



 **DynaTech** | Systems

Accelerate Business

About DynaTech

Unified Purpose, Shared Journey

DynaTech Systems stands out as a comprehensive and flexible solution for businesses looking to leverage technology to drive growth and innovation.

As thought leaders in digital transformation, we deliver cutting-edge solutions and industry best practices. From consulting and proof of concept to end-to-end implementation and custom solutions, our expertise ensures your success.



150+

Projects

100+

Happy Clients

350+

Expert Minds

What Sets Us Apart

DynaTech's Competitive Advantage



Global Work Experience
(USA, Europe, Asia) for
seamless rollouts



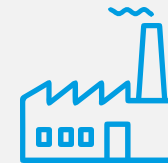
Successful Deployment
of 150+ Microsoft
Dynamics Projects



A single-stop shop for
all of Microsoft's
Business Applications



In-house QA Teams to
ensure Information and
Data Security



Empowering businesses in
Manufacturing, Retail,
Education, and more



Strategic Approach
Resulting in Quick
Turnaround & Solutioning

Microsoft Cloud Capabilities



Microsoft Azure



Azure Infra



Azure Services



Azure Fabric for BI



Logic Apps



Service Bus



Functions



Event Grid



API Management



Synapse Analytics



Data Lake



Data Factory



Load Testing



Microsoft Dynamics 365



Marketing



Sales



Finance



Supply Chain Management



Commerce



Customer Service



Field Service



Project Operations



Human Resources



Customer Insights



Finance & SCM



Copilot



Power Platform



Power Pages



Power BI



Power Apps



Power Automate



Copilot Studio

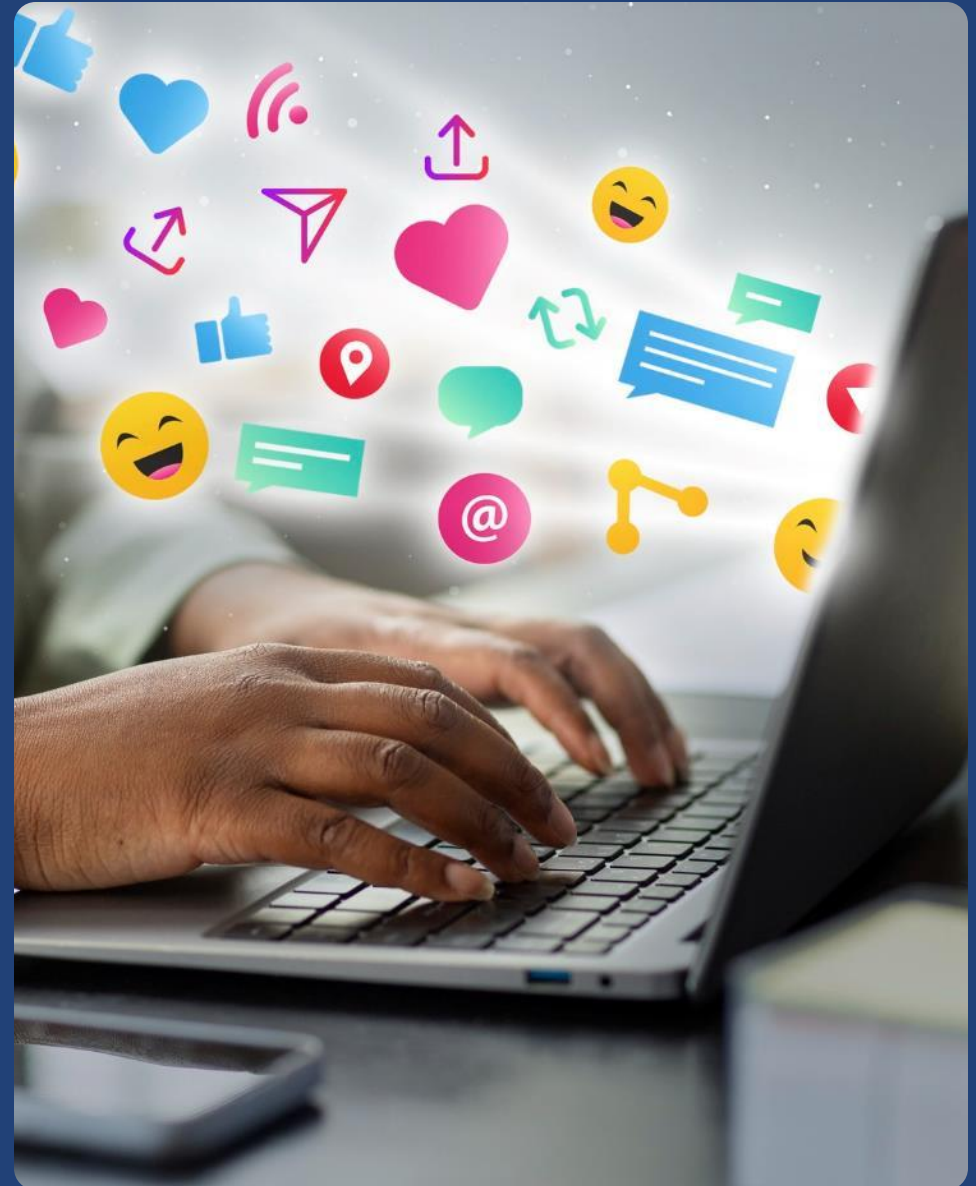


Dataverse

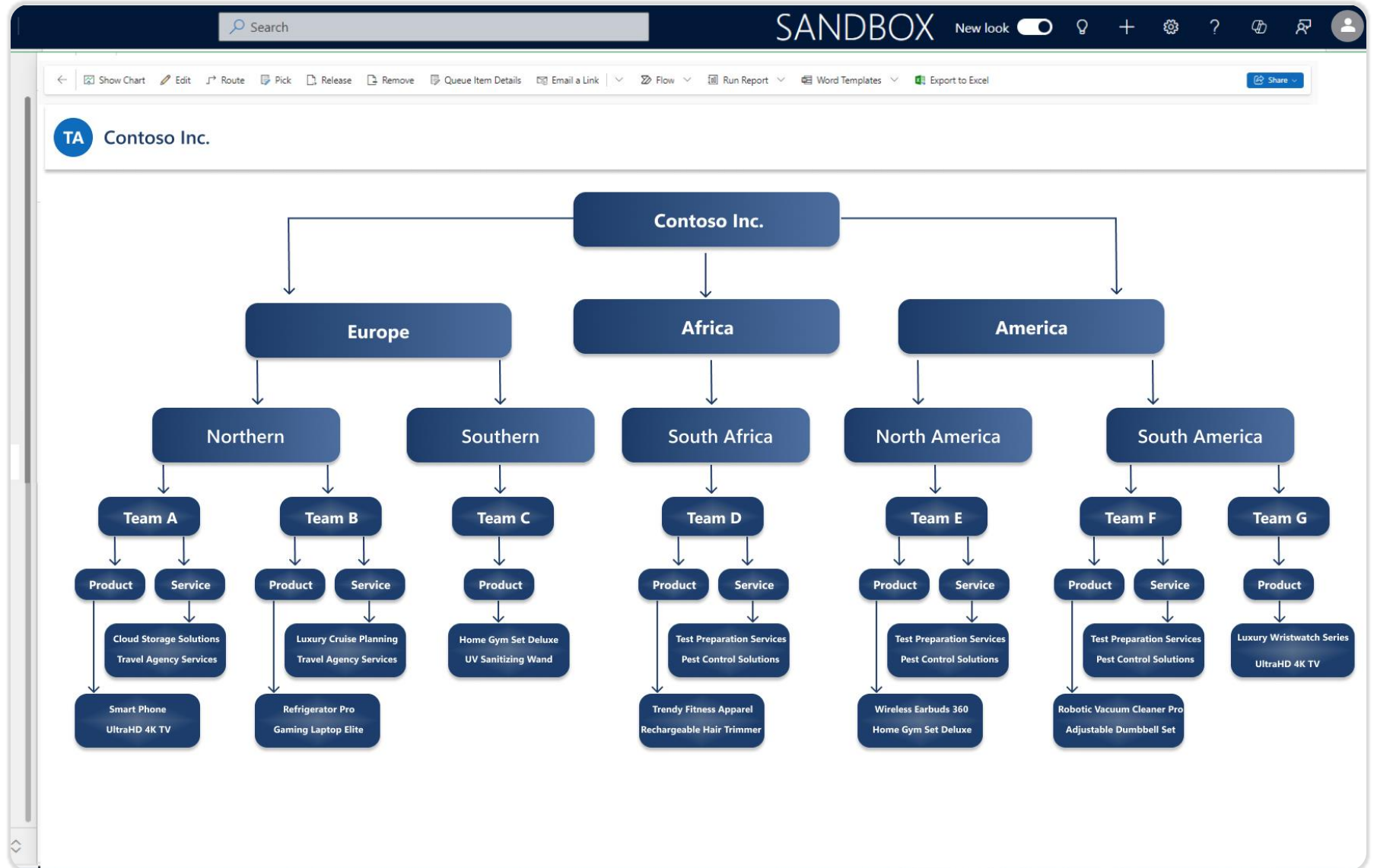


AI Builder

Account Based Marketing (ABM)



Tree Structure View
New accounts are automatically assigned to teams based on predefined criteria like region, product, and services, ensuring alignment with the right sales team.



Queue for Sales Team

Each sales team has access to a team dashboard, which displays all accounts assigned to them. Team members can view and manage these accounts efficiently.

The screenshot shows the Dynamics 365 interface with a 'Task Queue' view. The interface includes a top navigation bar with 'Dynamics 365', a search bar, and a 'SANDBOX' environment indicator. A left-hand navigation pane lists various options like Home, Recent, Pinned, My Work, Customers, Knowledge, and Templates. The main content area displays three tables, one for each team:

Team A				
Account Name	Region	Product	Service	Details
Tata Motors	Asia	5	45	2 hour
Phillips Health Care	North America	10	33	1 hour
ITC india	Africa	20	2	30 Min
Dell	South America	7	10	3 hour

Team B				
Account Name	Region	Product	Service	Details
Havells	North America	5	45	2 hour
TCS	Europe	10	33	1 hour
Infosys	Asia	20	2	30 Min
Tesla Motors	Africa	7	10	3 hour

Team C				
Account Name	Region	Product	Service	Details
James Convey	VP Sales	5	45	2 hour
Michael Jennifer	Operation Manager	10	33	1 hour
Robert Richard	Sales Executive	20	2	30 Min
John Doe	IT Manager	7	10	3 hour

Account Allocation

Sales team members can pick up new accounts from the dashboard as they become available, ensuring equitable distribution and timely attention to each account.

