



Discover **LISA Reach**

Licence and Subscription Automation

LISA Reach maximises your subscription sales capabilities and aligns with your digital marketing and sales processes.

Overview

This document provides insights into the positioning and capabilities of LISA Reach. It is intended for Microsoft Dynamics 365 partners, and customers that require subscription management capabilities for Sales and Customer Service teams.

LISA Reach is designed for subscription sales management, from lead-to-order subscription, incorporating capabilities based on Microsoft Dynamics 365 Sales.

In a Nutshell:

- LISA Reach is designed and built for any business in the subscription space
- LISA Reach is a subscription application built for Microsoft Dynamics 365 DataVerse and fully integrates with Microsoft's Power Platform
- LISA Reach can be extended with LISA Business and LISA BusinessPro
- LISA Reach is a 100% SaaS offering based on a subscription plan
- LISA Reach is delivered via a network of Microsoft Dynamics 365 partners
- LISA Reach is built on the latest cloud platform and apps, offering performance, security, and easy use

What LISA Reach Can Do

LISA Reach is a SaaS offering that is designed to run within Microsoft Dynamics 365, a cloud business management solution built for any business driving better and smarter digital subscription sales.

LISA Reach provides subscription-based capabilities that extends Dynamics 365 Sales. Together, LISA Reach and Dynamics 365 Sales offer a modern and flexible cloud-based CRM application that work seamlessly together, along with your other Microsoft 365 applications.

Who is LISA Reach for?

LISA Reach is designed for sales teams who are working to engage customers and prospects with subscription models, driving recurring interaction and consequent billing and operations.

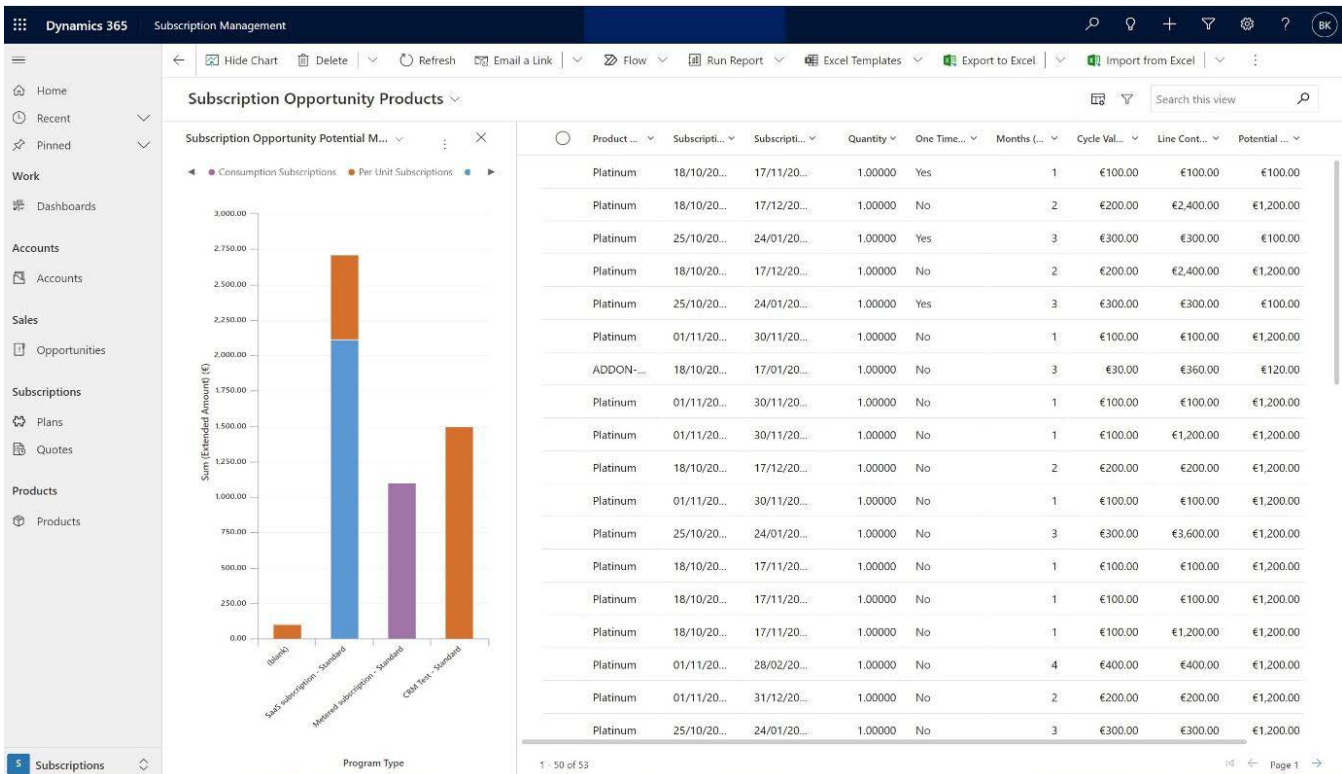
Subscription leaders are powered by customer obsession and efficiency. They are innovators, dreamers, and builders – leading the way with game-changing business visions, teamwork, and grit.

