

# Effective Sales and Demo Tools

Errol Schoenfish

@iferrolcandoit



# The Cloud Buyer

Self-educating

Anonymous research

Highly informed

Industry orientation

Allergic to sales

Proximity is irrelevant

Will find you before you find them!

Risk averse

Accelerated time to value

# Compelling Prospect Conversations

## Video Details

Dynamics 365 Business Central -  
Compelling Prospect Conversations  
(Blitz)



00:01:07 / 00:11:15



Level: 100

Published: March 16, 2018

Join Errol Schoenfish, Director of Product Marketing, as he talks through how to have compelling conversations with prospects on Microsoft Dynamics 365 Business Central.

### RESOURCES

- [Dynamics 365 Business Central - Compelling Prospect Conversations PowerPoint Deck](#) (13.9 MB)



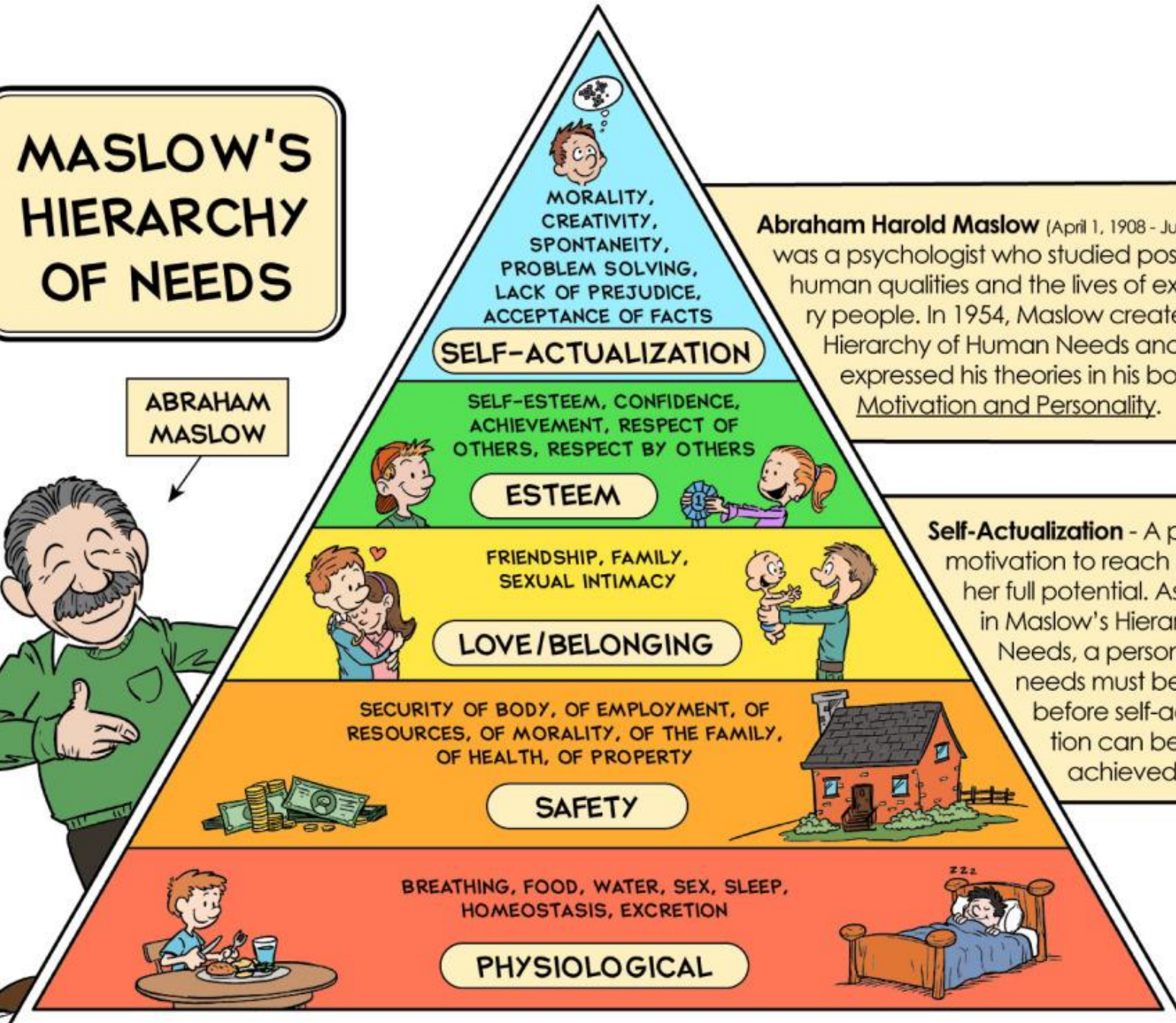
## Dynamics 365 Business Central - Compelling Prospect Conversations (Blitz)