The screenshot shows a web application interface for 'Team A' (Queue for Sales team). At the top, there is a search bar and the word 'SANDBOX'. Below the search bar is a toolbar with various icons for actions like 'Show Chart', 'Edit', 'Route', 'Pick', 'Release', 'Remove', 'Queue Item Details', 'Email a Link', 'Flow', 'Run Report', 'Word Templates', and 'Export to Excel'. The main content area features a table with the following data:

Account Name	Key Stakeholder	Sub-Region	Industries	Allocation Date	Details
<input checked="" type="checkbox"/> Tata Motors	James Convey	North America	Electronics	12/06/2024	Major Player in North American Market for Mobile Phones
<input type="checkbox"/> Phillips Health Care	Michael Jennifer	North America	Healthcare	16/08/2024	They are working on Advancements under Clinical Diagnostics of a
<input type="checkbox"/> ITC india	Robert Richard	North America	Consumer	02/09/2024	Interested in Chemical Raw Materials
<input type="checkbox"/> Dell	John Doe	North America	Electric	10/09/2024	They inquired about Petroleum Products
<input type="checkbox"/> Nippon India	Blesing Thomas	North America	Healthcare	04/10/2024	Leading Player Healthcare Industry
<input type="checkbox"/> Havells Electronics	John Parker	North America	Electronics	13/11/2024	Leading Player in Mobile Phones and its accessories

Activity Timeline & KPI

When a sales representative opens an account, they access activity timeline (360-degree view of customer interactions) and KPIs (AI-driven analytics and actionable suggestions) from D365 Customer Insights.

The screenshot displays the Dynamics 365 Customer Insights interface for 'One Ten Inc. Corporation'. The account is categorized as 'Customer Master Main Form' with an annual revenue of \$10,000.00. The interface is divided into several sections:

- ACCOUNT INFORMATION:** A list of fields including Company (USME), Account Name (One Ten Inc. Corporation), Phone (555-0158), Account Number (CUS-00004025), Customer Group Id (Government), Relationship Type (Customer), Product Price List, Parent Account, Ticker Symbol (\$), Is One Time Customer (No), Currency (US Dollar), Vendor Group, and Vendor.
- Activity timeline:** A vertical scrollable list of customer interactions. Recent activities include:
 - 4 eCommerce...
 - 5 EnquiryData
 - 5 posPurchases
 - 4 webReviews
 - CustomerReview - 1/22/2019: Motor is available only in limited p...
 - CustomerReview - 11/30/2018: Satisfied with my KB duct
 - Semi Electric pumpPurchase ...: Purchased a course online
 - Enquiry for product In-Store ...: Enquiry for product ProdID_5748
- KPI Cards:** A grid of performance indicators:
 - Product_Recommen...: 3 (Last updated a month ago)
 - All product Spend (\$): 954 (Last updated a month ago)
 - Loyalty Credits: 180 (Last updated a month ago)
 - Average Spare part P...: 129.5 (Last updated a month ago)
 - Average Industry Sol...: 95.4 (Last updated a month ago)
 - Time since last purchase: 6 (Last updated 6 months ago)
 - Transcation Value: 228.6K (Last updated 6 months ago)
 - Customer Lifetime Value: 16.7K (Last updated 6 months ago)
 - Churn Score: 0.56 (Last updated 6 months ago)

Activity Template Selection

The sales team can select a follow-up template in Dynamics 365 after reviewing an account, outlining tasks at set intervals to ensure consistent organizational engagement.

