USER ADAPTATION TOOLS TO REACH YOUR FULL POTENTIAL
Your Presenters

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Agenda

• Why is User Adoption Important
• Adoption vs Compliance
• D365 Adoption Model
• Data Quality
• Familiar Tools to help with User Adoption
• Other Tools
• Gamification
Why is User Adoption important

- Poor user adoption is the main reason why CRM projects fail to deliver their expected results
  - Reasons
    - Outdated Interface
    - Unnecessary Complexity
    - Busy Screens
    - Taking on too much

- High cost for organizations if there is no user adoption
Adoption vs Compliance

Adoption
It’s mine
I want to
I’m motivated
I am trusted
It will help me succeed

Aim for adoption
Fall back on compliance

Compliance
It’s the company’s
I have to
I’m scared
I need a baby sitter
It’ll slow me down
D365 Adoption Model

People
- Willing Users
- Accountability

Cadence
- HABITS
  - Day to Day Consistency
- PROCESS
  - Process Consistency
- INTEGRATION
  - Integration Consistency

Technology
- Excellent Configuration
- Familiar Tools
- Ease of Use
- Data Quality
Data Quality

• Start with clean data
• Use Duplicate Detection
• Data Validation
• Data Verification
• Process Alignment
Data Quality

• Start with clean data
Data Quality

• Use Duplicate Detection

Duplicate Detection Settings
Select default duplicate detection settings for your organization.

Duplicate Detection Jobs
Create and monitor duplicate detection jobs.

Duplicate Detection Rules
Create, modify and publish duplicate detection rules.

Duplicate Detection Rules

<table>
<thead>
<tr>
<th>Entity Type: All</th>
<th>View: All Duplicate Detection Rules</th>
</tr>
</thead>
<tbody>
<tr>
<td>Rule Name ↑</td>
<td>Status Reason</td>
</tr>
<tr>
<td>Accounts with the same Account Name</td>
<td>Unpublished</td>
</tr>
<tr>
<td>Accounts with the same e-mail address</td>
<td>Unpublished</td>
</tr>
<tr>
<td>Accounts with the same e-mail address</td>
<td>Unpublished</td>
</tr>
<tr>
<td>Accounts with the same phone number</td>
<td>Unpublished</td>
</tr>
<tr>
<td>Accounts with the same website</td>
<td>Unpublished</td>
</tr>
<tr>
<td>Contacts with the same business phone number</td>
<td>Unpublished</td>
</tr>
<tr>
<td>Contacts with the same e-mail address</td>
<td>Unpublished</td>
</tr>
<tr>
<td>Contacts with the same e-mail address</td>
<td>Unpublished</td>
</tr>
<tr>
<td>Contacts with the same first name and last name</td>
<td>Unpublished</td>
</tr>
</tbody>
</table>
Data Quality

• Data Validation
Data Quality

• Data Verification
Data Quality

• Process Alignment
Familiar Tools

• Unified Interface
  - Browser
  - Tablet
  - Mobile Phone

• Outlook Integration
  - Track emails
  - Contacts
  - Email Templates
  - Sales Literature

• Excel
• Word
Demo
Other Tools

- Sharepoint Integration
- MS Teams (will replace Skype for Business)
- PowerBI Reports
- PowerApps
  - Role Based Apps
- Gamification
Other Tools

• Sharepoint Integration
Other Tools

• PowerBI Reports
Other Tools

• PowerApps
Other Tools

• Mobile Access
Gamification

• Accelerate adoption
  - Boost adoption of business processes and applications using positive reinforcement

• Boost Results
  - Change in annual revenues, deal sizes, etc.

