

MICROSOFT DYNAMICS

Release Wave 2 Customer Engagement features

September 8, 2021



Presenter



Ami Arad

Director, Presales Engineer

Relatively new to RSM as a Director in the Presales organization

CRM seller at Microsoft

Segment leader for the Apparel, Accessories, & Footwear division at Oracle Netsuite

Founder & CEO of Wingtip, a men's retail concept in San Francisco



What have I done to make this more engaging?

- I have grabbed every screen shot available
- I will demo every early access feature I can
- I have removed references to user interface (UI) enhancements because the feature appears in every application, all equally vague but that doesn't mean they won't be good
- I have slides with big numbers coming up...

404



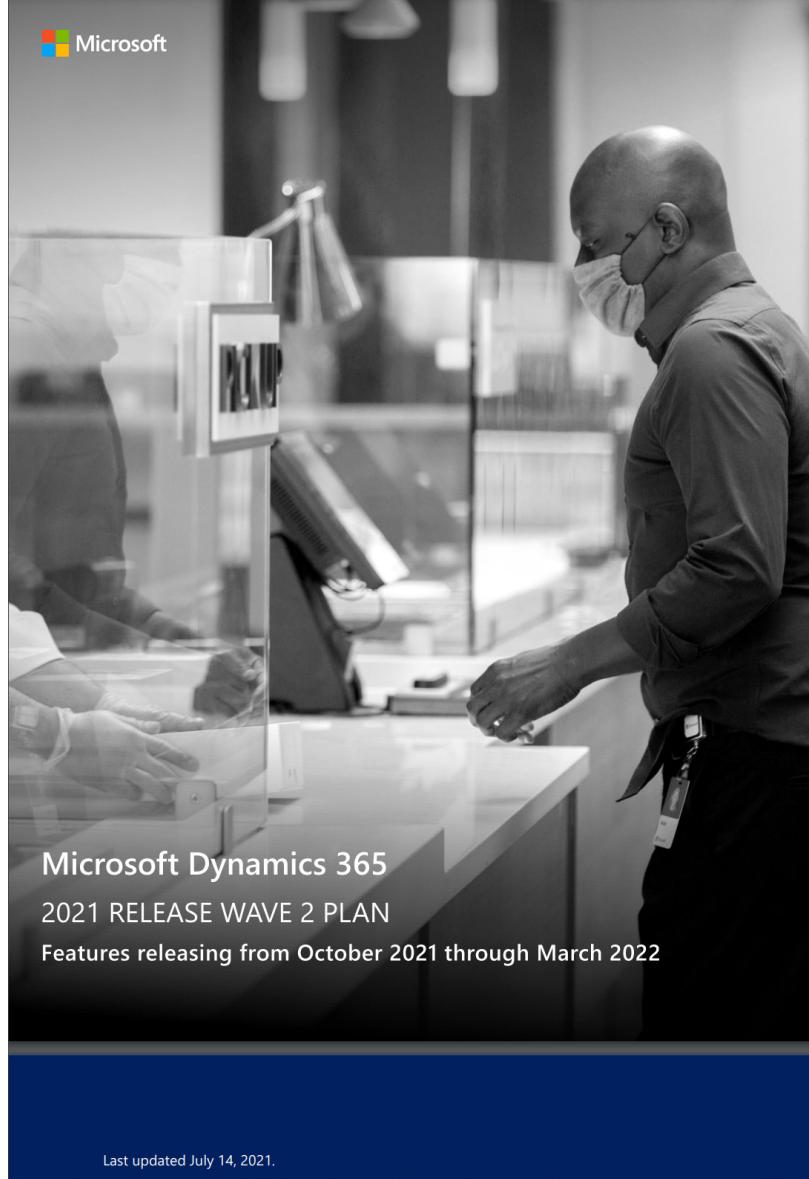
Microsoft Dynamics 365

2021 RELEASE WAVE 2 PLAN

Features releasing from October 2021 through March 2022

Last updated July 14, 2021.