LISA Reach is a business application that helps them to accomplish their sales goals, by providing sales process automation and solid CRM and pipeline management.

LISA Reach extends the Microsoft DataVerse application family working with:

- Microsoft Dynamics 365 Marketing
- Microsoft Dynamics 365 Sales
- Microsoft Dynamics 365 Customer Service
- Microsoft Dynamics 365 Field Service

With LISA Reach you have the power of intelligent digital selling tailored to the subscription space.



What does LISA Reach do?

LISA Reach helps you expand your sales, yet keep control of workloads. Driving sales cycles for subscriptions is different to a classic product or service sale - selling a continued relationship over an ongoing period. With that in mind, KPIs are different when it comes to subscription sales reporting. This is where LISA Reach comes in.

Using the intelligent Customer Service, Project Operations, sales and marketing capabilities of Microsoft Dynamics 365, deployed as a Microsoft DataVerse app, LISA Reach supports sales and customer services teams selling and updating subscription plans. LISA Reach also connects to LISA BusinessPro for process automation, so your entire subscription business can work together.

 Sales

Companies that are empowered with LISA Reach Sales deploy their sales and customer services teams with an application that tracks all subscription commercial activities from lead-to-order. Create new subscription quotes and opportunities, or just pick up a running subscription and upgrade or downgrade it.

Extend LISA Reach Sales with LISA BusinessPro. Integrate using standard Dualwrite technology so your subscription CRM and ERP are synced. LISA Reach Sales is based on a per user pricing model.

 Operations

LISA Reach Operations works in conjunction with Microsoft Dynamics 365 Project Operations and Finance to offer next generation project operations applications.

Build your project structures in Project Operations and use LISA Reach Operations to manage the elements of the project that are subscription based. LISA Reach Operations is based on a per user price model.

 Customer Service

Customer experience is at the core of any successful subscription business. LISA Reach Customer Service brings Microsoft Dynamics 365 Customer Service into the subscription model.

Allow your customer to self-serve their subscriptions using portals designed how you like. LISA Reach Customer Services is based on a per user price model.

