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Benefits of Using Teams as Part of Your D365 CE Strategy

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Teams as a Collaboration Tool

Microsoft Teams –

The hub for team collaboration in Microsoft 365, integrates the people, content, and tools your team needs to be more engaged and effective.

Why Teams?

- **More and more people are working remotely or in a hybrid situation –**

  We need a place to work together (and not just in meetings), whether in the office, home, or on the road.

- **We need to have flexibility in using our devices as we go through our day –**

  We need our workspace to be available and switch seamlessly between our pc, tablet, and phone.

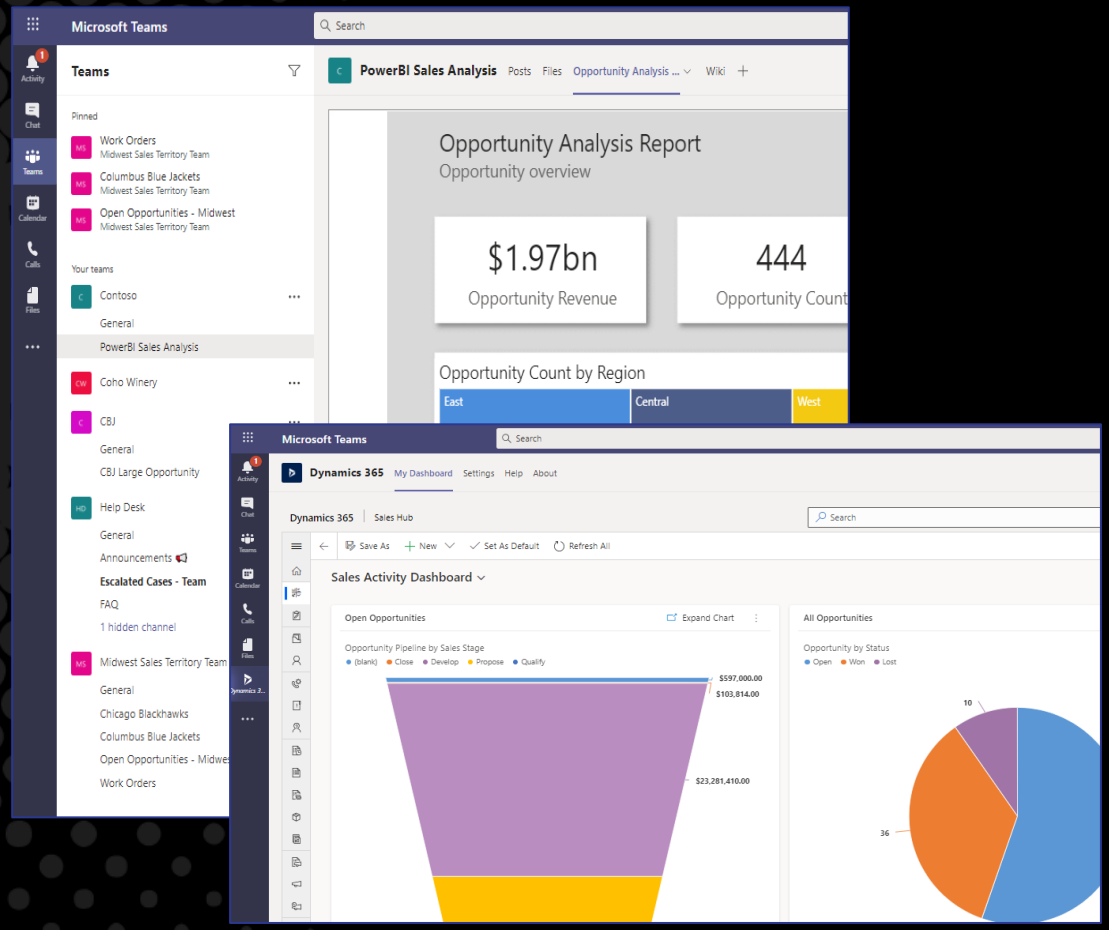
- **Can we put all of our apps in one app?**

  We need to be able to work without switching from app to app to app…

Why Use D365 in Tandem with Teams?