Join Errol Schoenfish, Director of Product Marketing, as he talks through how to have compelling conversations with prospects on Microsoft Dynamics 365 Business Central.

<https://mbspartner.microsoft.com/D365/Videos/101761>

# MASLOW'S HIERARCHY OF NEEDS

ABRAHAM MASLOW



**Abraham Harold Maslow** (April 1, 1908 - June 8, 1970) was a psychologist who studied positive human qualities and the lives of exemplary people. In 1954, Maslow created the Hierarchy of Human Needs and expressed his theories in his book, Motivation and Personality.

**Self-Actualization** - A person's motivation to reach his or her full potential. As shown in Maslow's Hierarchy of Needs, a person's basic needs must be met before self-actualization can be achieved.



# 3 - Demo Experiences

"Let me show you something right now"

Power Point  
Click Through  
Demos



"Let's schedule a quick overview demo"

Demos.microsoft.com  
+  
Trial



"Let me show you everything we have to offer"

AAD  
+  
Trial



———— Self actualization/Esteem ————

Physiological/Safety

# 1 Other Demo Experience

"Let me *test* and show you everything we have to offer"

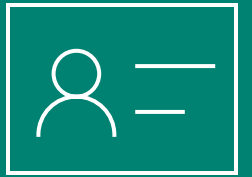
Docker  
Image

+/-

AAD

Physiological/Safety





# Power Point Click Through Demos

[aka.ms/dynamics365businesscentral/salestools/](https://aka.ms/dynamics365businesscentral/salestools/)

also on Ready to Go page





# Demos.microsoft.com

(90 day)

+

# Trial

# Using the MOD (demos.microsoft.com)

## PROS

- ✓ Free Office 365 account
- ✓ License all MSFT cloud apps
- ✓ Access Customer Engagement
- ✓ Create up to six (6) tenants
- ✓ Leverage 25 Pre-Defined Users
- ✓ Quick and easy to create

## CONS

- ✓ Requires Incognito/InPrivate OR
- ✓ Separate Windows Profile
- ✓ O365 expires in 90 days\*
- ✓ Country Limitations

\* *Business Central trial (CRONUS US + Evaluation Company does NOT expire)*

# Create a Demo Environment

Demos.microsoft.com

Viral Trial Signup

Additional Setup



Home

Demos

My Environments

Support

Search Microsoft Demos

ERROL SCHOENFISH

## Deliver Best-In-Class Demos

Microsoft 365  
Enterprise

DEMO NOW

EXPLORE MORE >

Microsoft 365  
Business

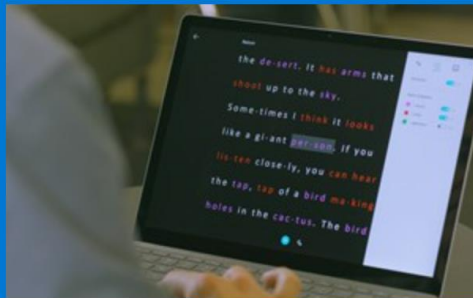
EXPLORE MORE >

Microsoft  
Dynamics 365

EXPLORE MORE >

Microsoft  
Education

EXPLORE MORE >



## Boost Productivity & Foster Inclusion with Microsoft 365

With new Accessibility Hero Demo Resources, showcase how Microsoft 365 is a must-have for organizations as they reimagine accessibility, empowering people of all abilities to consume, create and communicate content in their preferred ways and helping diverse teams collaborate inclusively.

