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MARCH 2023
CUSTOMER ENGAGEMENT
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Dynamics 365 & Power Platform: 2023 Release Wave 1 Overview

Scott Roller, Functional Architect

New Dynamic LLC

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Disclaimers

- I will be taking a functional point of view
- These are my favorite features for D365 and Power Platform
- There are several hundred new features, I can only cover a few in the time we have available
- Sorry if I skip over a feature that you are excited about or interested in
- https://experience.dynamics.com/releaseplans

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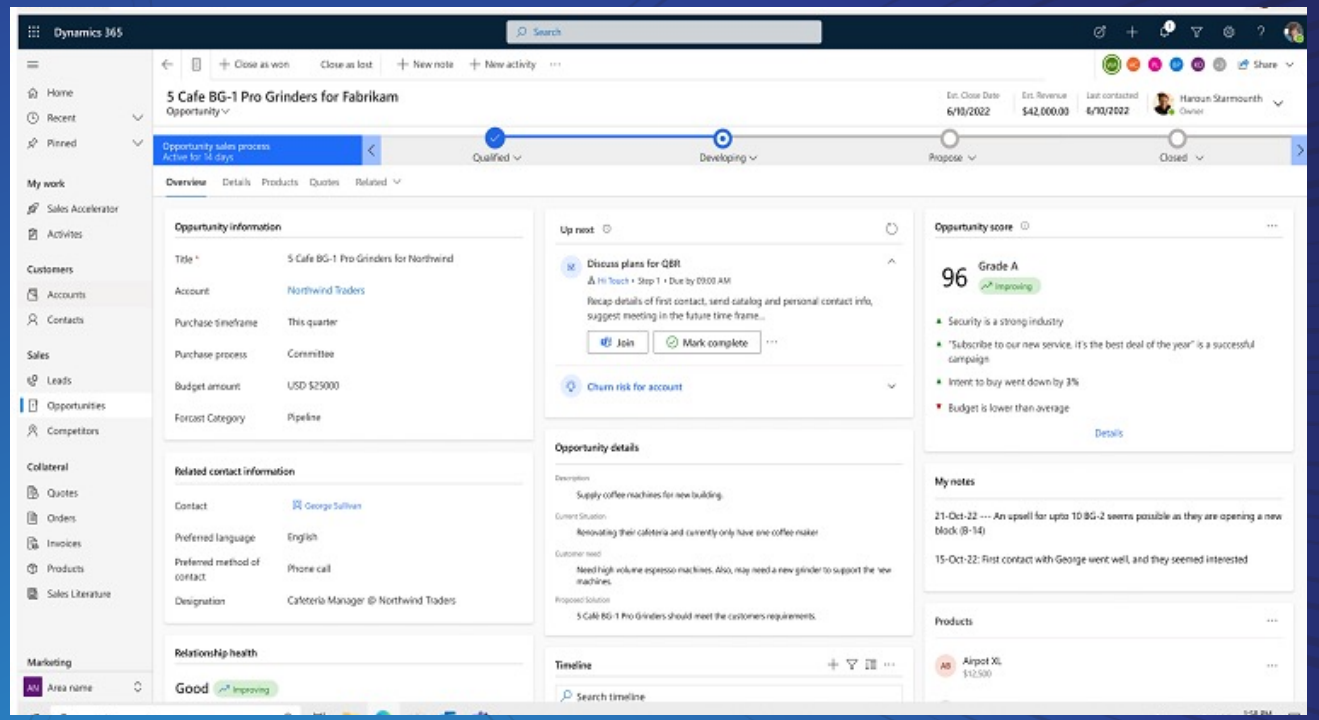
Dynamics 365 Sales

Enhanced Opportunity Form

- Changed the proportion of the out-of-box opportunity form columns to provide a wider central column for clear, actionable insights.
- Rearranged the command bar to provide the most frequently used buttons up-front.
- The account to which an opportunity is linked is mapped in the header.
- Added chevrons at the end of each BPF stage to highlight the button.
- Added widget headers "Key details" and "More info" for clarity of information.
- To provide consistency throughout the opportunity form, change all of the header and field values to sentence case.



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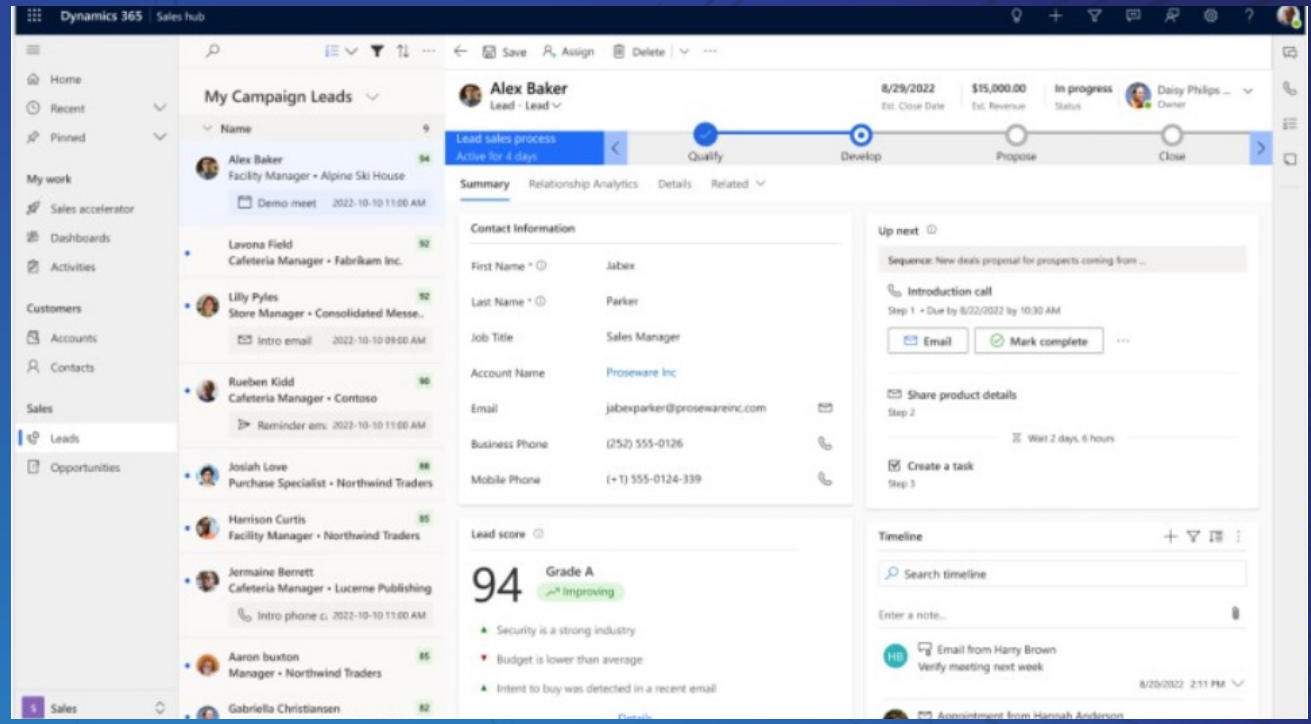
Sales Focus Mode

- Switch between the current grid and the focused view with one click.
- Get a consolidated set of filtering and sorting capabilities, including grid and focused view filters, to create a focused workspace.
- Define the structure and the fields you want to see as part of the work list cards in the focused view.



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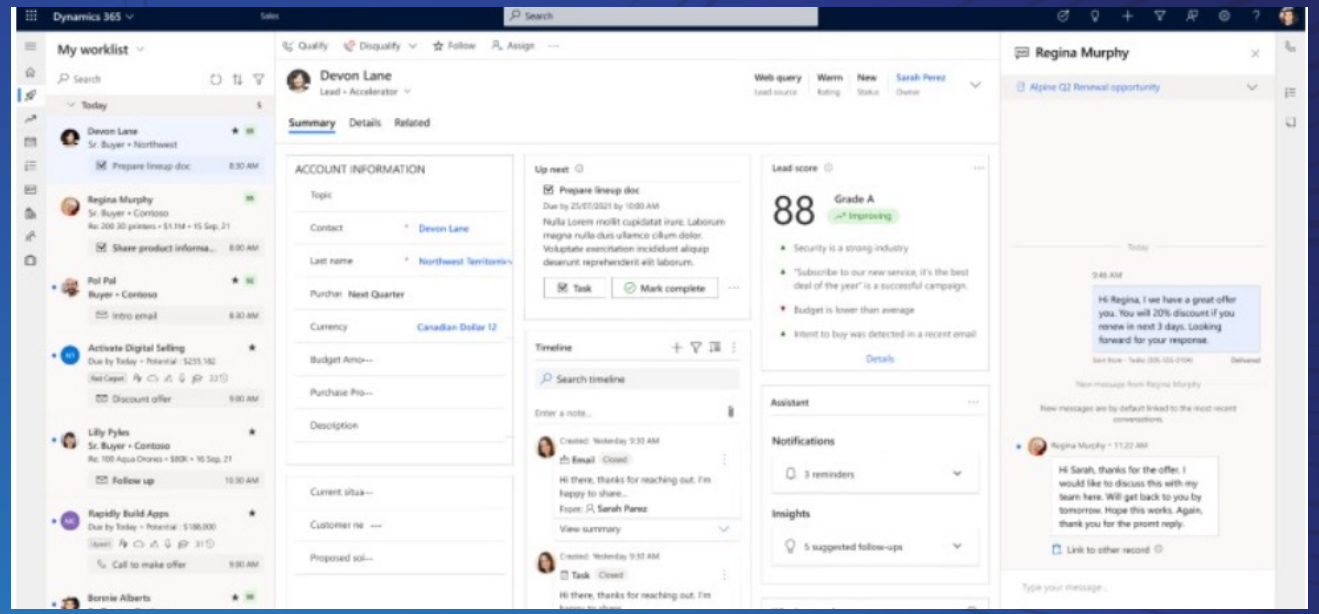
Engage Customers with SMS Text

- Admins will be able to assign specific numbers to any user/team for SMS.
- Receive customer responses for SMS sent and revert to build an ongoing conversation.
- Send and receive SMS from all relevant Dynamics 365 Sales entity forms.
- Get real-time notifications for incoming SMS.



