



POWERED BY  DUG

DYNAMICS CON

LIVE

MAY 2024

Unleashing the Power of Conversations Omnichannel for Customer Service in Dynamics 365



Agenda

Time	Topic
3:15pm – 3:20pm	State of Customer Service
3:20pm – 3:25pm	Copilot Studio Primer
3:25pm – 3:30pm	Customer Service App Overview
3:30pm – 3:40pm	Demos (Chat, Voice, Copilot)
3:40pm – 3:45pm	Trial Provisioning
3:45pm – 3:50pm	Licensing
3:50pm – 4:00pm	Questions/Open Discussion



About Me



- Power Platform Lead at Alithya
- 10 Years working with Microsoft Customer Relationship Management from version 4.0 to 9.2 (current version)
- Primary Focus Areas
 - CRM Business Outcomes
 - Business Process Review & Optimization
 - Solution Architecture
- Solutions
 - Copilot
 - Microsoft Dynamics CRM/Customer Engagement
 - Power Platform
- Verticals
 - Manufacturing and Distribution
 - Professional Services
 - Insurance





Customers expect exceptional service

80% of customers expect personalized customer experience ¹

90% of consumers regard resolution as their most important customer service issue ²

87% admit they are worried that sharing their personal information over the phone with a brand could make them vulnerable to fraud ³



¹ Forbes, [50 Stats Showing the Power of Personalization](#), 2020

² KPMG, [Customer experience in the new reality](#), 2020

³ Forbes, [Fraud is Eroding the Customer Experience](#), 2020

⁴ Forbes, [50 Stats That Prove the Value of Customer Experience](#), 2019



But service organizations are not equipped to provide this service

55% of contact centers do not have collaboration tools to resolve customer issues faster ⁴

53% of contact center agents do not have proper visibility of information to understand the customer context ⁴



96%

of customers will leave
without warning due to
poor customer service¹



¹ Shep Hyken blog, [Guestpost](#), 2022

96%

of customers will leave
without warning due to
poor customer service¹



Contact centers
need to evolve for
modern service
experience

¹ Shep Hyken blog, [Guestpost](#), 2022

Business leaders are tasked with multiple priorities

Innovate and grow revenue while providing service across touchpoints

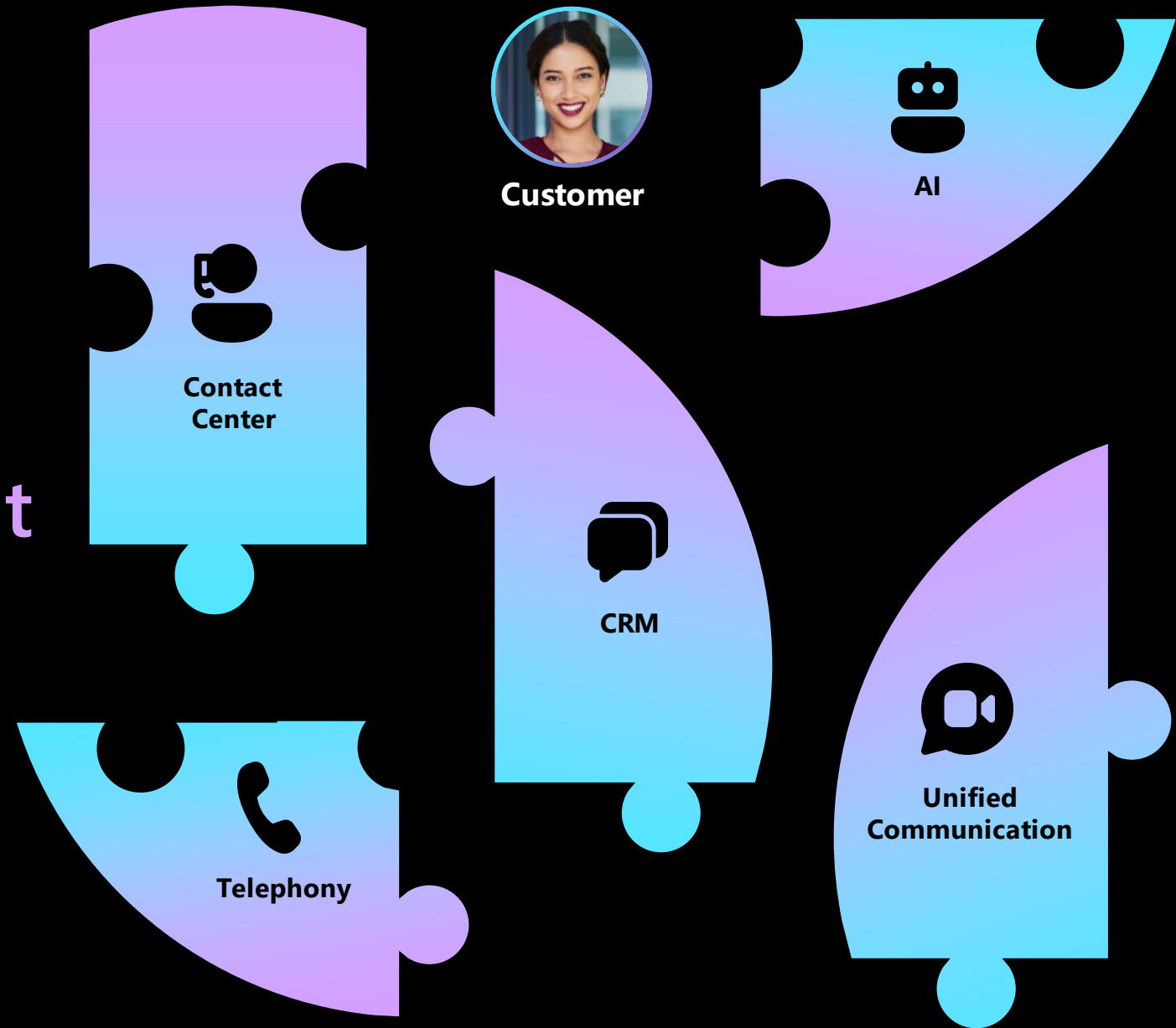
Increase customer retention and brand loyalty