- **Gather, share and analyze data all in one place.**

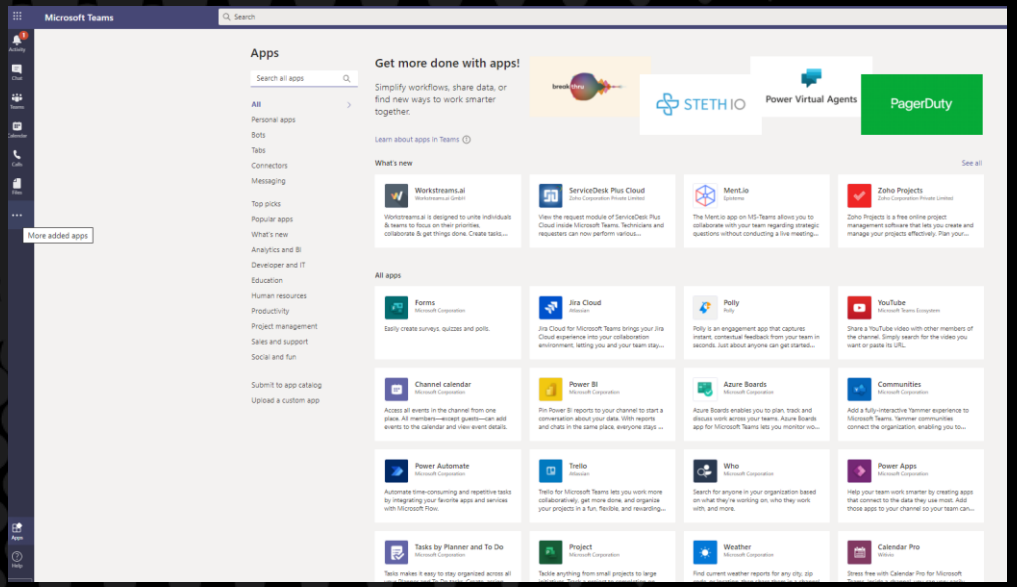
- **Collaborate with colleagues within and outside your organization.**
  - Conversations and chats
  - Meetings
  - Files and notes
  - Calendar
  - Calls



Why Use D365 in Tandem with Teams?

Open platform to Microsoft Apps –

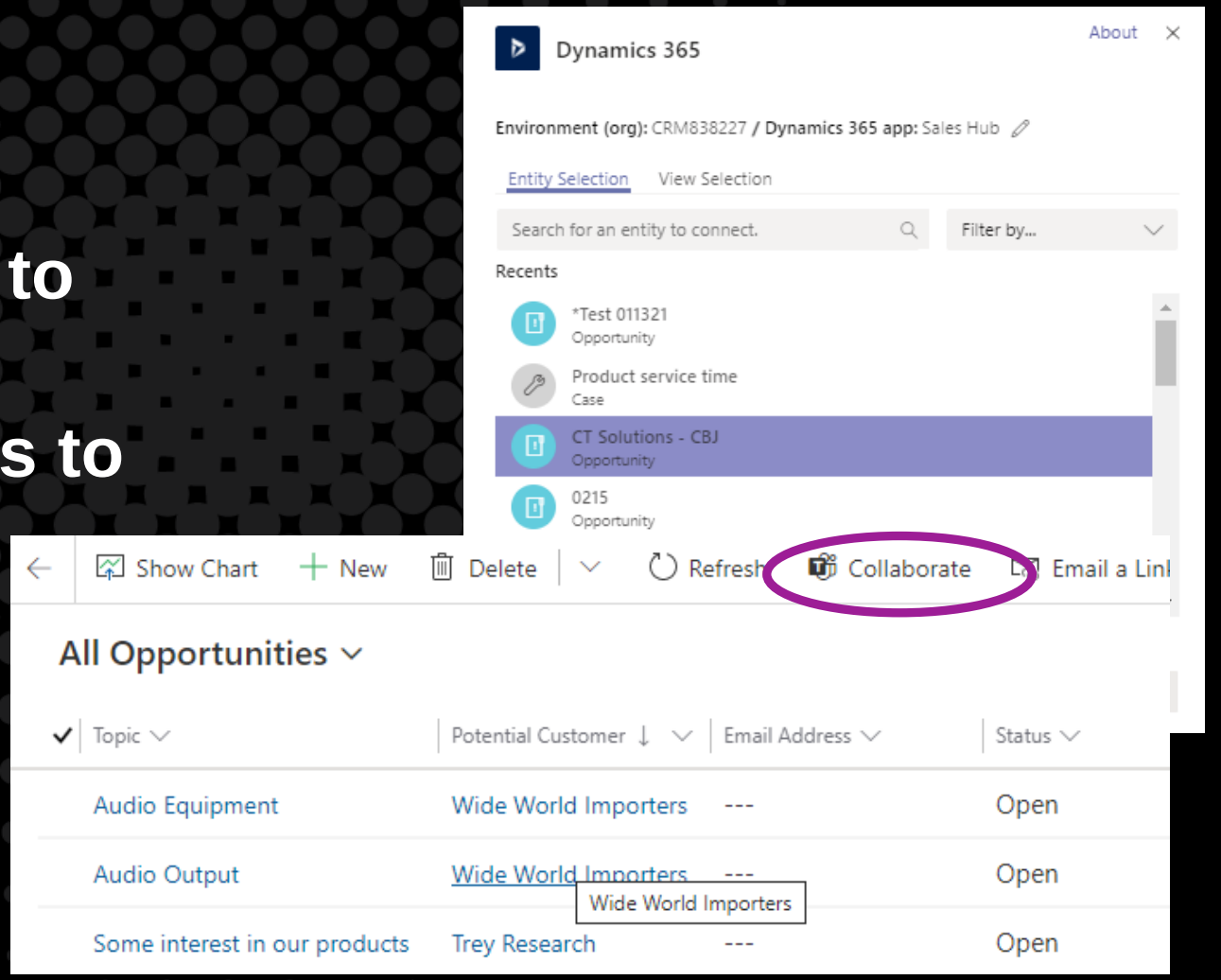
- Dynamics 365
- PowerBI
- OneNote, OneDrive
- Sharepoint
- Power Automate
- Microsoft Forms