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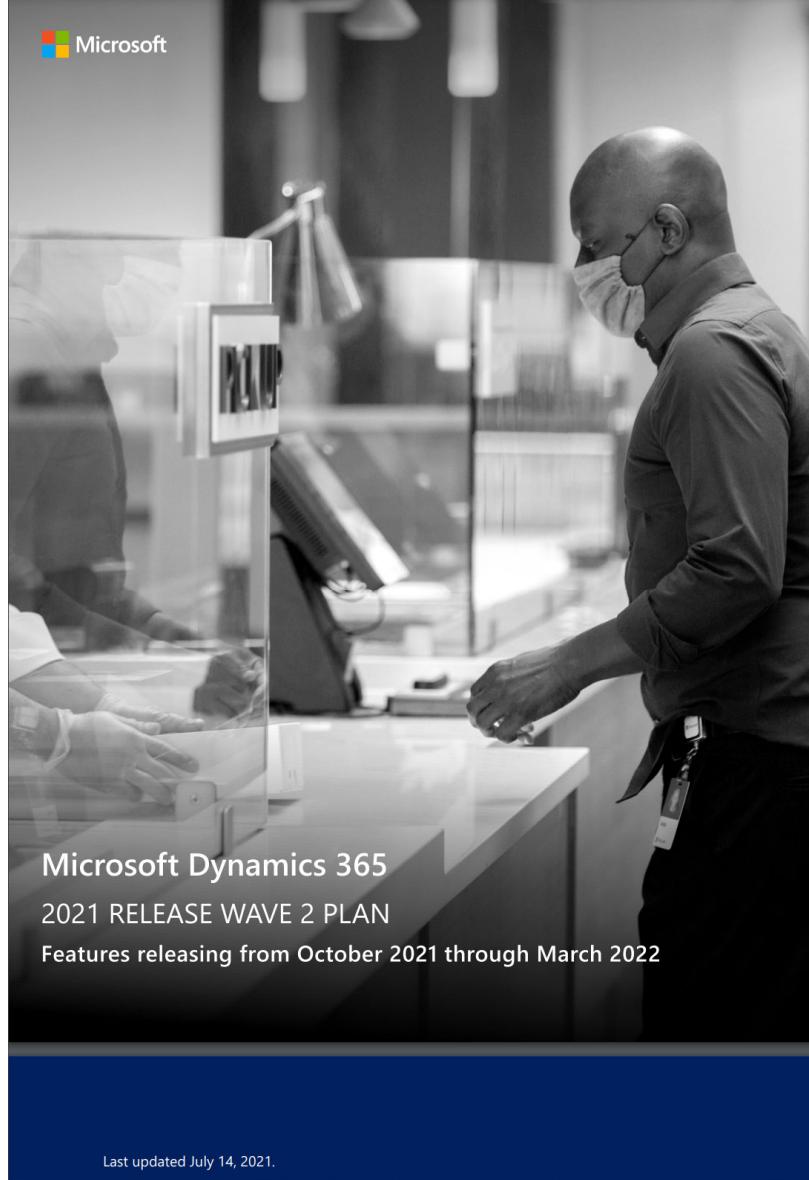


Microsoft

Microsoft Dynamics 365
2021 RELEASE WAVE 2 PLAN
Features releasing from October 2021 through March 2022

Last updated July 14, 2021.

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Microsoft

Microsoft Dynamics 365
2021 RELEASE WAVE 2 PLAN
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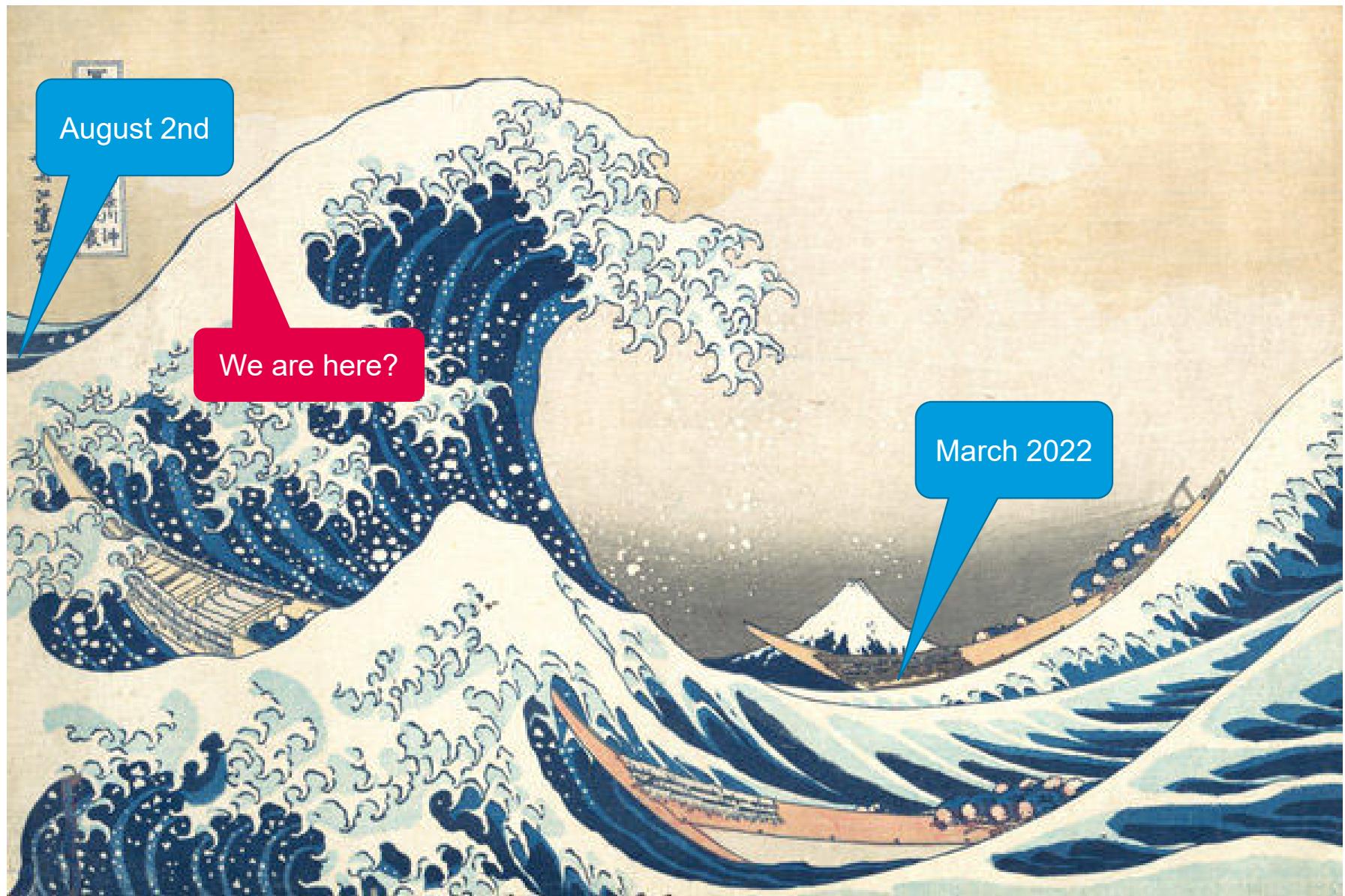
Last updated July 14, 2021.