Safeguard customer privacy and security

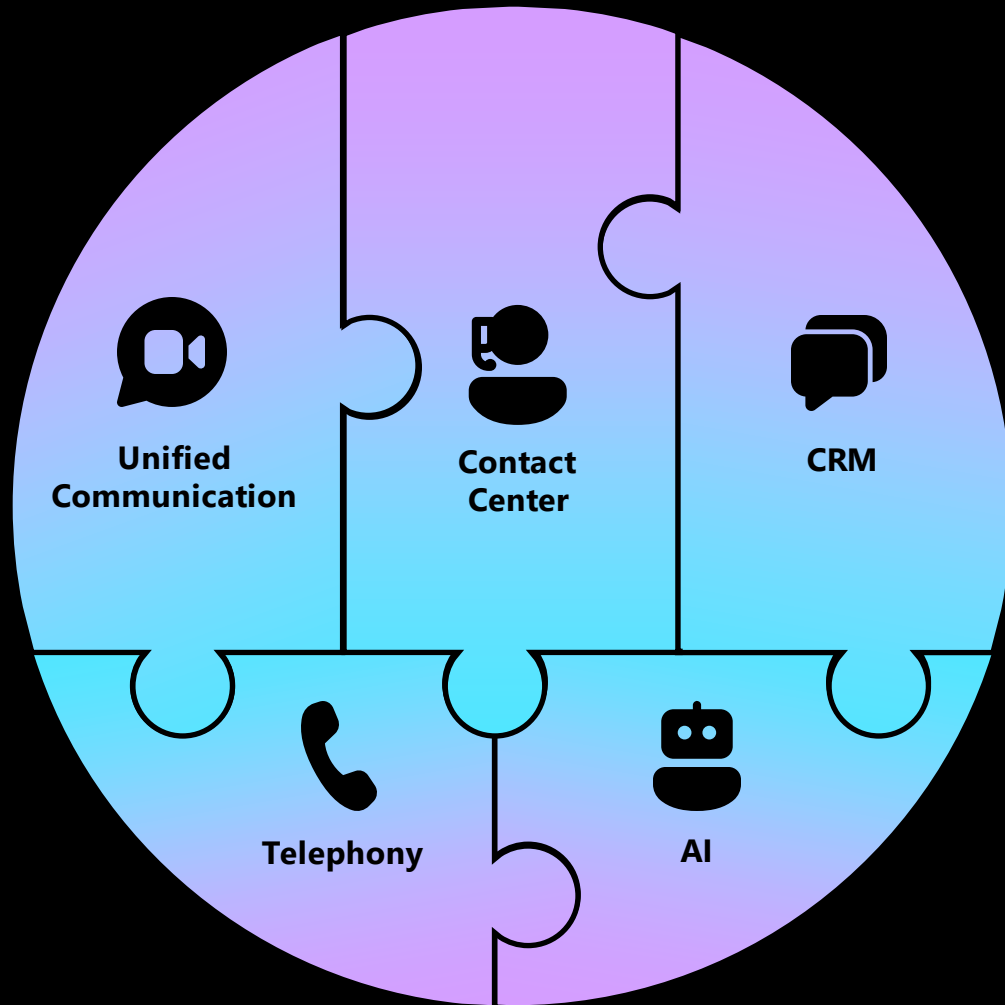
Enhance the agent experience and improve CSAT

Eliminate silos and simplify operations

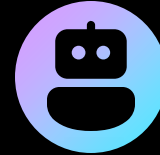
Disjointed solutions
have led to **inconsistent**
customer experiences



**Connect
the stack.
Connect the
experience.**



Connect
the stack.
Connect the
experience.