Connect lead to sequence

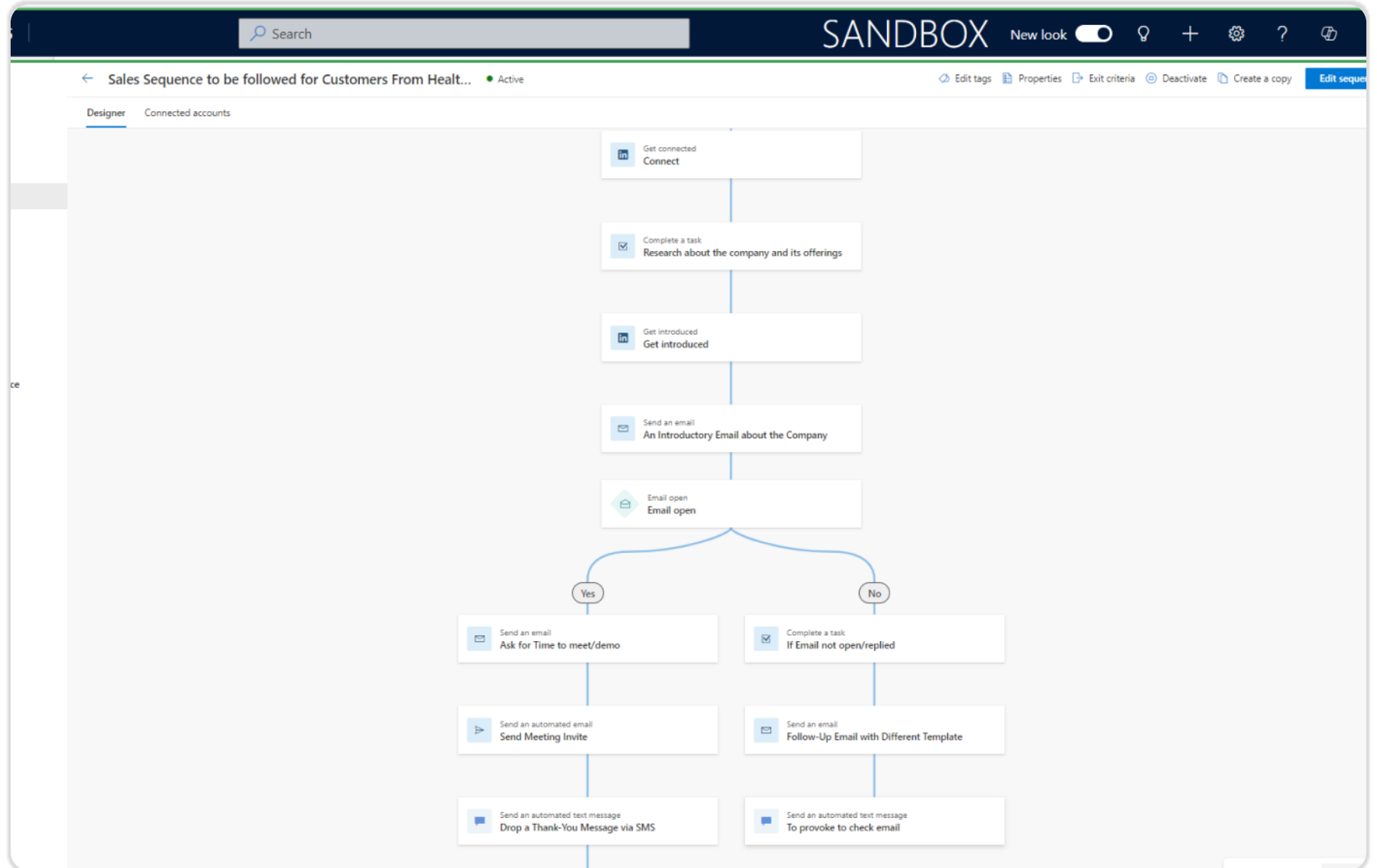
Select the sequence that you want to connect to the lead.

Name	Status	Record type	TotalRecordsColumn	SuccessRate	Max. s...	AvgDurationC...	Tags	Owner
Sales Sequence to be f...	Active	Account	--	--	9	--		# Demo Us...
New lead nurturing Nurture outreach series fo...	Active	Account	50 96.0%	4.0%	2%	5	0 WaitNodeHeaderD...	# Demo Us...
Lead Nurture outreach series fo...	Active	Lead	0 TotalRecordsNotStarted	0%	5	0 WaitNodeHeaderD...		# Demo Us...

Buttons: Connect, Cancel

Activity Template Set-Up

Sales sequences can be designed using different activity templates, integrating social media platforms, and leveraging AI copilot capabilities within the tool. This integration allows for a more personalized and effective outreach strategy.



Activity Execution

By utilizing these follow-up activity templates, the sales team can maintain a methodical and consistent approach to account-based marketing, enhancing customer engagement and driving business growth.

The screenshot shows the Dynamics 365 interface for an account-based marketing activity template. The account is 'One Ten Inc. Corporation' with an annual revenue of \$10,000.00. The 'Activity Template' tab is selected, showing a sequence of steps:

- Up next:** Sales Sequence to be followed for Customers From Healthcare
- Step 1:** Connect via LinkedIn (Due by 3:46 PM). Description: Get in Touch with C level executives from the healthcare domain. Includes 'Connect' and 'Mark complete' buttons.
- Step 2:** Research about the company and its offerings. Description: search for the Websites, Product Catalogues, Financial Information, Competitors, etc.
- Step 3:** Find intro person. Description: Request to Mutual connections for Introductions.
- Step 4:** An Introductory Email about the Company. Includes a 'Wait for 2 days' delay.
- Step 6:** Follow-up email. Description: If there is no Reply on the Introductory Email.
- Step 7:** Send InMail.
- Step 8:** To check/confirm Meeting Invite/Agenda.
- Step 9:** A Quick Thank you Message Post Meeting.

Task Management Dashboard

It helps sales team to follow up task which are overdue, due today and due by tomorrow for various activities like events, phone, email, meeting etc.

SEARCH
SANDBOX
New look
⚙️ ?

← 📁 💾 Save 🗑️ Save & Close ➕ New 👤 Open org chart 🗑️ Deactivate 🔗 Connect | ⌵ ➡️ Add to Marketing List 👤 Assign 🗑️ Delete 🔄 Refresh 🔍 Check Access

AD

My Activity Dashboard

Activity ^

All Activity
 Events- Industry, Product
 Phone
 Product Demo
 In-Person Meeting
 LinkedIn- Post, Msg
 Person Call
 Free Credits
 Task Creation
 Email Scheduler

Tasks for the Day	Account	Activity	Mark as Complete	Due Date
Complete project proposal	One Ten Inc. Corporation	Product Demo	<input type="checkbox"/>	26/06/2024
Prepare presentation slides	Tcs	Task Creation	<input checked="" type="checkbox"/>	26/06/2024
Review quarterly report	Tesla Motors	Email	<input type="checkbox"/>	26/06/2024

Tasks Overdue	Account	Activity	Mark as Complete	Due Date
Send follow-up emails	Lenovo	LinkedIn- Post, Msg	<input type="checkbox"/>	25/06/2024
Submit expense report	Dynatech Corporation	Events- Industry, Product	<input checked="" type="checkbox"/>	25/06/2024