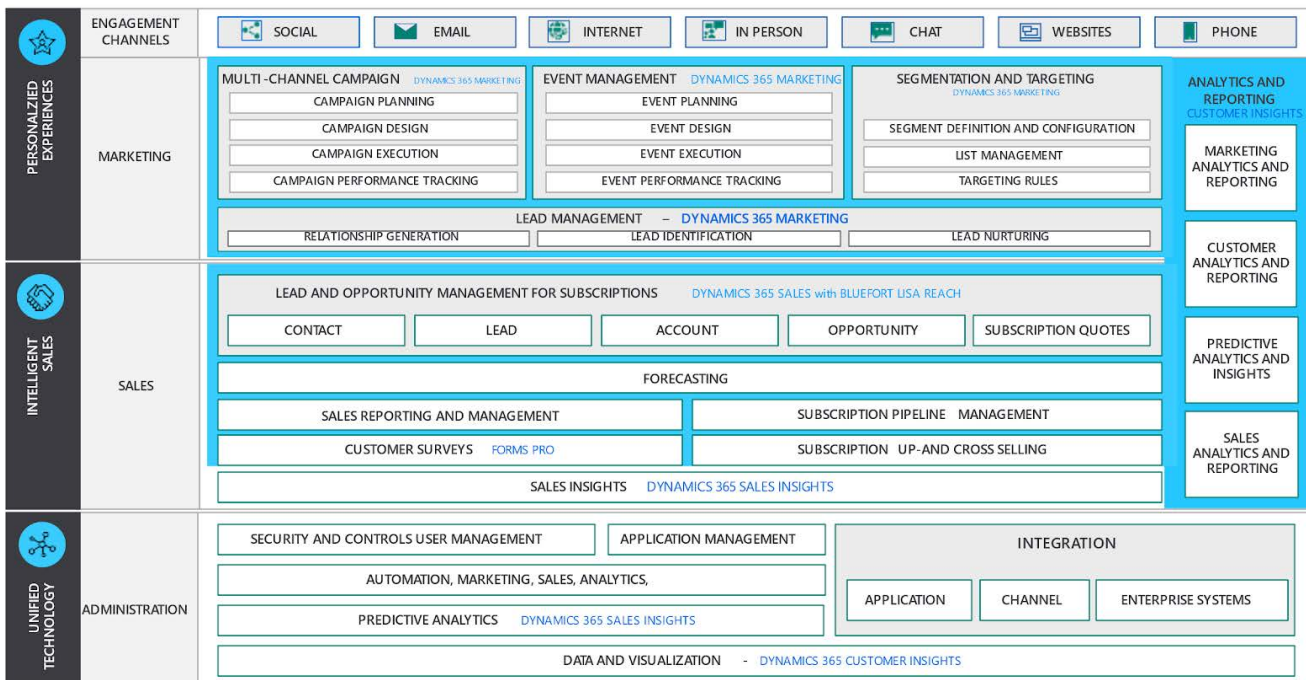
How can LISA Reach help subscription businesses?

A modern business application for subscription sales teams needs to provide smart capabilities, and be easy to use.

With LISA Reach and Microsoft Dynamics 365 Sales and Marketing you get these capabilities:

- Sales teams can get marketing qualified leads via the digital marketing capabilities.
- Define sales tactics for leads and move them into opportunities.
- Create beautiful quotes using smart capabilities such as automated lead and opportunity scoring.
- Connect all communication channels and see a full picture of accounts, partners, and customers.
- Sell new subscription plans and track your pipeline development using clear and engaging visuals in Dynamics 365 and LISA Reach.
- Create quotes by pulling in existing agreements and offer upgrades, new subscriptions, or add-ons.

With LISA Reach and Microsoft Dynamics 365 you can sell the smarter way.



Sell subscriptions the smart way

At Bluefort we team up with various customers around the world. Our objective is to learn and understand real world business scenarios and map out how LISA Reach can support them. The primary business challenges and objectives we focus on include.

Smart capturing of subscription quotes

Sales teams are built to communicate and sell. Team members need easy and fast ways to capture subscription quotations and understand the sales pipeline. Pick up existing plans and drive up- and cross selling activities. Sell renewals and upgrades.

By building a multi-channel communication capability with leads, prospects and customers, your sales team can easily generate opportunities and quotes from emails, websites, portals, social platforms and more. Connect sales teams to customers using the customer's preferred channel through personalised selling at scale.

Find out more here →

<https://docs.microsoft.com/en-us/dynamics365/sales/overview>

Streamline sales cycles through suggested actions, focusing on the highest-priority activity with the best propensity to close.

Find out more here →

<https://dynamics.microsoft.com/en-us/sales/overview/>

The screenshot displays the Dynamics 365 Sales Hub interface for the 'FY2019 Quarterly Forecast DN' view. The main table shows performance metrics for several sales users, including Quota, Won, Prediction, Committed Forecast, Committed, Best case, Pipeline, Gap To Quota, and Pipeline Coverage. Below this, a detailed view for 'Samuel Strom (Group) - Committed opportunities - \$134,500.00' is shown, listing individual topics with their forecast categories, potential customers, estimated revenue, and close dates.