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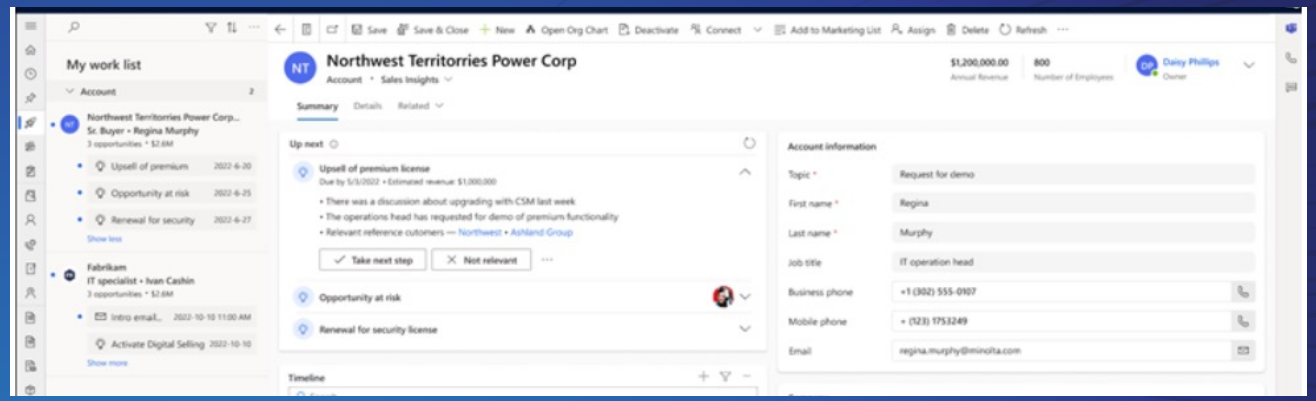
AI - Intelligent Sales Suggestions

- An easy-to-use, AI-powered suggestions solution
- A curated list of account-based suggestions for targeting the prioritized list of accounts.
- Sellers can follow the precise workflows to leverage the suggestions for improving sales effectiveness.
- Sellers can seamlessly collaborate with the team to collectively work on suggestions.



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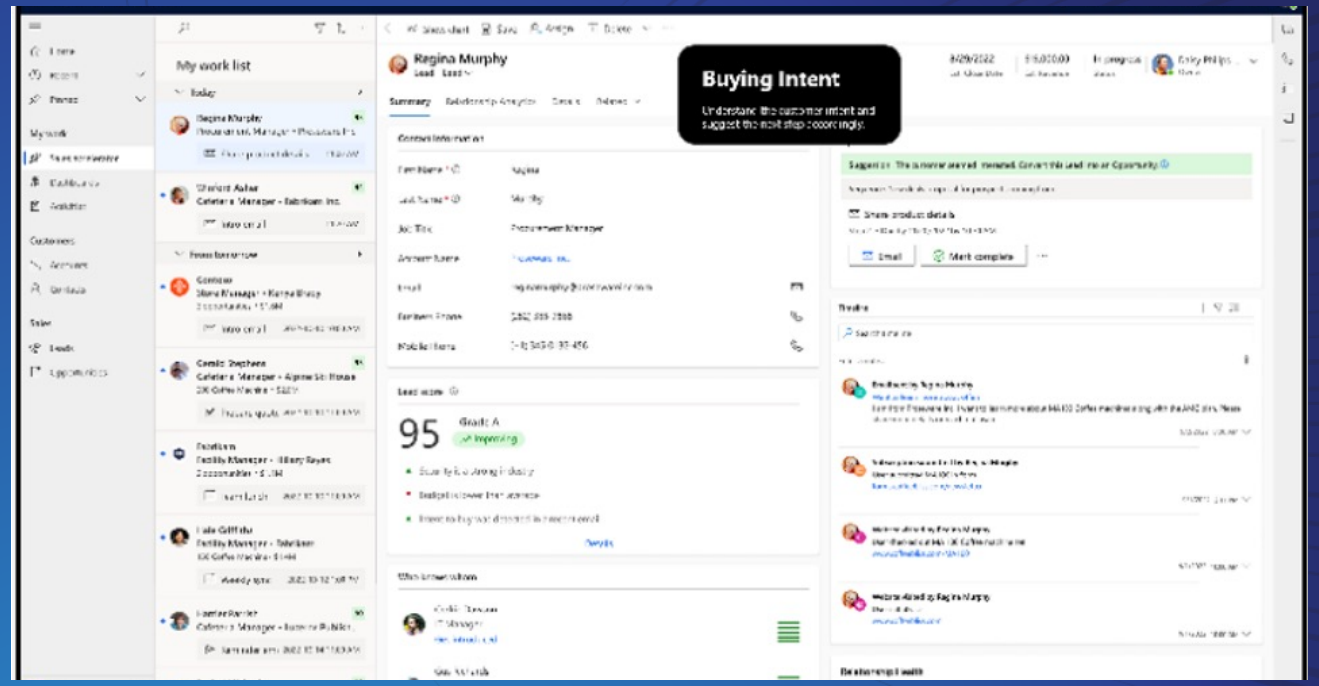
AI – Automate Follow-up Tasks

- Follow-up tasks are automatically created based on emails, Teams messages, and calls.
- Follow-up tasks are available for quick reference from within the Up Next Widget.



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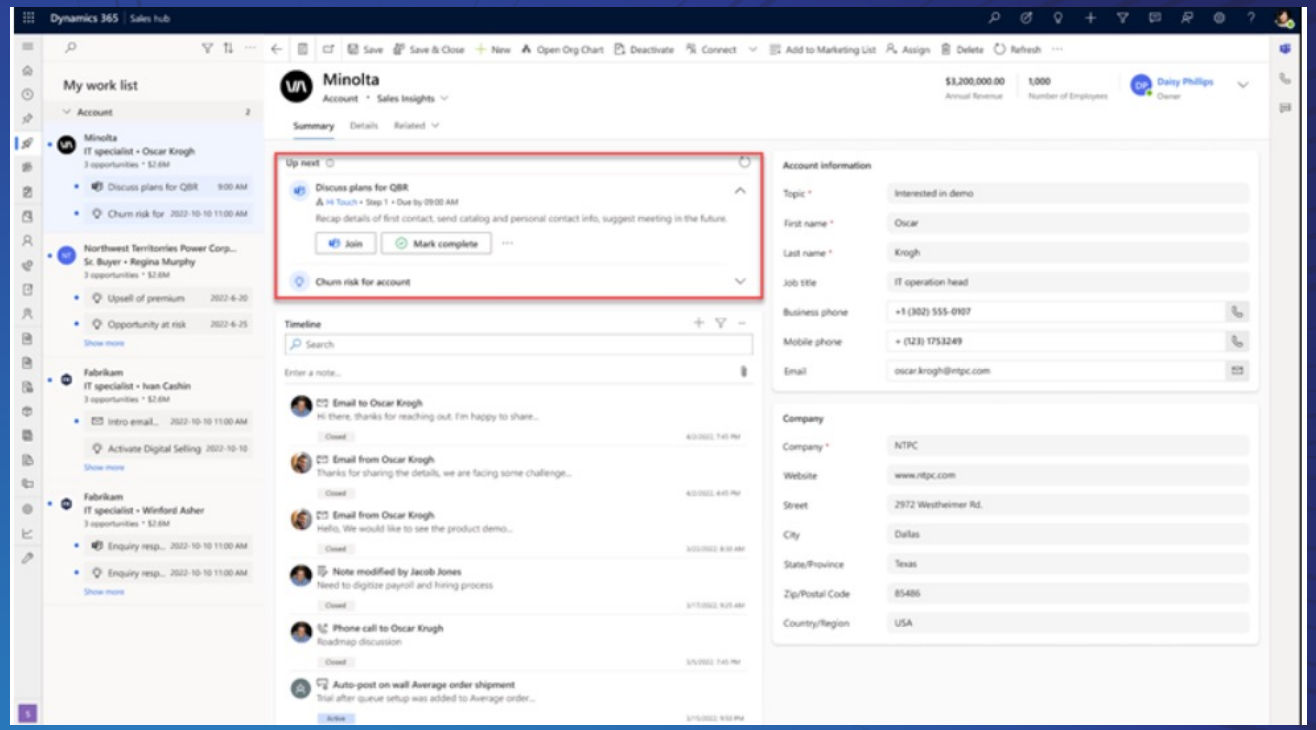
AI – Guide Sellers with Next Best Step

- Up Next Widget – focused tasks
- Help in composing emails.
- Automatic follow-up tasks.
- Suggestion on product recommendations.



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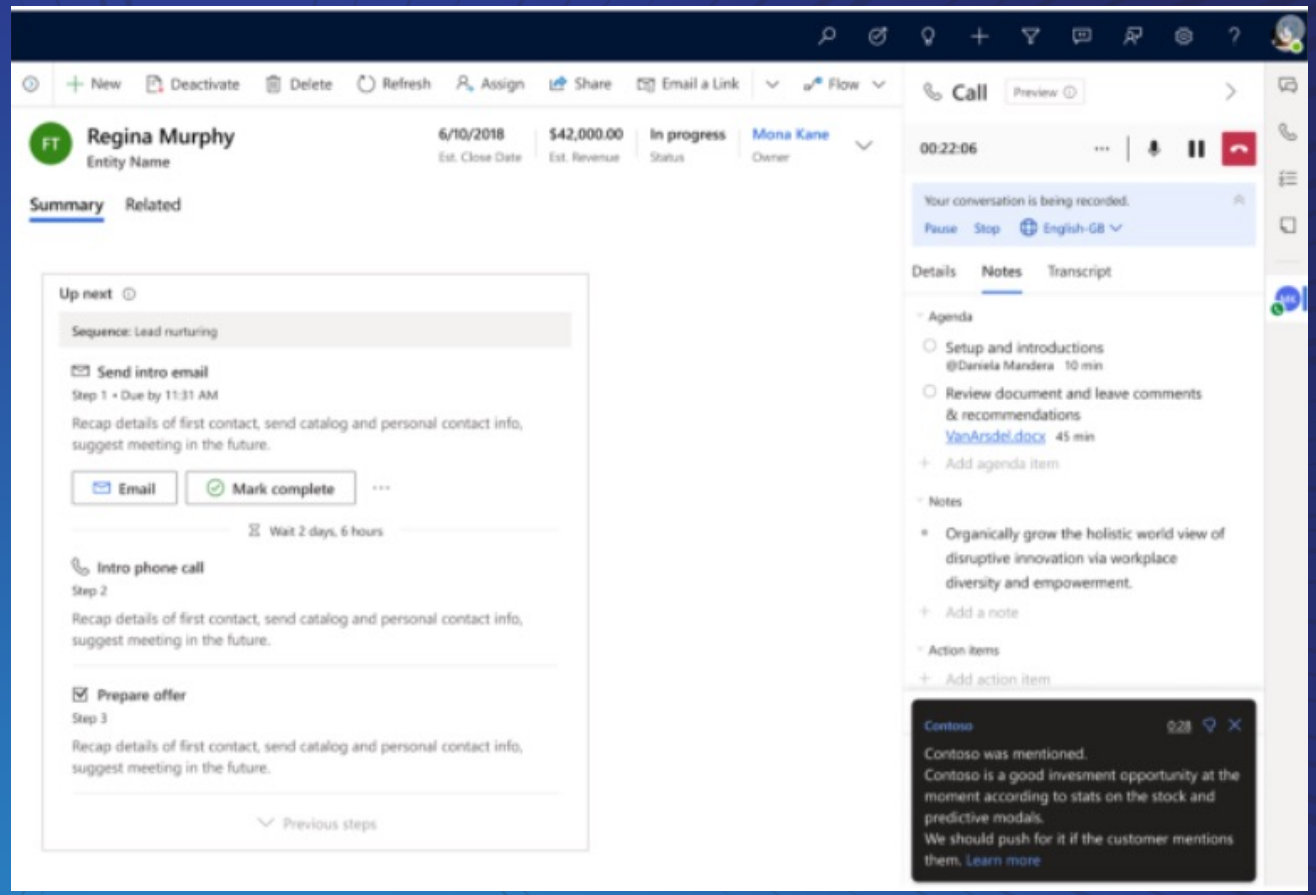
AI – Real Time Sales Tips & Suggestions