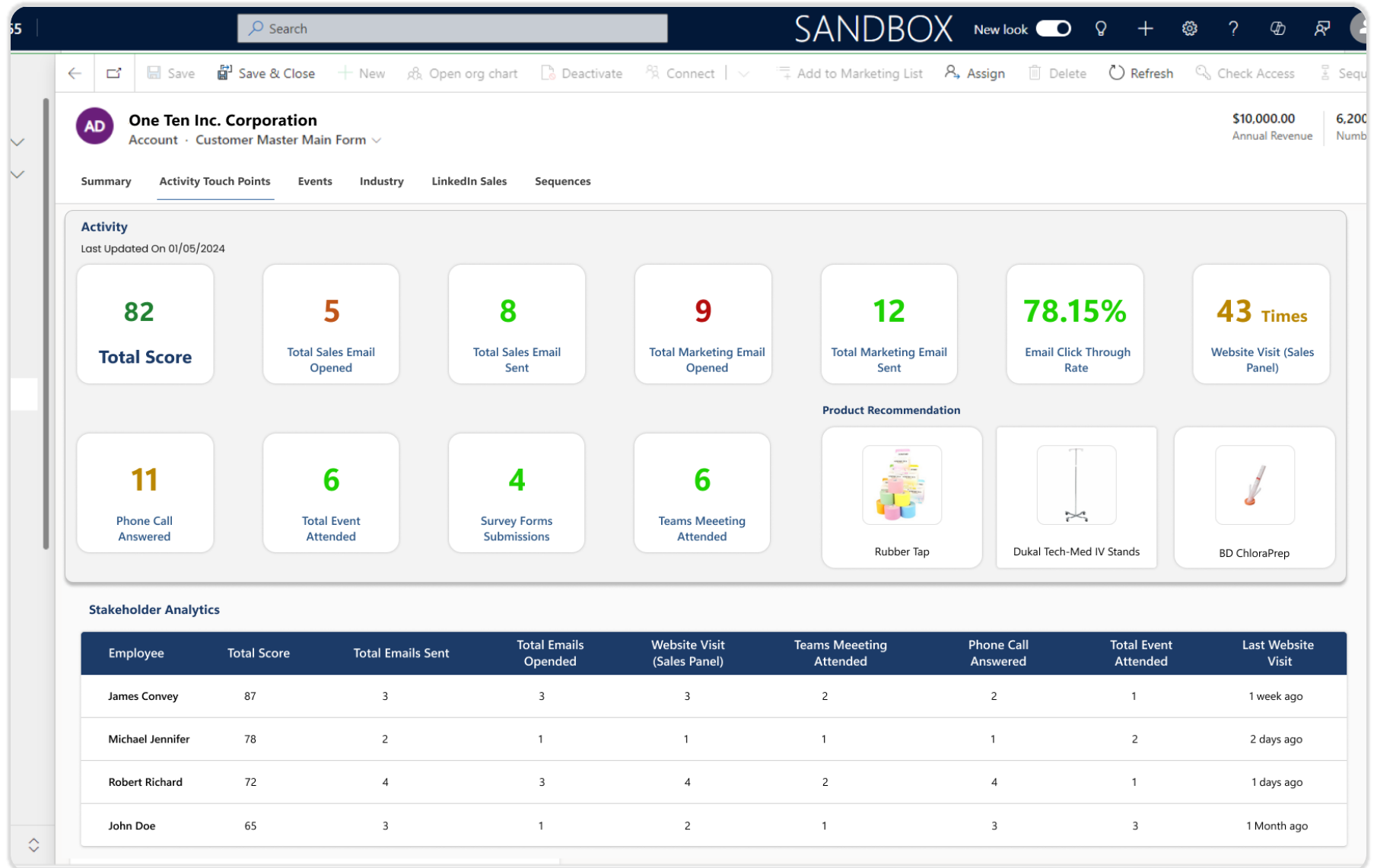
Tasks Due by Tomorrow	Account	Activity	Mark as Complete	Due Date
Meeting with client	Dell	In-Person Meeting	<input type="checkbox"/>	27/06/2024
Finalize budget plan	Tata Motors	Phone	<input type="checkbox"/>	27/06/2024

USA | CANADA | UK | INDIA

13

Account Touchpoint Analytics

The sales team gains a 360-degree analysis of account touchpoints, including total score, email analytics, website visits, meetings attended, product recommendations, and a ranked list of top stakeholders by touchpoint scores.



All Account Touchpoints

This view helps users to quickly assess the level of engagement with each account, allowing them to identify which accounts require increased attention and follow-up activities. The information is presented in a tabular format, facilitating easy comparison and decision-making.

The screenshot displays the Dynamics 365 interface for 'All Accounts*'. The table lists various accounts and their engagement metrics across different touchpoints. The interface includes a search bar, navigation menu, and various action buttons like 'New', 'Delete', 'Refresh', etc.

Account Name	Total Sales Email Opened	Total Sales Email Sent	Total Marketing Email Opened	Total Marketing Email Sent	Email Click Through Rate	Website Visit (Sales Panel)	Phone Call Answered	Teams Meeting Attended	Survey Forms Submissions	Total Event Attended
Margie's Travel	8	6	8	9	73.00%	2 Times	5	7	12	8
Maple Company	5	4	5	5	56.00%	8 Times	10	11	5	6
M&M	7	7	8	7	88.00%	5 Times	7	8	7	7
Lucerne Publishing (sample)	11	9	6	11	58.00%	4 Times	11	6	11	14
Lucerne Publishing	3	7	3	3	71.00%	4 Times	12	8	3	5
Litware, Inc. (sample)	6	6	6	6	63.00%	9 Times	6	9	6	6
Litware Instrumentation	9	9	6	9	43.00%	3 Times	11	15	9	9
Litware	12	9	10	12	86.00%	4 Times	12	15	8	9
Lamna Healthcare Company	7	7	7	7	68.00%	7 Times	7	7	7	4
Humongous Insurance	12	6	8	12	83.00%	8 Times	9	6	12	12

Blogs & Knowledge Articles

The system recommends curated blogs that align with customer interests, offering insights into industry trends and best practices. It also provides access to in-depth knowledge articles, addressing common questions and facilitating self-service problem resolution.

The screenshot shows the Dynamics 365 interface for a customer account. The account name is "One Ten Inc. Corporation" with an annual revenue of \$10,000.00 and 6,200 employees. The "Blogs and Knowledge Articles" tab is selected, displaying two sections: "List of Suggested Blog" and "List of Suggested Knowledge Articles".

Name	Description	Action
AI Advancements in Clinical Trails	If you are going to use a passage of Lorem Ipsum, you need to	Read Further Email link
Lung Cancer Molucul	If you are going to use a passage of Lorem Ipsum, you need to	Read Further Email link
BS-6 Engine in EV Car	If you are going to use a passage of Lorem Ipsum, you need to	Read Further Email link

Industry	Description	Action
Aya Healthcare	be sure there isn't anything embarrassing hidden in the middle of text.	Read Further Email link
Nextgen Healthcare	be sure there isn't anything embarrassing hidden in the middle of text.	Read Further Email link
Deer Creek Animal	be sure there isn't anything embarrassing hidden in the middle of text.	Read Further Email link

Event Suggestions

Dynamics 365 suggests events for the sales team to engage with customers, including nearby events and those aligned with customer interests. These suggestions are enhanced by insights from the D365 Customer Insights platform, reflecting customer preferences and Brand Share of Voice (SOV).

The screenshot displays the Dynamics 365 interface for 'One Ten Inc. Corporation'. The top navigation bar includes 'Summary', 'Report', 'Suggested Events', 'Industry', 'LinkedIn Sales', 'Sequences', and 'Design'. The 'Suggested Events' section is active, showing two tables of event suggestions.