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Microsoft

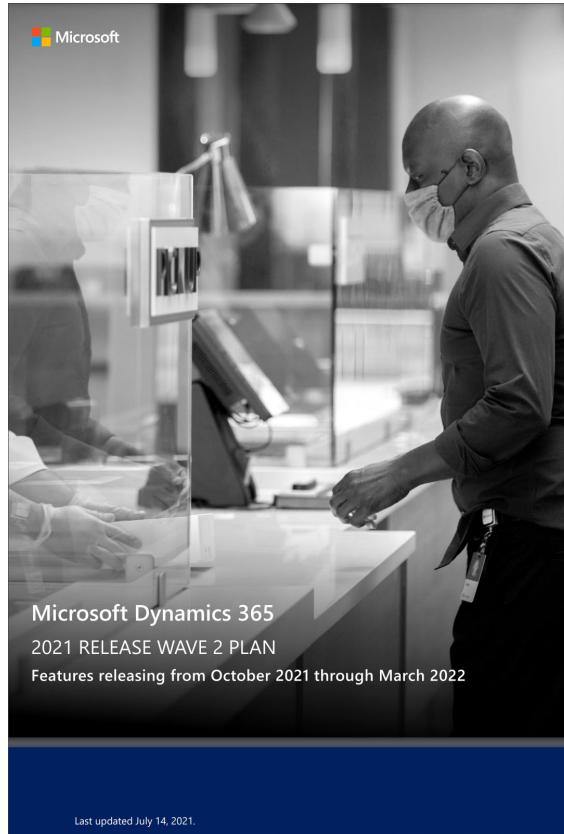
Microsoft Dynamics 365
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2021 Release Wave 2

