextual and impactful. New capabilities help sellers gain more control as well as introduce additional information and relevant actions to help get things done in the moment.

Feature details:

- **Improved user interface:** Have a new and modern layout for insight cards based on the adaptive cards' infrastructure. With the new layout, the content of the card is better organized and supports the option to perform advanced actions directly from within the cards, so sellers are more productive without changing context.
- **Group insights by sections:** Group cards by card type. Cards with 100% confidence, like task due today or opportunity due soon or upcoming meeting will be in the notification section while cards with a lower level of confidence that are based on predictive models and heuristics will be in the insight sections. The separation into these two sections helps organizations to provide better guidance and focus to their sellers through cards.
- **Drill down to receive more context:** Benefit from the flexibility to drill down into cards to receive more information so sellers can always have all the information they need to choose the best course of action.

▶ Watch the overview video:  
[aka.ms/Overview/2020RW1/SalesInsights/EnhancedInsights](https://aka.ms/Overview/2020RW1/SalesInsights/EnhancedInsights)





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## Advanced forecasting and pipeline intelligence

### Remove the guesswork with predictive forecasting

Growing volumes of sales data offer a unique opportunity to inform business decisions and enhance sales performance. Sales organizations can transform forecasting with large-scale sales data to make more comprehensive and reliable sales predictions.

Predictive forecasting complements subjective bottom-up projections with objective data-driven forecasts. By leveraging both historical and pipeline data, sales managers can forecast sales more accurately and without bias.

Feature details:

- **Explore historical evidence:** Complement subjective bottom-up forecasts with predictive projections to identify discrepancies or inconsistencies without manual effort.
- **Leverage your existing data:** Compare actual performance directly against predictions to visually contrast how the number of deals won is pacing against predictions. The predictive model captures all related data from past deals and open pipelines to identify signals that have the most impact.

▶ Watch the overview video:  
[aka.ms/Overview/2020RW1/SalesInsights/PredictiveForecasting](https://aka.ms/Overview/2020RW1/SalesInsights/PredictiveForecasting)



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## Uncover hidden insights in your forecasts

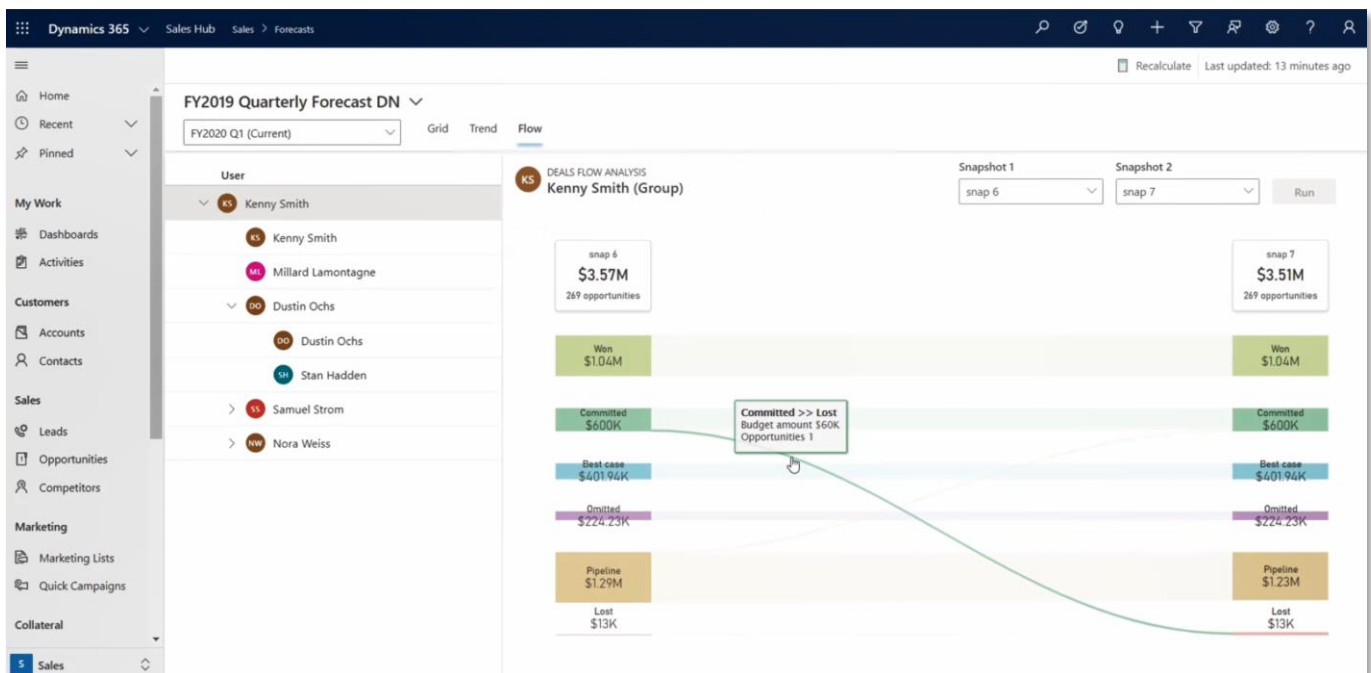
To ensure sales managers can provide leadership with meaningful forecast numbers that they trust, the forecasting capabilities of Dynamics 365 Sales offer great flexibility. Sales managers are empowered to take snapshots to freeze a forecast in the moment and to analyze forecasts, gaining a deeper understanding through changes that occur between snapshots.