Why Use D365 in Tandem with Teams?

Connect data from Dynamics 365 to Teams

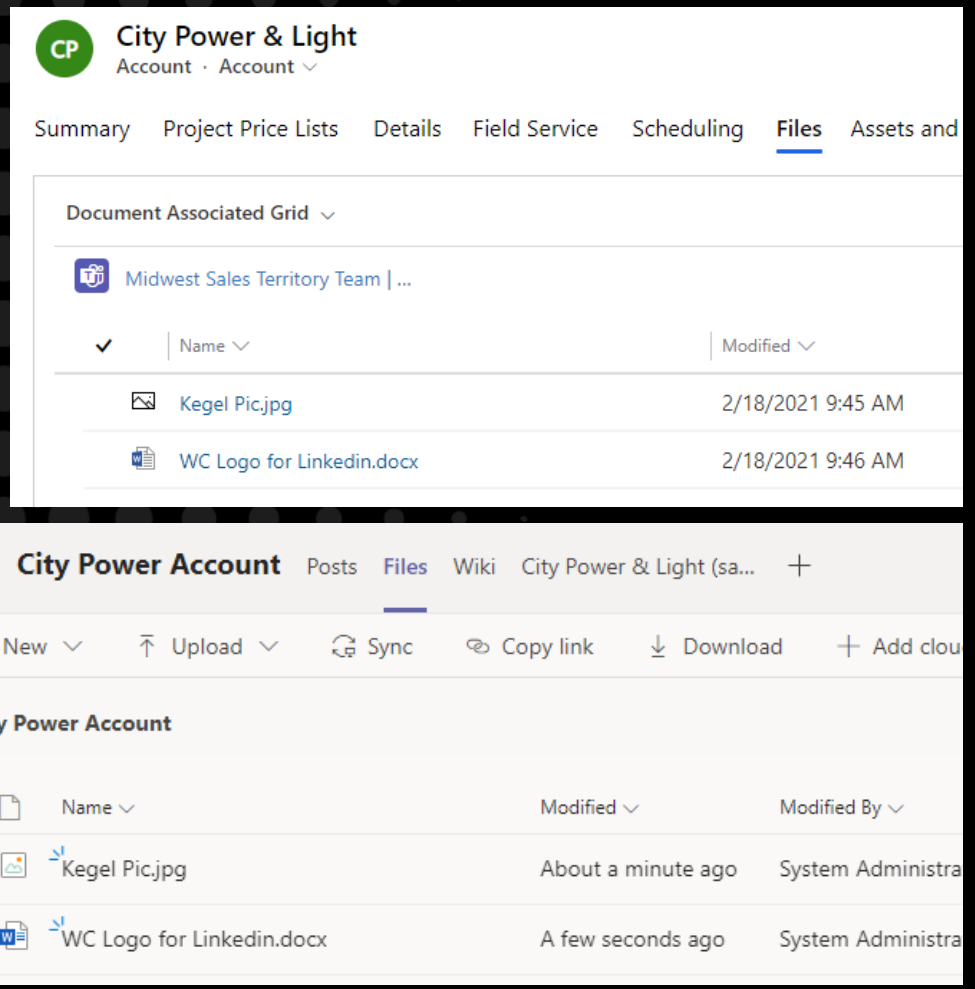
- Connecting from D365 to Teams
- Connecting from Teams to D365