VIEW MORE NEWS >

https://demos.microsoft.com/environments



Home

Demos

My Environments

Support

Search Microsoft Demos

ERROL SCHOENFISH



## Environments

Manage and view your customized demo environments.

[CREATE A TENANT](#)

CREATE A VIRTUAL MACHINE



You have no environments

Looking for advanced environment creation options?

<https://demos.microsoft.com/environments/create/tenant>





# Environments



## Let's get started creating your Tenant

### Select Type

### Select Period

Europe, Middle East, Africa

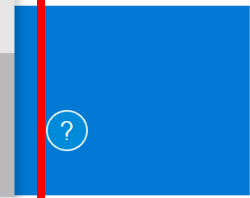
Europe, Middle East, Africa

France

United Kingdom

Asia and Pacific

Asia/Pacific



Micro:

This demo environment contains the most complete demo content to showcase Microsoft 365 to your customer. We recommend this environment for most demo circumstances. This choice includes content for Office and Enterprise Mobility + Security. In addition, you also have the option to include additional demo content, such as Project Online.

**+ Additional Content**

This demo environment is a pared down version of our Microsoft 365 Enterprise tenant, with the standard 24 demo users and no pre-provisioned demo content. We recommend this environment if all you require is core Microsoft 365 infrastructure and looking to complete high levels of customization.

**+ Additional Content**



Home

Demos

My Environments

Support

Search Microsoft Demos

ERROL SCHOENFISH



## Environments



# Let's get started creating your Tenant

## Select Type

[QUICK TENANT](#)

## Select Period

90 DAY (0 OF 6)

## Select the tenant location

Europe, Middle East, Africa



### Microsoft 365 Enterprise Demo Content

This demo environment contains the most complete demo content to showcase Microsoft 365 to your customer. We recommend this environment for most demo circumstances. This choice includes content for Office and Enterprise Mobility + Security. In addition, you also have the option to include additional demo content, such as Project Online.

[+ Additional Content](#)

### Microsoft 365 Enterprise with Users and No Content

This demo environment is a pared down version of our Microsoft 365 Enterprise tenant, with the standard 24 demo users and no pre-provisioned demo content. We recommend this environment if all you require is core Microsoft 365 infrastructure and looking to complete high levels of customization.

[+ Additional Content](#)



## Environments

Back to [My Environments](#)