- To make remote selling more powerful than face-to-face selling
- Get suggestions on product and service details
- Competitive battle cards
- Brand info, pricing, and more, while you are on a call with a customer



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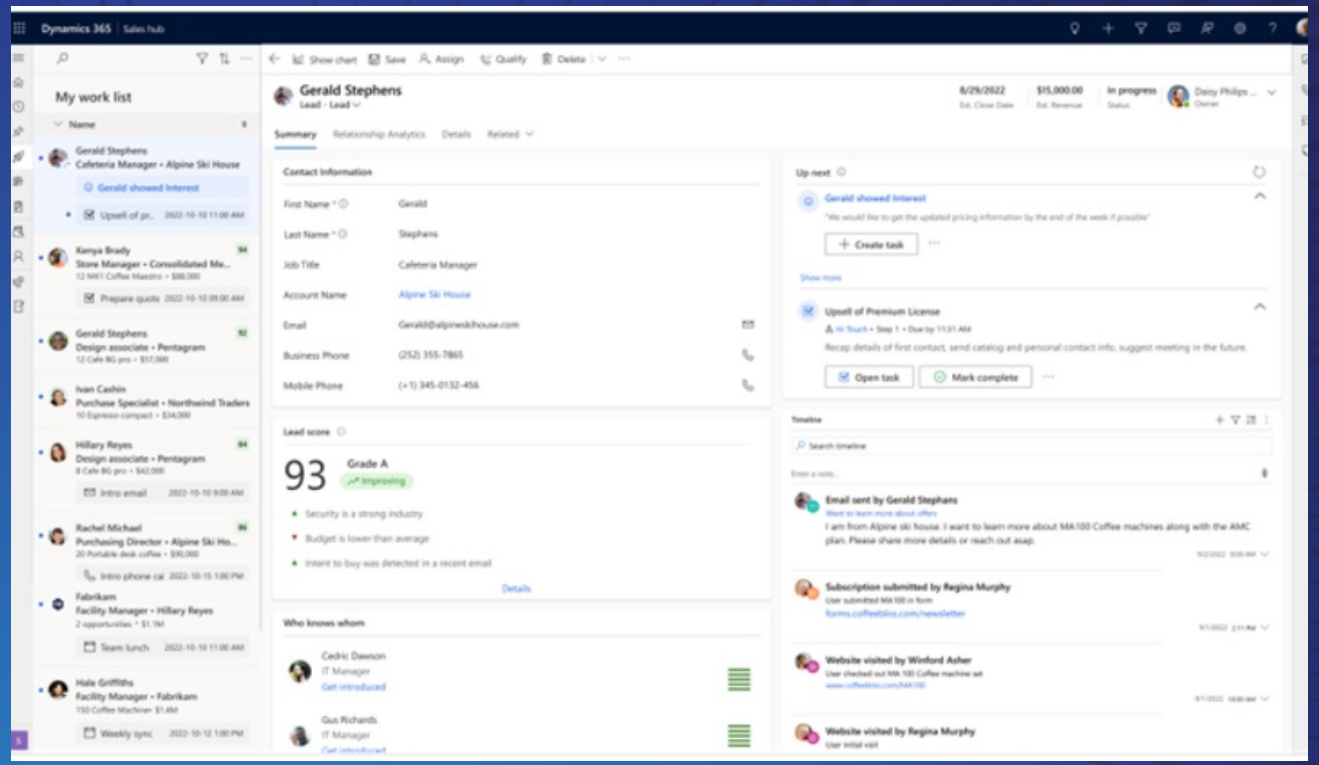
AI – Intent Detection for Lead Qualification

- This new AI-based feature would detect customer intent from emails and ensure that good quality leads are acted upon by the sellers at the right time
- Engage with the lead for the possible next steps based on the intent detected by the AI model, thus expediting the lead qualification process.
- Be proactive in your customer engagement and improve the sales process.



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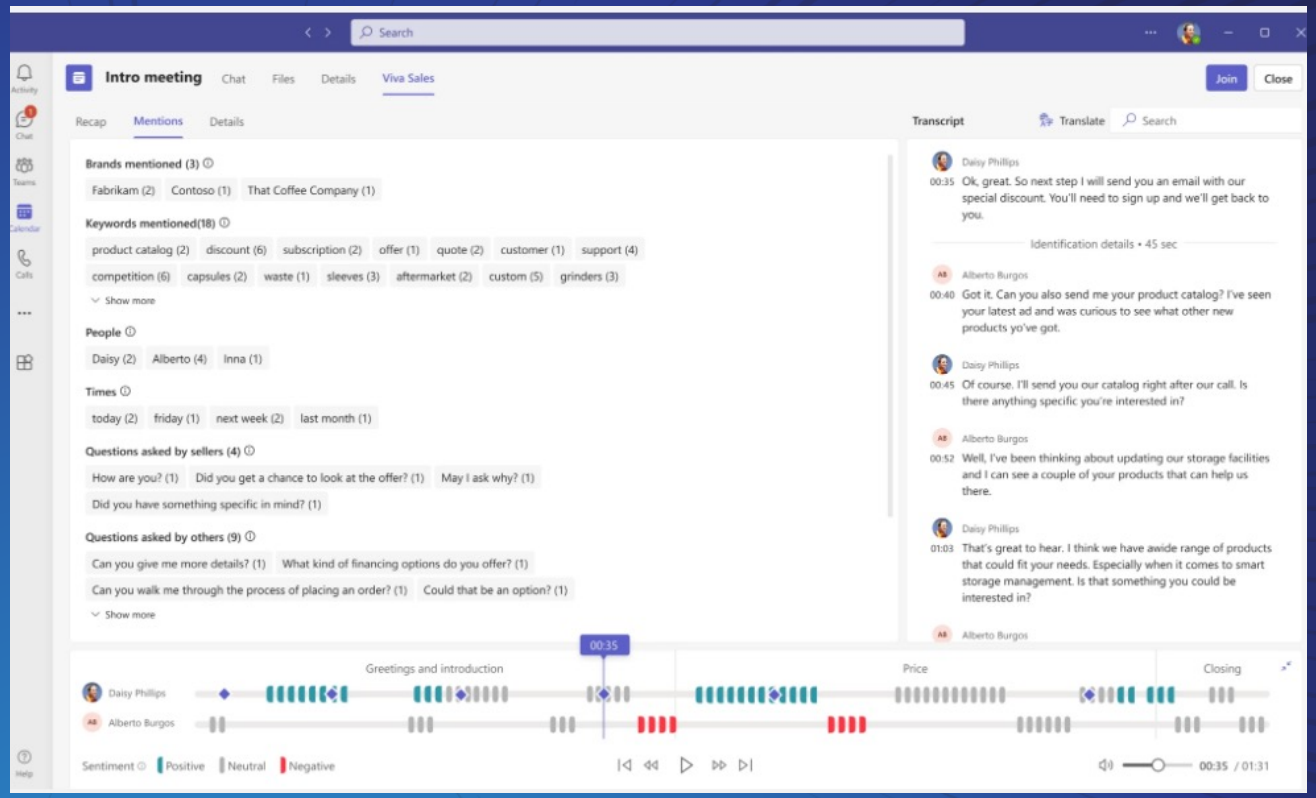
AI – Customer Call Insights

- **Question analysis**: Get a better sense of a seller's effectiveness by analyzing engagement and discovery questions used across calls.
- **Call categorization**: Easily find relevant calls by filtering out immaterial calls such as voicemail and other types of calls without essential content.



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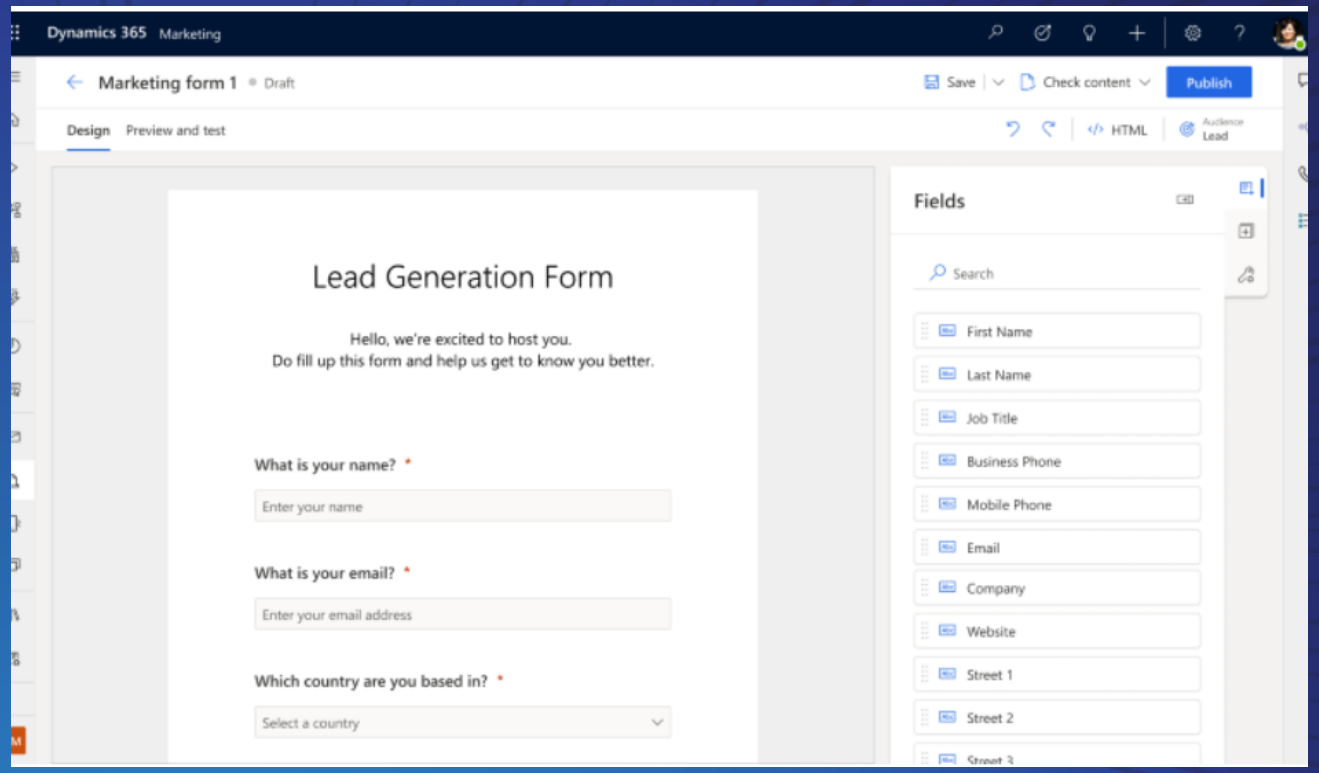
Dynamics 365 Marketing