Channel Setup

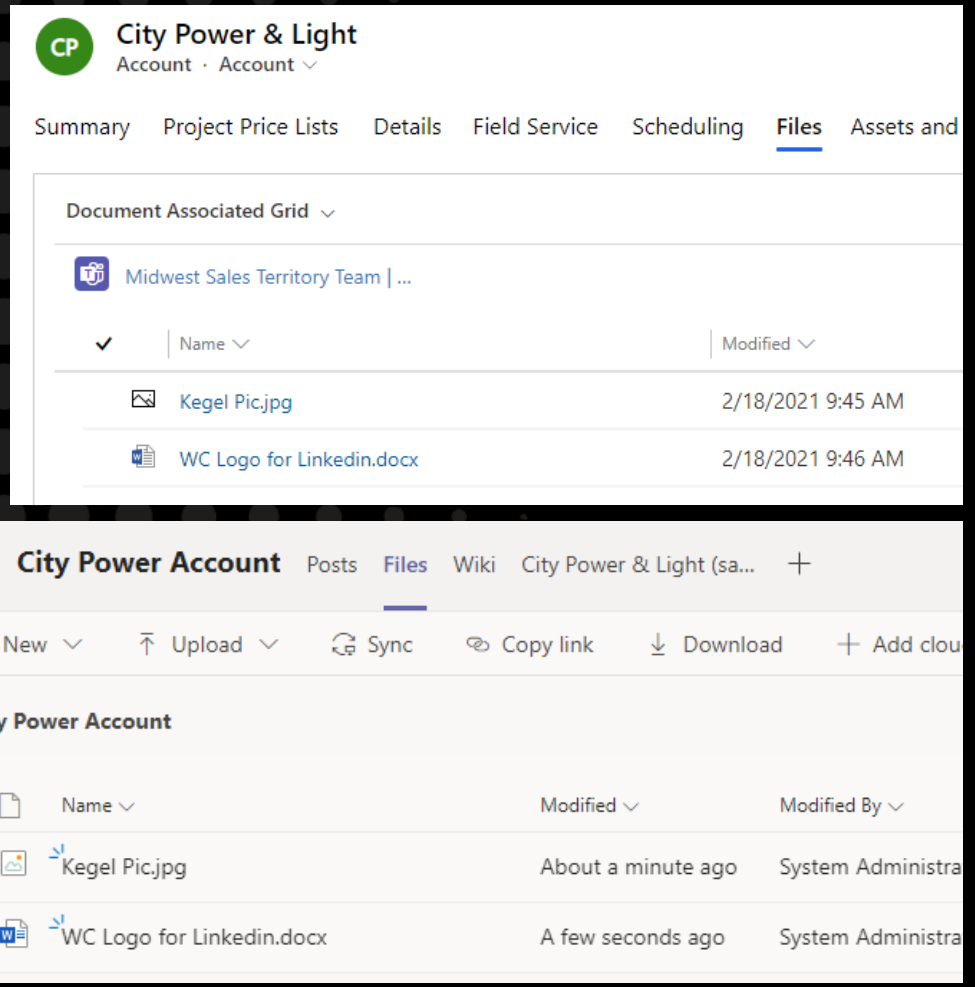
Channel setup in Teams allows you to view one or more records, views, PowerBI reports –

All in one channel !



File Sync

Files are synced between the D365 record and the Teams channel automatically, from either direction -