AI



CRM



Contact
Center

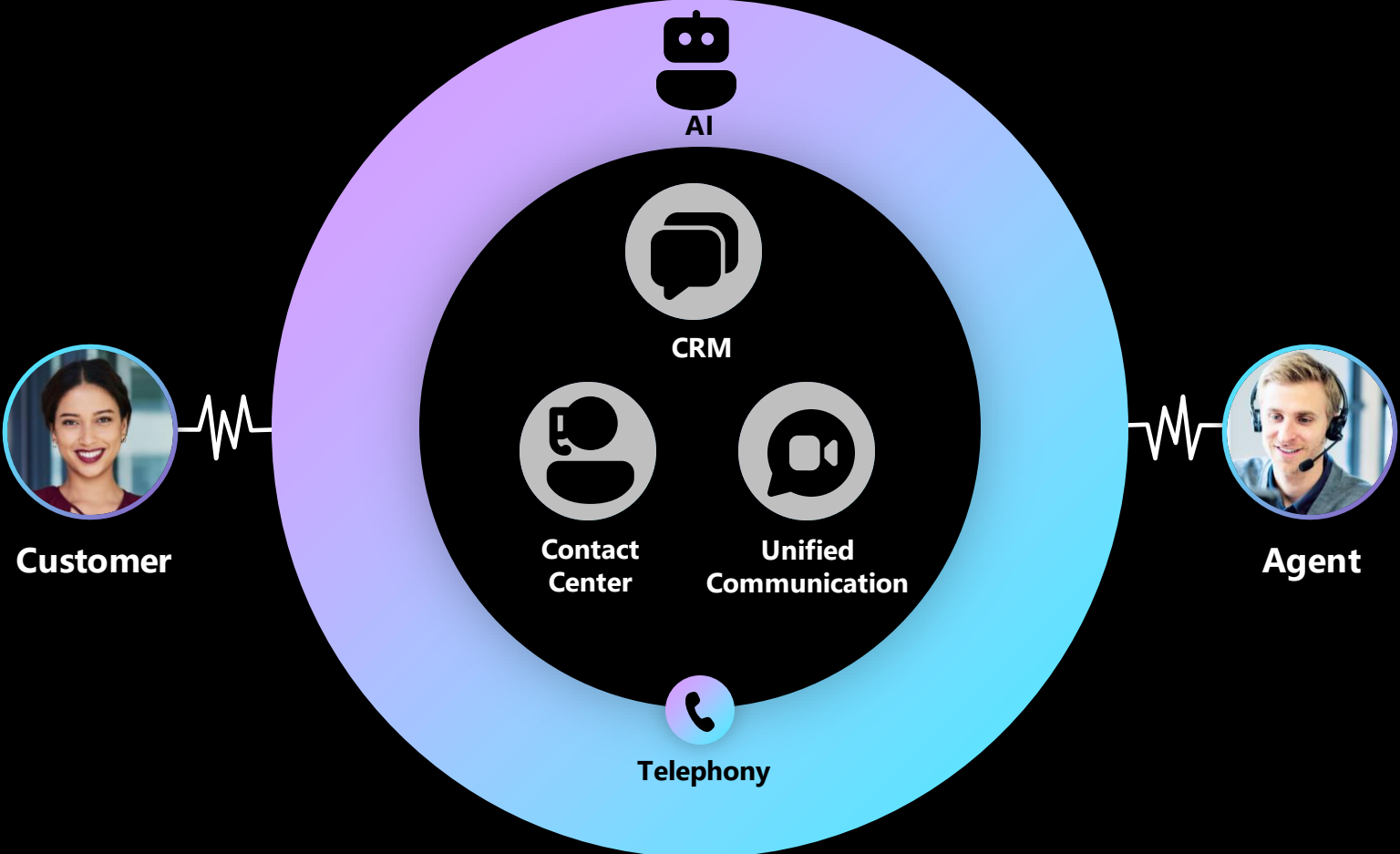


Unified
Communication



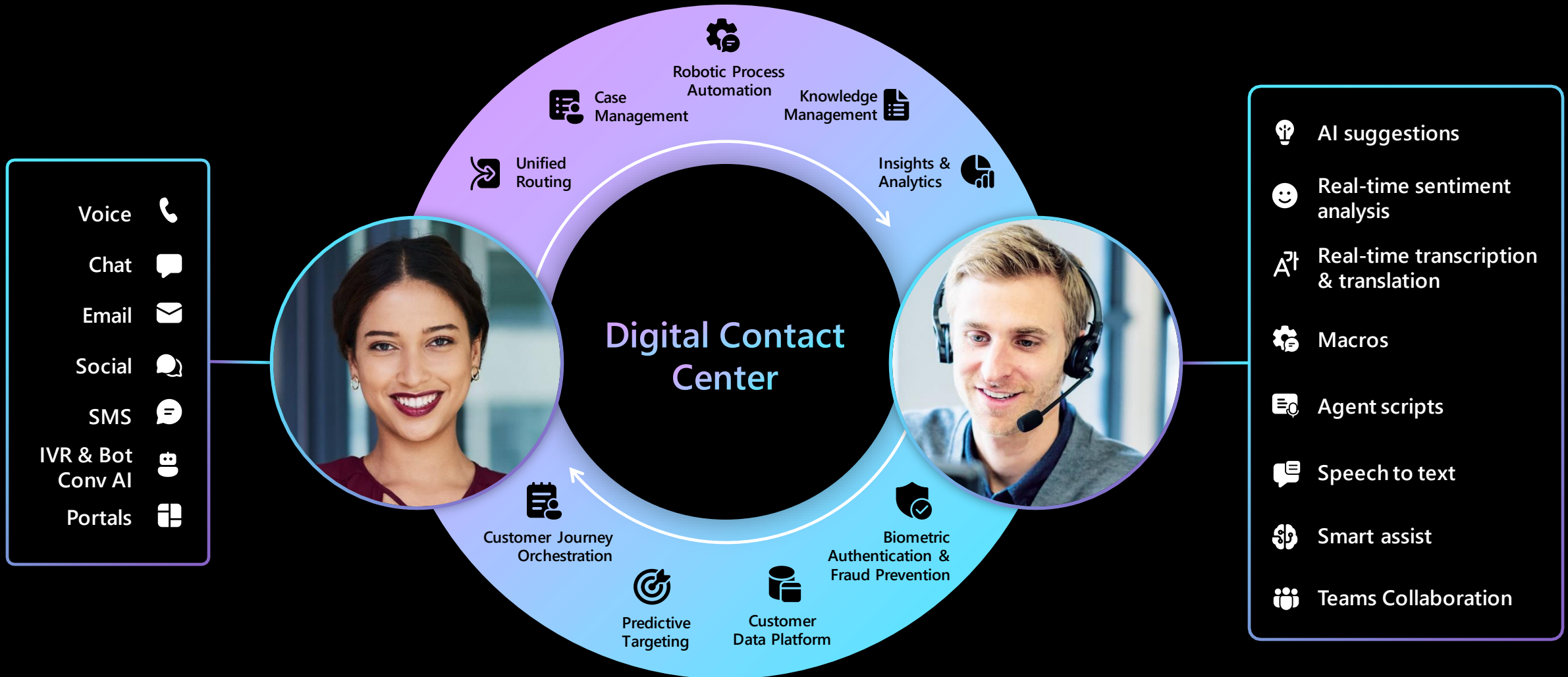
Telephony

Connect
the stack.
Connect the
experience.

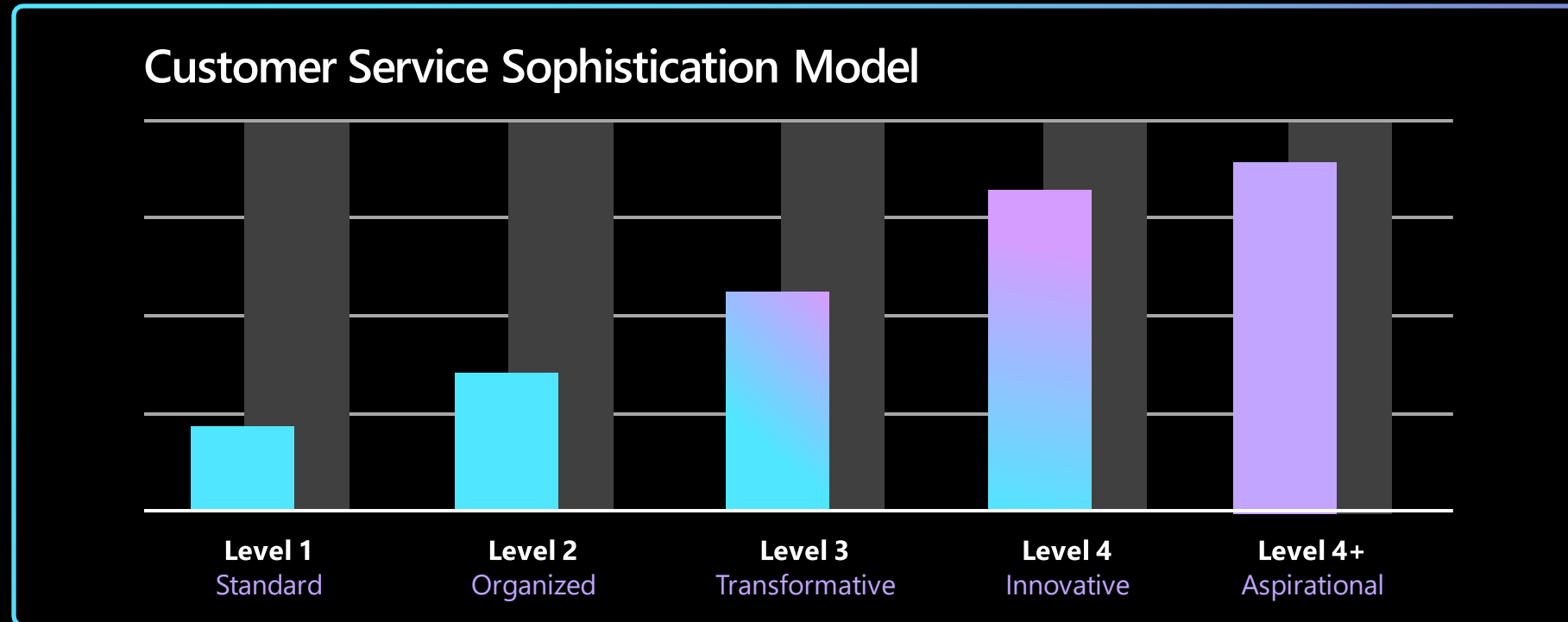


Level 4: Innovative

Are you ready to make service profit-centric? Harness technology such as AI to change the service business.



Deliver the right experience with the Microsoft Digital Contact Center Platform



Copilots and Conversational AI

Microsoft 365
Conversational Experiences
for M365

Copilot for
Microsoft 365



Biz Apps & Power Copilots
Conversational Experiences for
D365 and Power products

Sales Copilot

Service Copilot

Copilot for Power
Platform



Other Microsoft
Copilots

...