List of Suggested Events based on nearby Location
 Last Refreshed on 20/04/2024

Event	Location	Start Time	Action
TechSpark Summit	Washington Hall	30 May 20:30	Send Invite
Eco-Conscious Expo	New York Hall	31 May, 20:30	Send Invite
Innovation Ignited	Washington Hall	01 Jun, 01:30	Send Invite

List of Suggested Events based on Industry
 Last Refreshed On 19/04/2024

Event	Industry	Action
AI : Explore the future	Healthcare	Send Invite
3D Robotics in Healthcare	Pharmaceutical	Send Invite
Innovation Ignited	Medial Science	Send Invite

On the right side, there are two charts:

Interest SoV for customers like Thomas Dennett

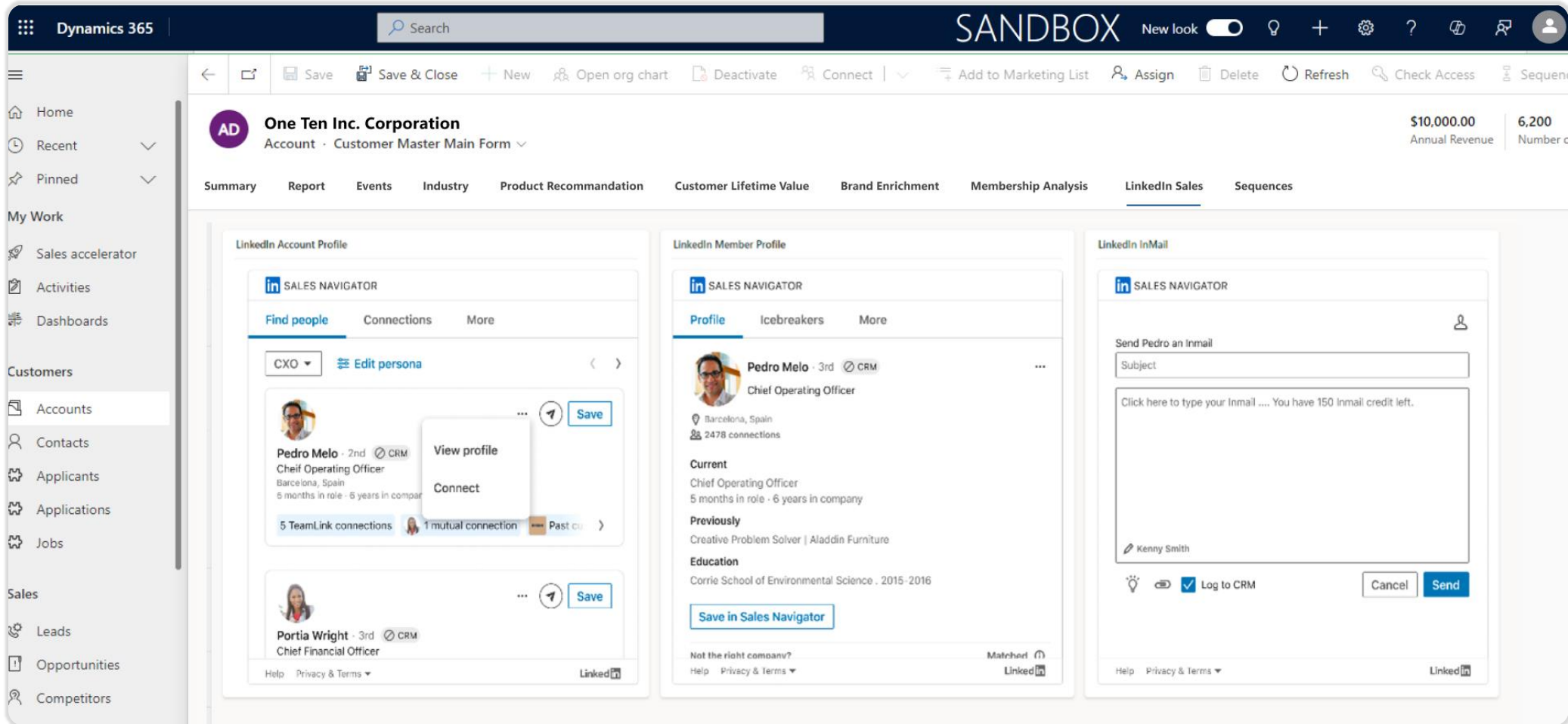
Category	Percentage
Consumer E...	~10%
Furniture M...	~10%
Industrial M...	~60%
Auto Indust...	~10%
Pharmaceut...	~10%

Brand Sov for customers like Thomas Dennett

Brand	Percentage
Caterpillar	~35%
Bridgestone	~10%
Goodyear TI...	~30%
Firestone TI...	~10%
Michelin	~10%

LinkedIn Integration

With LinkedIn integration, the system suggests customer account profiles and key stakeholders, complete with icebreakers. The sales team can also send LinkedIn InMail directly from Dynamics 365, enhancing networking and relationship-building efforts.



Account Overview Dashboard

This section offers insights into top accounts based on overall touchpoint scores. It provides a detailed view of accounts by industry and a geographical concentration map, helping the sales team to understand the distribution and focus areas.

Account Overview Dashboard

Region ▾
Product ▾
Score ▾

Account Name	Product/Service	Region	Highest Active Score
James Convey	James Convey	James Convey	95
Michael Jennifer	Michael Jennifer	Michael Jennifer	90
Robert Richard	Robert Richard	Robert Richard	80
John Doe	John Doe	John Doe	75
James Convey	James Convey	James Convey	73
Michael Jennifer	Michael Jennifer	Michael Jennifer	68

Account Name	Product/Service	Region	Lowest Active Score
James Convey	James Convey	James Convey	42
Michael Jennifer	Michael Jennifer	Michael Jennifer	50
Robert Richard	Robert Richard	Robert Richard	67
John Doe	John Doe	John Doe	68
James Convey	James Convey	James Convey	73
Michael Jennifer	Michael Jennifer	Michael Jennifer	75

