



## INSIGHT NAVIGATOR: Accelerating Sales Success



Maximise efficiency, clarity, and forecast accuracy with Dynamics 365 Sales and Copilot

### About Insight Navigator

Insight Navigator is a collaborative and flexible approach that involves a cross-functional team of experts from your organisation and Insight, working together to design and execute a complete delivery solution cycle.

The process starts with understanding the needs of your sales teams and your business then rapidly configuring Dynamics 365 Sales and Copilot to meet the needs of your teams, aligned to your strategic business value drivers.

To navigate your teams to define and realise that value, we seamlessly integrate design thinking with a deep understanding of emerging technologies. Our agile expertise and organisational change acumen ensures that your investment delivers you outcomes rapidly.

### Business challenge

In a competitive market, standing out and gaining market share has never been so difficult, your Sales Teams need to have the right tools to navigate potential opportunities, minimise time-consuming data entry to spend more time building long-term relationships with new and existing clients alike.

Insight's approach helps you to maximise the effectiveness of your sales teams, within just seven weeks, witness a seamless transition, creating pipeline clarity and improved forecast accuracy with Dynamics 365 Sales and Copilot.

**Duration:** 7 Weeks

### What we do:

Over the course of just 7 weeks, we will work with you to:

- Create a single view of all your customers across the Sales Process, enabling your sales teams to collect relevant data at every touchpoint.
- Streamline and personalise customer communications and activities through the sales cycle.
- Provide the sales team with real-time insights, and recommendations to navigate their way to a winning deal with Copilot.
- Setup and configure a secure, Dynamics 365 Sales environment tailored to the needs of your business



Dynamics 365  
Sales



Microsoft  
Dataverse

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## How Insight Navigator lights the path to more deals across four stages



### Assess and Understand Weeks 1-2:

During the assess and understand phase we will work with your teams to discover user requirements, uncover specific user needs, and identify security considerations. We will play back how these requirements come together across Accounts, Contacts, Leads, and Opportunities in Dynamics 365 Sales.



### Configure and Setup Weeks 3-4:

During the configure and set-up phase we will bring your requirements to life by configuring your Dynamics 365 Sales environment to meet the needs of your business and set up the profiles to ensure your information remains secure and aligned to your security needs.



### Testing and Training

During the testing and training phase, we will take your teams through their brand-new Dynamics 365 Sales environment, documenting business rules and helping them navigate the new workspace with the support of Copilot to help them uncover new ways of working.



### Finalise and Launch

During the finalise and launch phase we will make updates to the Dynamics 365 Sales environment based on feedback and ideas from the testing and training phase, help you migrate key data from other systems, and prepare for the launch of an enhanced way of working for your sales teams.

## Why Insight for Microsoft?

Few can compare with our relationship with Microsoft. Partners for 30 years and counting, we are the largest Microsoft global partner with more than 5,000 consultants and 1000 dedicated Microsoft resources globally. Our best-in-class capabilities, unmatched expertise, and ability to successfully deliver solutions built across all areas of Microsoft technology have earned us numerous recognitions.

### 7 Microsoft Solutions Partner Designations, including:

- Business Applications
- Modern Work



### Microsoft Partner Awards, including:

- 2023 Microsoft Australia Partner of the Year
- 2023 Microsoft Hong Kong Partner of the Year
- 2023 Solution Assessments Partner of the Year
- 2022 Microsoft Surface Reseller Partner of the Year
- 2022 Microsoft Surface Hub Reseller Partner of the Year
- 2021 Microsoft Security Partner of the Year (Singapore)

### 17 Specialisation, including:

- Business Applications
- Low Code Application Development
- Intelligent Automation



**2,500** Microsoft certifications globally

## About Insight

Insight Enterprises, Inc. is a Fortune 500 solutions integrator with more than 11,500 teammates worldwide helping organisations accelerate their digital journey to modernise their business and maximise the value of technology. We enable secure, end-to-end transformation and meet the needs of our clients through a comprehensive portfolio of solutions, far-reaching partnerships and 33+ years of broad IT expertise. Rated as a Forbes World's Best Employer and certified as a Great Place to Work, we amplify our solutions and services with global scale, local expertise and a world-class e-commerce experience, realising the digital ambitions of our clients at every opportunity.