



POWERED BY  DUG

# DYNAMICS CON

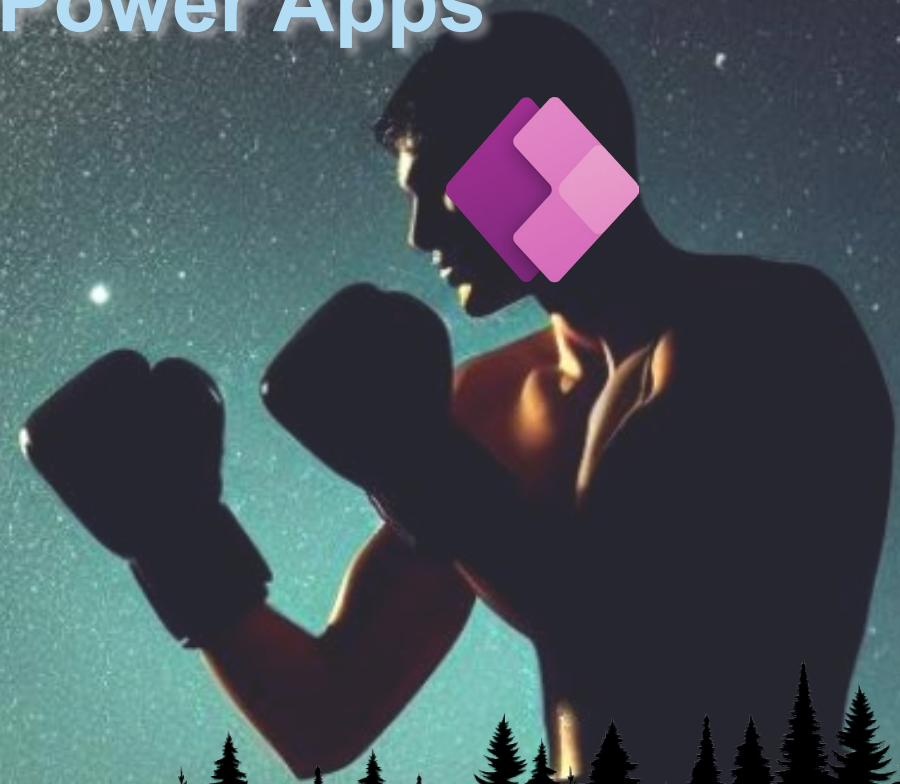
# LIVE

MAY 2024

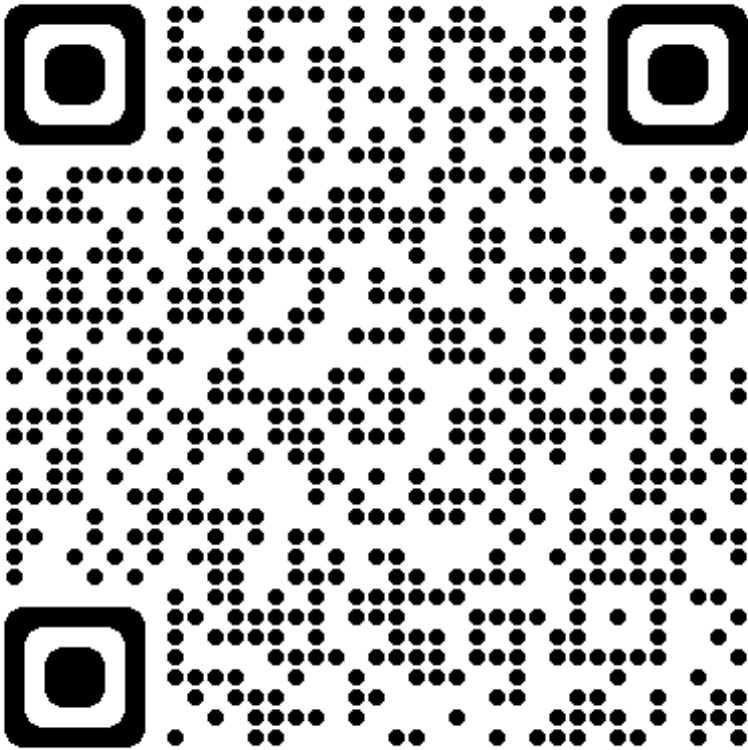
The central graphic is a large, multi-colored starburst shape. Inside the starburst, the text "POWERED BY" is in yellow, followed by a logo consisting of three colorful arrows (purple, green, blue) pointing towards each other, and the word "DUG" in yellow. Below this, "DYNAMICS CON" is written in large, bold, yellow 3D block letters with colorful sides. Underneath that, "LIVE" is written in the same style. At the bottom of the starburst, "MAY 2024" is written in yellow. The background of the entire image features a sunset with rays of light, stylized clouds, and silhouettes of mountains and trees.

# To Build or Buy?

Case Management in  
Dynamics 365 or Power Apps







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# Agenda

- What is case management?
- What is Power Platform?
- Should you build it or buy it?
- Copilot for Dynamics 365 Customer Service
- Q&A





**What is Case Management?**



**“Case management solutions are applications designed to support a complex process that requires a combination of human tasks and electronic workflow...”**



# Poll

Do you use  
Dynamics 365  
Einstein Analytics for  
asset management?  
Management?



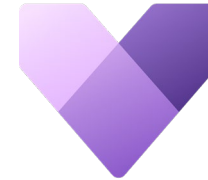
# Not all Case Management is created equal...



## Power Platform

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- Configure just what is needed



## Customer Service

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- Pre-built case management capability

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servicenow





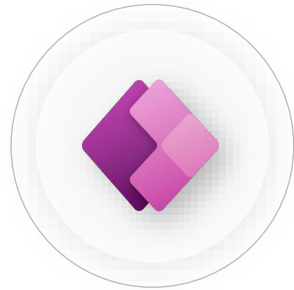
**What is Power Platform?**



# Microsoft Power Platform

The low-code platform that spans Office 365, Azure, Dynamics 365, and standalone applications

**Innovation anywhere unlocks value everywhere**



Power Apps

Application development



Power Automate

Process automation



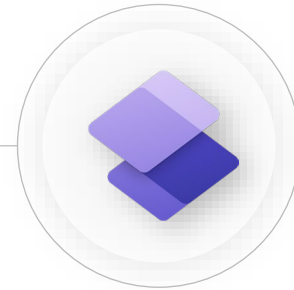
Power BI

Business analytics



Copilot Studio

Intelligent copilots



Power Pages

Business websites



Copilot  
AI-Assisted development



Data  
connectors



AI Builder



Microsoft Dataverse



Power Fx



Managed  
Environments



**Should You Build it or Buy it?**





The background features a stylized landscape. The sky is a gradient of blue, with numerous thin, light blue lines radiating from the top center towards the bottom. Below the sky is a layer of white, fluffy clouds. Underneath the clouds are several layers of mountains, rendered in shades of blue and purple, creating a sense of depth. In the foreground, there are dark blue silhouettes of evergreen trees on rolling hills.

It Depends...