- Marketing
- Sales
- Customer Service
- Field Service



<https://docs.microsoft.com/en-us/dynamics365-release-plan/2021wave2/>

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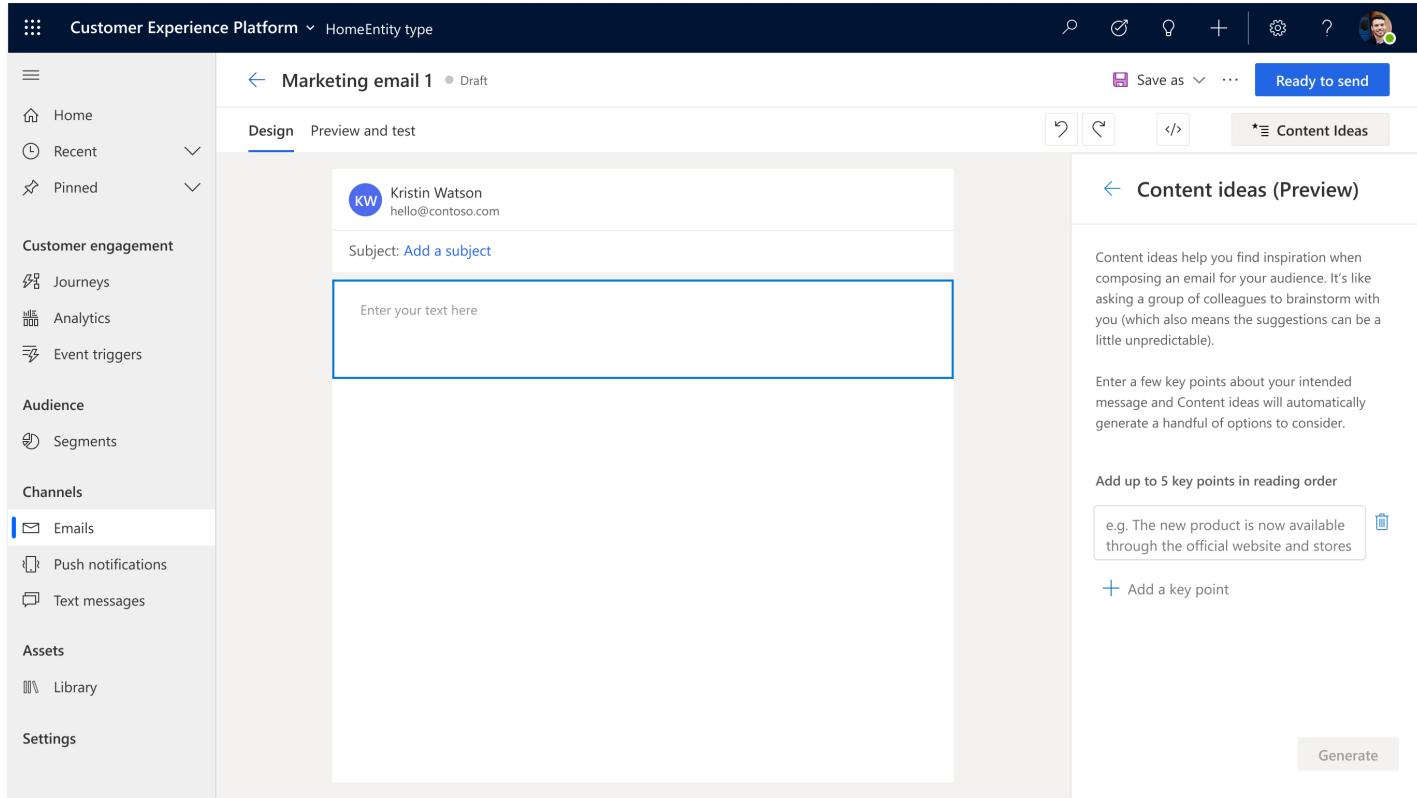


MARKETING

Dynamics Marketing

- Analytics & AI
- Moments-based
- Personalization

AI-based content ideas



The screenshot shows the Microsoft Customer Experience Platform interface. On the left, a sidebar navigation includes Home, Recent, Pinned, Customer engagement (Journeys, Analytics, Event triggers), Audience (Segments), Channels (Emails, Push notifications, Text messages, selected), Assets (Library), and Settings. The main area displays a 'Marketing email 1' draft for Kristin Watson (hello@contoso.com). The 'Design' tab is selected, showing a placeholder 'Enter your text here'. To the right, a 'Content ideas (Preview)' panel is open, explaining that content ideas help find inspiration for emails. It includes a text entry field with placeholder 'e.g. The new product is now available through the official website and stores', a 'Generate' button, and a 'Add a key point' button.

Moments-based

- Real-Time Marketing
- Account-based info from Customer Insights in journeys (ABM)
- Connect Customer Insights and your own data lake with customer journey orchestration
- SMS through Twilio or Telesign (ACS?)
- Customer Journey activities in Customer Insights
- Teams webinar registration → Journey...

Create a webinar registration experience in Teams, then design the participants' journey in Marketing with a few clicks

Dynamics 365 Marketing x + https://contoso.dynamics.marketing.com

Marketing

Save | Check for errors | Activate | Save as template | Flow

Entertainment in 2021
Customer Journey

No Recurring 5/5/21, 12:00PM Draft Status

Designer General Insights Related

Starts when:

Contacts registered for Entertainment in 2021 webinar

```
graph LR; Start((Start)) -->|+| SendEmail1[Send an email]; SendEmail1 -->|+| End((End))
```

Send an email

Starts when:

Contacts attended Entertainment in 2021 webinar

```
graph LR; Start((Start)) -->|+| SendEmail2[Send an email]; SendEmail2 -->|+| End((End))
```

