



INTEGRATED SALES MANAGEMENT & ANALYTICS ECOSYSTEM

A COMPREHENSIVE BUSINESS SOLUTION
BUILT ON MICROSOFT POWER PLATFORM

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THE PROBLEM

- **Context:** Modern businesses often struggle with fragmented data across various platforms (emails, spreadsheets, and disconnected CRM tools).
- **Problem:** Manual data entry, lack of real-time visibility, and time-consuming report generation.
- **Solution:** A unified environment covering the entire customer lifecycle - from initial lead to final invoicing - integrated with real-time advanced analytics.

PROJECT GOALS & OBJECTIVES

- **Primary Goal:** To centralize sales operations and provide stakeholders with actionable insights through a seamless user interface.
- **Key Objectives:**
 - Automate data transition between sales stages (Lead → Opportunity → Project).
 - Implement high-level data transformation using Power BI Dataflows.
 - Ensure a "Seamless UI" by embedding analytics directly into the CRM.

SYSTEM ARCHITECTURE (THE "POWER" STACK)

- **Database:** Dataverse (Relational data model with custom tables and logic).
- **User Interface:** Model-driven Power App (Optimized for operational efficiency).
- **Automation:** Power Automate (6 specialized flows for process orchestration).
- **Analytics:** Power BI (Embedded via custom HTML Web Resource).

BUSINESS JOURNEY

Lead Management | Capturing potential

- **Cold Inquiries:** Dedicated space for managing and nurturing initial cold leads.
- **Lead Source Analysis:** Tracks sources (e.g., Website) to evaluate marketing ROI and channel effectiveness.
- **Activity Tracking:** Timeline integration for logging calls, emails, and notes during the nurturing phase.
- **Seamless Qualification:** One-click automated conversion from a Lead to a Qualified Opportunity.

The screenshot displays a Power Apps form for an IT Service Management App. The record is titled "Cold lead - system integration" and is currently a "Lead" with a "Qualified" status and "Inga But" as the owner. The form is divided into several sections:

- General:** Contains fields for Subject, Existing company, Company name, and Description.
- Existing contact:** Includes fields for Contact name, Phone, and Email.
- Timeline:** A vertical timeline on the right side showing recent activities. The most recent activity is a "Phone Call from: Inga But" with a note: "Requirement gathering. Clarified requirements, customer need to harmonize his sales process. Agreed to...".
- Lead source:** A dropdown menu at the bottom left showing "Website" as the source.

The interface also features a top navigation bar with various actions like "Save", "Deactivate", and "Delete", and a right-hand sidebar with a "Form assist" button.

BUSINESS JOURNEY

Opportunity Management | Driving the Sale

- **Guided Sales Journey:** A Business Process Flow (BPF) guides the user through Discovery, Proposal, Contract Preparation, and Finalization stages.
- **Automated Documentation:** Integrated Word Templates allow for the instant generation of professional Business Offers and Contracts.
- **Financial Visibility:** Detailed tracking of estimated revenue, costs, and profit percentages based on active opportunity services.
- **Control & Conversion:** Includes a Manager's Approval workflow and automated conversion of won opportunities into active Projects.

The screenshot displays the Power Apps interface for the IT Service Management App. The main view is for a sales opportunity titled "Referral - system upgrade". The interface includes a navigation bar at the top with options like Save, Deactivate, Delete, Refresh, Check Access, Process, Assign, Flow, Word Templates, and Run Report. The opportunity is currently in the "Discovery" stage of a sales process that also includes Proposal, Contract Preparation, and Finalize. The user is Inga But, the Opportunity Owner, and the Opportunity number is OP-0044. The "General" tab is active, showing fields for Topic, Customer (Teklist), Contact (David McGee), and Description (Old CRM system upgrade). Financial details include Estimated close date (5/29/2026), Est. Revenue (€5,700.00), Est. Costs (€3,100.00), Est. Hours (65.00), Est. Profit (€2,600.00), and Est. Profit % (46). A "Timeline" section is also visible with a search bar and a "Get started" button. Below the main form, there is a "Services" section with a table of Active Opportunity Services.