• Keep it Timely and Relevant
Increase engagement with multiple game models

• Fantasy teams game
  - Recommended game model to let players to draft their own team of peers and allow non-sales people to compete

• Fixed teams game
  - All players are placed into predefined teams; points are rolled up to team and also tracked individually

• No teams game
  - All players compete on points individually
Game setup

- Business Unit: Testgames
- Name: Test
- Game Model: Fantasy Teams
- Sport Theme: American Football
- Draft Frequency: Weekly
- Start Date: 07/29/2019
- End Date: 09/29/2019

Reminder: You must register any new players before you set up the Game!
Note: Games have weekly game periods: Monday - Sunday (except TV games). Consider this when you choose start and end dates to try to avoid game periods of less than a week.
## KPI’s in D365

### Active KPIs

<table>
<thead>
<tr>
<th>Name</th>
<th>KPI Type</th>
<th>Status</th>
<th>Game</th>
<th>Game Status (Game)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Appointments</td>
<td>KPI Data</td>
<td>Setup</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Calls Made</td>
<td>KPI Data</td>
<td>Setup</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cases Resolved</td>
<td>KPI Data</td>
<td>Setup</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Emails Sent</td>
<td>KPI Data</td>
<td>Setup</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Leads Created</td>
<td>KPI Data</td>
<td>Setup</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Opportunities Created</td>
<td>KPI Data</td>
<td>Setup</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Pipeline Added</td>
<td>KPI Data</td>
<td>Setup</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Revenue Won</td>
<td>KPI Data</td>
<td>Setup</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Tasks Completed</td>
<td>KPI Data</td>
<td>Setup</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
KPIs
Players
Fans

Available Fans
- Select All
- Adam Wolf
- Divyesh Khatri
- Sierra Stottlan

Fans in Game
- Adam Wolf
Game awards

<table>
<thead>
<tr>
<th>Awards</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fantasy Team Awards</td>
<td>Gold (1st Place): Lunch with CEO</td>
</tr>
<tr>
<td>Game MVP Award</td>
<td>Gold (1st Place): Extra week off in calendar year</td>
</tr>
<tr>
<td>Position Awards</td>
<td>Gold (1st Place): Lunch with Regional VP</td>
</tr>
<tr>
<td>KPI Awards - Leads</td>
<td>Gold (1st Place): Gift certificate</td>
</tr>
</tbody>
</table>
Track Individual Performance

Amelia Britt, Sales Executive

My Stats
- Game MVP Award: 2/39
- Fantasy Team Award: 1/39
- Position Award - Green: 2/5
- KPI Award - Revenue Booked: 1/7
- KPI Award - New Opportunities Created: 2/39
- KPI Award - Pipeline Added: 17
### Track team performance

**Countdown to next period:**
- **05** Days
- **15** Hours
- **35** Minutes
- **29** Seconds

**Leaderboards**

<table>
<thead>
<tr>
<th>Rank</th>
<th>Player</th>
<th>Prize</th>
<th>Points</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Reggie Cowell</td>
<td>Lunch with CEO</td>
<td>141.00</td>
</tr>
<tr>
<td>2</td>
<td>Desiree Vaughn</td>
<td></td>
<td>134.50</td>
</tr>
<tr>
<td>3</td>
<td>Sharon Pickett</td>
<td></td>
<td>125.20</td>
</tr>
<tr>
<td>4</td>
<td>Stacie Young</td>
<td></td>
<td>123.00</td>
</tr>
</tbody>
</table>
Track team performance

### Top Game MVP Leaders

<table>
<thead>
<tr>
<th>Rank</th>
<th>Name</th>
<th>Points</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>David Brettell</td>
<td>1074.30</td>
</tr>
<tr>
<td>2</td>
<td>David Gaston</td>
<td>860.00</td>
</tr>
<tr>
<td>3</td>
<td>David Clode</td>
<td>839.00</td>
</tr>
<tr>
<td>4</td>
<td>Matt Ramsden</td>
<td>838.00</td>
</tr>
<tr>
<td>5</td>
<td>Ben Wells</td>
<td>743.67</td>
</tr>
</tbody>
</table>
Engage with players via Smack Talk
QUESTIONS
AND ANSWERS