# Maturity and Experience



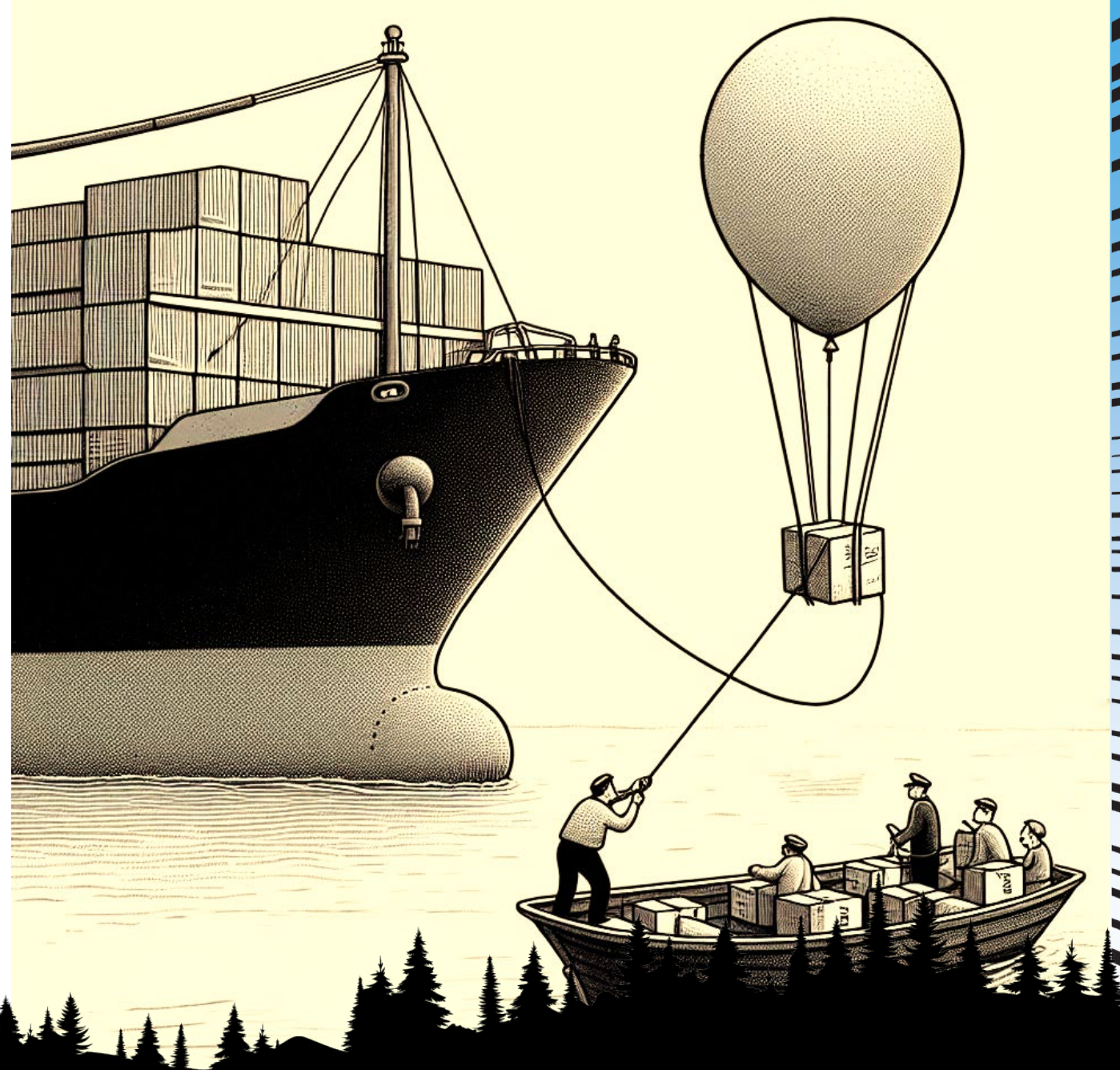


# Workflow Complexity



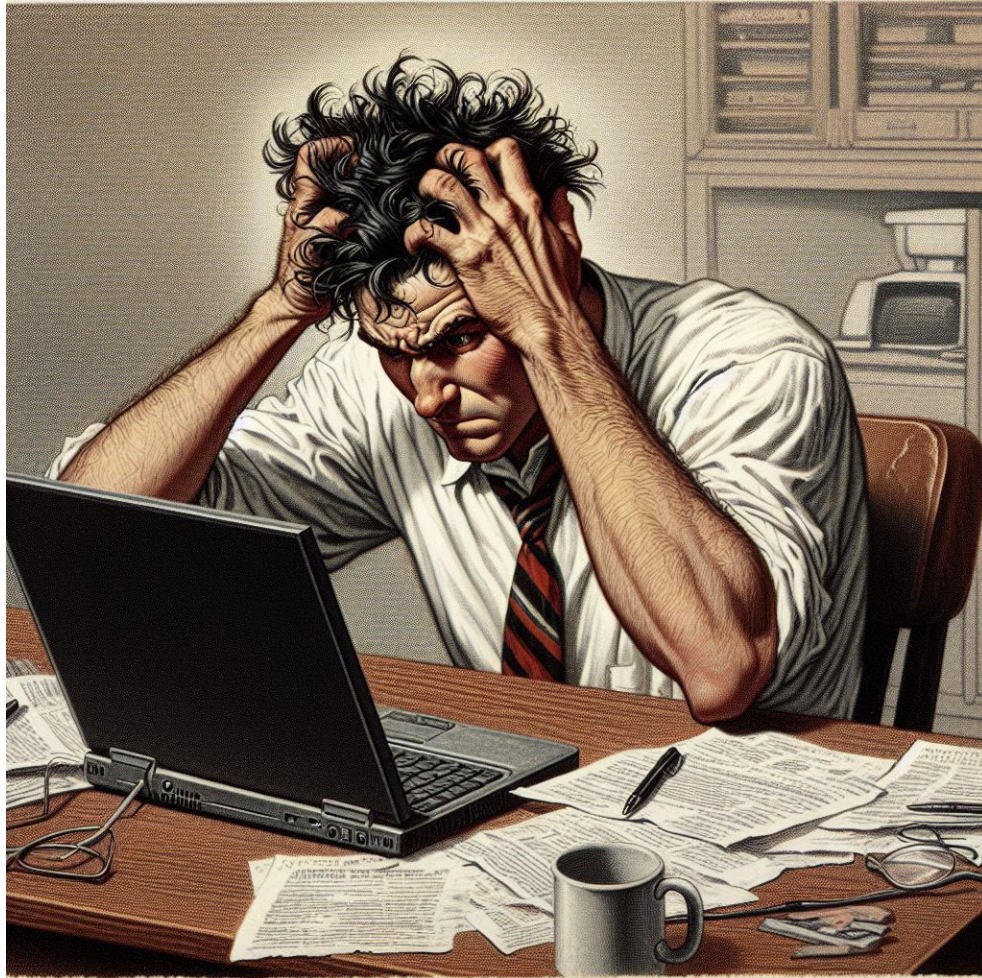


Is it 100% Your  
Process/Data?



