What’s New in Dynamics 365 for Customer Engagement

2018 Winter Release (Release 9.1)
• **Resources List**: Download today’s slides and access other helpful links by clicking the 📄 icon.

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What’s New in Dynamics 365 for Customer Engagement

2018 Winter Release (Release 9.1)
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- 2 years of experience with RSM
Agenda

2019 RSM Webcast Series

Sales

Service
- Field Service
- Customer Service
- Omni-Channel Engagement Hub
- Dynamics 365 Portal

Marketing
2019 RSM Webcast Series

Dynamics 365 for Customer Engagement

All events on Wednesday at 2pm ET | 60 minutes

- Winter's release of Microsoft Dynamics 365 for customer engagement
  Jan. 9, 2019
- Microsoft brings users Common Data Model
  March 13, 2019
- Leveraging Applications in Dynamics 365
  May 8, 2019
- Spring's release of Microsoft Dynamics for customer engagement
  July 10, 2019
- User adaptation tools to reach your full potential
  Sept. 11, 2019
- What's new with Field Services - The October release
  Nov. 13, 2019
Sales
Playbooks

- Automate repeatable sales activities and respond to external events
- Playbooks allow pre-determined logic to suggest the next ‘play’ in various scenarios during the selling process
- Each scenario playbook must be pre-determined
- Tasks and Activities to be automated are defined in the playbook
- Search and launch playbooks for a particular scenario
- Track the success or failure of playbooks over time
Live Organization Charts

Use hierarchy settings for accounts and contacts to build org charts for your accounts.

Maintain the org chart with easy access to LinkedIn Sales Navigator.

Use this as a starting point to add contacts to new accounts.
Create and Modify the Org Chart

Click and drag contacts to re-arrange
Add contacts to the org chart on the fly
Access LinkedIn Profiles immediately to ensure accuracy
Microsoft Teams

- Add a Microsoft Teams channel to any record in Dynamics 365
- Microsoft Teams is a new platform for teams to communicate and collaborate effectively
- Teams is the most recent re-design of Skype for Business
- It includes audio and video calling, instant messaging, plenty of app integrations, and virtual meetings
Teams Integration with Dynamics

- Microsoft supports a full integration between Dynamics 365 and Teams.
- Sales teams can communicate effectively through chat sessions across the Teams and Dynamics 365 records.
- Users can access the channels through Microsoft Teams or Dynamics 365.
- Files are stored in a central location, ensuring the entire team has consistent data and the most recent communications.
Dynamics AI for Sales

Use AI driven insights to gather data and inform decisions in the sales process.

Prioritize Leads that are more likely to convert based on advanced scoring models.

Find colleagues with active relationships with prospects to make introductions easier.
Field Service Business Application

- Integration with Finance and Operations
  - Allows for master data and work order data to be pushed to sales orders
  - Warehouse, Purchase Order, and Invoice integration are also supported

- Entitlement Management
  - Define entitlement levels and associate them to customers and work orders to ensure customers get the service they are eligible for

- Multi Resource Scheduling
  - Allows for multiple resources to be scheduled towards a single work order

- Service Level Agreement Management
  - Capability to establish and manage SLAs for customers and populate the details in work orders
Field Service Mobile

- Integration with Microsoft Bot Framework
  - Use a Bot in the mobile app to streamline repeatable tasks that must be completed for each work order
  - Bots must be created using the Microsoft Bot Framework

- Background Location Sharing
  - Allows technicians to share their current locations
  - Location data streams into Dynamics 365 and surfaces on the schedule board

- Push Notifications
  - Technicians can receive push notifications:
    - When they are assigned a booking
    - When a booking has changed
    - When they have arrived onsite for a work order
Universal Resource Scheduling

- Multi-Resource Scheduling
  - Dynamically assemble a group of resources to work together on various tasks
  - Mix and match:
    - Pools and individual resources
    - Individuals and crews
    - People, equipment, and facilities

- Resource Pools
  - Group together individuals into a pool, and assign the pool to a job instead of an individual
Predefined Crews

Group together a set of resources into a crew that works together on the same job

Book crews with the schedule assistant
Predefined Crews

Group together a set of resources into a crew that works together on the same job

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Facility Scheduling

Reserve a physical space

Reserve an appointment with a person at a facility
Capacity Scheduling

Resource requirements can now specify how much effort a requirement needs from a resource.
Service Scheduling

Powered by Universal Resource Scheduling

Considers availability of Employees, Facility, and Equipment
Customer Service Administrative Settings

- Redesigned **Queues** help appropriately prioritize and monitor progress
- **Subjects** help classify cases, knowledge base articles, products, and more
- **Parent-Child** case settings
- **Routing Rules** allow automatic routing of cases to the appropriate queue, user, or team
- **Automatic record creation and update rules** allow incoming activities to create or update a relevant case or related record.
- **Entitlement** helps define and quantify the support for which a customer is eligible by number of hours or cases
- **Customer Service Schedule** allows for precise scheduling of cases and workload
Suggest Similar Cases

Intelligent Insights on similar cases help customer service organizations respond quickly to cases that may have similar resolutions.
Knowledge Management Enhancements

This feature leverages Relevance search to provide knowledge article recommendations.