Create Intuitive Modern Forms

- A modern drag-and-drop editor guides you through the entire form creation process.
- No need to depend on developers; start creating forms within seconds.
- Instantly publish a form as a standalone page or embed the form into an existing page.
- Deliver compelling forms to your customers that match your brand and track conversions.



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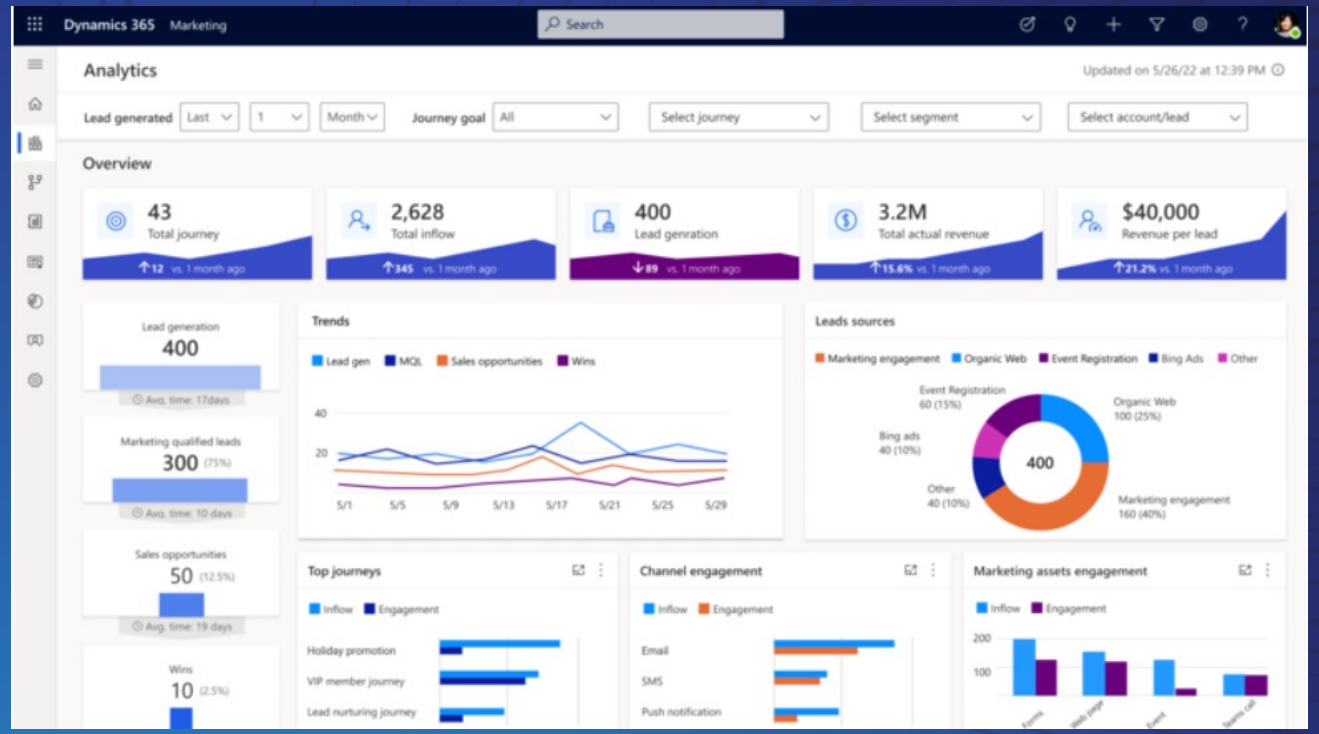
Optimize B2B Marketing with OOB Dashboards

- Seamless integration with Dynamics 365 Sales gives a comprehensive view to track accounts moving through the pipeline (from prospects and leads to won opportunities).
- Understand the main drivers for lead generation and qualification.
- Learn about your most effective sources that produce high-quality leads.



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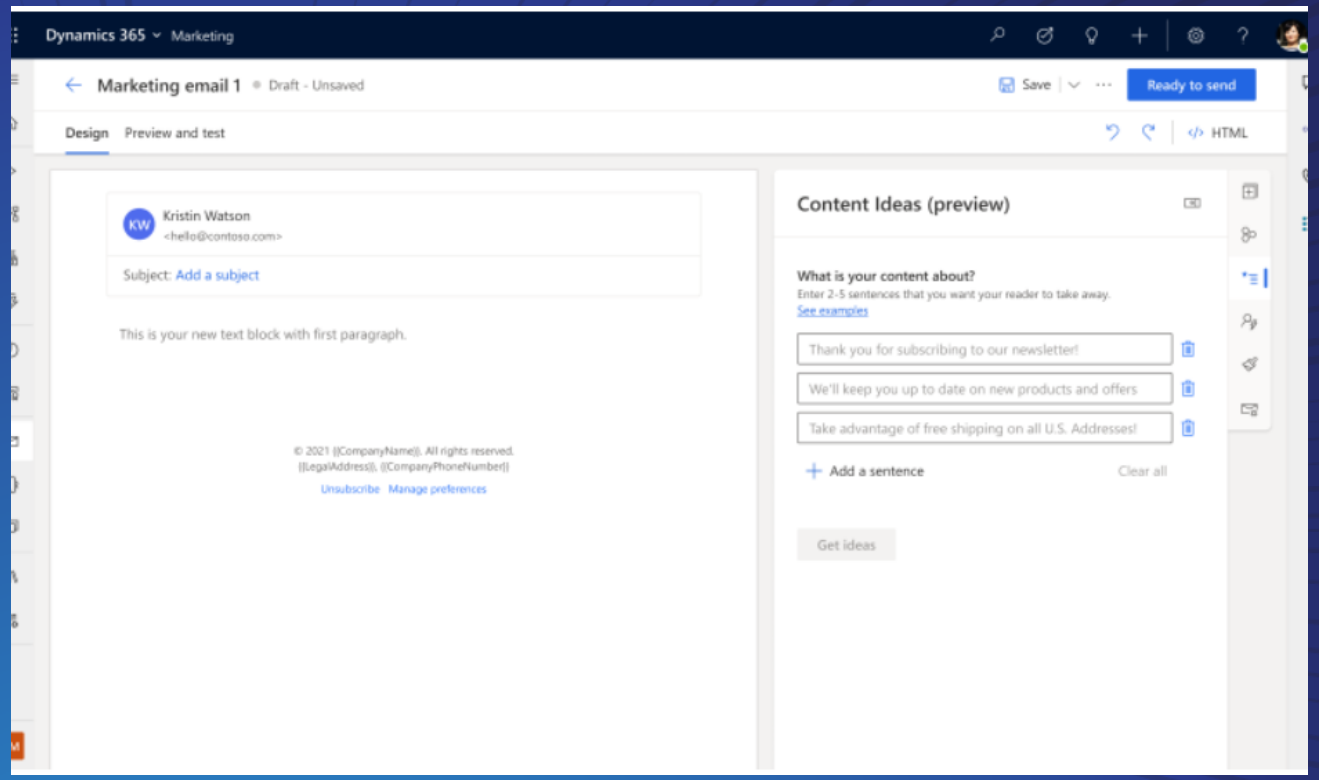
AI – Email Content Suggestions

- The feature is built on a machine learning model called GPT-3 and is trained on a vast amount of text samples from the Internet
- Get content suggestions based on key messaging points you want to convey in your email.
- Use generated English text that looks and sounds similar to text that a person wrote.
- Receive personalized content ideas based on your latest commercial emails.
- Review the suggestions generated and edit them according to your needs.



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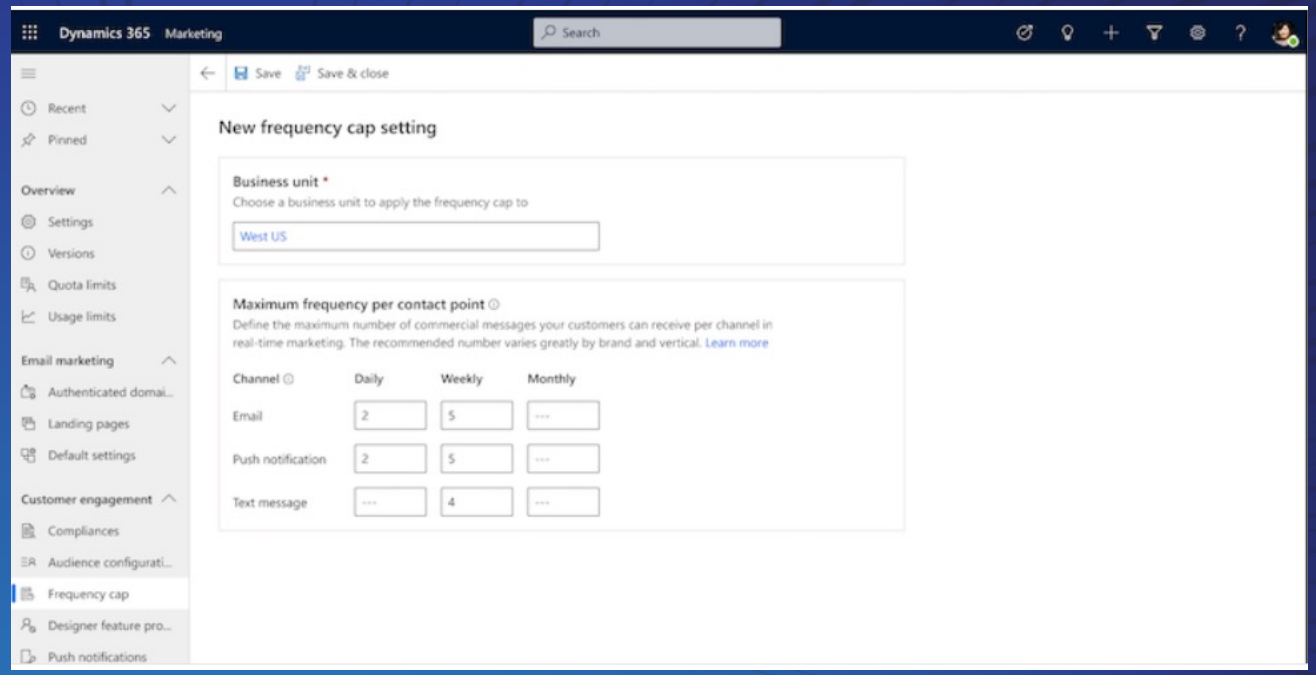
Prevent Message Fatigue

- Define a specific cap per channel (email, text message, push, and custom channels).
- Enable daily, weekly, and monthly frequency caps.
- Decide which journeys should have the frequency cap enabled or disabled.
- Transactional messages will always be excluded.
- Check which messages have been sent and which are still pending for each customer.