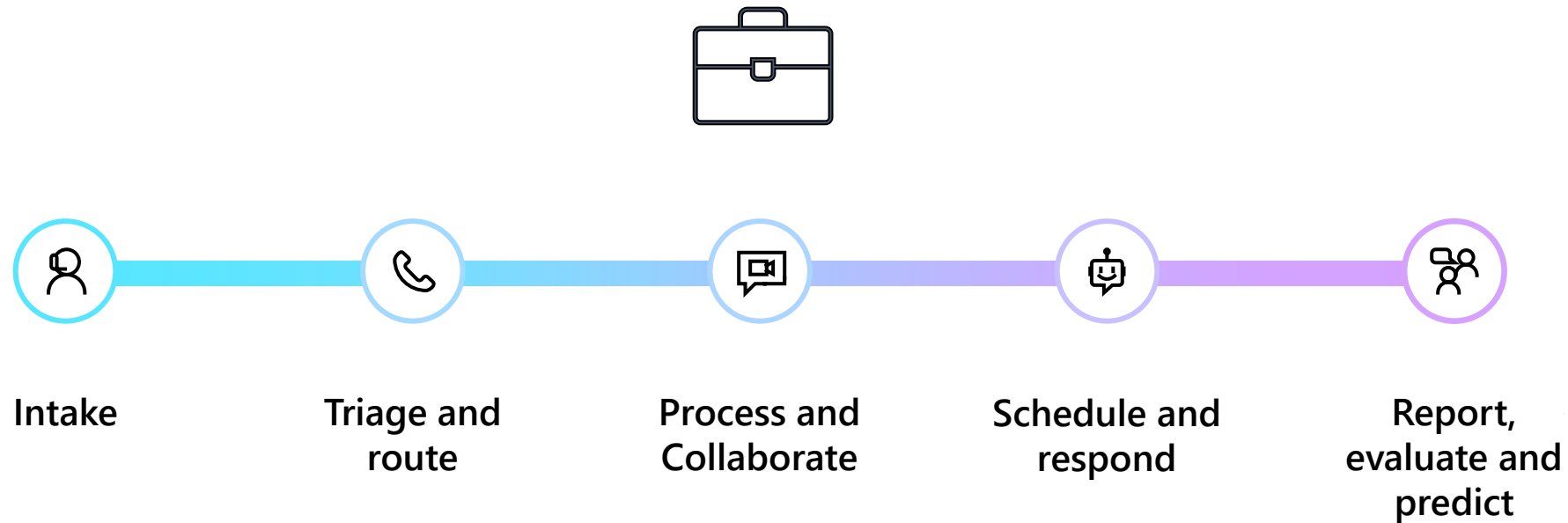


# Triangle of Madness

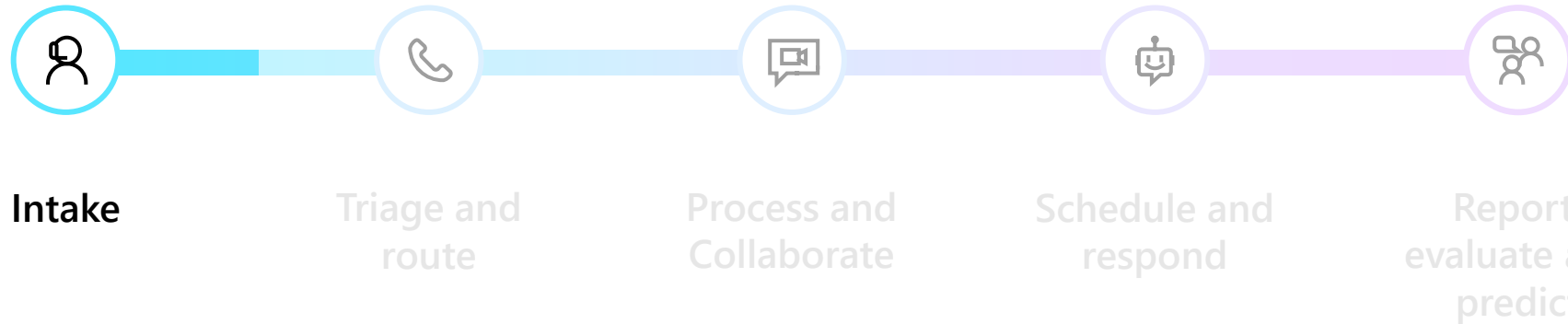




# Stages of Case Management



# Stages of Case Management



- Self Service
- Omnichannel Requests
- Email Management
- Case creation rules





# Intake Feature Comparison

Feature	Dynamics 365	Dynamics 365 Case Mgmt*	Power Platform
Dedicated Agent Interface	●		
Multi-session	●		
Digital Messaging	●		
SMS	●		
Telephony integration*	●		
Real time analytics	●	●	○
Extensible Channel Framework	●		
Self Service Portals	●	●	○
Support Self Service Chat	●	●	●
Self Service Knowledge	●		
Inbox interface	●		
Case Creation rules	●	●	○