# M365x162763



Add Content



Delete

### NOTES

Tenant: M365x162763

Demo User meganb@M365x162763.onmicrosoft.com



Admin User admin@M365x162763.onmicrosoft.com



Password errol.sch@031189



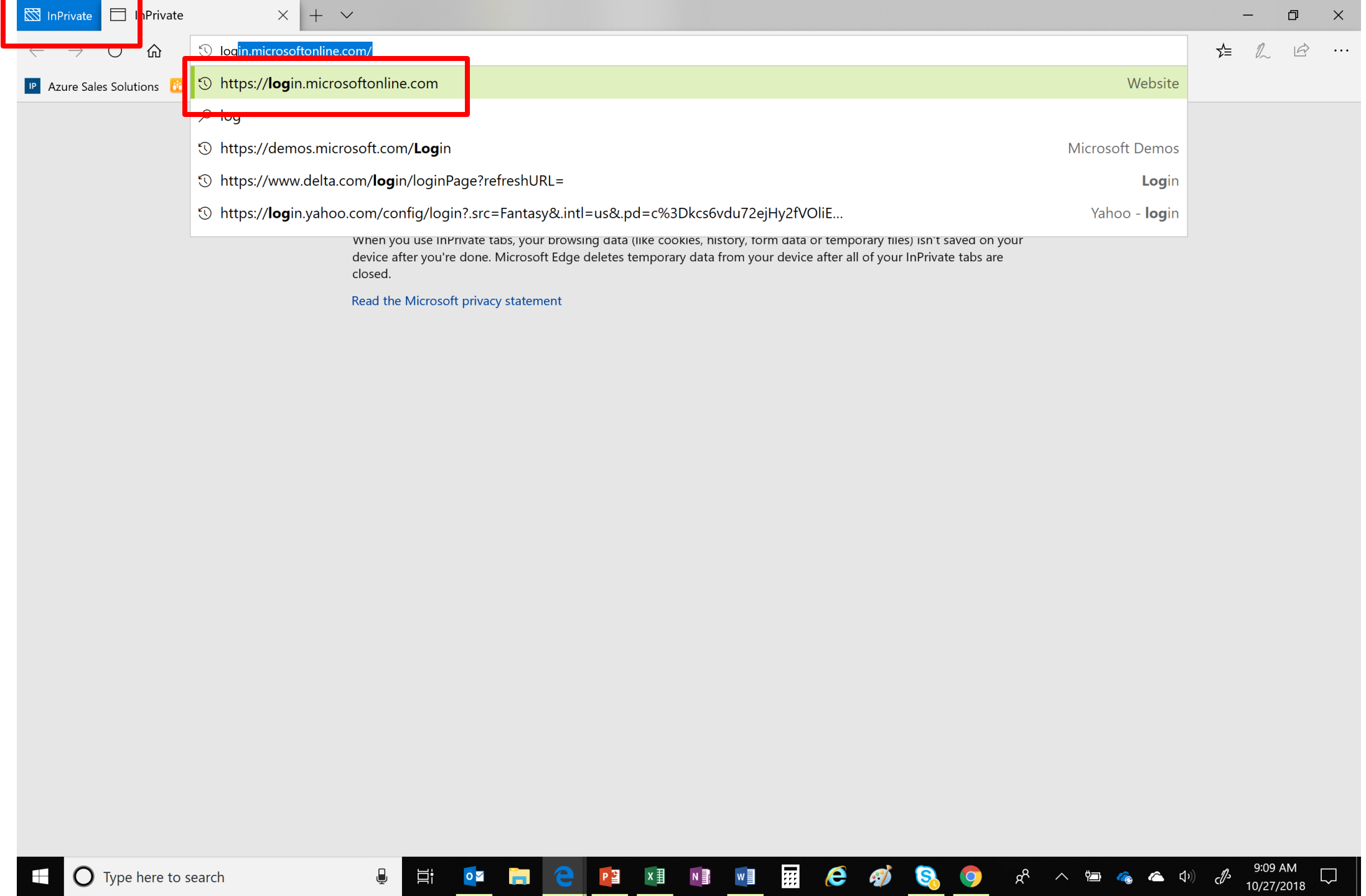
### Microsoft 365 Enterprise Demo Content