Custom Copilots
Custom copilots and bots
for enterprises and third parties

Custom
Enterprise
Copilots

Microsoft Copilot Studio
Extend and customize 1st party copilots | Build custom Copilots

Bot
Framework
/ SDK

Bot Service
Channels

Azure AI
Studio

Azure
Cognitive
Services

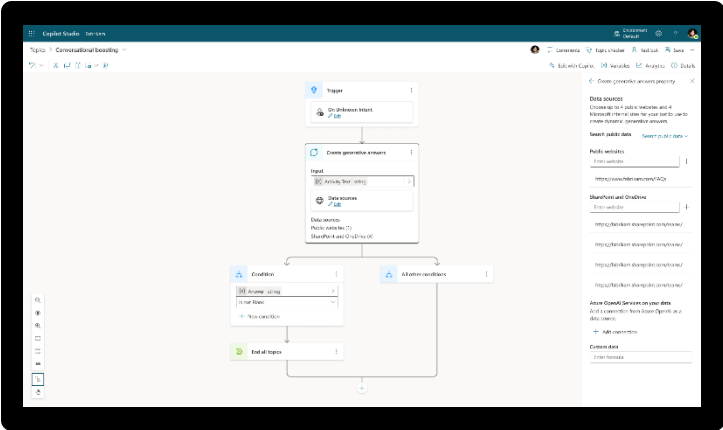
Power
Platform
Connectors

AI Builder

Generative AI in Copilot Studio

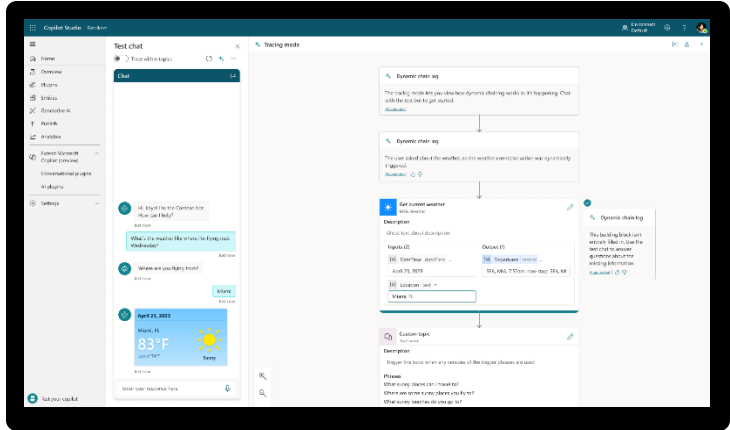
Powered by Azure OpenAI Service

TO ANSWER



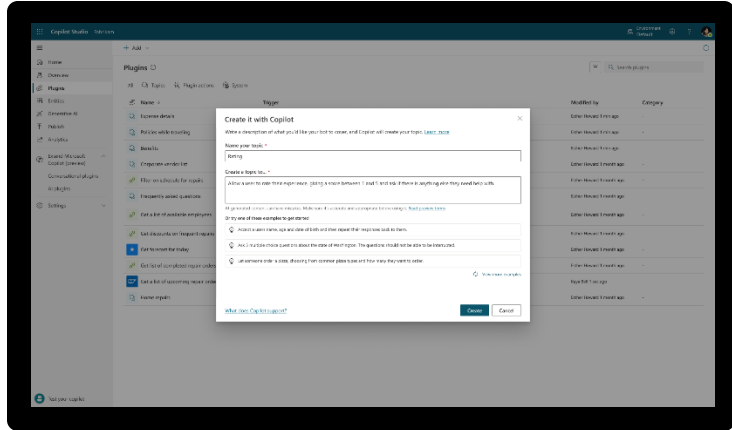
Generative Answers
Dynamically generate multi-turn answers based off an organization's content in real-time.

TO ACT



Generative Actions
Generate dialog and take action through dynamically chaining existing building blocks and plugins.

TO BUILD



Generative Building
The Copilot assistant helps build, design and modify copilot topics through natural language.

Copilot Studio Primer

- Copilot Studio can infuse Copilots into your service channels like chat, SMS, Voice and Social
- Low code interface to build bots

The screenshot displays the Microsoft Copilot Studio interface for a 'Customer Service Trial Virtual Agent (classic)'. The top navigation bar includes 'Environment: Customer Service Trial' and a warning message: 'This topic is managed and customizable. Modifying it will prevent future publisher updates. Learn more about managed objects'. Below the navigation, there are tabs for 'Details', 'Trigger phrases', 'Variables', and 'Analytics'. The main content area is titled 'Product issues' and shows a flowchart. The flowchart starts with a 'Trigger Phrases (1)' box containing 'Product issues'. This leads to a 'Question' box with the text 'Sure. What's the name of the product you're having trouble with?'. Below the question is an 'Identify' section with 'Multiple choice options'. Underneath, there are 'Options for user' including 'Smart brew 1000', 'Smart brew 2500', and 'Talk to agent'. The flowchart then branches into three 'Condition' boxes. Each condition box contains a variable '[x] bot.product_name (text)' and a dropdown menu set to 'is equal to'. The first condition is set to 'Smart brew 1000', the second to 'Smart brew 2500', and the third to 'Talk to agent'. Each condition box has an 'Add condition' button. On the left side of the interface, there is a 'Test bot' panel with a 'Tracking between topics' toggle, a 'Select a channel' dropdown set to 'All', and a 'Chat' window. The chat window shows a user message 'I have a product issue' and a bot response 'Sure. What's the name of the product you're having trouble with?'. Below the chat, there are input fields for 'Smart brew 1000' and 'Smart brew 2500', and a 'type your message' input field.



Customer Service Overview

- Case Management
 - Queues
 - Routing
 - Copilot Assistance
 - Surveys
- Omnichannel
 - Email, Chat, Voice, SMS, Social
- Knowledge Base
- Self-service Portal



Customer Service Workspace

- Allows for working on multiple cases or conversations in one screen
- Copilot helps summarize and suggest answers
- Productivity Pane showing AI suggested KB Articles and similar resolved Cases
- Are you still using the Customer Service Hub?

Customer Service Agent Dashboard

Case Title	Case Number	Priority	Origin	Customer	Status Reason	Created On
A Mineral Build Up in Water Supply	CAS-47732-V4V6K6	Normal	Email	Claudia Mazzanti	In Progress	4/9/2024 11:03 PM
Milk container is not fitting	CAS-47418-L6D9C5	Normal	Web	Trey Research	On Hold	4/10/2024 6:22 AM
The Cafe S-100 Semiautomatic has air bubbles in the I	CAS-47999-R9S3N3	Low	Phone	Graphic Design Institute	In Progress	4/10/2024 12:39 PM
What are some coffee machines cleaning techniques...	CAS-48032-Q9G4Z5	Low	Phone	Graphic Design Institute	In Progress	4/11/2024 6:45 PM

1 - 4 of 4

Cases Available to Work On

Title	Entered Queue	Queue	Worked By
How do I measure my tamp pressure?	4/12/2024 11:52...	Contoso Coffee Questii ---	
How Do You Fix A Coffeemaker That Won't Hea	4/12/2024 11:52...	Contoso Coffee Questii ---	
Airpot Duo won't Heat or not hot enough	4/12/2024 11:52...	Contoso Coffee Suppoi ---	
Airpot Duo keeps shutting down	4/12/2024 11:52...	Contoso Coffee Suppoi ---	
Cafe BG-1 stuck on preheating mode	4/12/2024 11:52...	Contoso Coffee Suppoi ---	

My Open Activities

Activity Type	Subject	Regarding	Priority	Start Date
Task	Setup Warranty Account	A Mineral Builc	Normal	2/22/2021 1:00 PM
Appointment	Meeting with Owner	A Mineral Builc	Normal	4/14/2024 6:00 AM

Customer Service Workspace

- Allows for working on multiple cases or conversations in one screen
- Copilot helps summarize and suggest answers
- Productivity Pane showing AI suggested KB Articles and similar resolved Cases
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The screenshot displays the Dynamics 365 Customer Service Workspace interface. At the top, the browser tabs show the current case: "A Mineral Build Up in Water Supply". A red arrow points to this tab. The main content area is divided into several sections:

- Case Information:** Case ID: CAS-47732-V4V6K6, Email: 4/9/2024 11:03 PM, Created On, System Administrator (SA) Owner.
- Summary:** A red box highlights the AI-generated summary text: "Claudia Mazzanti is experiencing reduced pressure and water flow issues with her SmartBrew 3000 machine, which she believes is due to mineral build-up from hard water. She reached out to customer service for instructions on how to properly clean the water tank. Enrico Cattaneo from Contoso Coffee responded, expressing their commitment to resolving the issue quickly. They offered to set up a phone call to discuss a service warranty replacement while working on the problem. Claudia confirmed her availability for a call and mentioned that the water doesn't consistently come out of the machine, sometimes sputtering and spitting water. Enrico requested additional information about when the problem started, if it always occurs, and any steps Claudia has taken to fix it. He assured her that even though he will be on vacation, one of his colleagues will continue working on her case. Enrico also expressed confidence in resolving the issue and thanked Claudia for her patience." Below the summary is a "Copy" button and a note: "AI-generated content may be incorrect. Make sure AI-generated content is accurate and appropriate before using. See terms."
- Details:** Case Title: A Mineral Build Up in Water Supply, Customer: Claudia Mazzanti, Subject: Water supply, Priority: Normal, Case Status: In Progress, Product: Smart Brew 300, Description: ---
- Timeline:** Search timeline, Enter a note..., Highlights, Recent: Modified on: 4/17/2024 5:20 PM, Live chat from: Claudia Mazzanti (Closed), A Mineral Build Up in Water Supply, View more, Transcript.