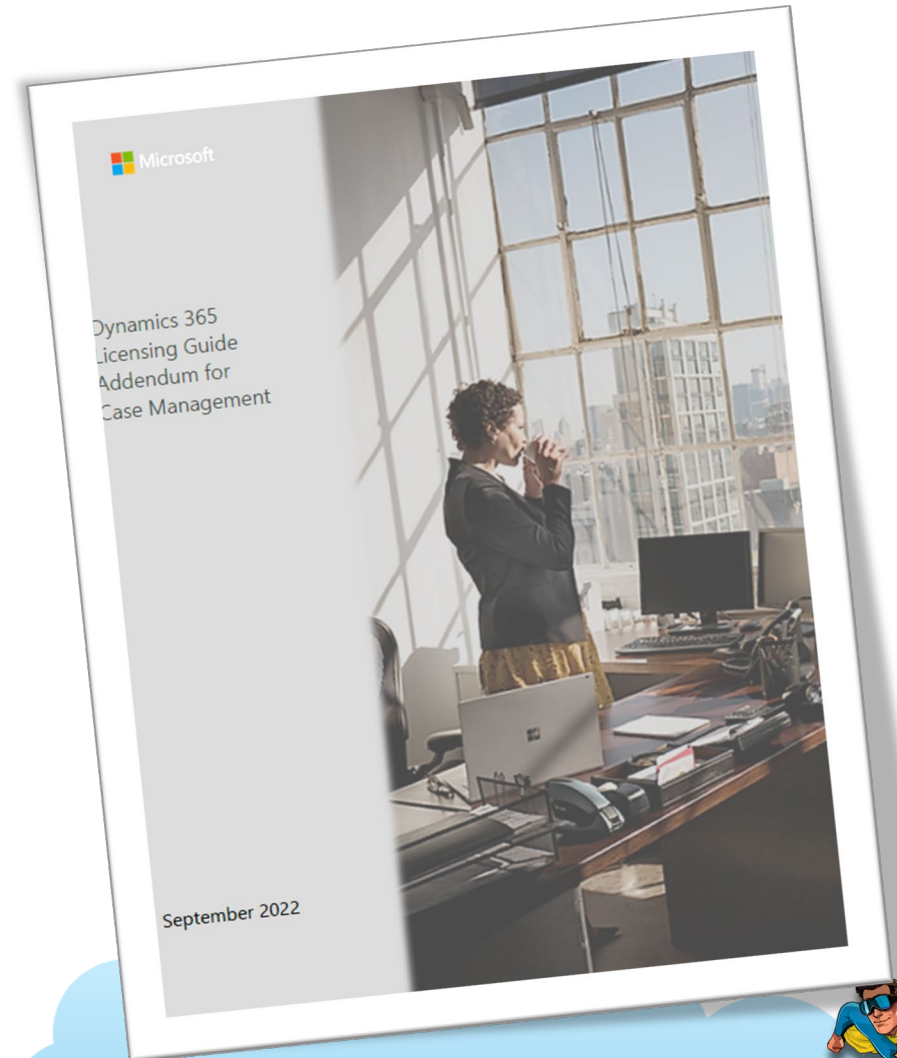
● Out of box

○ Could be built in PowerApps alone

\*Yet to be part of GCC

# \*Case Management for Public Sector

- Dynamics 365 Case Management was phased out several years ago
- EXCEPT for qualified public sector customers





# Intake best fit....

## Dynamics 365

- Traditional case management scenarios
- Multi-channel submissions
- Organisations running many mailboxes and customer/citizen facing addresses
- Correspondence management
- Complaints management

## Power Platform

- Simpler, low level request management
- Limited reporting requirements, without KPI measurement
- 'Work tracking' scenarios



# Stages of Case Management



Intake

Triage and  
route

Process and  
Collaborate

Schedule and  
respond

Report,  
evaluate and  
predict

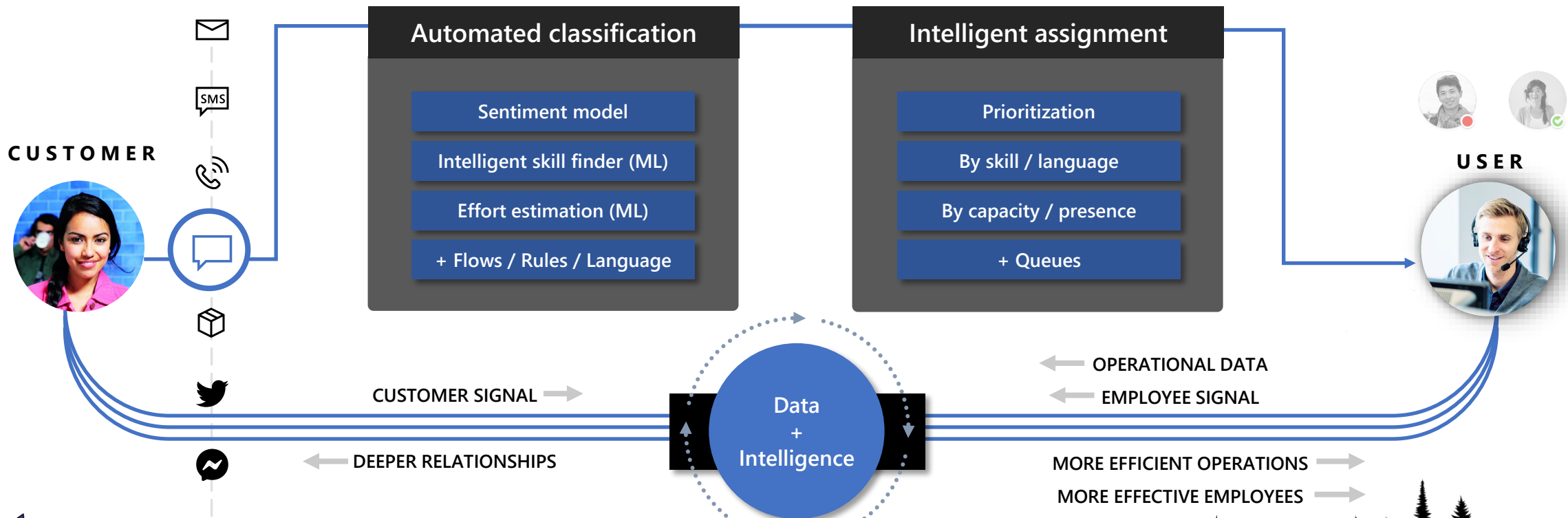
- Unified Routing
- Case Routing
- Queues





# Intelligent Unified Routing

An omnichannel and intelligent routing and assignment service that can assign incoming work items to the best-suited worker or queue



# Triage and Route Feature Comparison

Feature	Dynamics 365	Dynamics 365 Case Mgmt*	Power Platform
Queues	●	●	●
Advanced Queues	●	●	
Record Routing	●	●	●
Case Routing	●	●	○
Auto Case Creation Rules	●	●	○
Skills Based Routing	●	●	
Capacity Based Routing	●	●	
'Productised' AI Routing Models	●	●	



● Out of box

○ Could be built in PowerApps alone



# Triage and Route best fit...

## Dynamics 365

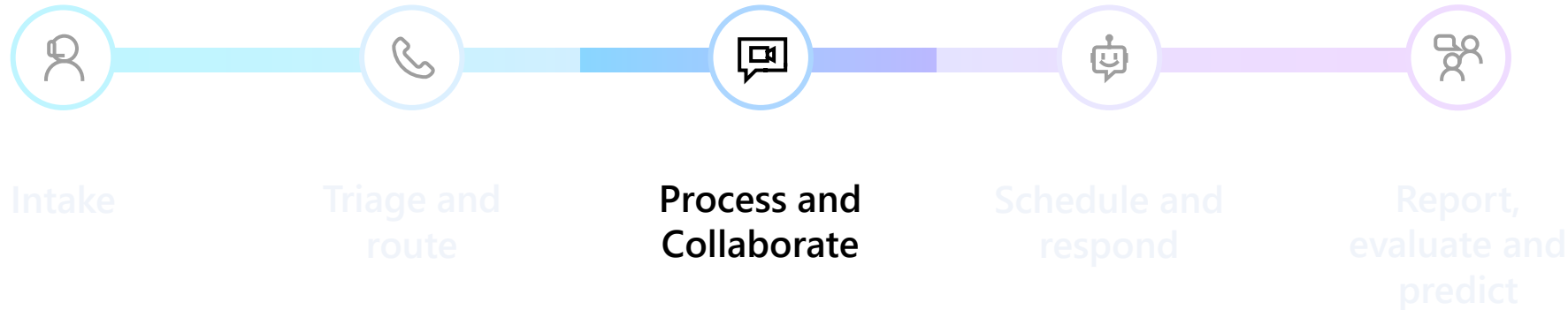
- Case management scenarios
- High volumes of inbound enquiries, case types or customer contact
- Contact centre environments
- Customers with multi-skilled, multi-disciplinary service teams