Send an email

Starts when:

Contacts cancelled registration for Entertainment in 2021 webinar

```
graph LR; Start((Start)) -->|+| SendEmail3[Send an email]; SendEmail3 -->|+| End((End))
```

Send an email

Designer General Insights Related

Home Recent Pinned

Analyze

- Dashboards
- Contact center
- Segments
- Lead source
- Website tracking
- Redirect URLs

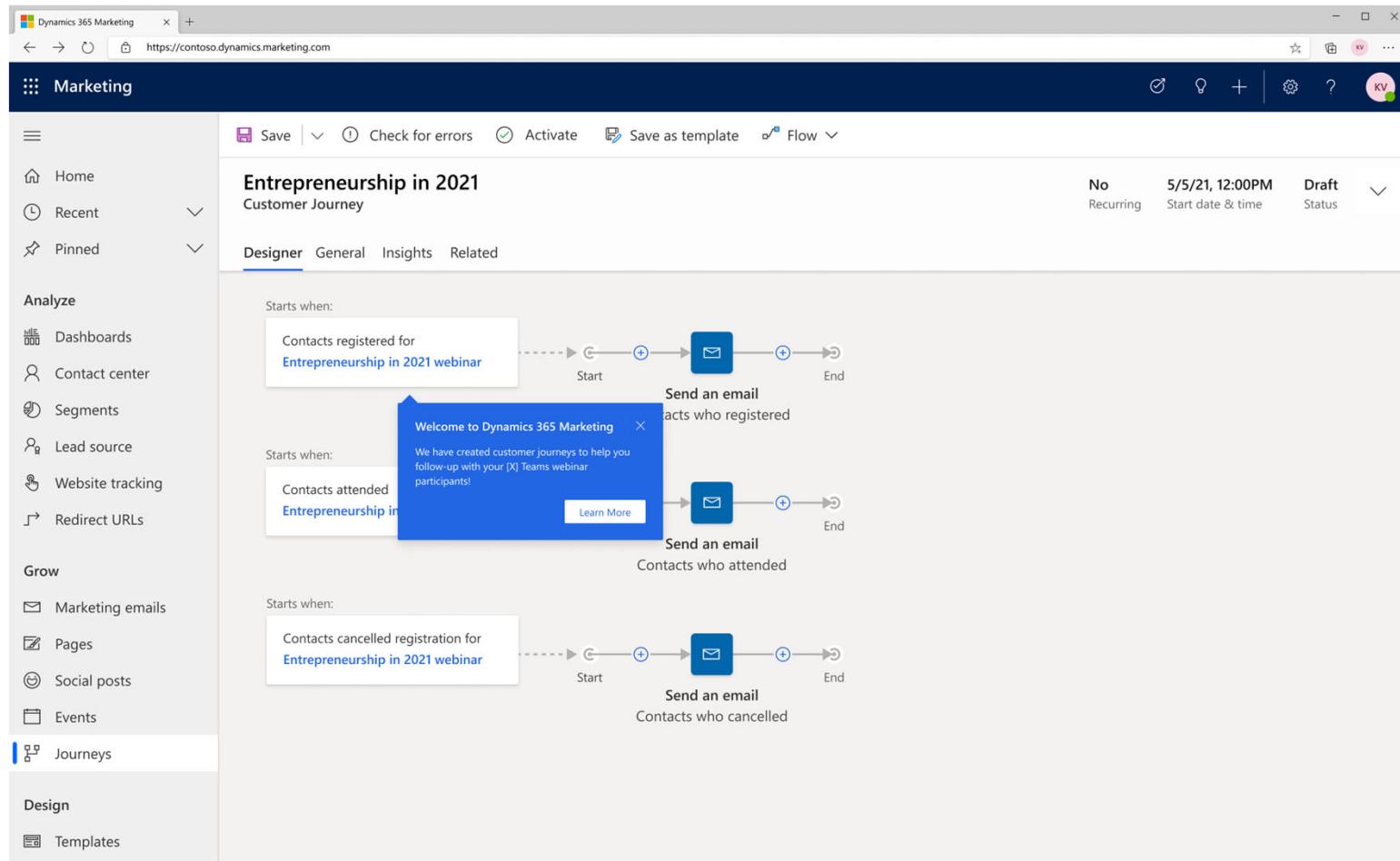
Grow

- Marketing emails
- Pages
- Social posts
- Events

Journeys

Design

Templates



Personalization

- Power Automate flows in Customer Journeys
 - Invoke in a Journey
 - Trigger a Journey
- Create segments based on Leads or Custom Entities...

New segment builder for leads & custom entities

- An even newer, simplified experience for segment-building
- Members
- Patients
- Donors
- ...