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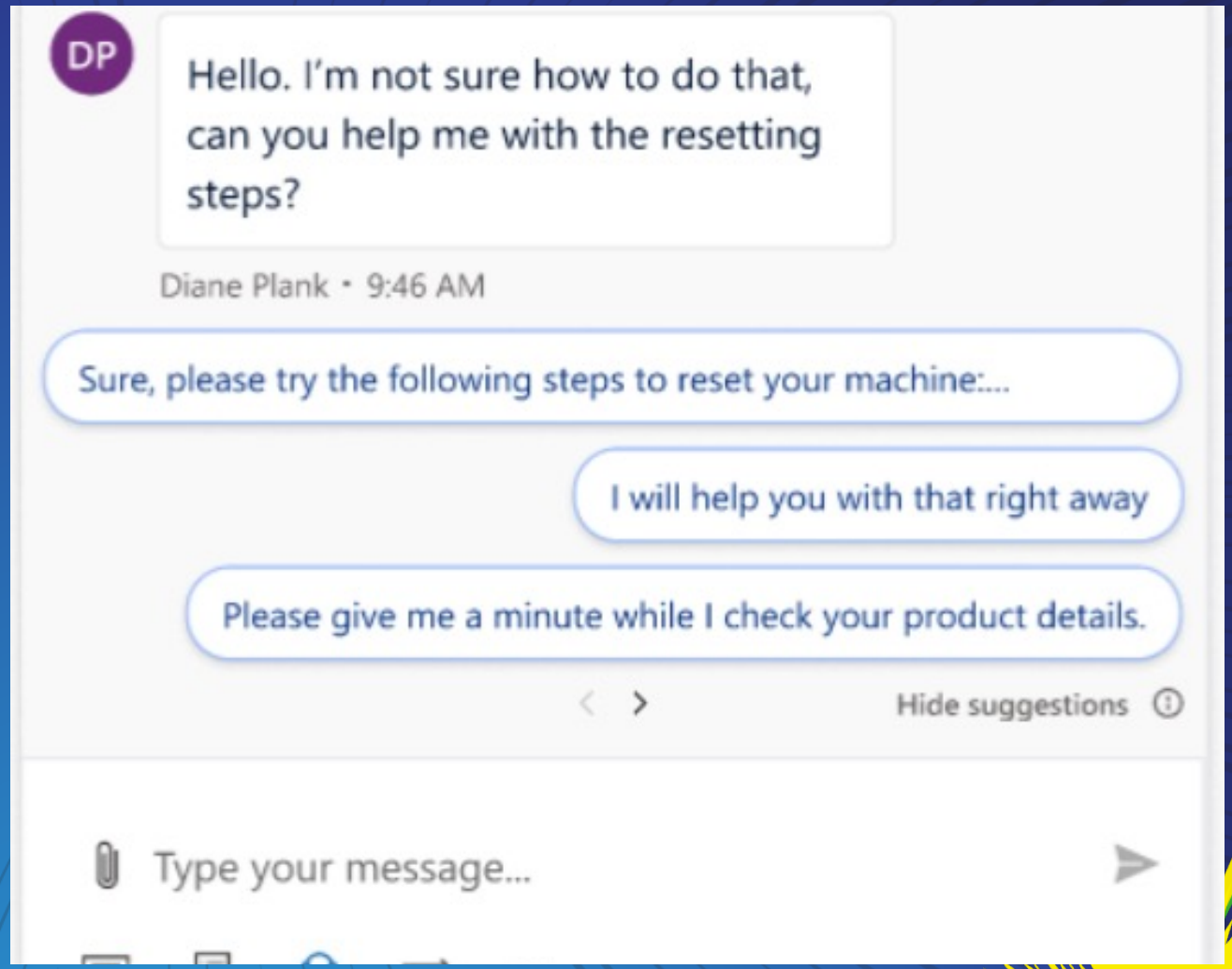
Dynamics 365 Customer Service

AI – Suggested Replies

- Intuitive, real-time suggested replies for agents directly in the digital messaging experience.
- Automated named-entity recognition and population that provides personalized responses for each user.
- Simplified data configuration experience to curate the reply set.
- Robust reply management experience for admins that provides visibility into the discovered responses and the ability to edit or consolidate responses.
- On-demand model retraining to ensure the model is always up to date and accurate.
- Unique models for each organization trained on historical support conversation data.



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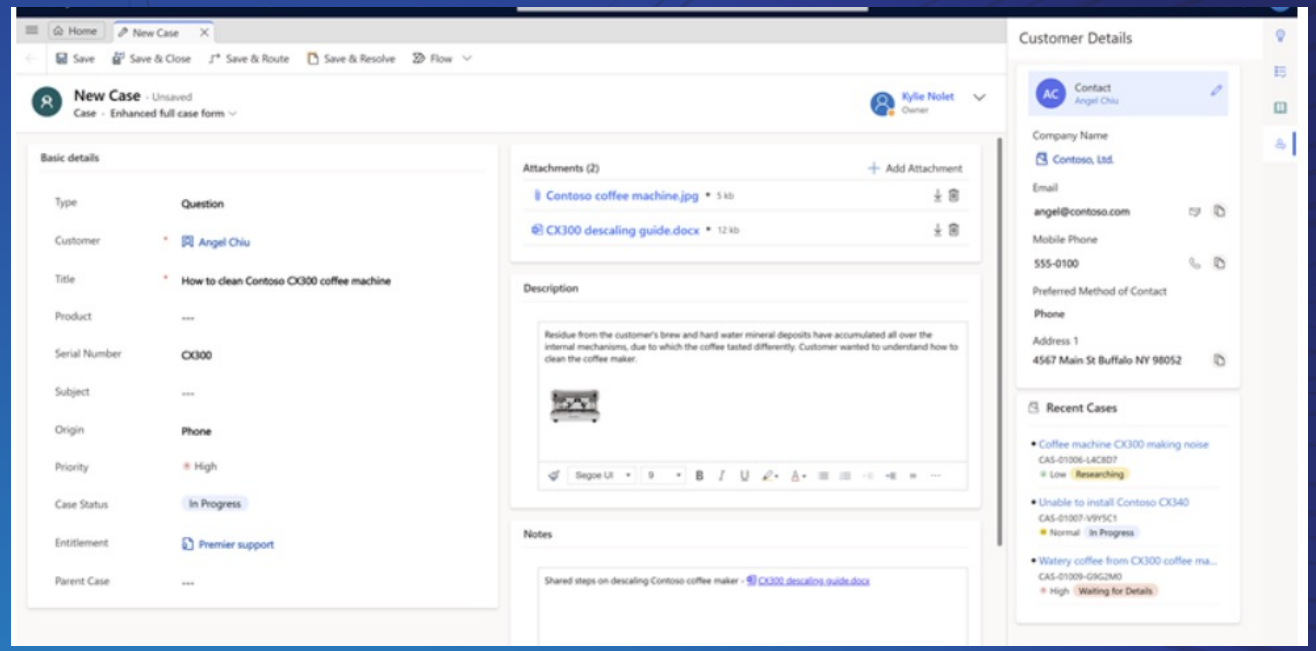
Enhanced Case Form

- Find information quickly and manage cases efficiently by leveraging the streamlined case form.
- Add key information to the case quickly without losing sight of customer details, past cases, and previous interactions. This avoids case duplication.
- Provide updates on existing customer cases without interrupting the case creation flow or switching tabs.
- Take notes during case creation.
- Upload multiple attachments directly to the case.
- Use the Description field along with RTE capabilities to capture rich case details.
- Access all the attachments related to a case in a consolidated view.



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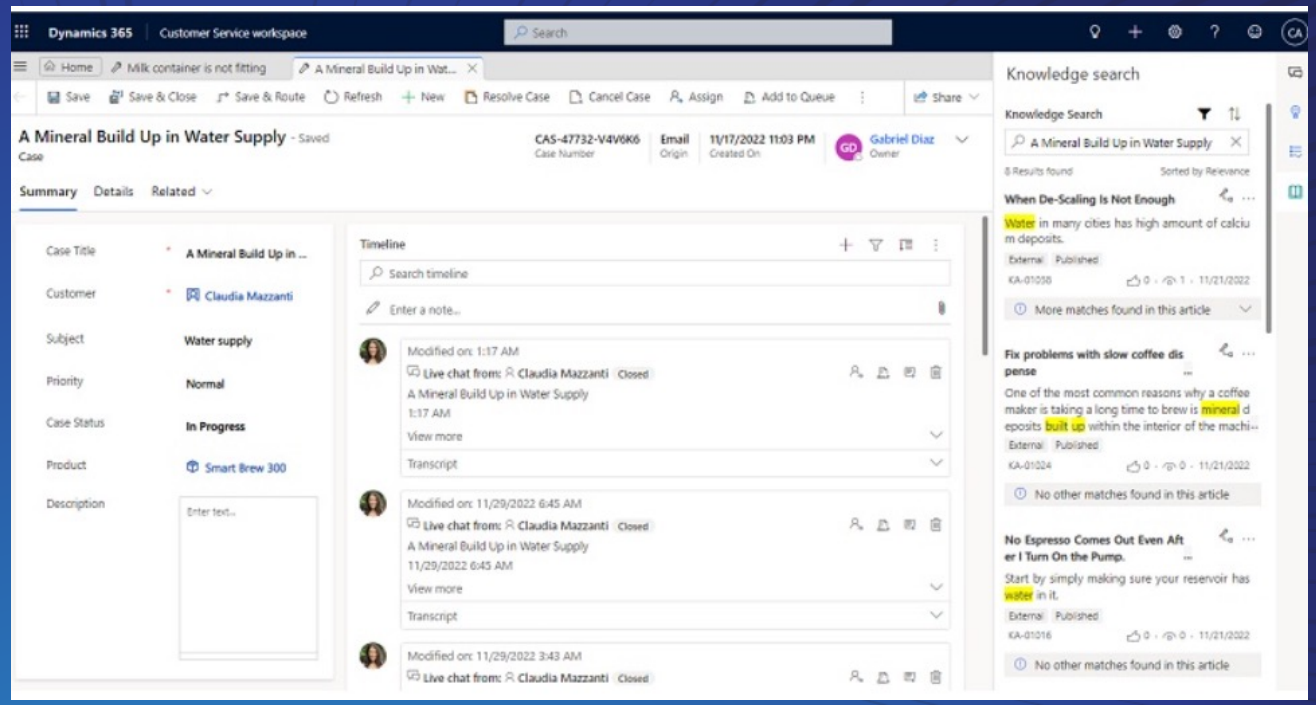
Enhanced Workplace Layout