Location: Europe, Middle East, Africa

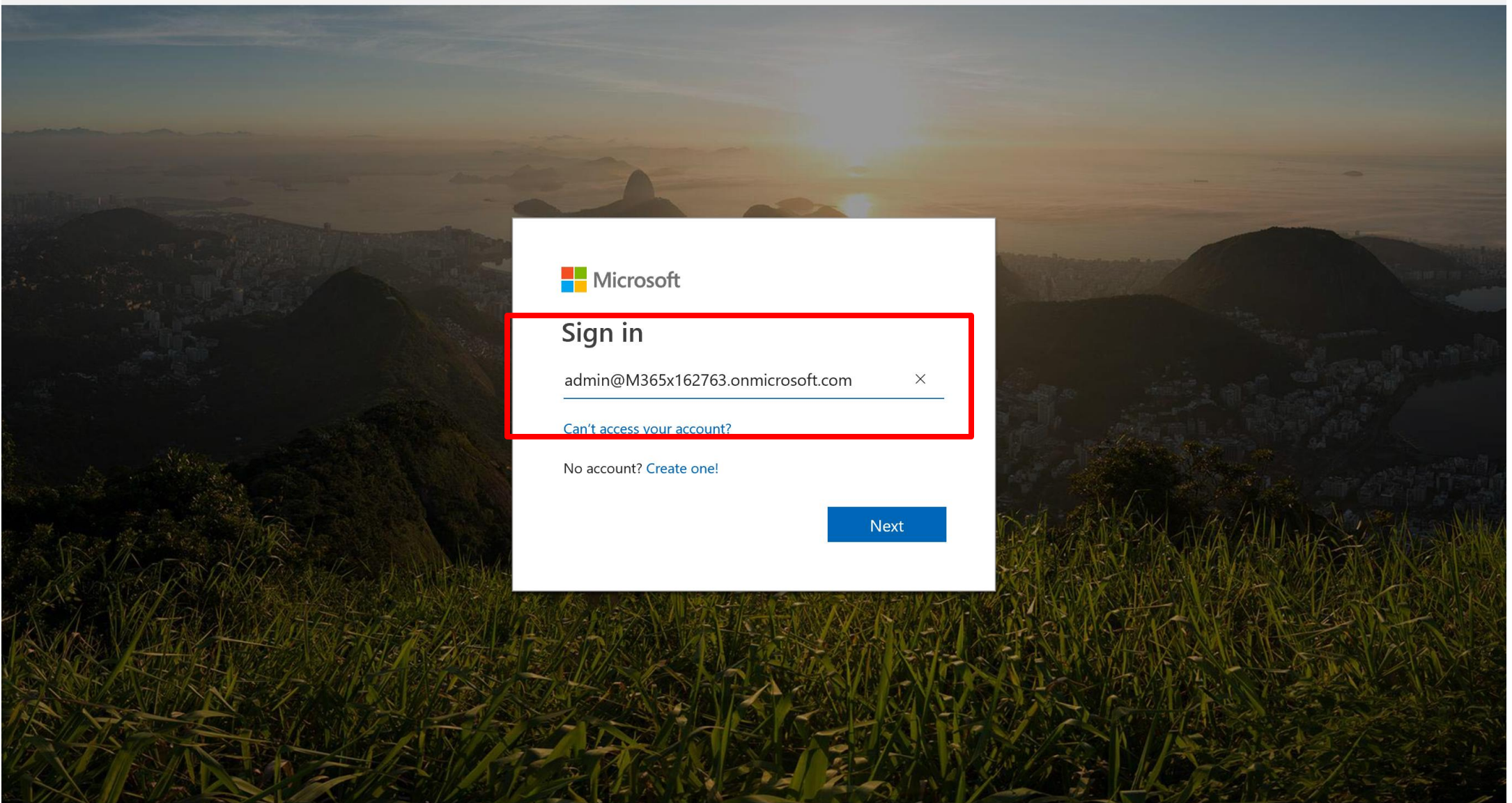
Period: 90 day


Expires: **12/28/18**





ⓘ This site uses cookies for analytics, personalized content and ads. By continuing to browse this site, you agree to this use. [Learn more](#)





## Sign in

admin@M365x162763.onmicrosoft.com

×

[Can't access your account?](#)

No account? [Create one!](#)

Next



Good morning

Apps



Outlook



OneDrive



Word



Excel



PowerPoint



OneNote



SharePoint



Teams



Yammer

Explore all your apps →

Install Office

Office 365 apps

Get the familiar desktop apps on your PC and Mac.

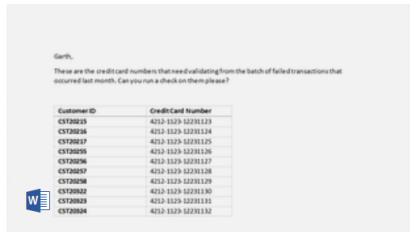
Next

Documents

Recommended



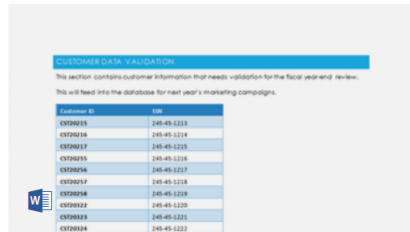
This document was edited



Credit Cards  
m365x162763.sharepoint.c...



This document was edited



Customer Accounts  
m365x162763.sharepoint.c...



This document was edited



Q3 Sales and Marketing Expense Rep...  
m365x162763.sharepoint.c...



This document was edited



Q3\_Product\_Strategy  
m365x162763.sharepoint.c...

Recent Pinned Shared with me Discover

Feedback

Need help?