Service name	Hourly rate	Hourly Cost	Quantity of Hours	Total service price	Total service cost	Created On
> Back-end Development	€100.00	€55.00	40.00	€4,000.00	€2,200.00	5/1/2026 7:55 PM
> Business Analysis	€80.00	€45.00	10.00	€800.00	€450.00	5/1/2026 7:55 PM
> QA / Testing	€60.00	€30.00	15.00	€900.00	€450.00	5/1/2026 7:55 PM

BUSINESS JOURNEY

Project Management & Execution | From Opportunity to Delivery

- **Seamless Transition:** Automatically generated from a "Won" Opportunity, carrying over all service details, budgets, and estimated hours.
- **Real-Time Tracking:** Comparison of Estimated vs. Actual Hours and budget allows for immediate visibility of project progress and resource utilization.
- **Proactive Budget Alerts:** An integrated Power Automate flow monitors consumption and automatically alerts management when 80% of the budget is reached to prevent overruns.
- **Efficient Billing:** Upon project completion, a Power Automate flow closes the project and instantly generates a new record in the Invoices entity, ensuring no revenue is left unbilled.

The screenshot displays the 'IT Service Management App' interface. The main section is titled 'Referral - system upgrade - Saved'. It shows project details for 'Inga But' (Owner) and 'PR-0034' (Project number). The project status is 'In Progress'. The 'General' tab is active, showing a summary of project metrics:

Field	Value
Name	Referral - system upgrade
Start date	5/1/2026
Customer	Teclix
End date	---
Estimated hours	65.00
Actual hours	70.00
Project value	€5,700.00
Total invoiced	€6,200.00
Originating opportunity	Referral - system upgrade
Remaining hours	-5.00
Remaining budget	(€500.00)

Below the summary is a 'Project tasks' table with columns for Subject, Estimated hours, Actual hours, Task Status, Project, Total task price, Hourly Rate, Hourly Cost, Invoiced, and Created On. The table lists three tasks:

Subject	Estimated hours	Actual hours	Task Status	Project	Total task price	Hourly Rate	Hourly Cost	Invoiced	Created On
Back-end Development	40.00	45.00	Completed	Referral - system u...	€4,500.00	€100.00	€55.00	No	5/1/2026 8:06 PM
Business Analysis	10.00	10.00	Completed	Referral - system u...	€800.00	€80.00	€45.00	No	5/1/2026 8:06 PM
QA / Testing	15.00	15.00	Completed	Referral - system u...	€900.00	€60.00	€30.00	No	5/1/2026 8:06 PM

BUSINESS JOURNEY

Financial Closure & Invoicing | Precision Billing & Profitability Analysis

- **Detailed Task Itemization:** Provides a transparent breakdown of completed tasks, actual hours, and hourly rates for the client.
- **Real-Time Margin Tracking:** Instant visibility of Total Invoice Cost, Profit, and Profit Margin % to evaluate the financial success of each project.
- **One-Click Documentation:** Leveraging Word Templates to instantly generate professional, branded invoice documents directly from the system.
- **Billing Integrity:** Tracks the "Invoiced?" status for every task to prevent revenue leakage and ensure data consistency.

The screenshot displays the 'IT Service Management App' interface. At the top, it shows 'Power Apps | IT Service Management App' and a navigation bar with icons for Save, Save & Close, New, Deactivate, Delete, Refresh, Check Access, Assign, Flow, Word Templates, and Run Report. The main content area is titled 'INV-0026 - Saved Invoice' and includes a 'General' tab and a 'Form assist' button. Below this, there are several data fields: Invoice number (INV-0026), Total invoice cost (€3,375.00), Account (Yedist), Project (Referral - system upgrade), Profit (€2,825.00), Total invoice amount (€6,200.00), and Profit margin % (45.56). A table titled 'Tasks for invoice' lists three tasks: Business Analysis, Back-end Development, and QA / Testing, all with a 'Completed' status. The table columns include Subject, Task Status, Actual hours, Hourly Rate, Total task price, Project, Invoice, and Invoiced?.

Subject	Task Status	Actual hours	Hourly Rate	Total task price	Project	Invoice	Invoiced?
Business Analysis	Completed	10.00	€80.00	€800.00	Referral - system upgrade	INV-0026	Yes
Back-end Development	Completed	45.00	€100.00	€4,500.00	Referral - system upgrade	INV-0026	Yes
QA / Testing	Completed	15.00	€60.00	€900.00	Referral - system upgrade	INV-0026	Yes