## Power Platform

- Simple rules-based routing using Power Automate or record ownership
- Lower volume enquiry levels
- Customers with an expectation of manual triage and assignment



# Stages of Case Management



- Business Process Management
- Single customer view
- SLAs
- Teams collaboration and swarming



# Process and Collaborate Feature Comparison

Feature	Dynamics 365	Dynamics 365 Case Mgmt	Power Platform
Case Entity	●	●	
Queues	●	●	●
Advanced Queues	●	●	
Basic Routing	●	●	○
Intelligent Routing	●	●	○
Service Level Agreements	●		
Knowledge Management	●		
Business Process Management	●	●	○
Teams Collaboration	●		
Teams Swarming	●		
Single Customer View	●	●	●



● Out of box

○ Could be built in PowerApps alone

# Process and Collaborate best fit...

## Dynamics 365

- Multi-stage, complex case management processes
- Need to collaborate with others across the organisation to get input
- Scenarios where Knowledge Management or availability of Standard Operating Procedures would benefit case workers or citizens
- Areas where defined service standards exist and can be automated through SLAs

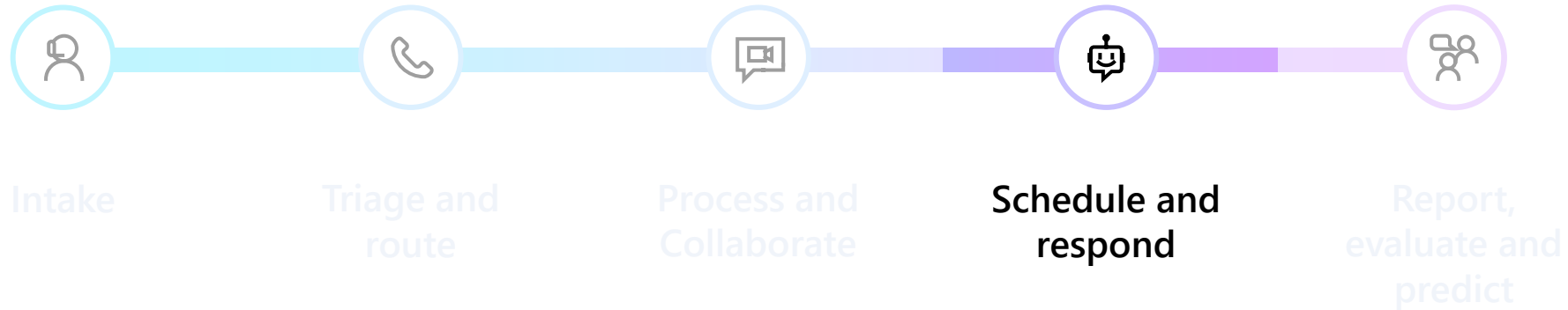
## Power Platform

- Simpler, low level request management
- Limited reporting requirements, without KPI measurement
- Limited need for real time collaboration
- No requirement for knowledge management (or Standard Operating Procedures) for case workers or citizens





# Stages of Case Management



- Unified Resource Scheduling
- Response Templates
- Self Service Templates



# Schedule and Respond Feature Comparison

Feature	Dynamics 365	Dynamics 365 Case Mgmt	Power Platform
Unified Resource Scheduling	●		
Email Templates	●	●	●
Self Service Portals	●	●	○
Self Service Case templates	●	●	○



● Out of box      ○ Add-on apps only      ○ Add-on apps alone





# Schedule and Respond best fit....

## Dynamics 365

- Requirements for the scheduling or booking of a resource to a location or work item
- Secure online, two-way case updates required
- Personalised response templates across email and documents

## Power Platform

- No requirement to schedule staff or resources
- No requirement to book facilities or locations



# Stages of Case Management



Intake

Triage and  
route

Process and  
Collaborate

Schedule and  
respond

Report,  
evaluate and  
predict

- Case Reporting
- Customer Voice
- Customer Service Insights



# Report, Evaluate and Predict Feature Comparison

Feature	Dynamics 365	Dynamics 365 Case Mgmt	Power Platform
Pre-built Case Reports and Dashboards	●	●	○
PowerBI integration	●	●	●
Embedded Customer Service Insights*	●		
Knowledge Insights	●		
Included Customer Voice capacity	●		



Out of box



Additional apps

Apps alone

\*Not yet part of GCC



# Report, Evaluate and Predict best fit....

## Dynamics 365

- High volumes of inbound enquiries, case types or customer contact
- Contact centre environments
- Multi-channel origination for cases and enquiries
- Knowledge management use cases
- AI driven analytics, sentiment and trend analysis
- Typically delivers value where more than one case type is supported
- Scenarios where responsive workforce planning is required

## Power Platform

- Standard reporting and dashboards
- No requirement for AI driven analytics or trend analysis
- Availability of PowerBI for more complex analytics scenarios