Marketing

Segment name 1 (Draft)

This segment will return a list of Contacts who satisfy the following conditions below. [Change target audience](#)

Contact

Records that satisfy the following conditions

Rule 1

Contact Address 1 City is Seattle

+ Add a condition

3,100 estimated members (34.5% of total users) [Refresh](#) [Collapse sample of included members](#)

Contact name	Email	Company	Mobile Phone
Robert Simmons	benjamin.ray@example.com	Contoso Inc	(207) 555-0119
Robert Simmons	benjamin.ray@example.com	Contoso Inc	(207) 555-0119
Robert Simmons	benjamin.ray@example.com	Contoso Inc	(207) 555-0119
Robert Simmons	benjamin.ray@example.com	Contoso Inc	(207) 555-0119
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Segment builder

Start with an attribute, action or event, or choose an existing segment to use when building your segment.

Attributes Interactions Segments

Search

Selected table

Contact 247 attributes

All related tables

Account 247 attributes

Attendee Pass 247 attributes

Check-in 247 attributes

Building 247 attributes

Lead 162 attributes

Customer Voice survey 247 attributes

Customer Voice survey question response 247 attributes

Customer Voice survey response 247 attributes

Event

Marketing

- Home
- Recent
- Pinned

Customer engagement

- Journeys
- Analytics
- Event triggers

Audience

- Segments
- Consent center

Channels

- Emails
- Push notifications
- Text messages

Assets

- Library
- Templates

Segment name 1 • Draft

Undo Redo Dynamic Edit in Query Save as draft Publish

This segment will return a list of Contacts who satisfy the following conditions below [Change target audience](#)

Contact
Records that satisfy the following conditions

Rule 1

Contact.Address 1 City is Seattle

+ Add a condition

Relationship path: Contact>Return all contacts [Edit path](#)

3,100 estimated members (34.5% of total users) [Refresh](#) [Collapse sample of included members](#)

100 of 3,100 members included in this segment

Contact name	Email	Company	Mobile Phone
Robert Simmons	benjamin.ray@example.com	Contoso Inc	(207) 555-0119
Robert Simmons	benjamin.ray@example.com	Contoso Inc	(207) 555-0119
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- Customer Voice survey response 247 attributes
- Event



SALES



Dynamics Sales

- Accelerator workspace
- Microsoft Teams collaboration
- Engagement platform & productivity intelligence
- Forecasting & pipeline analytics
- Mobile
- Pipeline management
- Relationship intelligence

Accelerator workspace

- Lead Routing
- Seller KPIs and Manager dashboards
- Sequence management
 - LinkedIn integration to Sequences! (InMail, connection request, intro)
 - Sequence templates
 - Transport Sequences between systems
- Improving leads quality with data hygiene
- Advanced sorting & filtering
- Worklists
 - Worklist card enhancement
 - Worklist ownership enhancement
 - Worklist and workspace improvement

Lead routing

- Define rules for automatic assignment. The following components are included:
 - **Segments:** This is a group of leads that can be assigned to the rule.
 - **Lead attribute:** Lead attributes that need to be considered should be maintained here.
 - **Seller attribute:** The attributes and skills of the sellers that need to be evaluated for lead distribution should be mentioned in the rule.
 - **Distribution method:** Lead can be distributed either through round robin or load balancing methods.
- Ability to define seller attributes and assign to the seller: Seller attributes can be specifically defined for lead routing.
- Create segment for the assignment rules.
- Maintain sales team and capacity. The user can maintain the sellers who would receive the leads. The capacity of the sellers can also be used, which would be taken into consideration when distributing the leads.

Seller KPIs and manager dashboards

- **Manager dashboard:** allow managers to view their team's performance and coach and guide sellers
- Number of active leads in the org versus previous periods.
- The conversion ratio between leads and opportunity.
- Leads by sources types.
- Leads per sellers.
- **Real-time seller KPIs:** define key performance indicators for sellers and allow them to see progress in real time
- Number of qualified leads.
- Number of calls.
- Number of meetings.
- Estimated value.