User	Quota	Won	Prediction	Committed F...	Committed	Best case	Pipeline	Gap To Quota	Pipeline C...
Kenny Smith	\$1,500,000.00	\$1,102,665.00 74%	\$3,646,957.64	\$2,984,610.00 199%	\$1,881,945.00 (\$616,445.00)	\$401,955.00 (\$362.9)	\$1,231,571.43	\$397,335.00	3.10
Kenny Smith	\$300,000.00	\$142,000.00 47%	\$1,276,733.33	\$261,445.00 87%	\$119,445.00	\$52,000.00	\$349,500.00	\$158,000.00	2.21
Millard Lamontagne	\$150,000.00	\$76,320.00 51%	\$221,186.67	\$151,320.00 101%	\$75,000.00	\$30,000.00	\$62,071.43	\$73,680.00	0.84
Dustin Ochs	\$300,000.00	\$181,500.00 61%	\$963,075.00	\$321,500.00 107%	\$140,000.00	\$105,001.00	\$180,000.00	\$118,500.00	1.52
Samuel Strom	\$700,000.00	\$511,000.00 73%	\$829,205.23	\$1,911,000.00 273%	\$1,400,000.00 (\$134,500.00)	\$79,945.00	\$420,000.00	\$189,000.00	2.22

Topic ↑	Forecast categ...	Potential Cust...	Est. Revenue	Est. Close Date	Actual Revenue	Actual Close D...	Status	Status Reason	Owner
Fincher Architects	Committ...	ChicagoAC	\$19,000.00	2020/01/10	---	---	Open	In Progress	Samuel Strom
Topic_11_sGIF	Committ...	---	\$0.0000	2020/02/08	---	---	Open	In Progress	Malcolm Ho...
Topic_23_aFYDFo6...	Committ...	2K_1_Acc_at_Le...	\$0.0000	2020/02/01	---	---	Open	In Progress	Samuel Strom
Topic_30_oLSKE3p...	Committ...	SeattleAC	\$10,500.00	2020/01/25	---	---	Open	In Progress	Cecelia French
Topic_32_FIMYC20V	Committ...	SeattleAC	\$10,000.00	2020/01/25	---	---	Open	In Progress	Cecelia French
Topic_35_esUDqaV...	Committ...	PortlandAC	\$45,000.00	2020/01/06	---	---	Open	In Progress	Vance Carrico

Run digital campaigns to up- and cross sell your subscriptions

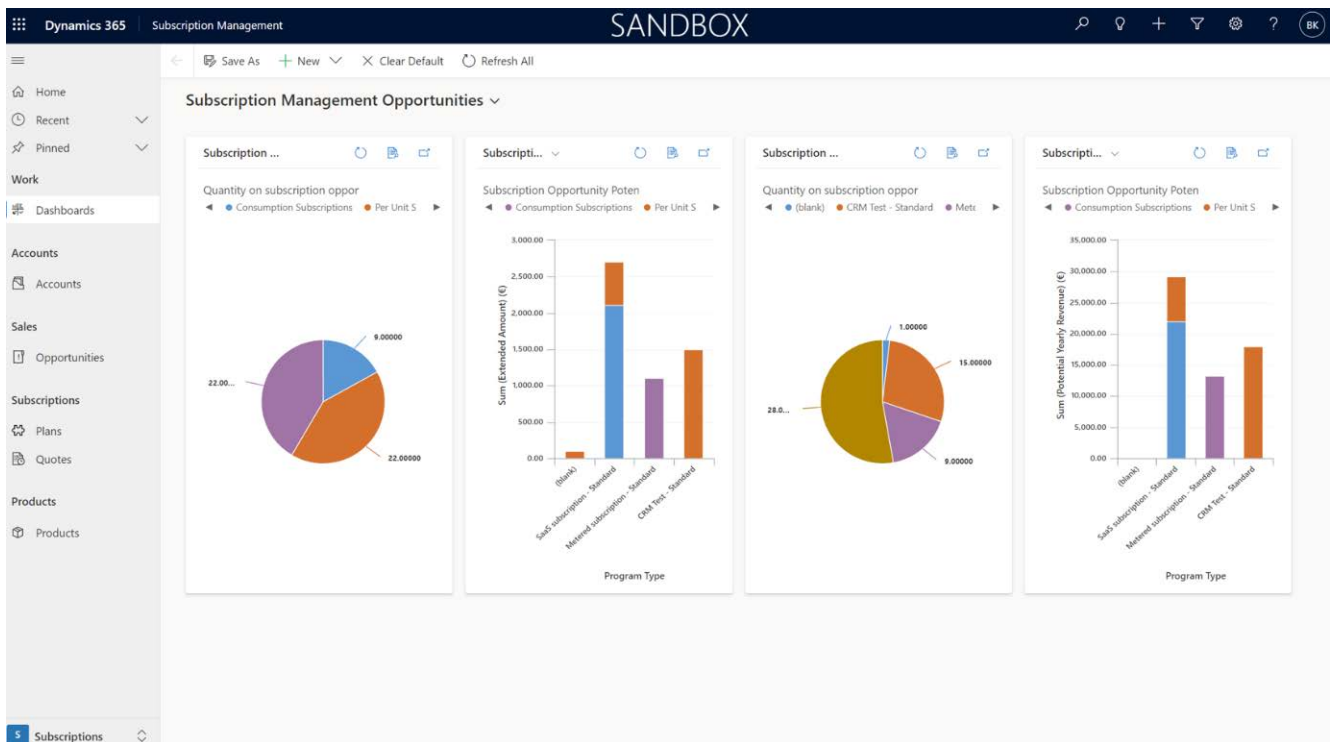
Many companies continue to innovate and grow their range of solutions, products, and services that their customers can subscribe to. This entails frequent and dynamic changes to their offerings.