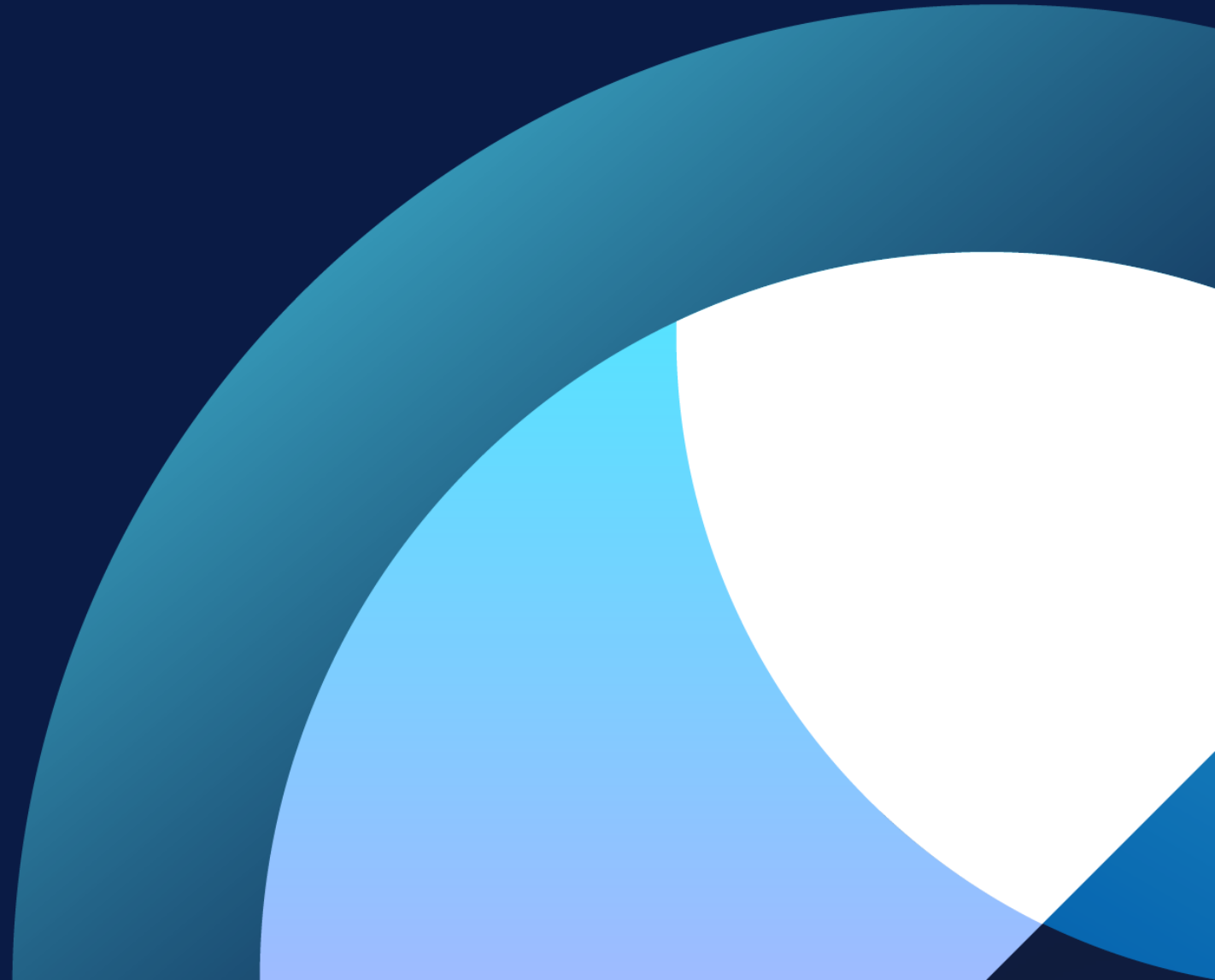
Customer Service Workspace

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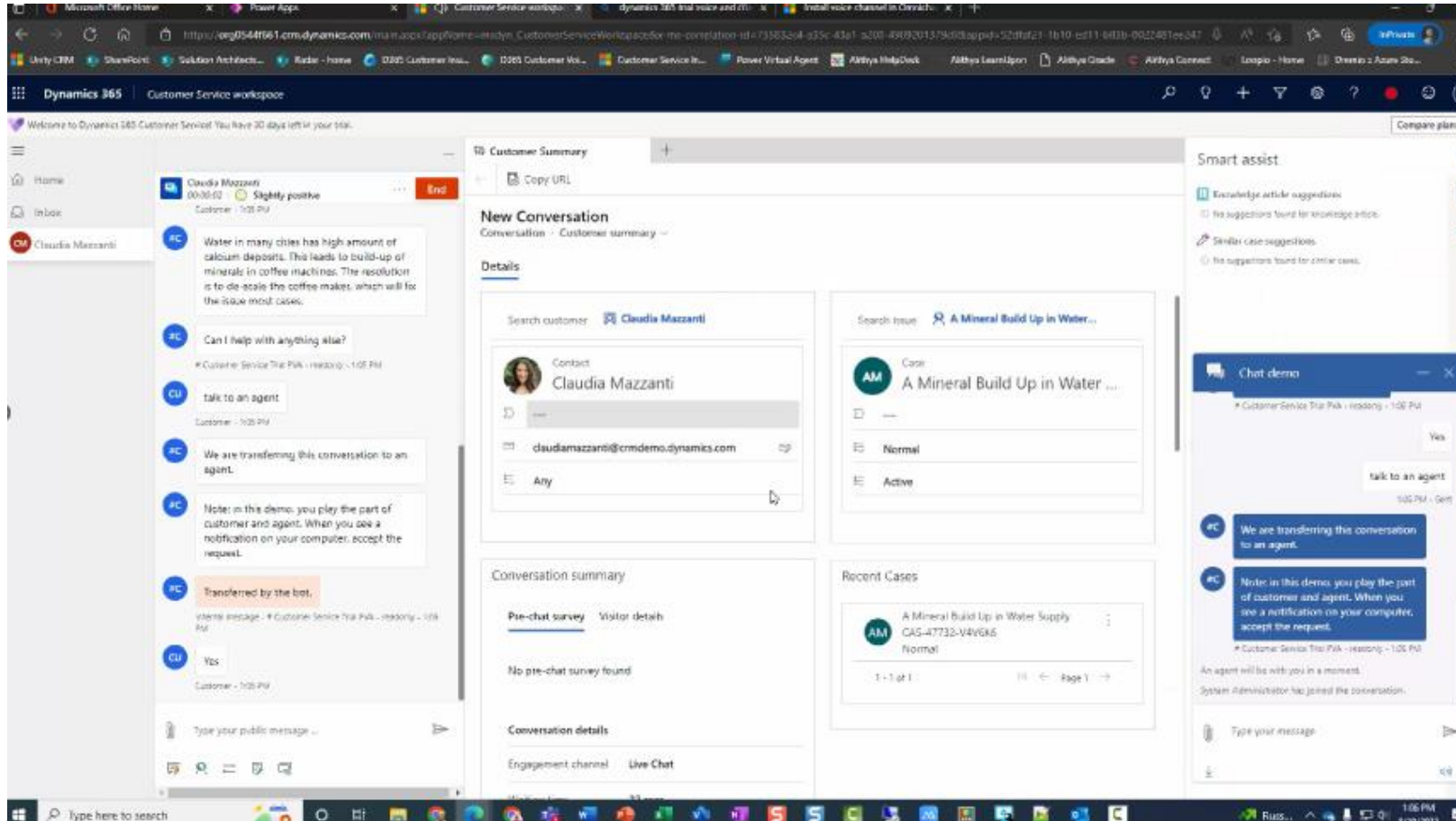
The screenshot displays the Dynamics 365 Customer Service workspace. At the top, the header shows 'Dynamics 365 | Customer Service workspace' and 'Try the new look' with various utility icons. Below the header, a navigation bar includes 'Home', 'Inbox', and two active tabs: 'A Mineral Build Up in Wat...' and 'Milk container is not fitting'. A toolbar contains actions like 'Save', 'Save & Close', 'Save & Route', 'Refresh', 'New', 'Resolve Case', 'Cancel Case', 'Assign', 'Add to Queue', and 'Share'. The main content area is divided into three sections: a left-hand 'Summary' pane, a central 'Timeline' pane, and a right-hand 'Smart assist' pane. The 'Summary' pane lists case details: Case Title 'A Mineral Build Up in W...', Customer 'Claudia Mazzanti', Subject 'Water supply', Priority 'Normal', Case Status 'In Progress', Product 'Smart Brew 300', and Description '---'. The 'Timeline' pane shows a search bar, a note entry field, and a 'Highlights' section with 'Recent' entries. Each entry includes a user profile, a modification timestamp (e.g., '4/17/2024 5:20 PM'), a 'Live chat from: Claudia Mazzanti' status, the case title, and options to 'View more' or see the 'Transcript'. The 'Smart assist' pane on the right features a 'Knowledge article suggestions' section with three items: 'When De-Scaling Is Not Enough' (80% confidence), 'Install a Water Filtration System' (74% confidence), and 'No Espresso Comes Out Even After I Turn On the Pump.' (71% confidence). Below this is a 'Similar case suggestions' section with three items: 'Milk is leaking when grinding is struck' (89% confidence), 'QuickPot says add water but reservoir is full' (89% confidence), and 'AutoDrip says add water but reservoir is full' (88% confidence). Each suggestion includes a brief description of the issue and resolution, a resolution timestamp, and a 'Relevant?' checkbox.



Demo



Chat Channel



Voice Channel

Welcome to Dynamics 365 Customer Service! You have 30 days left in your trial.

Customer voice tour

Explore voice

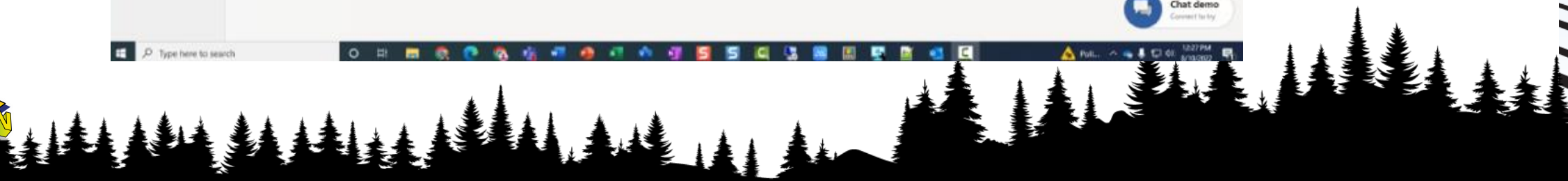
Voice is an engagement channel that lets your agents connect with customers in real time.

- 1. Pretend you're a customer and call (+18332207103) for help**
This phone number is a trial number for demoing the voice experience as if you are a customer. You have 60 minutes free call time for this number.
Transcription, recording, and sentiment analysis features are all on by default for the voice demo. You can turn them off by opening the voice demo workspace and selecting voice demo channel settings.
- 2. A bot will answer, and you can try its capabilities**
Say "product issues" or "store hours". The bot will route you to an agent at the end of the conversation, or you can say "talk to an agent" at anytime.
- 3. Accept the call as if you are an agent**
You'll see an incoming phone call notification. Select **Accept** to start the voice demo as if you are an agent. Allow permissions for your microphone.

12:27 PM
(833) 220-7103
Add Number

1 2 3
4 5 6
7 8 9
* 0 #


Chat demo
Connect to try



Copilot in D365 Customer Service

The screenshot displays the Alithya support portal interface. At the top, the navigation bar includes 'Alithya', 'Blogs', 'Forums', 'Ideas', 'Knowledge Base', 'Support', 'English', and 'Dave Smithers'. The main banner features the text 'Let's Work Together' in a large, green font. Below the banner, there are sections for 'Most Popular Articles' and 'Forums'. A chat window titled 'Let's Chat!' is open on the right side of the screen. The chat window shows a message from a virtual agent (VA) that reads: 'Hi I'm a virtual agent. I can help with account questions, orders, store information, and more.' Below this, there are two more messages from the VA: 'If you'd like to speak to a human agent, let me know at any time.' and 'So, what can I help you with today?'. The chat window also shows a 'My Subscriptions' section with the text 'There are no items to display.' and a 'store hours' input field at the bottom.