Leads quality with data hygiene + AI

- Detection mechanism
 - Duplicates detection
 - False or invalid lead detection
 - Detection of leads-related records
 - Detection of leads' additional available data
- Enable automated action based on anything above
 - Update, close, or delete a lead
 - Merge two (or more) leads
 - Notify user about detection (seller or admin)
- Configuration: user ability to choose and define a lead's characteristics for detection and type of actions as a result
- User-based decision or resolution interaction (advanced merge and advanced enrichment capability)

Teams collaboration

- Teams meeting integration (schedule, join, notes, call analysis)
- Send automated chat notifications from D365 to Teams
- Configure and secure integration seamlessly
- Contextual collaboration
- Enhancements to Suggested Contacts system
- Teams message extensions and actions
- Some of this in public preview this month (GA in Jan)

Engagement platform & productivity intel

- Microsoft Teams calling and meetings from Dynamics 365
- Real-time analytics and action items
- Connectivity to Dynamics 365 entities
- Third-party telephony system (3P) calling in Dynamics 365
- Incoming calls in Dynamics 365
- Embedded Microsoft Teams meetings
- Seller-side-only recording

Forecasting & pipeline analytics

- Filter users from forecast (i.e. Sales Ops personnel, support staff)
- Share & delegate access to other users
- Improve predictive scoring through field augmentation
- Seller views of annual, year-to-date, and weekly periods
- Quota inline editing and rollup

Mobile

- Come prepared to customer engagements
- Find, interact, and create CRM information easily
- Log and share information effortlessly (scan handwritten notes!)
- Never miss a detail in your customer engagements

Pipeline management

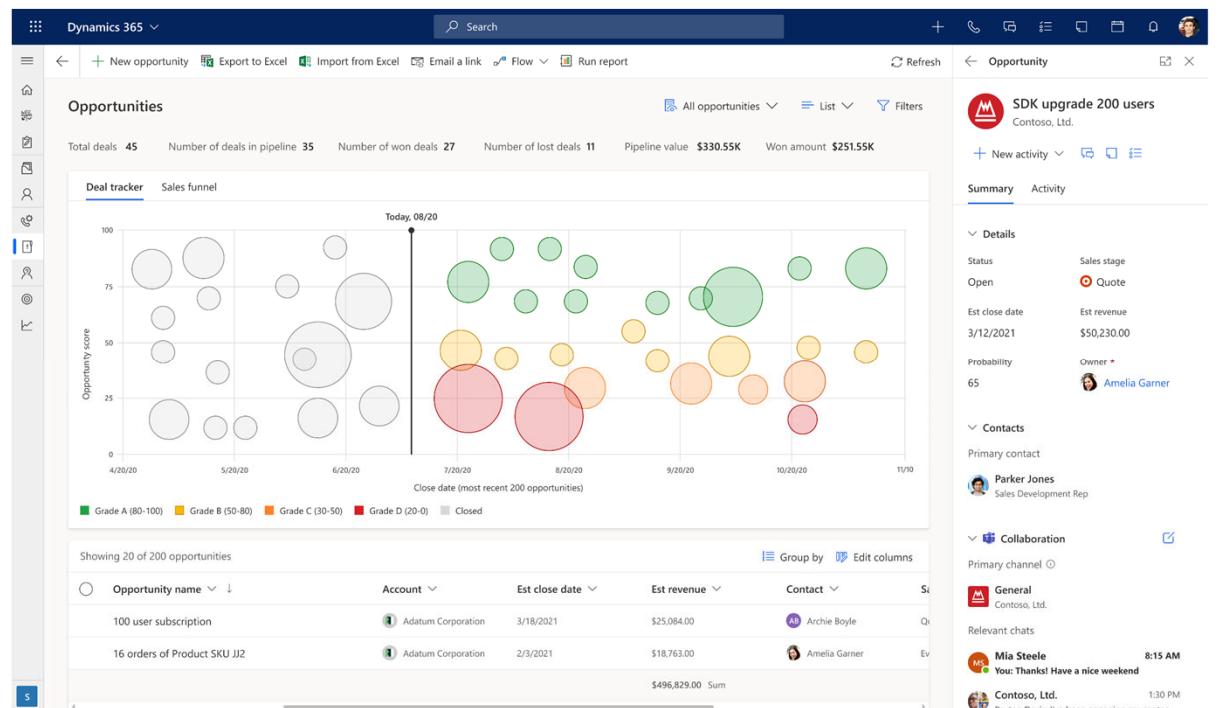
- Deal manager workspace
- Manage accounts, contacts, and leads in experience similar to Deal manager workspace
- Manage pipeline using hierarchy and date-based filters

Relationship intelligence

- Account-based contact discovery with Who knows whom
- Include custom activities in relationship analytics (demos!)

Deal manager workspace

- Get a quick view of the opportunity, contact, lead, and account entities using the side panel.
- Edit values in the grid inline.
- Filter, sort, and search data in the grid.
- Show or hide columns in the grid.
- Add columns to the grid.
- See aggregations for numeric columns.
- Get an optimized filtering experience.
- Manage notes and tasks effectively.
- Choose from three out-of-the-box interactive charts (bubble, funnel, and bar chart).
- Configure chart fields according to each seller's needs.
- View and configure stats or key performance measures that are predefined.
- Drill in to contacts and accounts within an easy-to-access record side panel form.