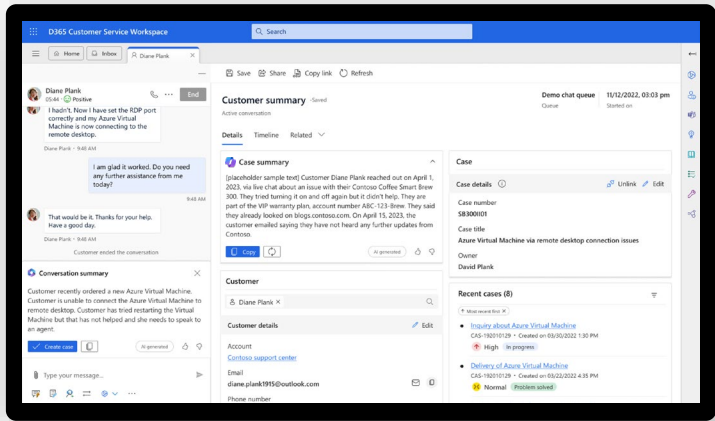


# Copilot

In Dynamics 365 Customer Service

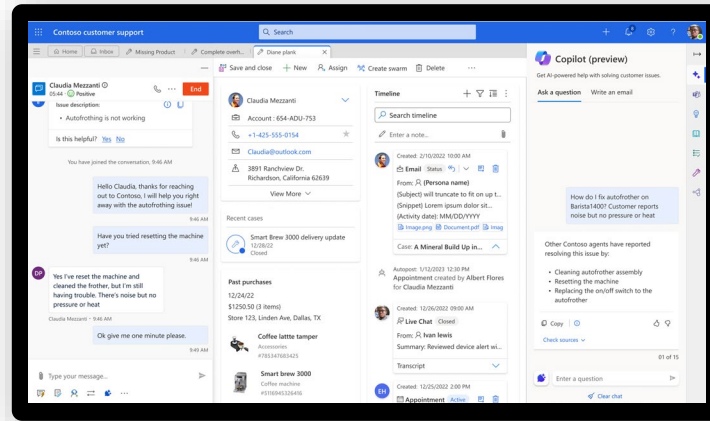


# Copilot in Dynamics 365 Customer Service



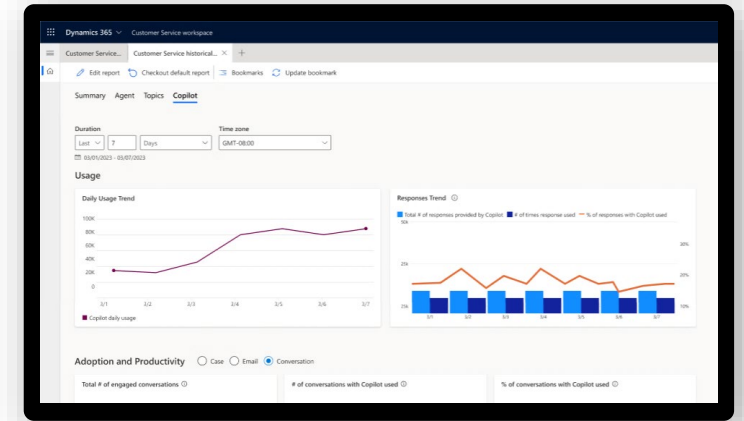
## Ramp up quickly with automatic conversation summaries

Expedite activities like ramp ups, handoffs, and wrap ups with automatic conversation summaries



## Resolve issues faster with a conversation expert

Use a conversational interface to ask questions of organizational knowledge sources to quickly find answers



## Discover agent productivity improvements

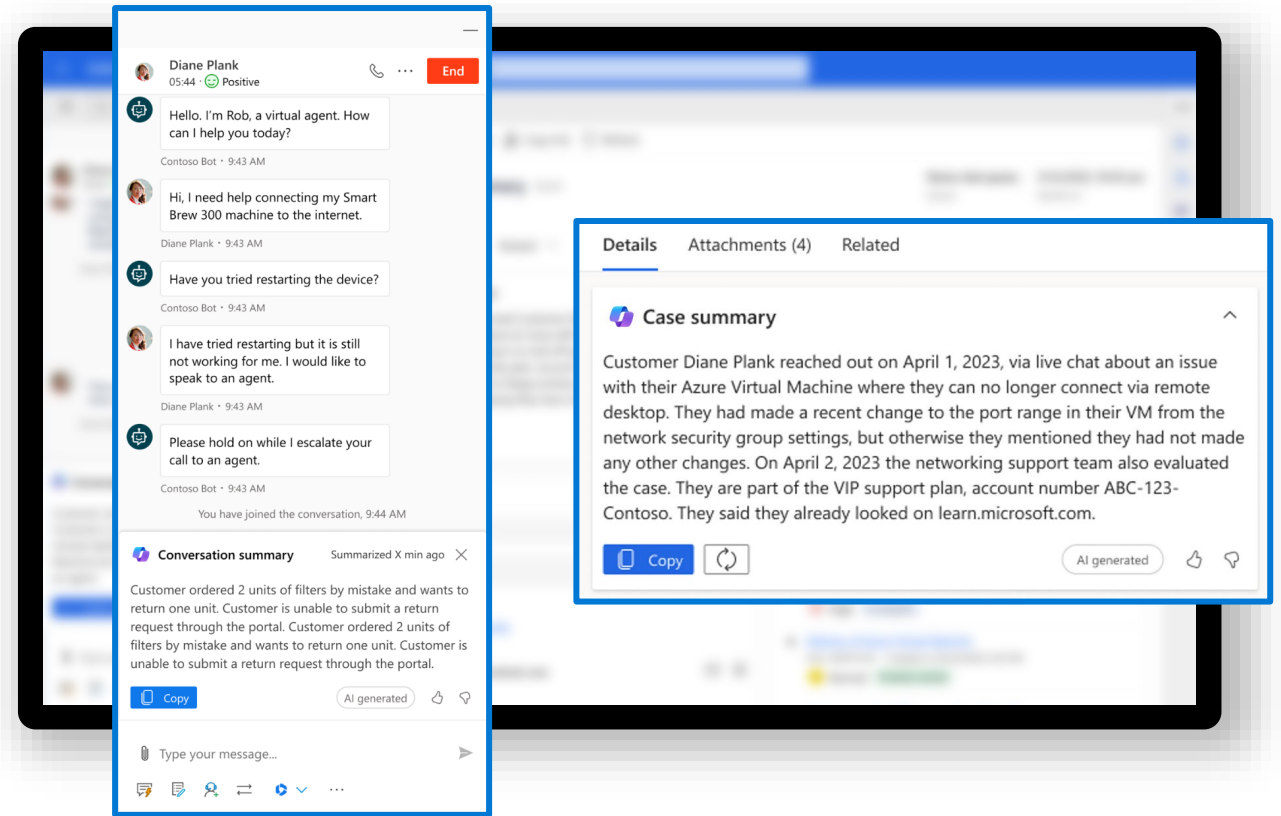
Understand how Copilot is impacting key support metrics, then convert those findings into changes that positively affect agents



# Copilot helps every agent become a super agent

Reduce time spent on ramp ups, handoffs, and wrap ups with conversation summaries

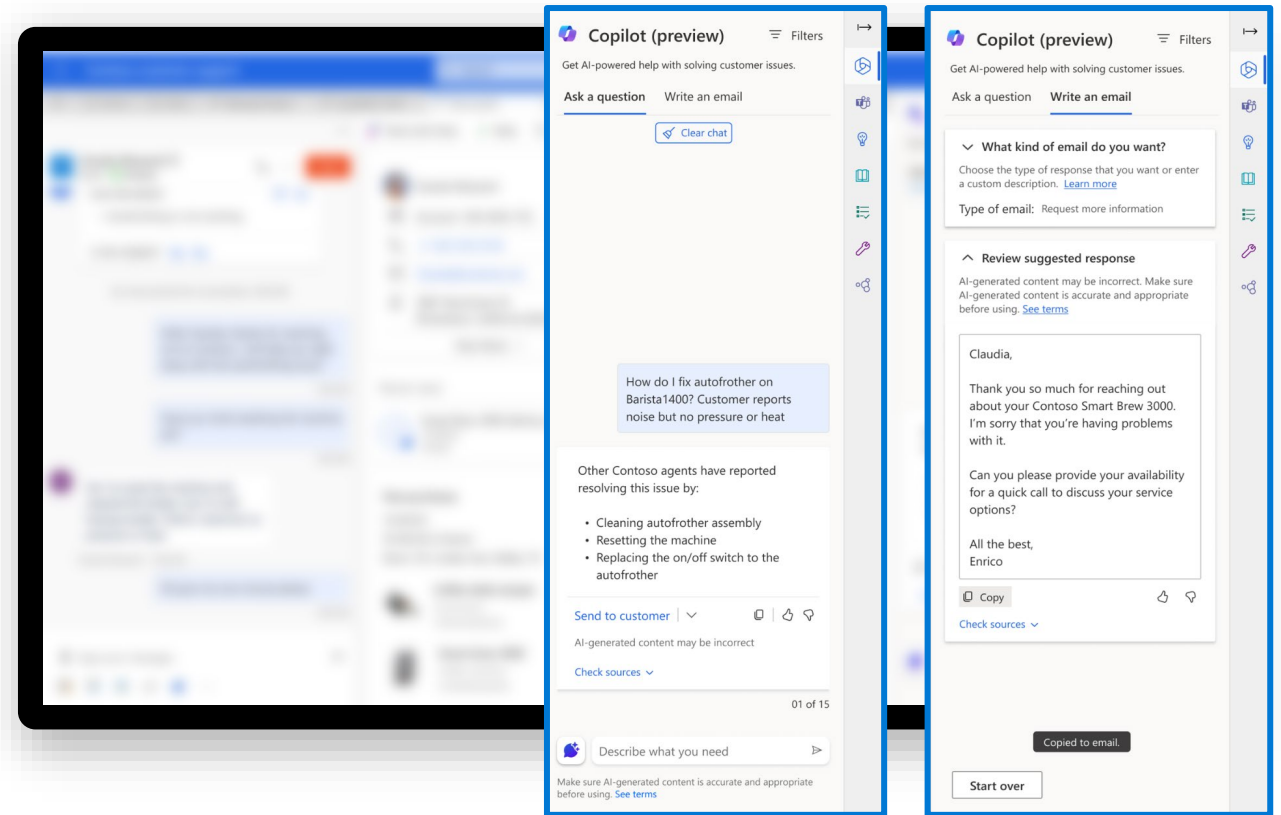
Support agents can accelerate the time it takes to ramp up, handoff, and close cases with automatic conversation summaries, including summaries of long-running cases.