- Home (preview)
- Favorites
- Recent
- Apps
- Shared with me
- Workspaces
- My Workspace
- Get Data

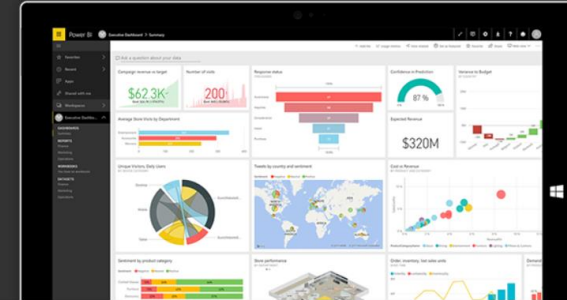
Good morning, MOD

Search

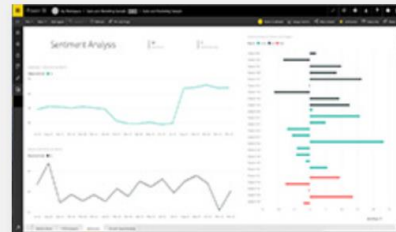
### Welcome to your Power BI home

Everything you need in one place: Your top visuals are displayed for easy consumption. Your favorites, frequents, and recents are close at hand. And you can explore learning opportunities to improve your Power BI experience.

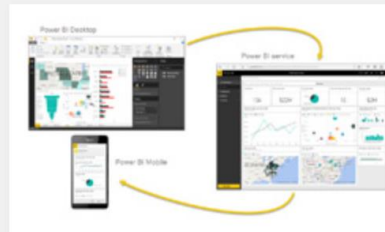
Got it



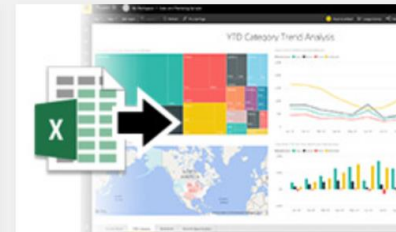
### Learn how to use Power BI [See all](#)



Getting started with Power BI  
6 minute read



Power BI guided learning



Tutorial: from Excel workbo...  
3 minute read



Get Power BI Desktop  
18 minute read



Microsoft 365 admin center

Home [Customize your home](#) Contoso ☐ Try the preview

Search users, groups, settings or tasks

Office 365 Enterprise E3 setup is incomplete. [Get someone to help you.](#)

[Go to setup](#) Personalize sign-in Add users Connect domain

**Settings**

- Services & add-ins
- Security **Organization profile**
- Organization profile
- Partner relationships

Billing >

Total balance: None

In trial: Buy now

Office software

- Install my software
- Share the download link
- Software download settings
- Troubleshoot installation

Train yourself  
For admins

[Need help?](#) [Feedback](#)

https://admin.microsoft.com/AdminPortal/Home%23/companyprofile

Contoso

Edit

|                    |                        |
|--------------------|------------------------|
| Name               | Contoso                |
| Address            |                        |
| Phone              | 8006427676             |
| Technical contact  | stockpiling@3sharp.com |
| Preferred language | English                |

Release preferences

Edit

Choose how your organization gets new features and service updates from Office 365.

|                     |                               |
|---------------------|-------------------------------|
| Release track       | Targeted release for everyone |
| Release track users | All                           |

Manage custom themes for your organization

Edit

Customize Office 365 to reflect your organization's brand.



Home > Organization profile

**Contoso**

|                    |                        |
|--------------------|------------------------|
| Name               | Contoso                |
| Address            |                        |
| Phone              | 8006427676             |
| Technical contact  | stockpiling@3sharp.com |
| Preferred language | English                |

**Release preferences**

Choose how your organization gets new features and service updates for Office 365.

|                     |                      |
|---------------------|----------------------|
| Release track       | Targeted release for |
| Release track users | All                  |

**Manage custom themes for your organization**

Customize Office 365 to reflect your organization's brand.