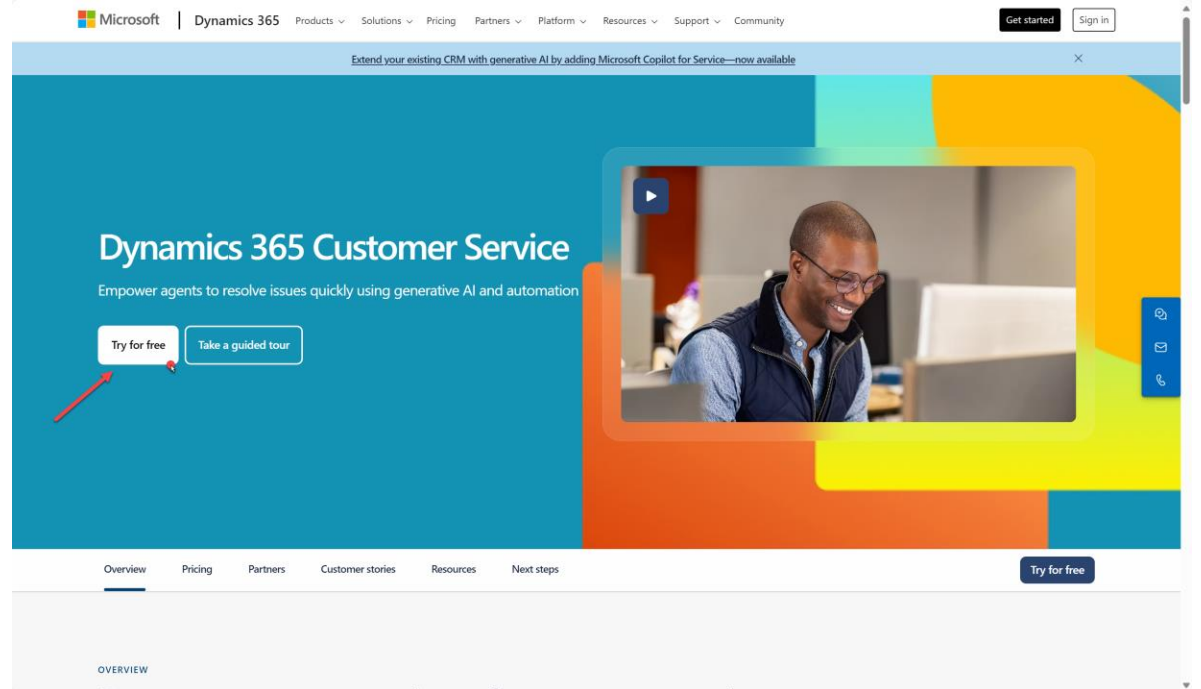
How to setup a
trial of D365
Customer Service
Omnichannel

Provision your trial

- Follow the documentation: [Sign up for a free trial - Dynamics 365 Customer Service | Microsoft Learn](#)

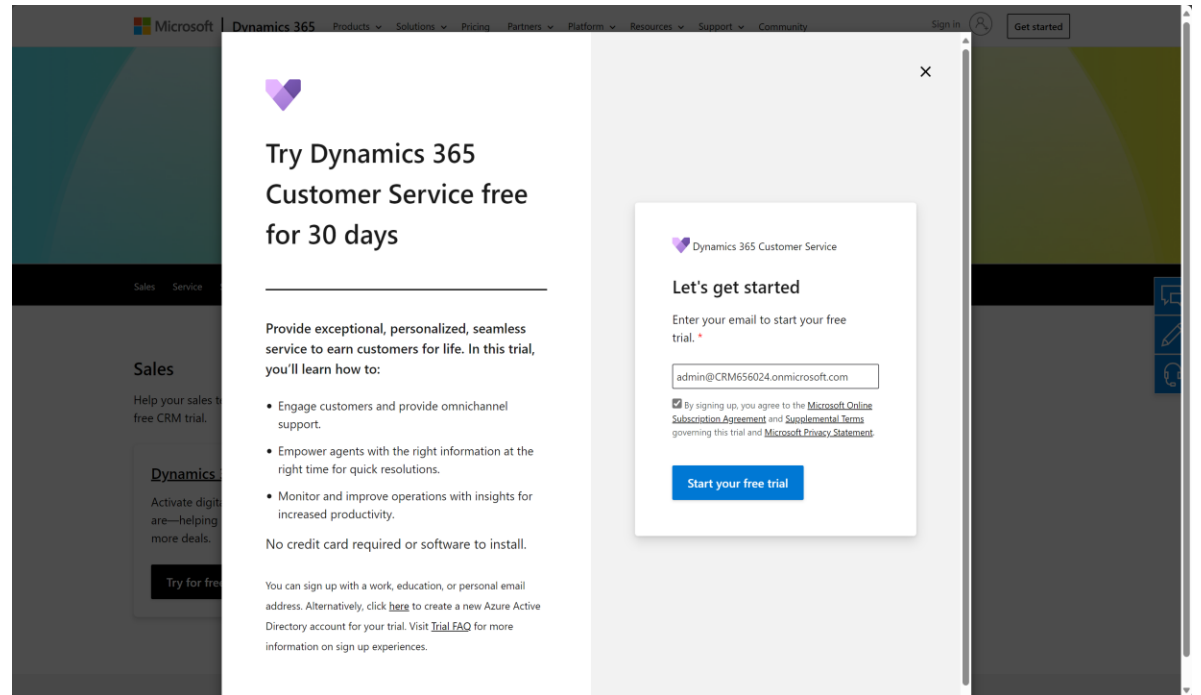


- <https://www.microsoft.com/en-us/dynamics-365/products/customer-service>
- Click “Try for free”



Setup Trial Demo

- <https://www.microsoft.com/en-us/dynamics-365/products/customer-service>
- Click “Try for free”



Setup Trial Demo



Sign up for a free Dynamics 365 Customer Service trial

Article • 11/23/2023 • 1 contributor

Dynamics 365 Customer Service offers a 30-day free trial. After a quick sign-up, you'll have access to many of the app's key features. The trial allows you to test the app with sample data and even try out your own customer data. [Learn more about what Customer Service has to offer.](#)

To sign up for the trial:

1. Go to the ["Try Dynamics 365 Customer Service"](#) page and select **Try for free**.
2. Follow the onscreen guidance to enter the email associated with your Microsoft account[®] or your personal email ID, such as alansteiner@gmail.com, and your contact information.

Note

- Check the availability of the product in the region you want to try before you sign up for a trial.
- If you use a personal email ID to sign up for the trial, not all the trial features will be available. More information: [Trial FAQ](#)

The trial will take a few moments to load, then you can start using Customer Service.

What to try?

The trial environment includes many of the same features as the paid version. The following links will guide you through using some of the key features.

Additional resources

Training

Module
[Start your free Dynamics 365 Business Central trial - Training](#)
Do you want to try, explore, and evaluate Business Central? Do you need a Business Central trial to facilitate your learning process? This module provides information on how to set up a...

Certification
[Microsoft Certified: Dynamics 365 Fundamentals \(CRM\) - Certifications](#)
Demonstrate fundamental knowledge about the customer engagement capabilities of Microsoft Dynamics 365.

Documentation

[Welcome to Dynamics 365 Customer Service](#)
Overview of Dynamics 365 Customer Service.

[Overview of the Customer Service workspace application for Dynamics 365 Customer Service](#)
Overview of the Customer Service workspace application for Dynamics 365 Customer Service.

[Customer Service admin center \(contains video\)](#)
Get started with Customer Service admin center to configure the various features and settings in Customer Service.

[Show 5 more](#)



Explore Chat and Voice



https://org4101061.crm.dynamics.com/.../appName=msdyn_CustomerServiceWorkspace...

Dynamics 365 Customer Service workspace

Welcome to Dynamics 365 Customer Service! You have 30 days left in your trial.

Hello, System Administrator!