# Copilot helps every agent become a super agent

## Resolve issues faster with a conversation expert at your fingertips

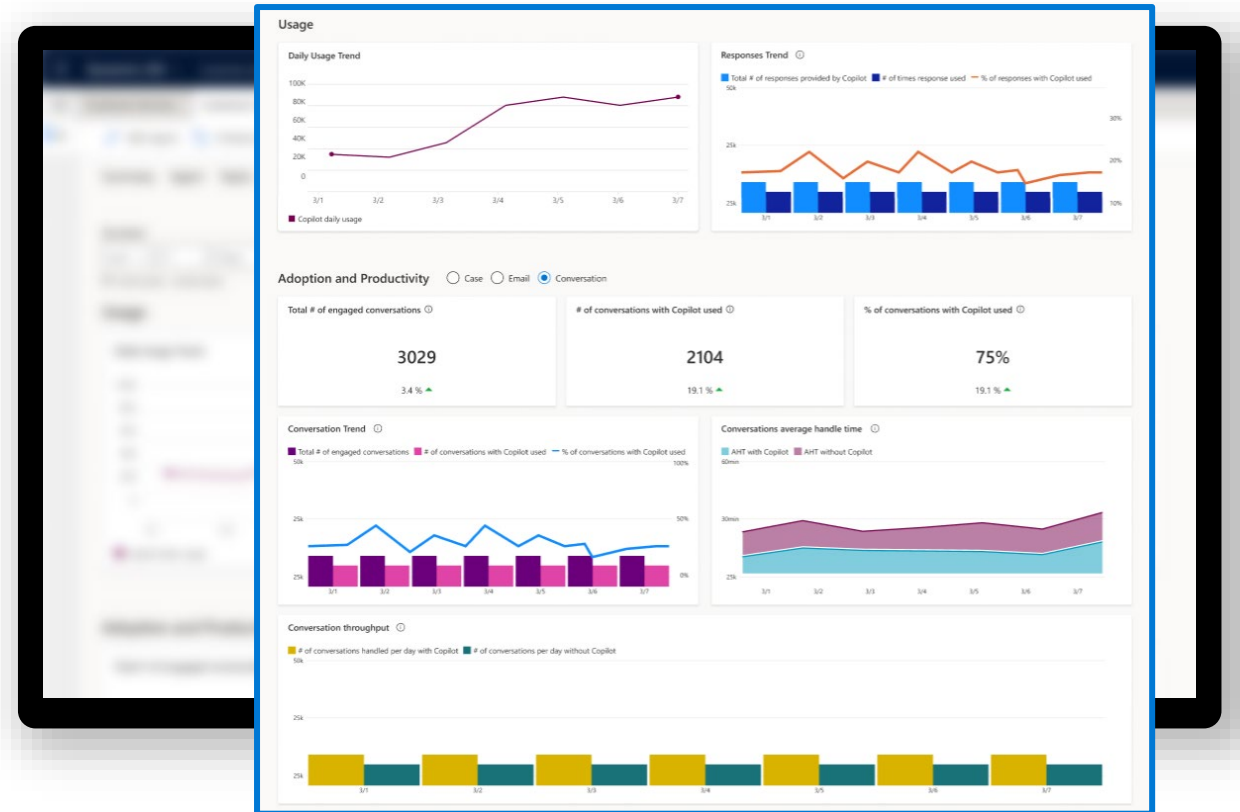
Using a conversational interface to ask questions of their organization's knowledge sources, agents can quickly gather relevant information to respond to customer's inquiries. Copilot can also create personalized email responses based on the context of that email conversation.



# Copilot helps every agent become a super agent

## Understand Copilot impact and discover agent productivity improvements

Support managers have a detailed view into Copilot usage by agent groups, and how it's impacting key support metrics including handle times, throughput and more through intuitive out of box reports.





# Summary

- Buy It (Dynamics 365)
  - Omnichannel
  - Intelligent Routing
  - Copilot for D365 CS
  - Unified resource scheduling
- Build It (Power Apps)
  - Limited Budget\*
  - Simple workflow
  - Working tracking
  - Limited/No Reporting required
  - System of record not yours
    - Extend or “bolt on” with Power Apps