Product and marketing managers require an adequate level of data management, so they can easily add new offerings, change prices, update indexes, and provide bundles and discounts to fuel the company's sales strategy.

LISA Reach integrates with Bluefort's HARP - the intelligent engine - and LISA BusinessPro for Finance and Operations. In just a few moments your team can create new subscription items, and update prices and discounts reflecting campaigns or permanent commercial updates.

Find out more here →

<https://bluefort.eu/licence-and-subscription-management-app-lisa/>



Drive innovation in customer experience

Customer centricity is a leading concept for companies providing subscriptions. SMBs are passionate about providing subscriptions to their customers and developing a long-lasting relationship. Frequently, they focus on providing a strong platform for customer communication. This should not be a one-time activity, but ongoing and changing over time.

LISA Business has the technology to integrate with other customer facing applications, such as eCommerce sites and stores or customer portals.

With LISA Business and Microsoft Dynamics 365, you can expand your customer service experiences and tailor your digital portals and apps the way you see fit. Moreover, you can empower your customers to add, remove and upgrade subscriptions making it easier to work with you.

The screenshot displays the Microsoft Dynamics 365 Subscription Management interface. The main header shows 'Dynamics 365 Subscription Management' and 'SANDBOX'. The left navigation pane includes sections for Home, Recent, Pinned, Work, Accounts, Sales, Subscriptions, and Products. The main content area is titled 'Contract Change 17891289 - Saved Quote' and shows a 'Confirmed' status with a total amount of €18,500.00. The interface is divided into several panels: 'Summary' (Subscription Quote Status, Company: DEMF, Quote Number: QUO-01717-D4Q09), 'PRODUCTS' (listing three SaaS products with their respective dates and statuses), 'SALES INFORMATION' (Opportunity: Sub&Co, Link Existing Subscription Plan: Yes, Existing Subscription Plan: DEMF-001075, Global Start Date: 01/05/2022, Fixed Cycles: 1, Global End Date: 30/04/2023, Requested Shipping Date: 11/04/2022, Subscription Quote: Yes, Program Type: EE SaaS offerings - Standard), and 'SHIPPING INFORMATION' (Shipping Method: ---). A summary table at the bottom right provides a breakdown of amounts: Detail Amount (€18,500.00), Total Amount (€18,500.00), (-) Discount (€0.00), Pre-Freight Amount (€18,500.00), (+) Freight Amount (€0.00), (+) Total Tax (€0.00), Total Pro-rata Cycle Value of Subscription (€158,179.91), Total Pro-rata Cycle Value of Quote (€32,179.91), Total Cycle Value of Subscription (€162,000.00), and Total Cycle Value of Quote (€36,000.00).



Want to discover more
about LISA Reach for
Microsoft Dynamics 365
Finance and Operations?

Get in touch

sales@bluefort.eu

<https://bluefort.eu/contact/>