Shows relevant knowledge management articles based on the search terms.
Service

Omni-Channel Engagement Hub
New Customer Interaction Channels

Instant Messaging
- Quick provisioning of multiple chat widgets
- Authenticated and Unauthenticated Visitor Support

SMS
- Two way SMS texting between customer and agents
- Automated SMS texts to update customers
- Automated Response Management
Unified Routing and Work Distribution

Route work items from multiple channels to the correct support team within the organization.

Unify work items across channels and work item types, such as Cases, Leads, Call Backs, and Scheduled Tasks.
Enhanced Portal Features

- Manage SharePoint Documents
  - Extend Document Management capabilities of Dynamics 365 to your portal
  - Add, View, Download, Organize, and Delete documents through the portal
  - Use a permissions based model to control these actions by specific users

- Embed PowerBI Visualizations
  - Add your PowerBI dashboards and reports to your portal
  - Use liquid code to embed the dashboard into your portal
Portal Customization Enhancements

- Configuration Migration
  - Moving configurations between environments is now simple and supported
  - Works similarly to how we move solutions between environments

- Restrict Portal Access by IP Address
  - Added security measure to restrict users’ access by their IP address
  - Can be set by a specific set of IP addresses or using a range defined by a subnet mask
Portal Customization Enhancements

- Simplified Customizations
  - WYSIWYG-based content editors
  - Modern web page authoring experience
  - Improved sitemap configuration

- Self-Service Portal Diagnostics
  - Diagnostic tools that assist in identified problematic configurations and suggesting solutions
Account Based Marketing

- Use Dynamics 365 for Marketing to target specific accounts with individual strategies
- Increase integration and alignment between the sales and marketing departments
- Identify and create segments of high-value accounts
- Create personalized content based on accounts
- Create account-level leads
- Continuously measure account engagement and optimize your messaging
Re-Usable Content Blocks

- Define and store blocks of content to be re-used in a variety of channels
- Establish standardized headers, footers, blocks of text or formatting that should be common across the entire marketing organization
- Blocks are used as templates that can be added to any design
- Content within blocks can be locked to limit changes
Re-Usable Content Blocks

Use the content blocks creator to build template content blocks
Videos in Marketing Content

Integrate videos into marketing pages and emails

Add a video using the video block in the content designer
Social Listening for Campaigns

Track key words or phrases used throughout social media

View Results through the social tab on a Customer Journey

Results display how frequently a phrase is used, the sentiment associated with each mention, potential influencers, and much more
Marketing Calendar

An overarching calendar showing marketing events with a beginning and end date and campaigns.

All stakeholders will be able to view the schedule of marketing events.

The calendar provides a mobile friendly responsive control.
Marketing Calendar

Create new events, appointments, or sessions on the fly

Similar look and feel to Microsoft Outlook
LinkedIn Integration

- Generate Leads from LinkedIn connections on the account level
- Integrate Dynamics 365 segments with LinkedIn-matched audiences
- Orchestrate journeys that include triggers that react to submission from LinkedIn Lead Gen Forms
Richer Segmentation Experience

An improved segment designer enables marketers to create segments more easily and effectively.

More functionality
New User Interface
Additional Languages and Geographies

- Arabic, Basque, Bulgarian, Catalan, Chinese (Hong Kong), Chinese (Taiwan), Croatian, Czech, Estonian, Finnish, Galician, Greek, *Hebrew, Hungarian, Indonesian, Korean, Latvian, Lithuanian, Norwegian (Bokmal), Polish, Portuguese (Brazil), Portuguese (Portugal), Romanian, Russian, Serbian (Latin), Serbian Cyrillic, Slovak, Slovenian, Swedish, Thai, Turkish, Ukrainian, Vietnamese
- In addition to: Danish, Dutch, English, French, German, Italian, Japanese, Spanish
Thank You!

Any Questions?
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Before we conclude

Follow-up
• We will respond to questions following today's event
• Today's presentation slides and a link to the call recording will be e-mailed to you within a few days.

Thank you for your time and attention!