BUSINESS JOURNEY

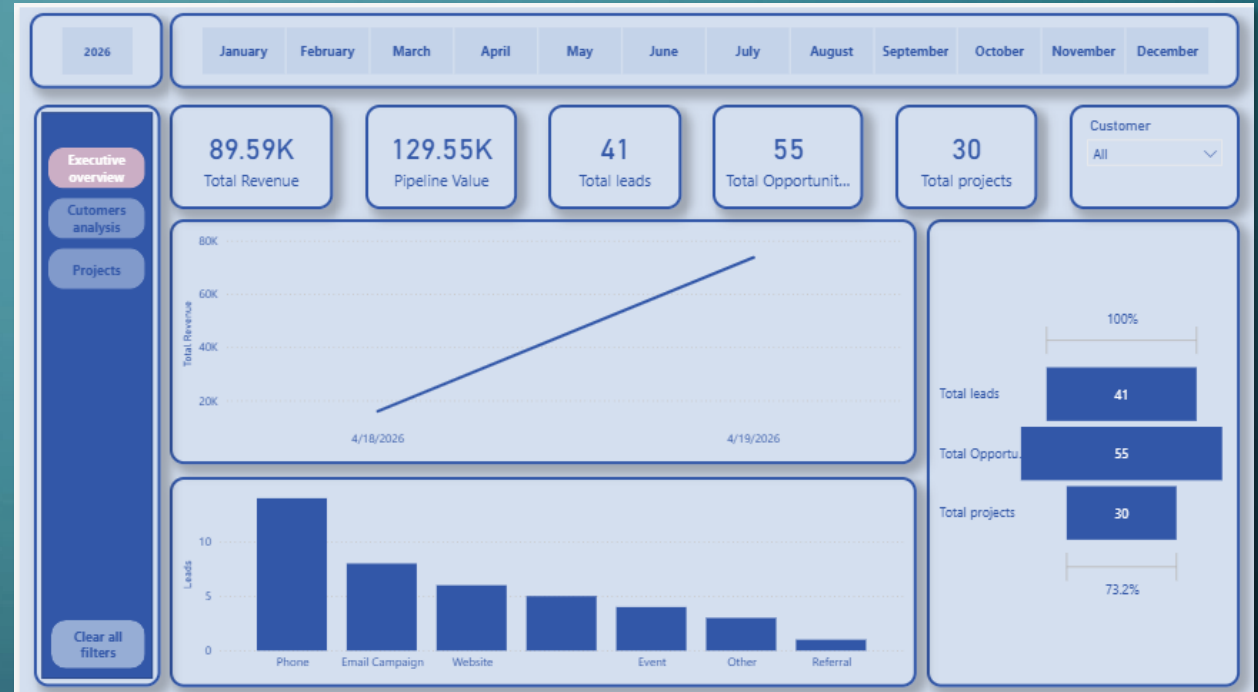
Strategic Business Intelligence | Bridging Operations and Analytics

- **Real-Time Data Sync:** Seamless integration between Dataverse and Power BI ensures that executive reports reflect the latest operational updates.
- **Advanced Data Preparation:** Utilizing Power BI Dataflows for cloud-based ETL (Extract, Transform, Load) processes, ensuring high-quality, cleaned data.
- **Seamless User Experience:** The dashboard is not just a link - it's embedded directly into the CRM interface via a custom HTML Web Resource for a unified workflow.