- Sessions and child tabs are displayed horizontally.
- Improved handling of overflow tabs and sessions.
- Tab bar is visible only if multiple tabs are present in a session.
- Improved site map that's accessed from the Menu with support for grouping and areas.
- Improved accessibility with 400 percent zoom mode.
- Increased predictability of session closure in multisession apps.
- In-app notifications aligned with the multisession navigation



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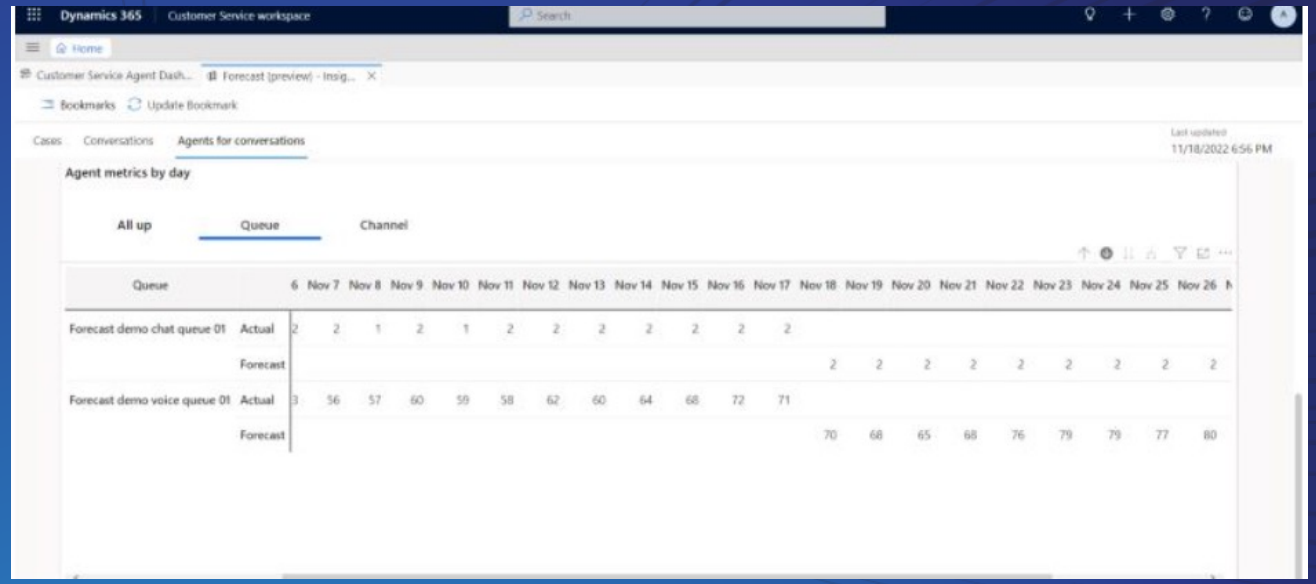
Forecast Agent Demand

- Forecast conversation volumes daily.
- Automatically detect seasonality from historical traffic to help customer service managers accurately forecast conversation volumes during special, seasonal events.
- Forecast agent demand to handle forecasted conversation volumes daily to account for business goals such as service-level agreements (SLAs) and average handle time.
- Visualize volume and agent forecasts on a daily, weekly, and monthly basis, for up to six months.
- Slice volume and agent forecasts by any combination of channels and queues



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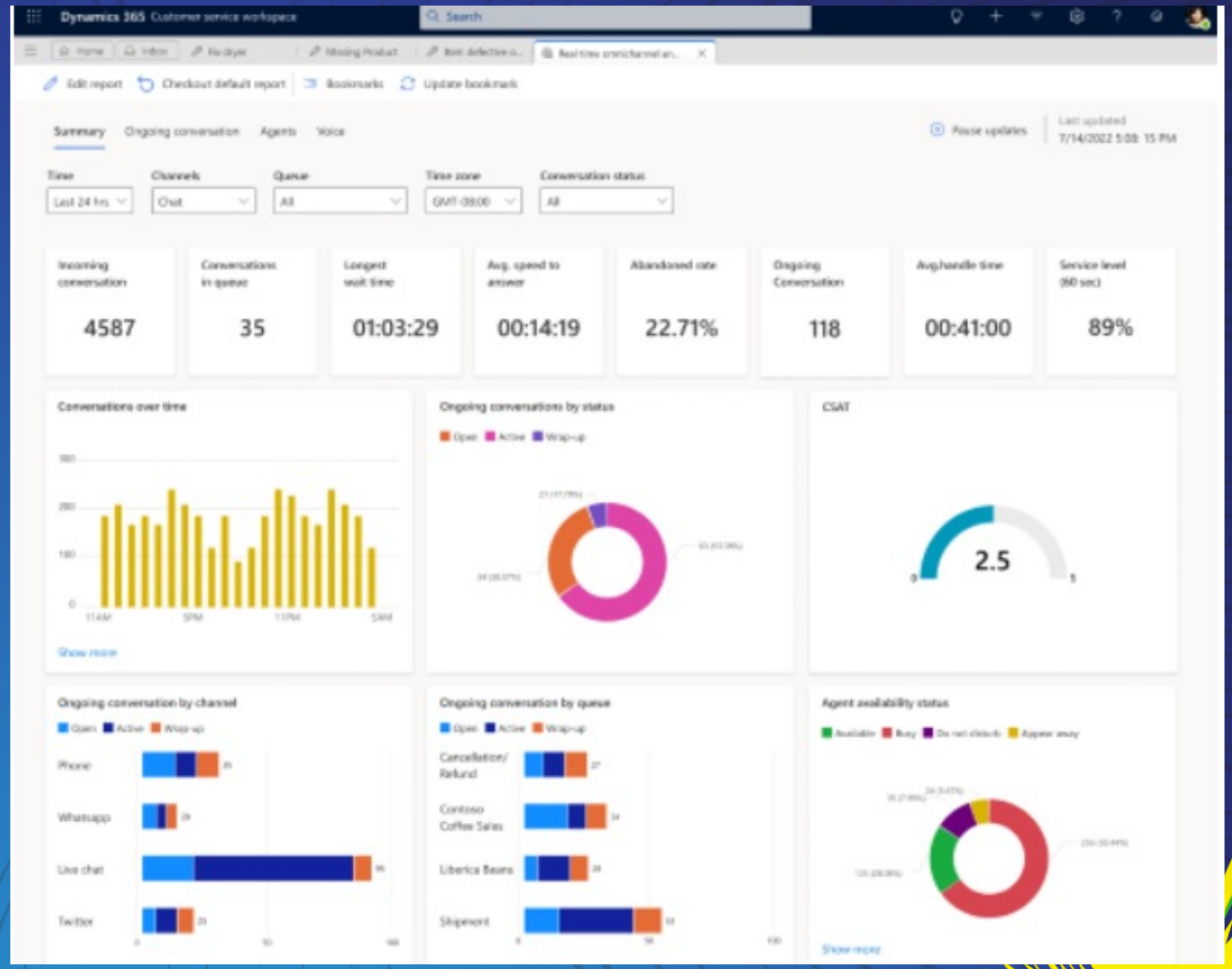
Real Time Support Monitoring

- **Summary report**: Helps understand the volume of customer interactions and service levels, along with the available capacity in near real time.
- **Agent report**: Provides information about the agent capacity and status for the last 24 hours with the ability to drill down to see details, like capacity and adherence, at each agent level.
- **Voice report**: Provides voice-specific metrics for the last 24 hours.
- **Conversation list**: Provides the list of currently ongoing conversations (in the last 24 hours).
- **Visual customization**: Helps customize the visual display of the out-of-the-box Power BI reports and publish to your organization.
- **Personalization**: Lets report users save and manage multiple bookmarks with the ability to set a default bookmark.
- **Auto refresh/Pause refresh**: Lets users pause and resume data refresh of reports.