Get started with Dynamics 365 Customer Service.
Provide seamless, end-to-end customer service experiences within a single solution built on the Microsoft cloud to deliver consistent, connected support across channels.

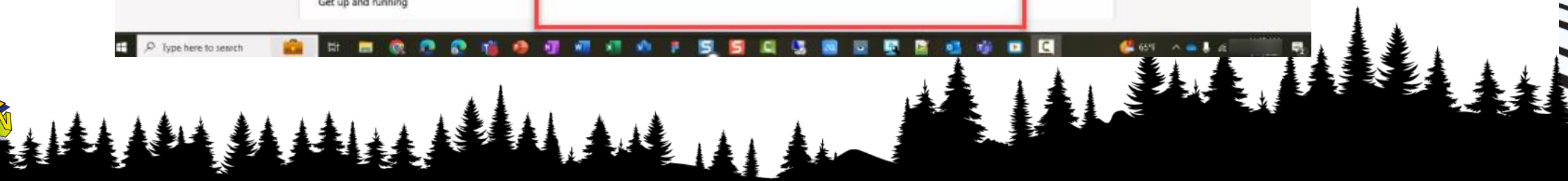
- Engage customers**
Provide cross-channel support to your customers and transform your agent experience.
- Empower agents**
Empower teams with productivity tools that help everyone stay focused on your customer needs.
- Monitor and improve operations**
Monitor and improve operations.

Watch the overview

Get up and running

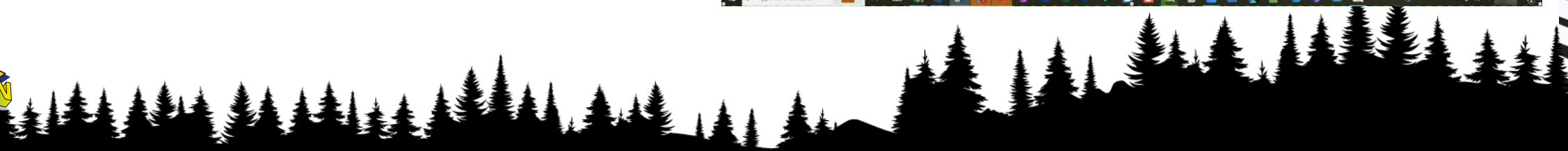
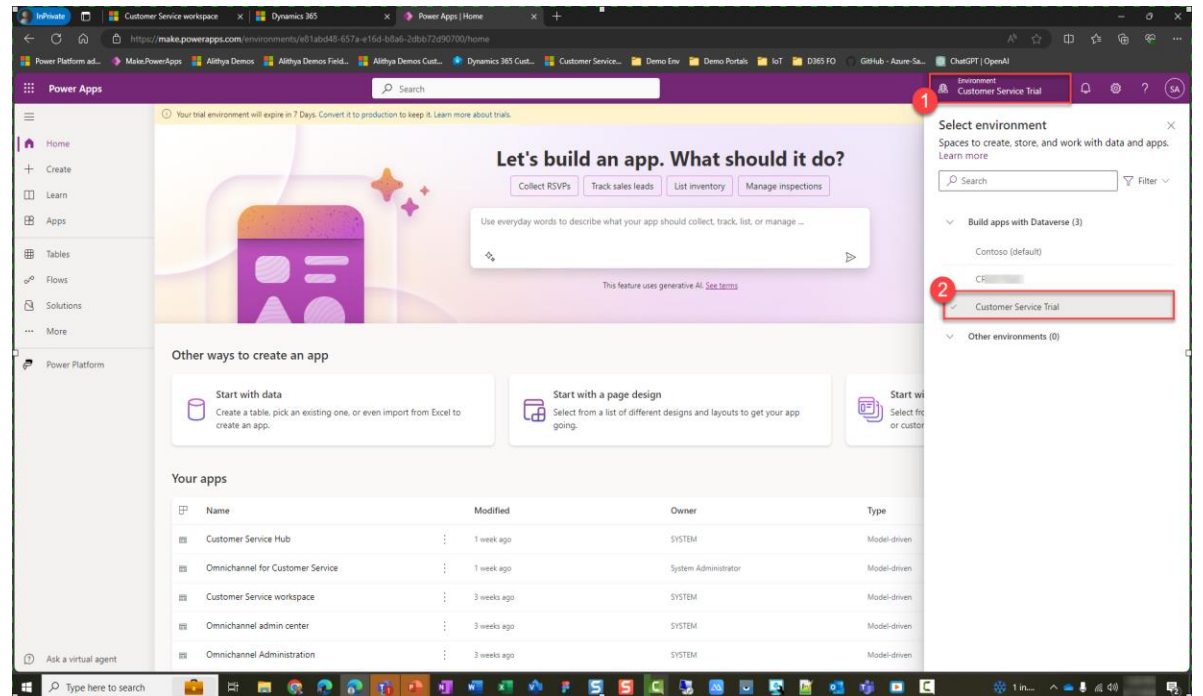
Take a tour

- Explore voice**
Experience our singular solution for voice as both a customer and an agent.
[Take tour](#)
[Customize voice](#)
- Explore chat**
Experience our intelligent chatbot as both a customer and an agent.
[Take tour](#)
[Customize chat](#)



Environment

- Make sure you are in your Customer Service trial environment in the maker portal to configure and customize it





Licensing

Dynamics 365 Customer Service pricing

Save up to 50% compared with similar customer service solutions from major competitors.¹

Dynamics 365 Customer Service Professional

\$50

per user/month

Core Customer Service capabilities

Contact us >

Dynamics 365 Customer Service Enterprise

\$95

per user/month

Advanced Customer Service capabilities

Contact us >

Customer Service add-ins²

Digital Messaging and Voice Add-in

\$90

per user/month

All-in-one omnichannel engagement across voice, digital channels, and chat

- Requires Enterprise license

Contact us >

Voice Channel Add-in

\$75

per user/month

Add native voice capabilities as part of your omnichannel engagement

- Requires Enterprise license

Contact us >

Digital Messaging Add-in

\$75

per user/month

Rich omnichannel engagement across digital messaging channels, including chat

- Requires Enterprise license

Contact us >

Chat Add-in

\$60

per user/month

Live chat omnichannel engagement between customers and agents

- Requires Enterprise license



Check out my colleague's session tomorrow at 1:15pm on Customer Insights - Journeys

Larkspur ▲



Unlocking the Power of Journeys: A Comprehensive Guide to Customer Insights - Journeys within D365

May 15, 2024, 01:15 PM - 02:15 PM

Larkspur

Customer Engagement 🎯

Join us for a comprehensive guide to Customer Insights - Journeys within Dynamics 365. In this session, you will learn the basics of customer journeys, Microsoft copilot within Customer Insights - journeys, segments, triggers, email creation, and more.

We'll cover the following topics:

- Provide an overview of the application and its features.
- Explain how to create customer journeys using segments and triggers.
- Explore the asset editor for email, SMS, and form creation.
- Discuss how to analyze customer journeys using analytics and insights.
- Discover the potential of Microsoft Copilot within Customer Insights - Journeys.

By the end of this session, you'll have a comprehensive understanding of the basics of customer journeys, Microsoft copilot within Customer Insights - journeys, segments, triggers, email creation, and more.

Speakers (1)



Tristan Scandar
Pre-sales Solution Architect, Alithya

Register for
Copilot
Academy



Thank You!