BUSINESS JOURNEY

Executive Overview Dashboard | Strategic Performance at a Glance

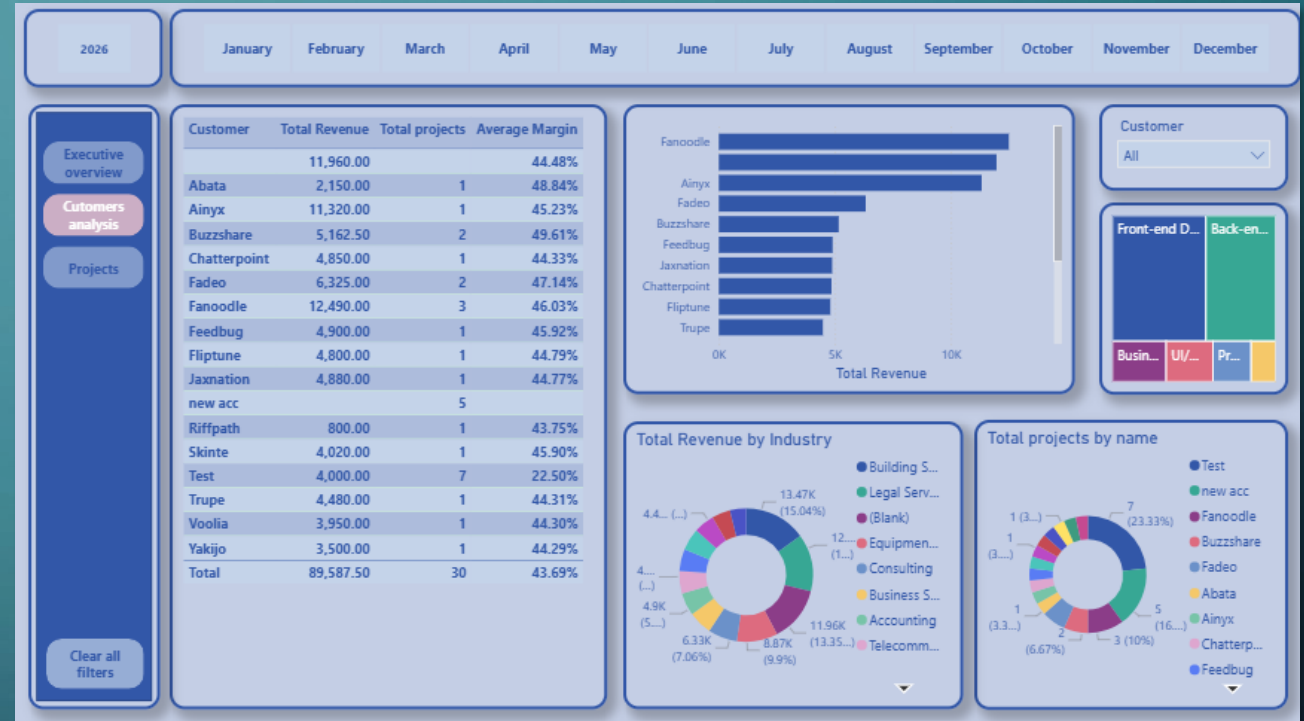
- **Real-Time KPIs** : Instant visibility of critical metrics: Total Revenue, Pipeline Value, and the volume of Leads, Opportunities, and Projects.
- **Interactive Time & Client Filtering**: Granular control over data using integrated Year/Month slicers and Customer-specific filters for tailored analysis.
- **Lead Source Intelligence**: Visual breakdown of acquisition channels (e.g., Phone, Website) to identify which sources drive the highest sales potential.
- **Conversion Efficiency**: A specialized funnel chart tracking the journey from Lead to Project, highlighting a 73.2% overall conversion rate.
- **Revenue Growth Trend**: A streamlined line chart visualizing revenue accumulation over time, providing clear insights into business growth trajectories.



BUSINESS JOURNEY

Customer & Industry Analysis | Deep Dive into Client Profitability

- **Detailed Client Metrics:** A comprehensive table displaying Total Revenue, Project Count, and Average Margin for every customer.
- **Top Performer Identification:** Ranked bar chart visualizing top-grossing clients to quickly identify key accounts.
- **Industry Segmentation:** Donut chart analyzing revenue distribution across various business sectors (e.g., Building Services, Legal, Consulting).
- **Service Portfolio Insights:** Treemap visualization showing which service types (e.g., Front-end vs. Back-end Development) generate the most value.
- **Project Volume Distribution:** Visual breakdown of project density per client to monitor account engagement and portfolio health.