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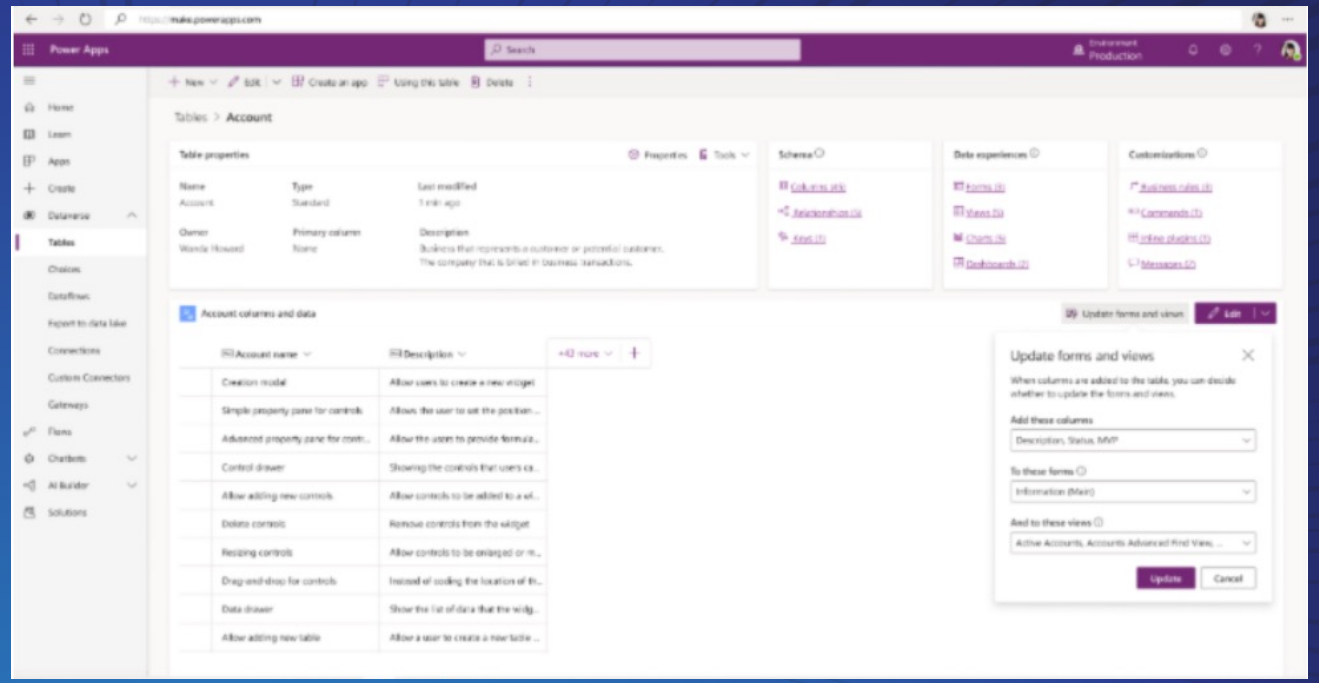
Power Platform: Power Apps

Add Columns to Forms & Views Automatically

Makers will be able to add table columns to selected forms and views through the table designer and table hub. An **Update forms and views** button will show up as the entry point of the feature in the table hub, full-page table designer, and inline table designer in the model-driven app designer. Selecting the button will allow makers to configure what table columns to add to the forms and views for the table.



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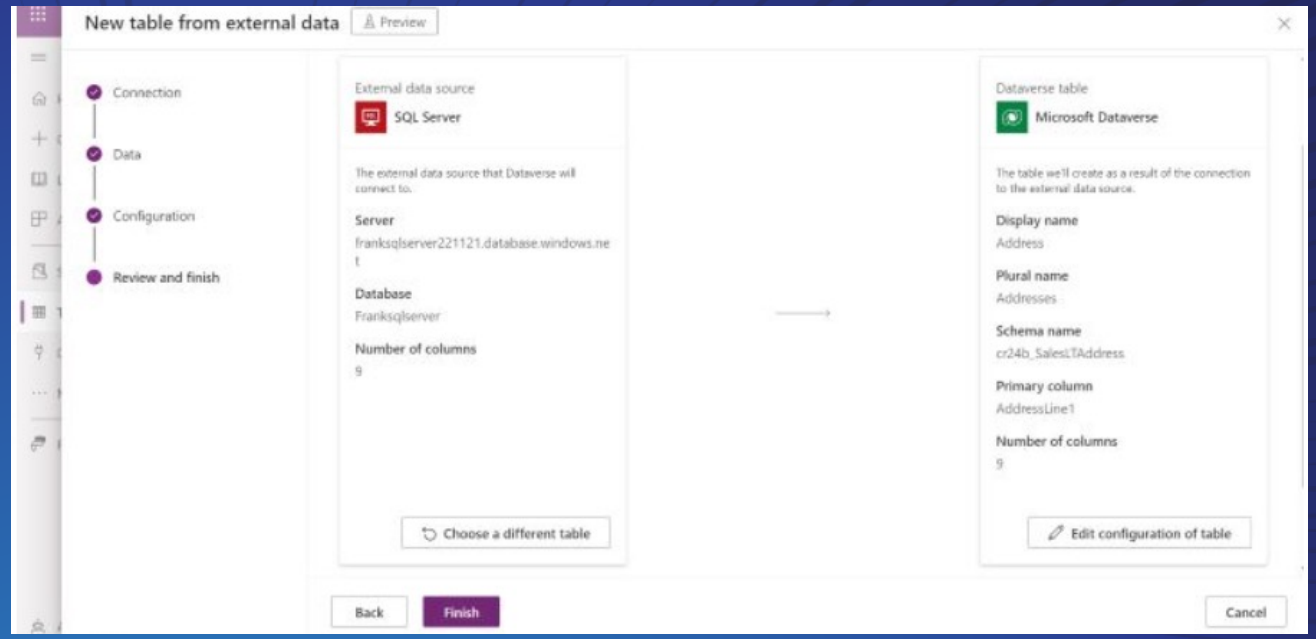
Virtual Table Wizard in Maker Portal

By introducing a guided, step-by-step wizard in Power Apps, all makers can quickly and easily create virtual tables in minutes. Existing virtual table users will find a dramatic decrease in clicks, time, and resources needed to create virtual tables.

Virtual tables will give makers new ways to use Dataverse to read and update data sourced in SQL and SharePoint. They can bring these datasets into model-driven apps and create new relationships with existing data.



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App Maker Enhancements

- Coauthoring in the modern model-driven app designer allows multiple makers—whether pro or citizen developers—to make changes to the app at the same time and see those changes in real time.
- Express design is a new way to quickly get started with Power Apps by instantly transforming your visual design into an app. With Express design, makers can quickly turn existing design artifacts (including paper forms, whiteboard sketches, and Figma files) directly into a working app.

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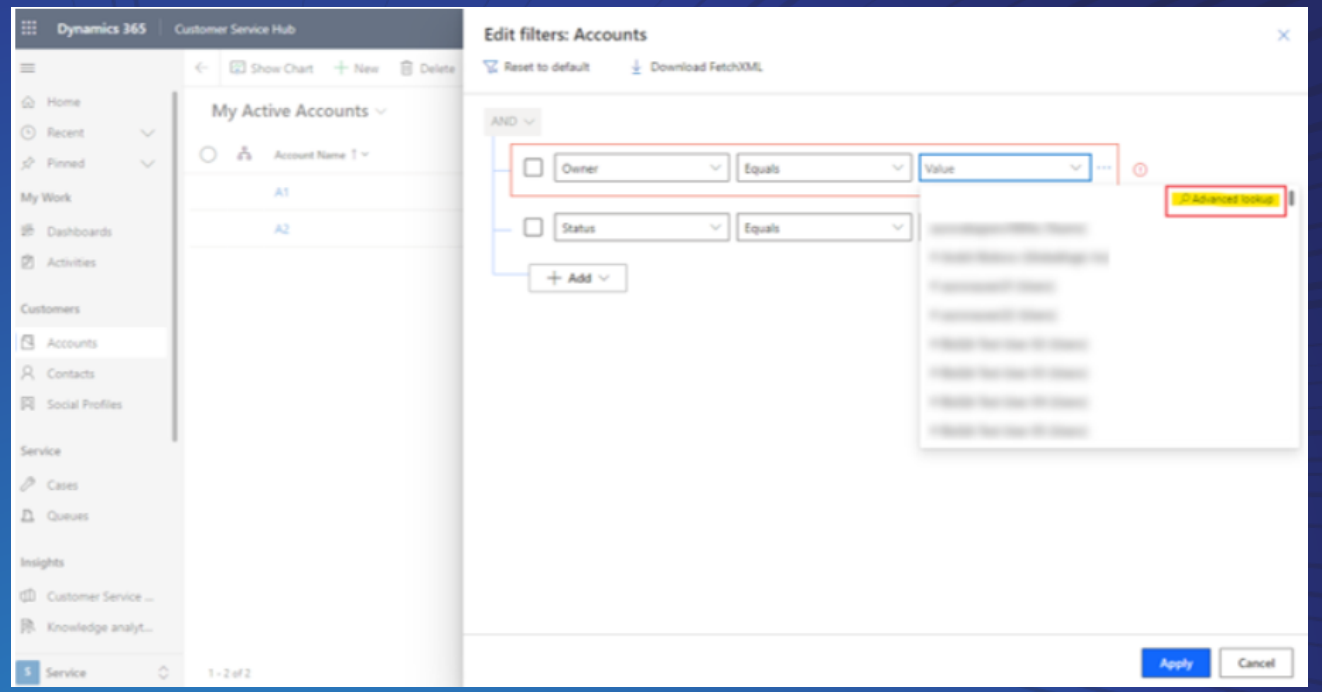
Modern Advanced Find

- Adding a condition or editing an existing condition on lookup columns in the **Edit filters** pane on grid pages is easier with the **Advanced lookup** option. You can see more fields per record and search for records within a specific view to choose the right record to filter against.



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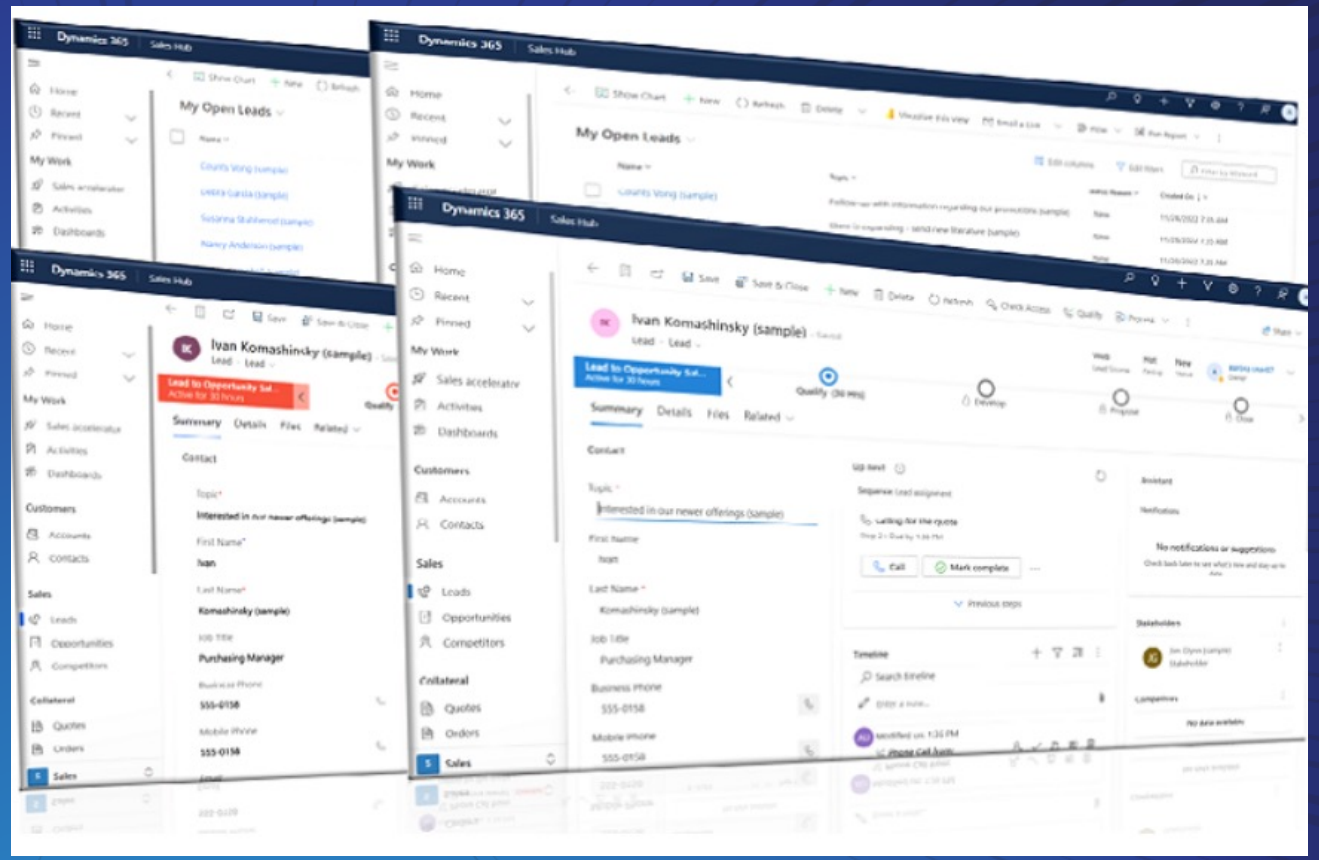
Model Driven Apps Look & Feel