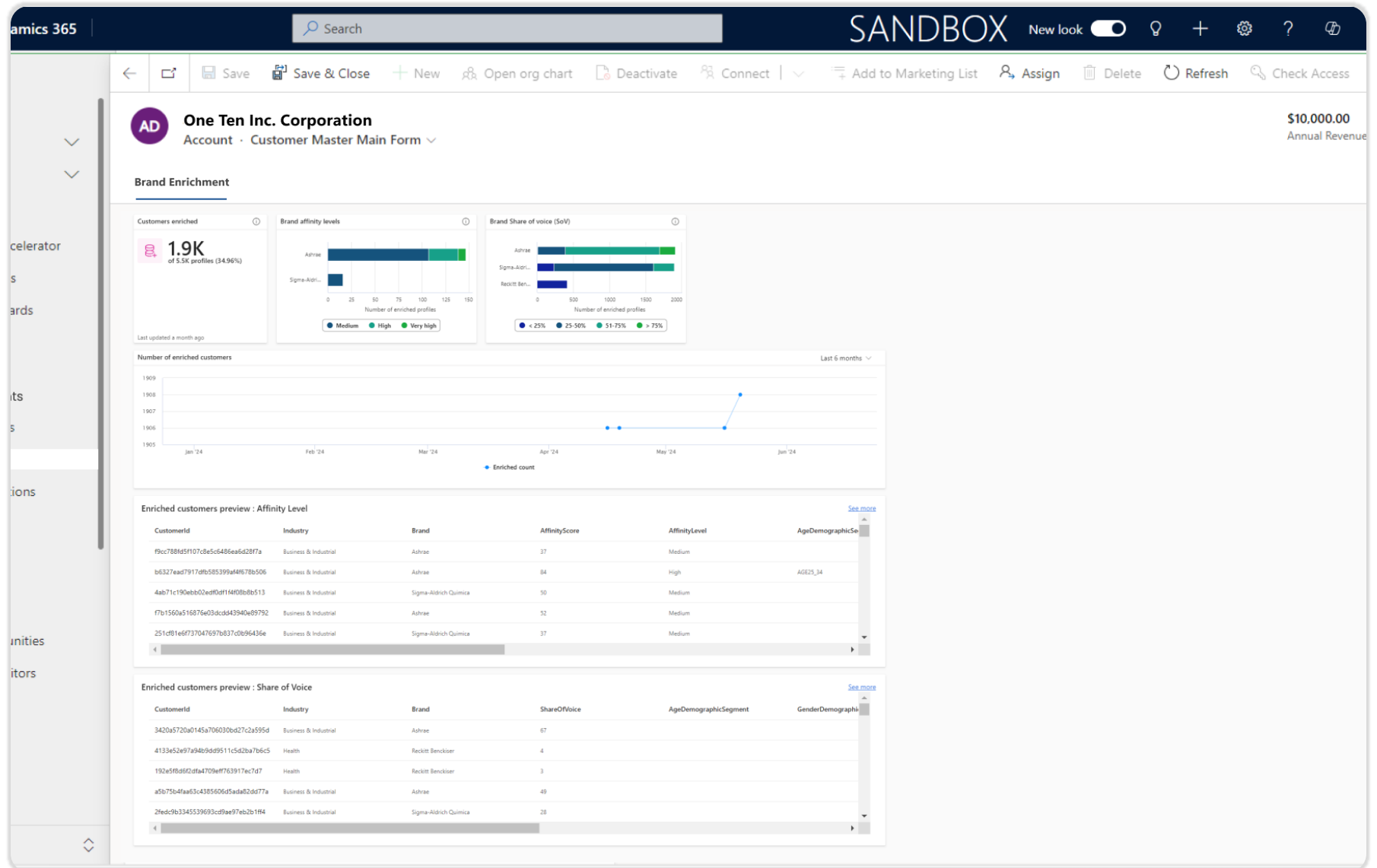
Accounts by Industries

Industry	Count
Auto	10
Insurance	6
Business Services	3
Transportation	3
Consulting	2
Financial	2
Wholesale	2

Global Chart

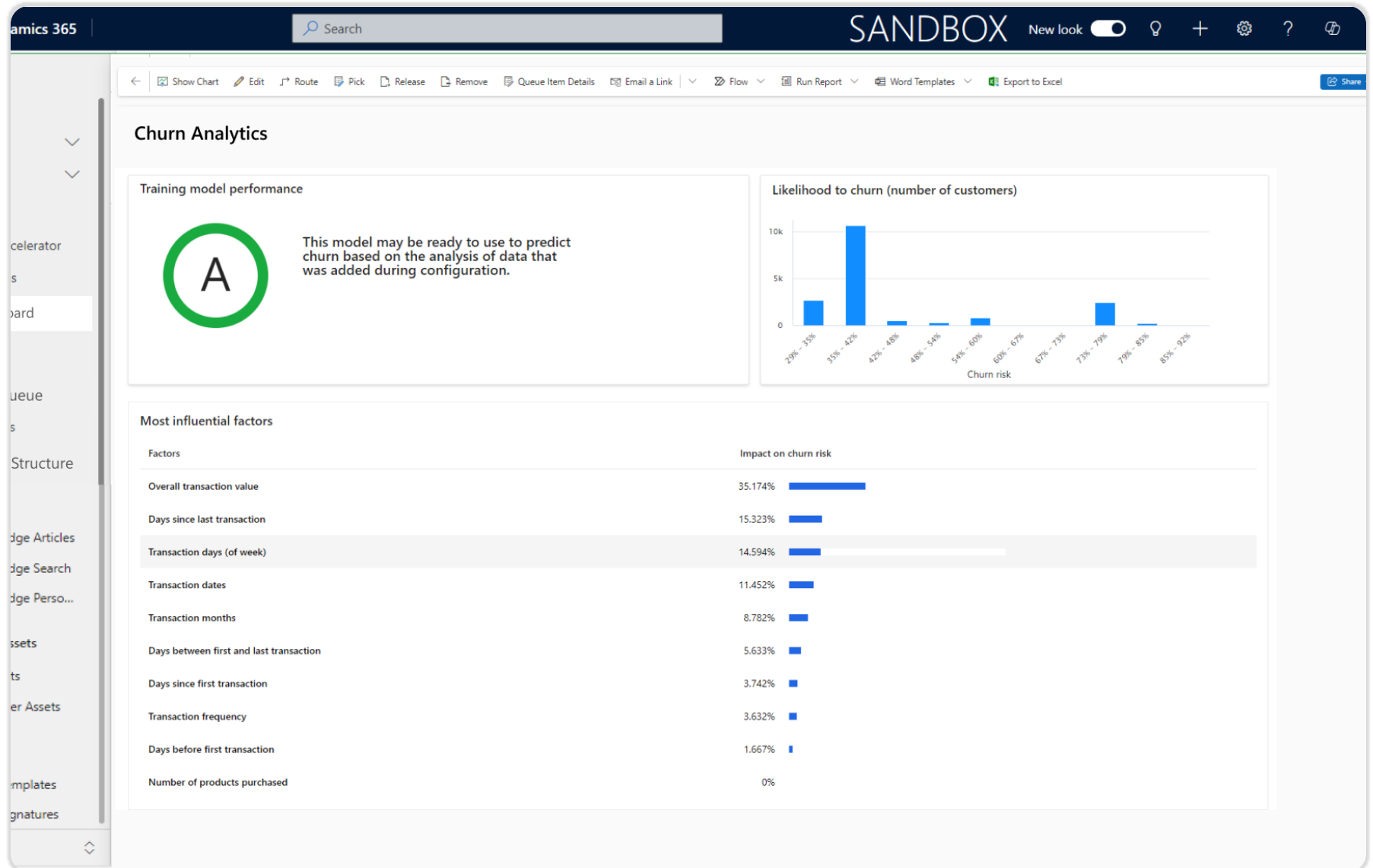
Brand Enrichment

This feature provides an overall report on the customer's brand Share of Voice (SOV), enabling the sales team to gauge the brand's presence and influence in the market.