Name\*

Contoso

Address\*

City\*

State or Province

Postal code\*

Country or region

Netherlands

Phone

8006427676

Technical contact\*

stockpiling@3sharp.com

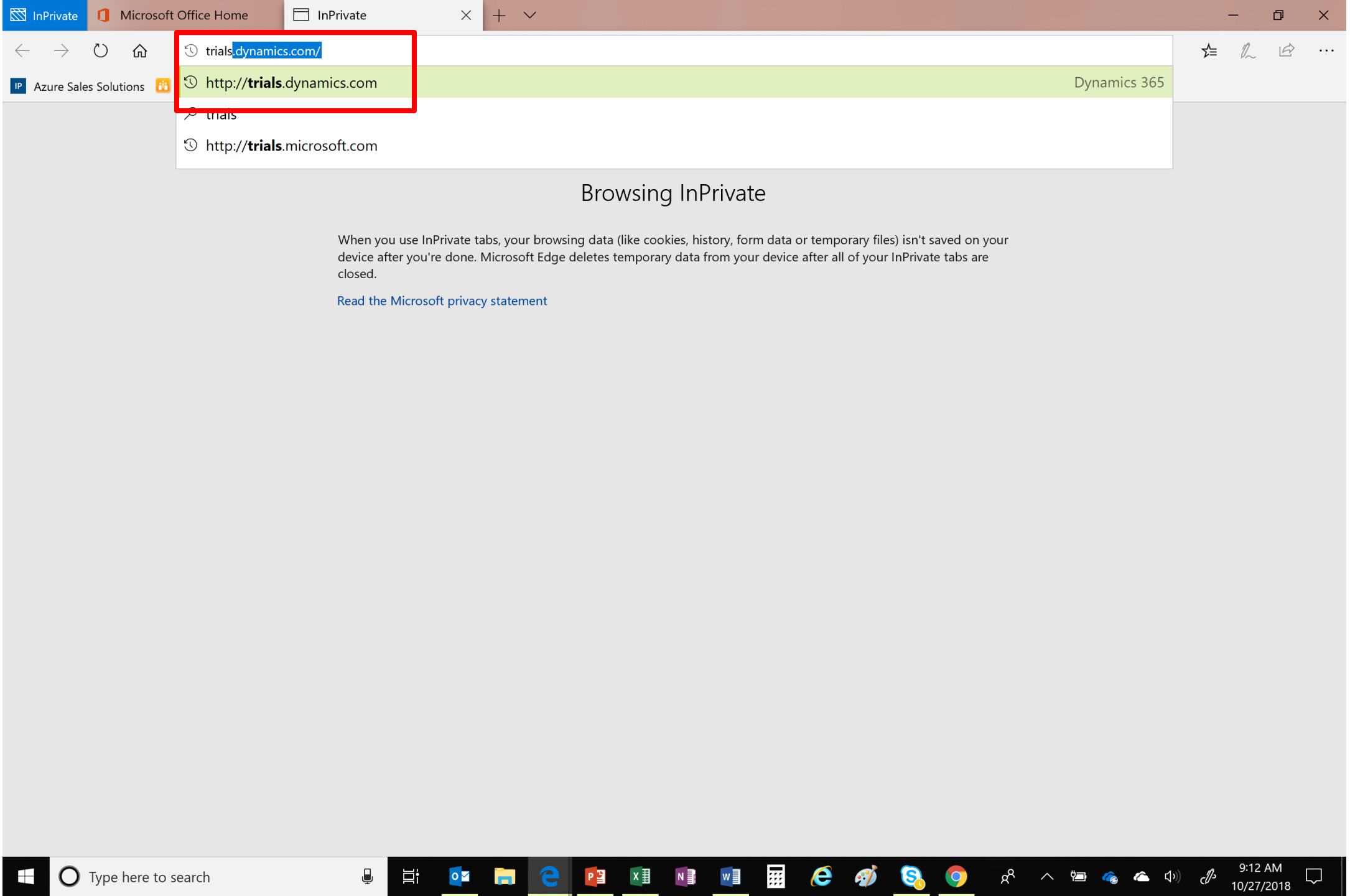
Preferred language \*

English


Nederlands

Save Close


Microsoft sends all communications to your organization in this language.




Automation




DYNAMICS 365 FOR  
Finance and Operations



DYNAMICS 365  
Business Central



DYNAMICS 365 FOR  
Talent



DYNAMICS 365 FOR  
Retail

Work email ⓘ

admin@M365x162763.onmicrosoft.com

Phone number

546256435 ✕

GET STARTED >



## You have an account with us

You're using admin@M365x162763.onmicrosoft.com with another Microsoft service already. To finish signing up for Dynamics 365 Business Central, sign in with your existing password.

