

Track an Opportunity

DataHug gives you a single view of all the relationships and sales activity between your organization and a prospect in Dynamics.

Here we are going to learn how DataHug can help us spot an Opportunity that is at risk due to poor engagement between us and the prospect.

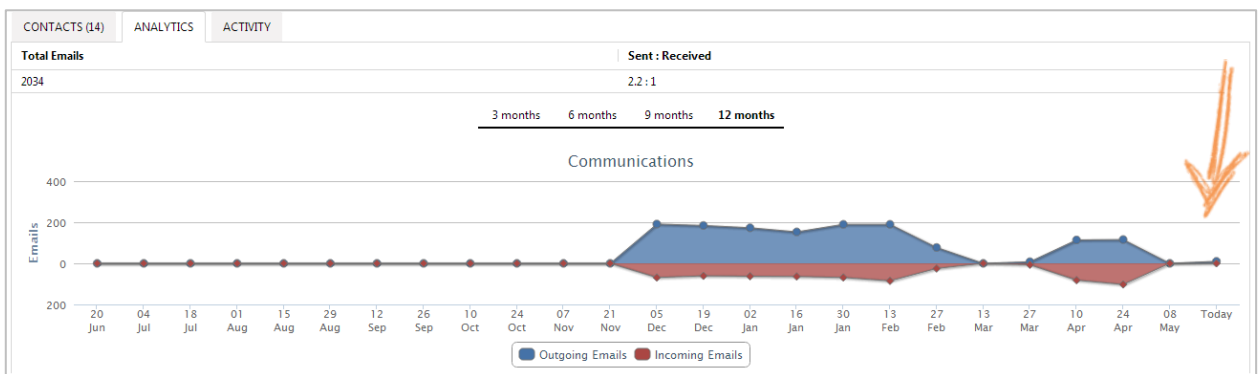
Let's Get Started

Scroll down to the DataHug widget on the Opportunity page in Dynamics.

HugRank	Contact Name	Job Title	Email	Last Interaction	Connected Colleagues
5	Serina Peebles	CTO	serina.peebles@macrointegrityguild.com	19 Feb 2014	3
4	Carli Seal	Supervisor	carli.seal@macrointegrityguild.com	21 Apr 2014	2
3	Johnathan Medina	VP of Global Sales	johnathan.medina@macrointegrityguil...	18 May 2014	2
3	Josphine Hayden	VP Marketing	josphine.hayden@macrointegrityguil...	20 May 2014	3
2	Chassidy Shiba	Administrator	chassidy.shiba@macrointegrityguild.com	18 May 2014	2
2	Annice Swan	Sales Operations	annice.swan@macrointegrityguild.com	18 May 2014	1
2	Ruth Sellman	Marketing Executive	ruth.sellman@macrointegrityguild.com	20 May 2014	3
2	Johnette Mitzel	Administrator	johnette.mitzel@macrointegrityguil.c...	20 May 2014	3

DataHug defaults to show you all the connections that exist between your organization and the Opportunity. You can switch the toggle to highlight the interaction with just the people that have been added to the Account.

To see what the pulse of the communication has been like with this prospect simply click on the Analytics tab.



In this case it's easy to see that the engagement has trailed off significantly over the last month. This deal looks like it might be at risk of slipping.

To confirm this you can click the History tab to see the email and calendar traffic.

FILTER BY: ALL CONNECTIONS (macrointegrityguild.com) CONTACTS AT ACCOUNT

CONTACTS (14) ANALYTICS ACTIVITY

Show: Emails Meetings

	Date	Time		
▼	21 Apr 2014	21:00	Carli Seal	→ Jason Bell Lourdes Barley
▼	21 Apr 2014	20:00	Carli Seal	→ Jason Bell
▼	21 Apr 2014	20:00	Jason Bell	→ Carli Seal, Lourdes Barley
▼	21 Apr 2014	17:00	Carli Seal	→ Jason Bell Lourdes Barley
▼	21 Apr 2014	17:00	Jason Bell	→ Carli Seal
▼	21 Apr 2014	17:00	Jason Bell	→ Carli Seal
▼	21 Apr 2014	16:00	Jason Bell	→ Carli Seal, Lourdes Barley
▼	21 Apr 2014	16:00	Jason Bell	→ Carli Seal

DataHug allows you to quickly and easily see which deals might be at risk due to poor communication. This allows you to re-engage and accelerate deals that would otherwise have slipped and for a more accurate Sales forecast.