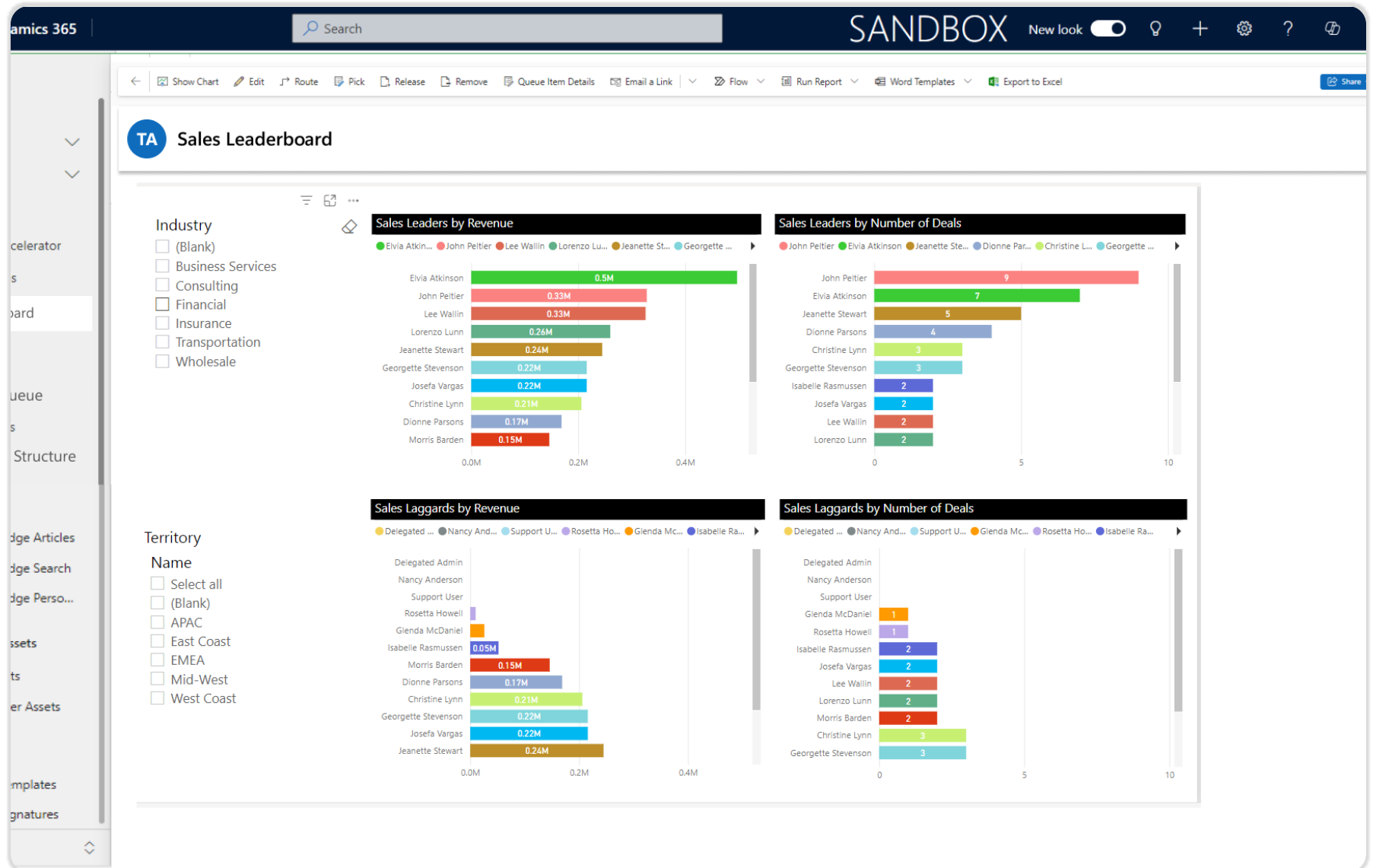
Churn Score

This tool delivers an in-depth analysis of customer churn behavior, allowing the sales team to identify at-risk accounts and develop strategies to retain them.



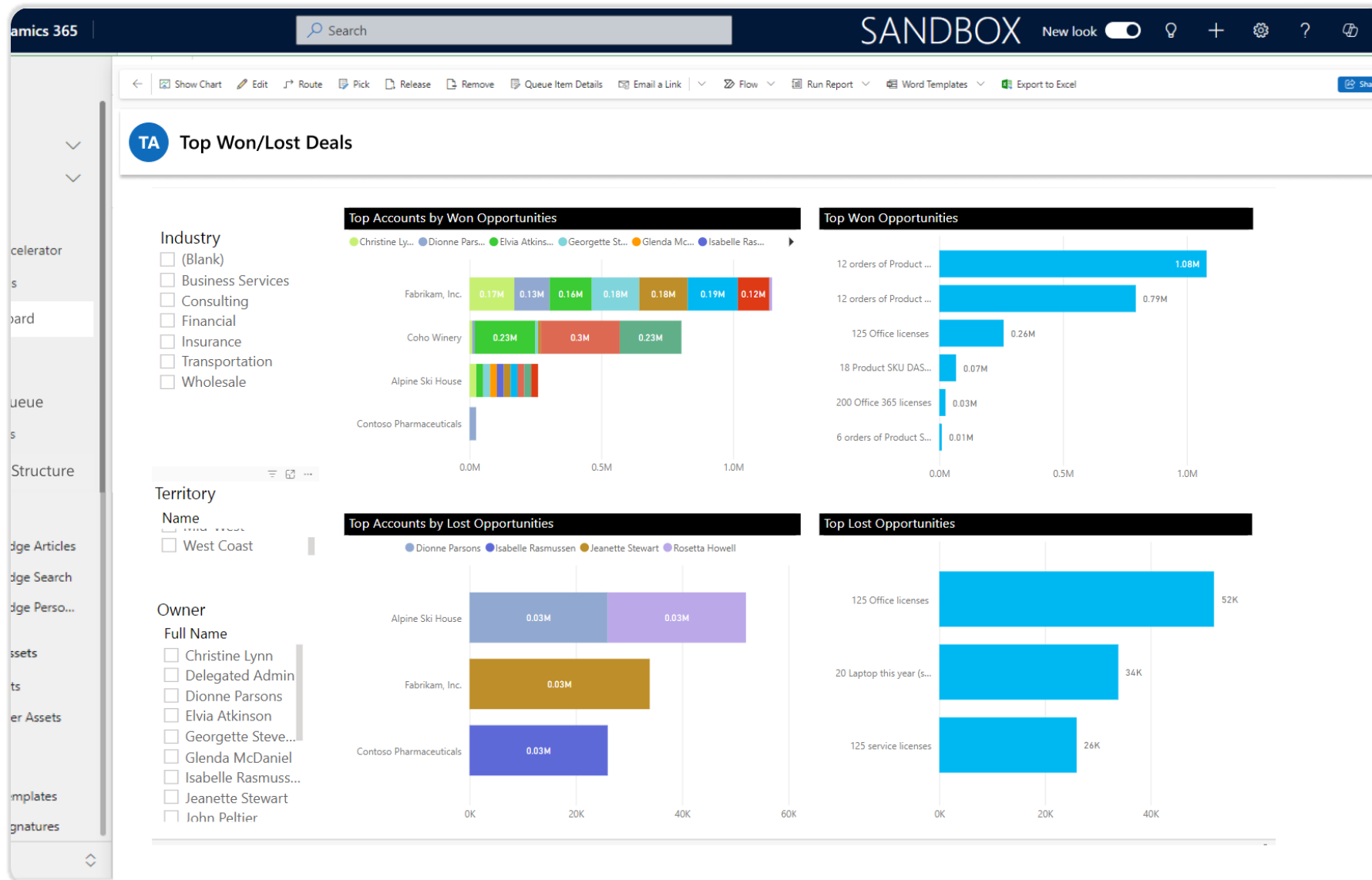
Sales Leaderboard

A dynamic leaderboard highlighting the top-performing sales team members. This promotes healthy competition and recognizes outstanding performance within the team.