Dynamics 365

Search

New opportunity Export to Excel Import from Excel Email a link Flow Run report Refresh

Opportunity

Opportunities

Total deals 45 Number of deals in pipeline 35 Number of won deals 27 Number of lost deals 11 Pipeline value \$330.55K Won amount \$251.55K

Deal tracker Sales funnel

Today, 08/20

Opportunity score

Close date (most recent 200 opportunities)

Grade A (80-100) Grade B (50-80) Grade C (30-50) Grade D (20-0) Closed

Showing 20 of 200 opportunities

Opportunity name Account Est close date Est revenue Contact

100 user subscription Adatum Corporation 3/18/2021 \$25,084.00 Archie Boyle

16 orders of Product SKU JJ2 Adatum Corporation 2/3/2021 \$18,763.00 Amelia Garner

\$496,829.00 Sum

All opportunities List Filters

SDK upgrade 200 users Contoso, Ltd.

New activity

Summary Activity

Details

Status Open Sales stage Quote

Est close date 3/12/2021 Est revenue \$50,230.00

Probability 65 Owner Amelia Garner

Contacts

Primary contact Parker Jones Sales Development Rep

Collaboration

Primary channel

General Contoso, Ltd.

Relevant chats

Mia Steele 8:15 AM You: Thanks! Have a nice weekend

Contoso, Ltd. Peyton Davis 1:30 PM Peyton Davis: I've been engaging my contac

CUSTOMER SERVICE

Dynamics Customer Service

- Agent experiences
- Agent productivity
- Case management
- Knowledge management
- Omnichannel voice
- Timeline
- Unified routing

Agent experiences & productivity

- Agent workspace inbox view
- Usability improvements for agent workspaces
- Contextual collaboration using Microsoft Teams

Case & knowledge management

- Modern control for subject entity
- Improvements to the Universal Resource Scheduling-based service scheduling experience
- Scheduling and IoT capabilities in Customer Service workspace
- AI-suggested keywords and brief description for knowledge articles
- Usability improvements in knowledge management

Omnichannel voice

- Call intelligence
- Call recording
- Call transcription and real-time sentiment analysis
- Consult & transfer
- Direct outbound calling
- Embedded analytics for voice channel
- Intelligent voice bot via Power Virtual Agents
- Modern administration experience
- Supervisor monitor and barge
- Topic clustering for voice
- Voice channel powered by Azure Communication Services

Timeline, unified routing

- BYOD to Timeline
- Improved historical analytics for unified routing
- Routing diagnostics for supervisors
- All GA in October!

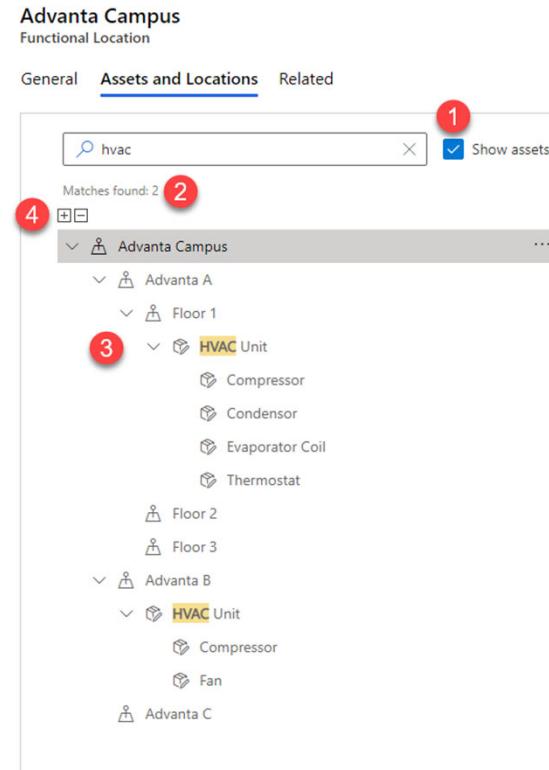
FIELD SERVICE

Dynamics Field Service

- Empower frontline workers
- Engage end-customers
- Optimize service operations
- Resource scheduling

Empower frontline workers

- Functional location and asset tree improvements
- Collaborate throughout the work order lifecycle with embedded Microsoft Teams



Engage end-customers

- Engage your customers with the new customer experiences homepage
- Enable customers to schedule service visits with a simple web experience

Optimize service operations

- Enable location sharing and analytics capabilities by default
- New feature spotlight in the Field Service Get Started hub
- Work order form simplification (early access now)

Resource scheduling

- Resource work hours extensibility
- Improved user experience with new schedule board enhancements

THANK YOU FOR
YOUR TIME AND
ATTENTION



QUESTIONS AND ANSWERS



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