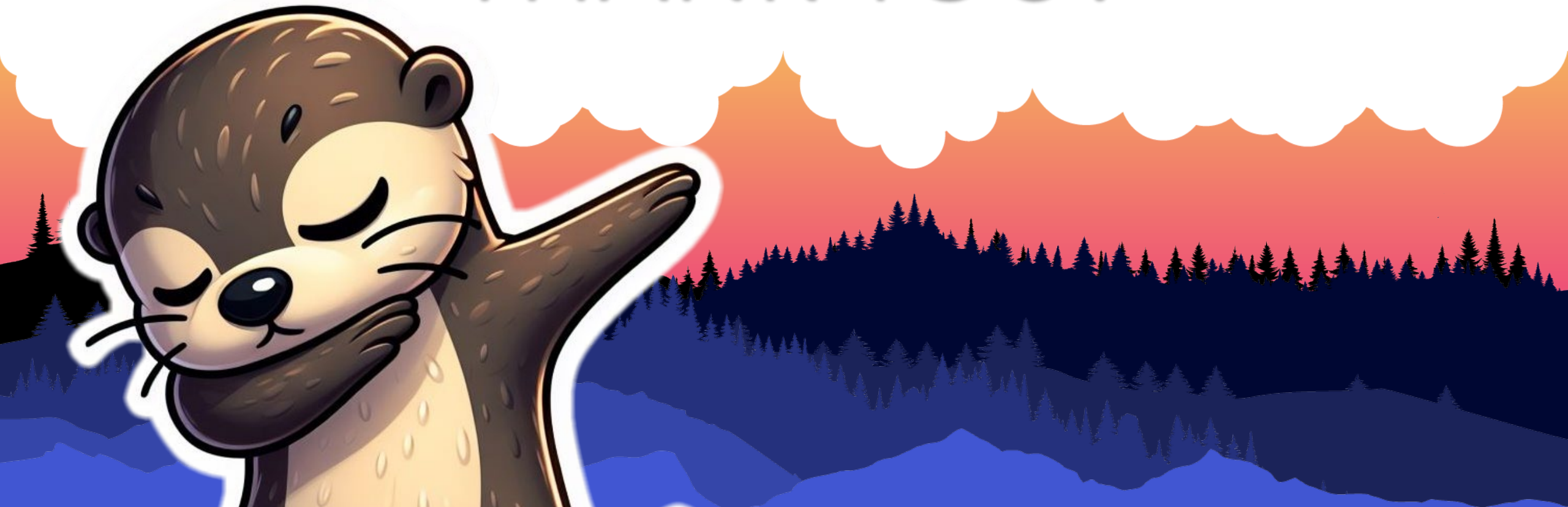


Q&A





THANK YOU!





# Appendix



# Resources

## Learning Links

- [Microsoft 365 Developer Program](#)
- [Power Apps Developer Plan](#)
- [Microsoft Learn for Dynamics 365](#)
- [Microsoft Learn for Power Platform](#)

## Community Links

- [Dynamics User Group](#)
- [Power Platform Community](#)
- [Dynamics 365 Community](#)
- [Community Days](#)



# Microsoft's Responsible AI principles

## Microsoft Cloud AI you can trust

Your data is your data.

Your data is not used to train the OpenAI foundation models without permission.

Your data is protected by the most comprehensive enterprise compliance and security controls.



Fairness



Reliability &  
Safety



Privacy &  
Security



Inclusiveness



Transparency

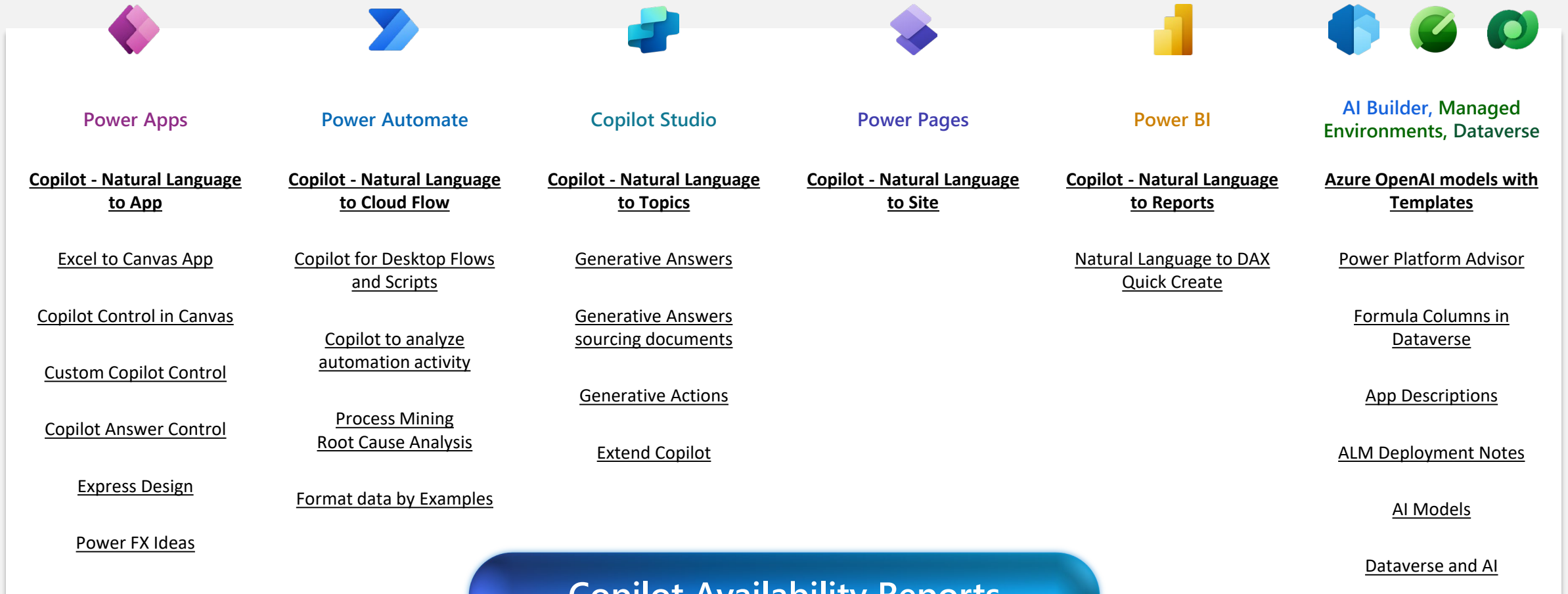


Accountability



# AI in Power Platform

Easier to make. Richer to use.



## Copilot Availability Reports

Features range from being in Private Preview, Limited Preview, Public Preview, or Generally Available (GA). Features may have prerequisites (e.g. require a US tenant, English only, etc.)

# Benefits of leveraging Dynamics 365 Customer Service

## Citizen Experience outcomes:

- Reduced customer/citizen Wait Time
- Increased customer/citizen Satisfaction
- Reduced Unemployment Rate

## Organization Centric outcomes:

- Increased Agent/Employee Productivity
- Reduced Staff Attrition
- Reduced Case Resolution Time
- Reduced Average Handle Time
- Increased number of Cases
- Increased First Call Resolution Rate
- Faster Training/On-boarding
- Reduced Operational Costs with single vendor to power voice
- Reduced Manual Entry of data
- Increased SLA Compliance
- Improved data quality
- Improved operational efficiency



# Unique Differentiation of D365 Customer Service

- **One-stop shop** for service and case management needs.
- **Seamless step up** from case management to omnichannel customer/citizen engagement. Only software vendor with **native voice channel\***.
- **Nuance acquisition**<sup>3</sup> to accelerate customer/citizen outcomes by empowering governments to meet their mission.
- **Seamless collaboration** across the organization with deep integration of D365 CS with MS Teams.
- Ability to build **complex routing rules** and diagnose to improve performance of the rules **intelligently**.
- Dynamics 365 Applications are **HIPPA Compliant**<sup>1</sup>
- Microsoft is one of the first hyperscale cloud service providers to receive certification for the **HITRUST CSF<sup>2</sup>**
- **Vast B2C experience** to help shape our D365 Customer Service solution from ground up.
- **WORLD LEADER in A.I.** We invest over a billion for cyber security and R&D.
- We are most **trusted** and secure in **regulated industries with our global, scalable and flexible cloud**.