With deal flow analyses, comparing two snapshots visually, sales managers can easily view changes in forecasted values as well as the underlying records that contribute to the change. For example, if a sales manager's team forecasted to close 100,000 deals, but only closed 80,000, the sales manager can investigate which deals slipped and why to get a deeper understanding and inform future planning.

Feature details:

- **Take advantage of snapshots:** Trigger snapshot creations before or after adjustment periods end. Empowers sales enablement managers to offer automated snapshots.
- **View snapshot history:** Explore a log of all snapshots taken per forecast and manage these as needed. Empowers sales enablement managers to develop valuable learnings for the organization.
- **Benefit from deal-flow and snapshot visualization:** Visually compare two forecast snapshots to better understand how and why forecasting has changed over time.
- **Take advantage of cumulative trend chart:** Inspect forecast projections visually across a timeline chart.

▶ Watch the overview video:  
[aka.ms/Overview/2020RW1/SalesInsights/UncoverInsights](https://aka.ms/Overview/2020RW1/SalesInsights/UncoverInsights)





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## For application administrators

### End-user impacting features to the user experience enabled automatically

End-user impacting features should be reviewed by application administrators. This facilitates release change management and enables successful onboarding of new capabilities released to market. For the complete list, look for all features tagged "End users, automatically" in the release plan.

### Features that must be enabled by application administrators

This release wave contains features that must be enabled or configured by administrators, makers, or business analysts to be available for their end users. For the complete list, look for all features tagged "End users by admins, makers, or analysts" in the release plan.



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## Get the most out of Dynamics 365

### Release plan

View all capabilities included in this release.

[aka.ms/Plan/2020RW1/SalesInsights](https://aka.ms/Plan/2020RW1/SalesInsights)

### Product updates

Stay up to date on latest product updates.

[aka.ms/Updates/SalesInsights](https://aka.ms/Updates/SalesInsights)

### Release calendar

Know important release milestones.

[aka.ms/Updates/Calendar/SalesInsights](https://aka.ms/Updates/Calendar/SalesInsights)

### Licensing

Improve your understanding of how to license Dynamics 365.

[aka.ms/Licensing/SalesInsights](https://aka.ms/Licensing/SalesInsights)

### Product documentation

Find documentation for Dynamics 365.

[aka.ms/Documentation/SalesInsights](https://aka.ms/Documentation/SalesInsights)

### User community

Engage with Dynamics 365 experts and peers in the community.

[aka.ms/Community/SalesInsights](https://aka.ms/Community/SalesInsights)

### Upcoming events

Find and register for in person and online events.

[aka.ms/Events/SalesInsights](https://aka.ms/Events/SalesInsights)

### Product trials

Get started with Dynamics 365.

[aka.ms/Trials/SalesInsights](https://aka.ms/Trials/SalesInsights)