BUSINESS JOURNEY

Project Health & Delivery Analysis | Monitoring Execution and Profitability

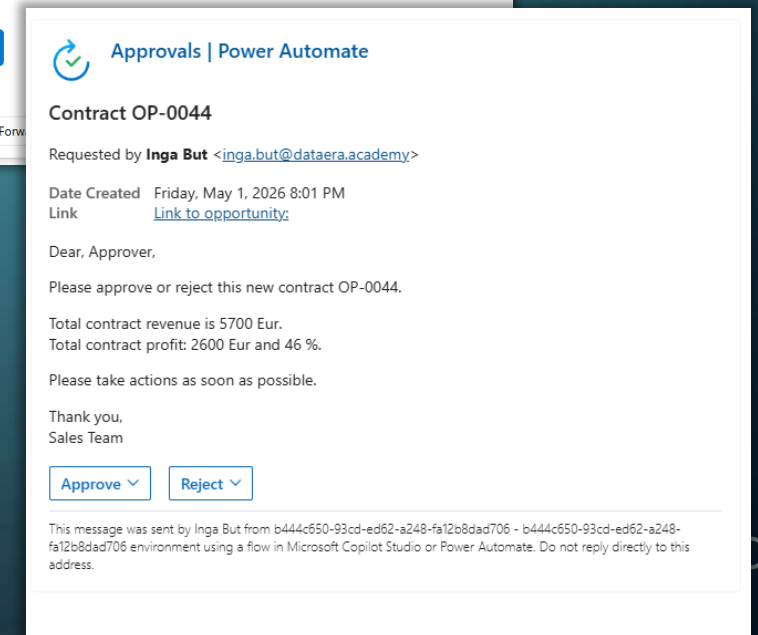
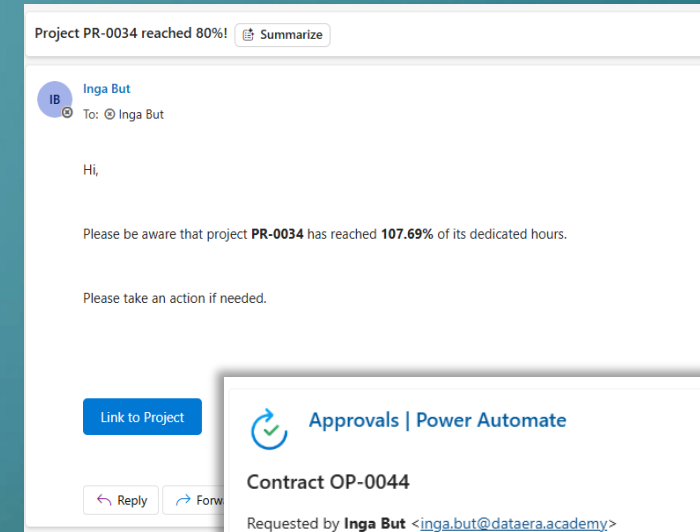
- **Financial Alignment:** Side-by-side comparison of Project Value vs. Total Invoiced to track cash flow and billing completion across the portfolio.
- **Resource Utilization:** Visual benchmarking of Estimated Hours vs. Actual Hours to identify discrepancies in time management and quoting accuracy.
- **Intelligent Health Indicators:** Automatically flags project health in the detailed matrix:
 - Green: Projects running efficiently within their estimated time (e.g., <80% usage).
 - Yellow/Orange: Projects approaching their time limit (e.g., 80-99%).
 - Red: Critical alerts for projects that have reached or exceeded 100% of estimated hours, signaling budget overruns.



AUTOMATION: THE OPERATIONAL ENGINE

Scaling Efficiency through 6 Specialized Workflows

- **Orchestrated Automation:** A suite of 6 custom Power Automate flows runs 24/7 to synchronize data across the ecosystem, eliminating manual administrative overhead.
- **Proactive Risk Mitigation:** Instead of passive monitoring, the system actively alerts management via automated emails when projects reach critical thresholds (e.g., 80% or 100% of dedicated hours).
- **Streamlined Governance:** Integrated Approval Workflows allow leadership to authorize high-value contracts directly from their inbox, ensuring control without sacrificing speed.
- **Data Integrity & Logic:** Complex back-end flows handle real-time project cost calculations and automated entity transitions (Lead → Opportunity → Project → Invoice), ensuring 100% data consistency.
- **Business Impact:** By automating these "behind-the-scenes" processes, the system reduces the risk of human error and allows the team to focus on sales rather than data entry.



CONCLUSIONS

The Strategic Value of the Solution

- **End-to-End Process Integration:** The ecosystem successfully bridges the gap between raw sales activities and high-level financial reporting, providing a 360-degree view of the business.
- **Operational Excellence through Automation:** By implementing 6 specialized Power Automate flows, the system minimizes human error, ensures data integrity across entities, and reduces administrative overhead.
- **Proactive Risk & Profitability Management:** Integrated health indicators and automated budget alerts (80%/100% thresholds) empower managers to make data-driven decisions before project overruns occur.
- **Actionable Business Intelligence:** The seamless embedding of Power BI into the CRM environment transforms static data into interactive insights, allowing for deep-dive analysis of client profitability and service performance.
- **Scalability & Future Readiness:** Built on the Microsoft Power Platform, the solution is fully scalable and ready for future enhancements, such as AI-driven sales forecasting or customer-facing portals.
- **Final Takeaway:** This project demonstrates how digital transformation through low-code tools can deliver a professional, enterprise-grade tool that optimizes workflows and empowers growth.



THANK YOU!

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