- The new look and feel for model-driven Power Apps include new controls, layouts, fonts, colors, and more. The updated user interface is a per app, opt-in feature. When enabled, model-driven apps will use the latest Microsoft Fluent Design-based elements as they're released.
- Microsoft Fluent is an open-source, cross-platform design system to create engaging product experiences—accessibility, internationalization, and performance included.



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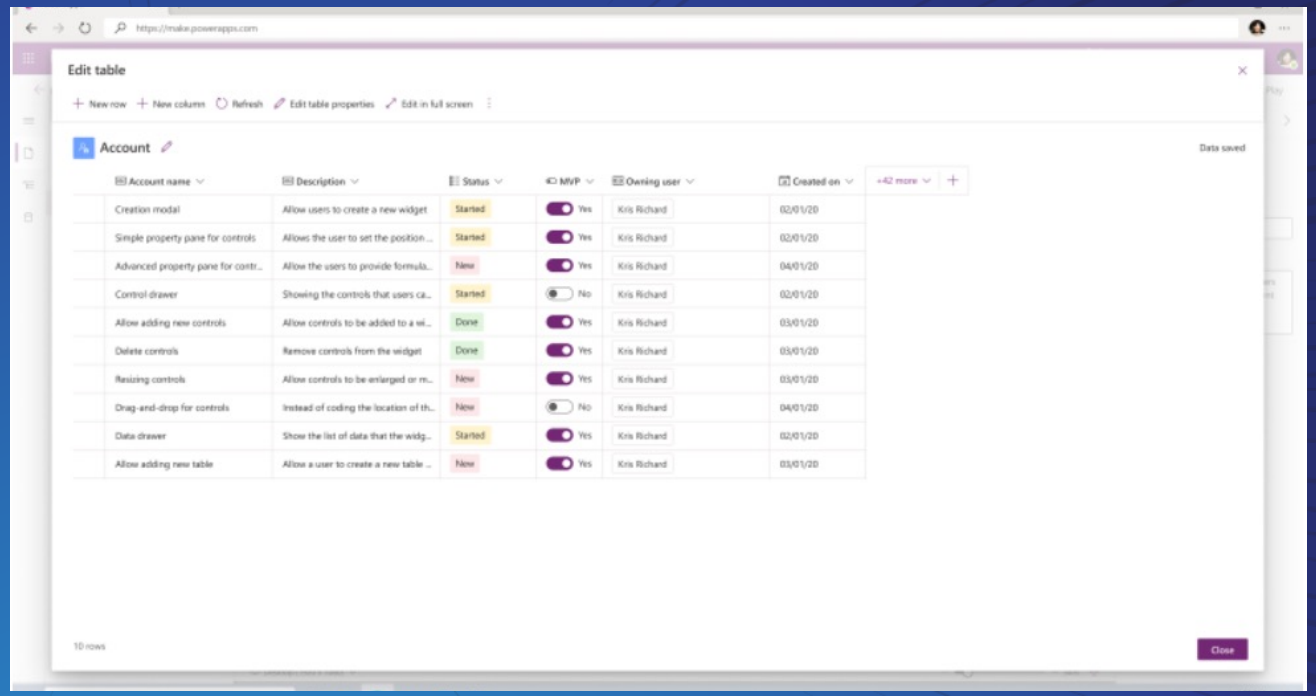
Dataverse Integrated Inside Power Apps Studio

- Familiar table experiences in Power Apps, app designers, other Power Platform products, and within Microsoft Teams.
- Dataverse will also support Power Fx calculated columns, making a much wider audience of citizen developers able to build powerful tables.
- New makers are guided with the experience of how Power Apps works through examples while building their first app that uses Dataverse data.



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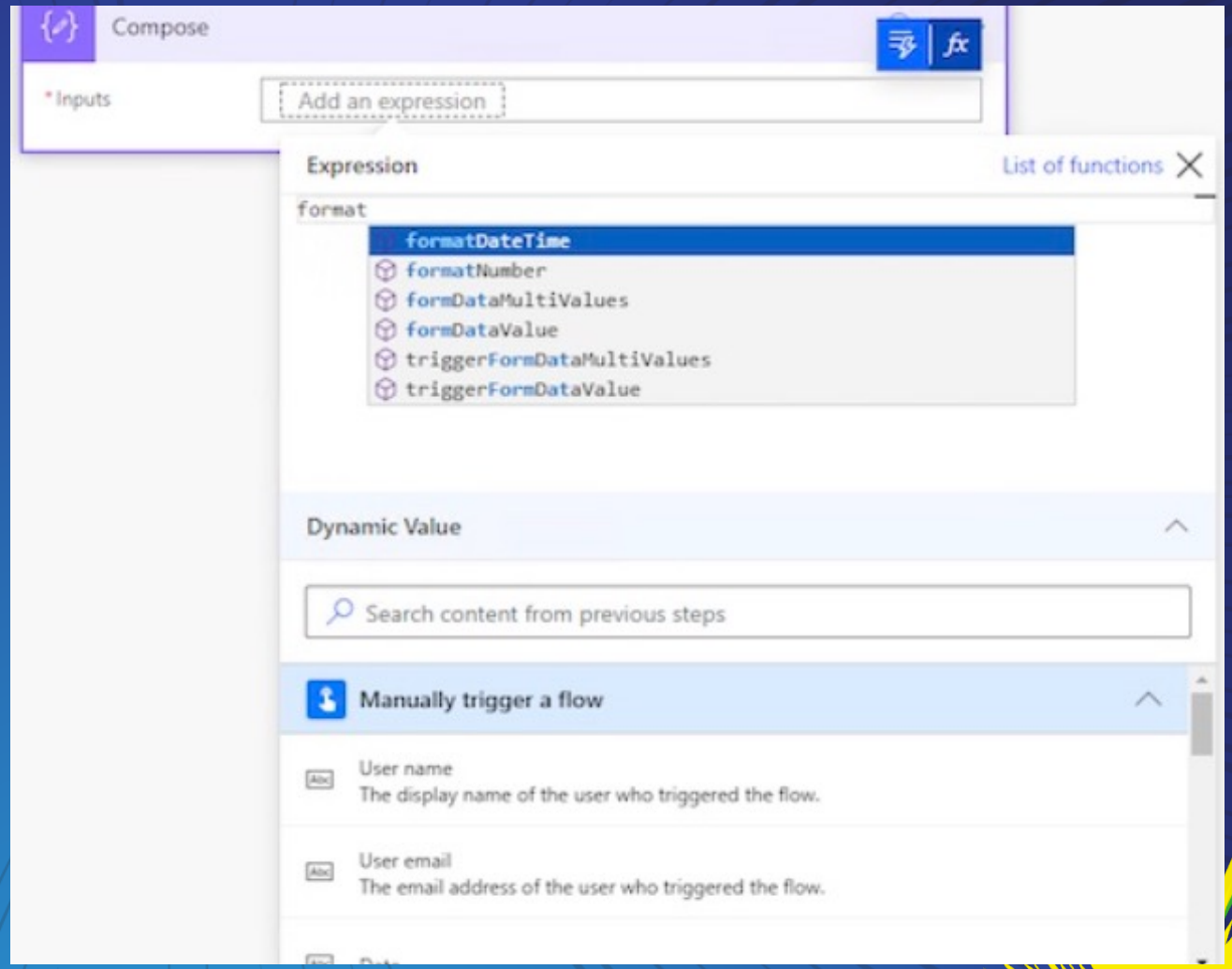
Power Platform: Power Automate

Flow Maker Enhancements

- Currently, makers can resubmit or cancel up to 20 flows at once. Being able to cancel more flows at once improves efficiency for all makers, especially those in enterprise scenarios.
- With the new expression editor, you can now build multiline expressions and add dynamic values without having to switch tabs. This feature makes it much easier to build richer expressions in the provided editing experience.



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Flow Maker Enhancements

Natural Language

- Sometimes, it can be difficult for makers to describe what they want to build. With this feature, makers receive auto-complete suggestions while they enter their **natural-language** description for the scenarios that they want to automate. These suggestions are for both actions and triggers, allowing makers to better describe the process they want to automate.
- Using state-of-the-art AI models like GPT3, Power Automate can take natural language as input to create flows. You can use everyday natural language to describe the cloud flow that you want, and Power Automate will create it based on your written description of the scenario to automate. This feature makes it easier for you to build different types of automation faster, allowing a broader population of business users to use Power Automate in a truly no-code experience.

Generate Expressions from Examples

- Power Automate has a rich expression language that you can use to format the different values within your cloud flows; however, finding the appropriate expression to use can be time consuming, particularly for new users. To address this, we're introducing format by examples. Show Power Automate an example of a value that you want to format and the desired output, and Power Automate will suggest the appropriate expression to use. With this feature, you can easily format dates, numbers, and texts.

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Honorable Mentions

- Adaptive Sequences: Personalized Sales
- Multiple Sequences to Multiple Salespeople
- Sequence Templates
- Sequence Insights
- Keep Queue Spot for Call Back
- Natural Language Segment
- Send Segment Based Email
- Organize Services by Trade
- Switch Tenants on Mobile

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