Sign in



## Almost there

You're signed in as admin@M365x162763.onmicrosoft.com

When using an organization email address (e.g. an employer or school), the administrator of your organization may assume control over your account and data. [Learn more.](#)

By choosing **Start**, you agree to our [terms and conditions](#) and understand that your name, email address, and trial organization name will be visible to other people in your institution. [Microsoft Privacy Policy](#)

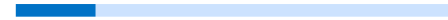
Start





# Dynamics 365 Business Central

Finishing setup...



less than a minute remaining

Want more? Start a free, 30-day trial to unlock advanced features.

CRONUS NL

Finance

Cash Management

Customers

Vendors

Items

Bank Accounts

SALES QUOTES  
2

SALES ORDERS  
4

SALES INVOICES  
7

PAYMENTS

UNPROCESSED PAYMENTS  
1

AVERAGE COLLECTION DAYS  
0.0

OUTSTANDING INVOICES  
10

START



Sales Quote



Sales Order



Sales Invoice



Purchase Invoice



Sales Return Order



Product Videos



[Replay Getting Started](#)

Insights

Business Assistance

Top vijf van klanten gerangschikt op omzetwaarde

Self-Service  
TIME SHEETS

PENDING TIME SHEETS

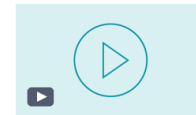
### TRIAL EXPERIENCE

Welcome to Microsoft Dynamics 365 Business Central  
[Let's get started](#)

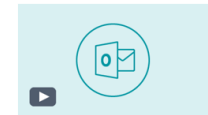
Start with basic business processes, or jump right in to advanced operations. Use our CRONUS NL demo company and data, or create a new company and import your own data.



**Introduction**  
Get to know Business Central



**Get Started**  
See the important first steps



**Get Assistance**  
Know where to go for information



**Role Centers**  
Explore different business roles



✓ Bedrijfsmanager

Demo data is provided for demonstration purposes only and should be used only for evaluation, training and test systems.

Get Started

# Demo Tips - Outlook

- OUTLOOK DESKTOP CLIENT – don't use web client of Outlook
- TRANSACTION – demo document view
- FAVORITES – Create a new folder in Outlook, add to Favorites
- PERSONALIZE – Add prospect's name as a Customer or Vendor "contact" card
- EMAIL PROSPECT – During Outlook demo, send the customer the quote, order
- RIBBON – Shift the "Contact Insights" add-in to left side of ribbon
- CALENDAR – "Contact Insights" integrates with the Outlook calendar
- PAYPAL – Show Sales Invoices with PayPal integration
- LEVERAGE PERSONAS – If using demos.microsoft.com
- ADD DATA PACKAGE – Add the data package for additional demo data on Manufacturing.

## Other Demo Tips

- **USER PROFILE** — use a computer user profile
- **SCHEDULE** - reports to Report Inbox (check date parameters)
- **OCR** - Send yourself an Invoice (.pdf), for OCR
- **ROLES** — Explore the roles – Accountant, Sales Processor, etc.
- **MOBILE** - Show off your mobile device
- **Excel** – Show off the edit in excel feature for general journals
- **NOTIFICATIONS** - Add a credit limit to a customers (for smart notifications)
- **DIMENSIONS** – Add dimensions, regions, departments, products
- **POWERAPP and FLOW** — create a simple demo
- **POWER BI** — Always navigate to the sample dashboard

# AAD + Trial

Buy a license



# Four Ways (that I know of)

## Work Account

(One tenant shared across  
your org)

## Partner Action Pack

(\$475 per year, 5 users)

## Office 365 Trial

(Turn into a paid  
license)

## Free AAD account

(no O365, Power BI  
etc. etc.)


<https://partner.microsoft.com/en-us/membership/action-pack>

# Do now:

<https://aka.ms/ReadyToGo>

[aka.ms/dynamics365businesscentral/salestools](https://aka.ms/dynamics365businesscentral/salestools)

[Aka.ms/dynamics365businesscentral/configureconnectexplore](https://aka.ms/dynamics365businesscentral/configureconnectexplore)



# We want to hear from you!

Please provide feedback  
by completing your  
session evaluation.

# Thank You