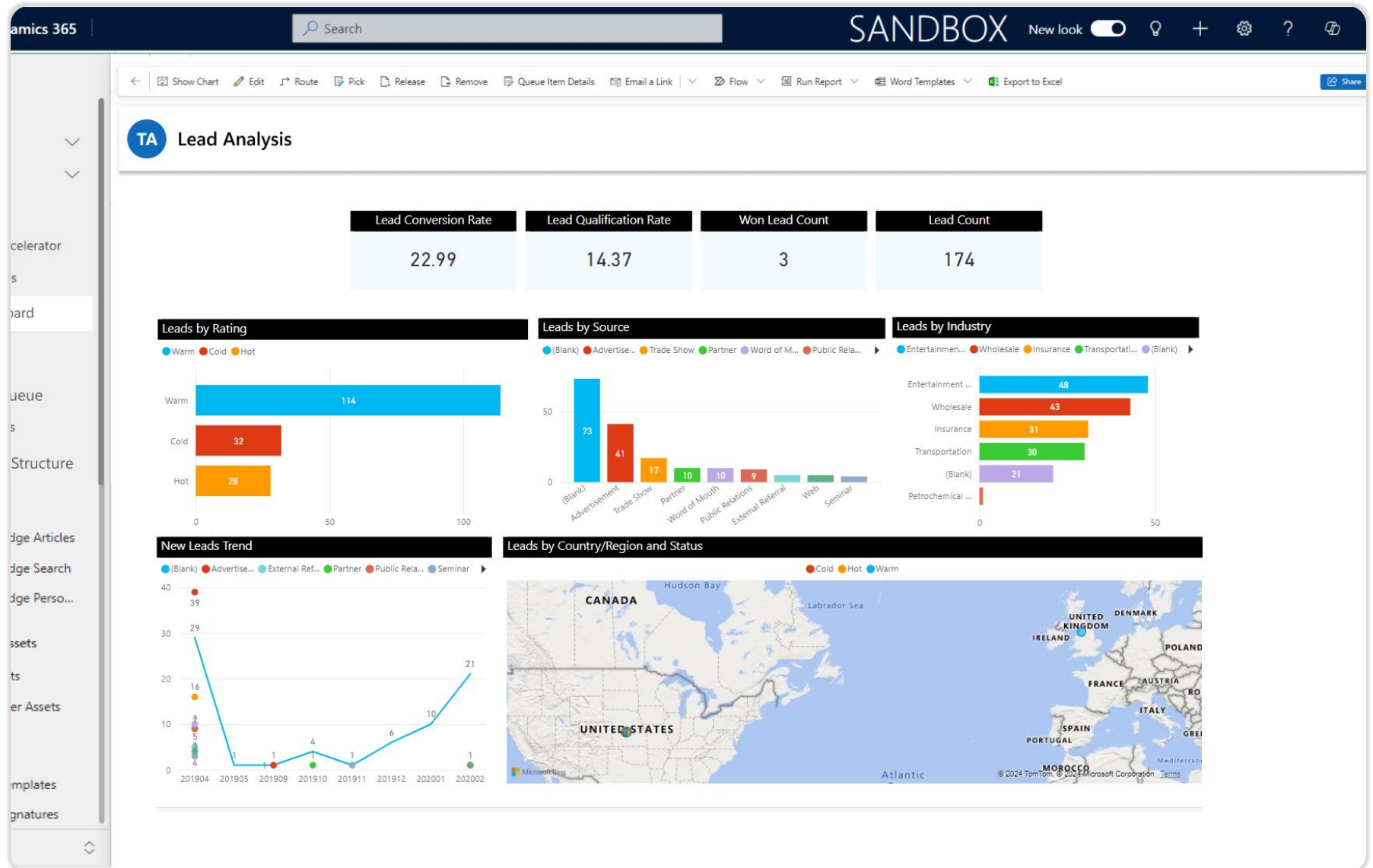
Top Won/Lost Deals

An analysis of the top won and lost deals based on accounts. This helps the sales team to understand the factors contributing to success and areas that need improvement.



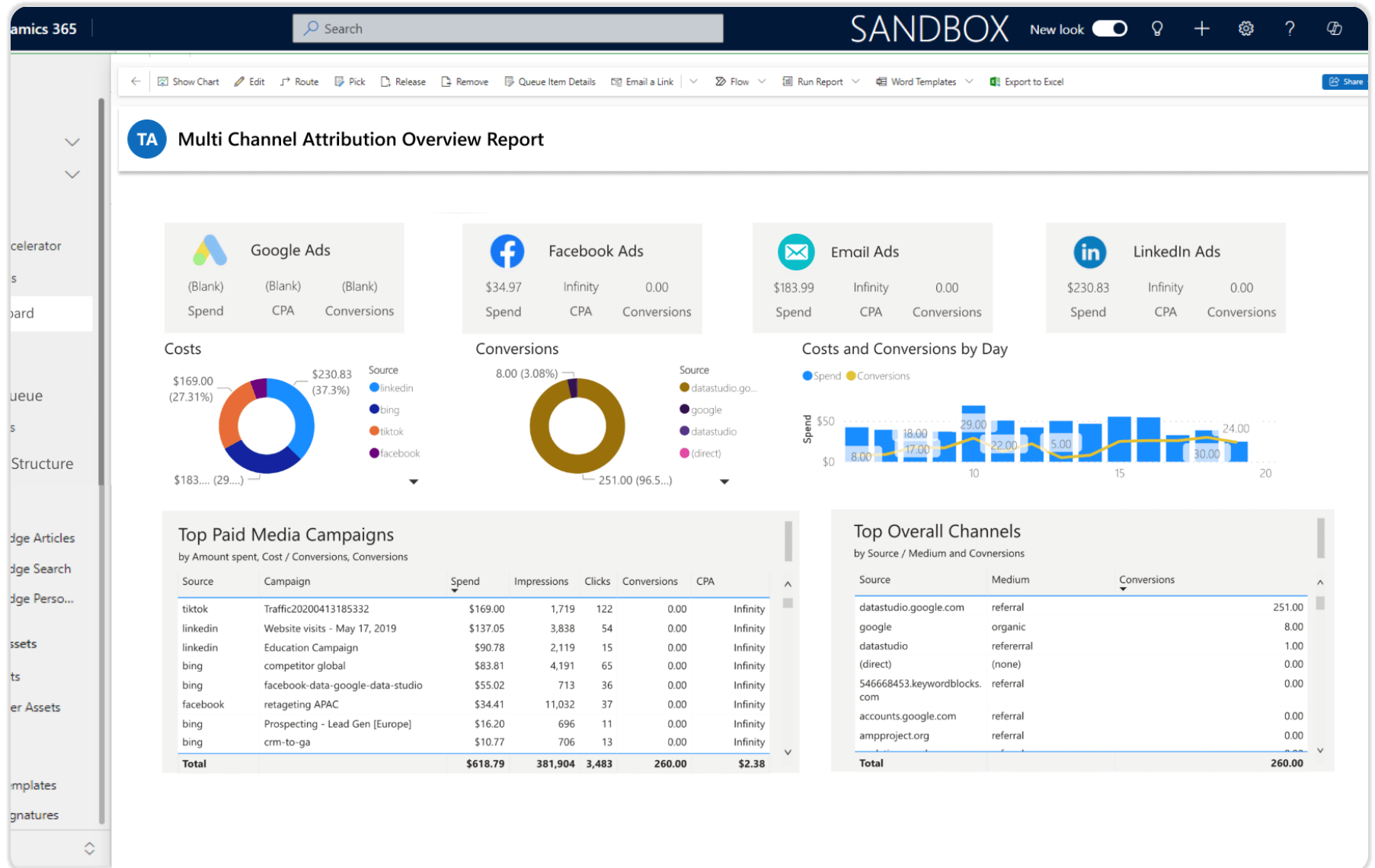
Lead Analysis

The account lead dashboard provides a comprehensive view of leads, offering insights into lead sources, statuses, and conversion rates.



Multi-Channel Attribution Review Report

This report gives an overview of customer touchpoints and cost analysis across various channels. It helps the sales team to evaluate the effectiveness of different marketing channels and optimize resource allocation.



Want to know more?

Contact Us!

DynaTech Systems has proudly served clients seeking advanced tech solutions across the globe with top-notch precision and excellence.



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