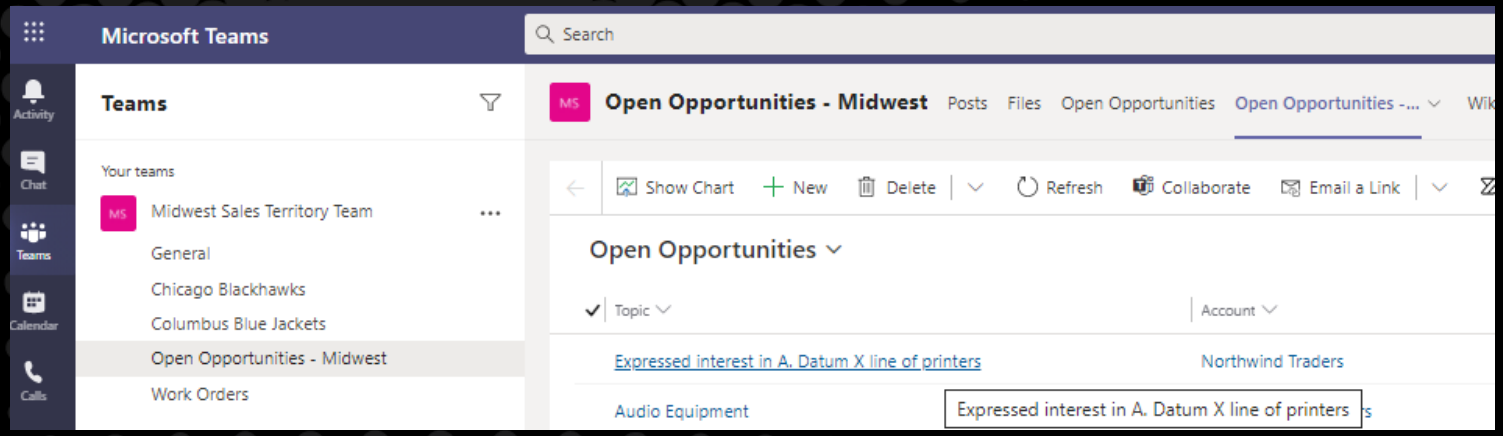


Scenarios of Teams Usage

- Sales team collaborates on target accounts and opportunities for increased efficiency and responsiveness.
- Customer Service team collaborates on escalated cases for faster resolution.
- Project management team focuses on a large opportunity, and the meetings to get the project to a win.

Scenarios of Teams Usage

Sales team collaborates on target accounts and opportunities for increased efficiency and responsiveness.



Sales Team

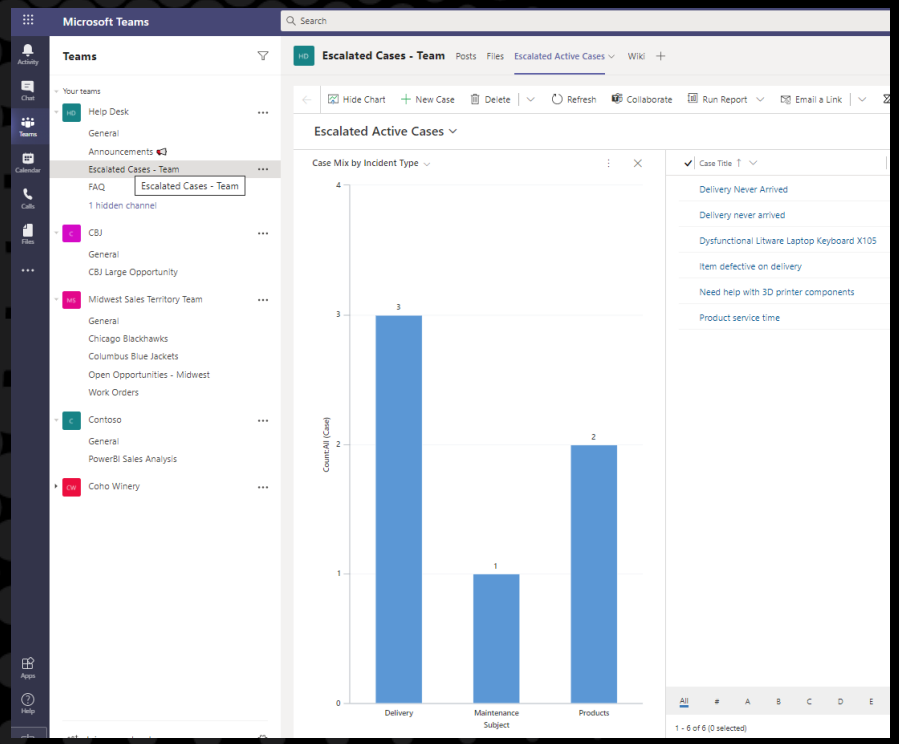
Scenarios of Teams Usage

Sales team collaboration –

- Major accounts listed in the team
- List of items to review, such as the open opportunities in the territory
- Files
- Instant shared communication on the latest happenings.

Scenarios of Teams Usage

Customer Service team collaborates on escalated cases for faster resolution.



Customer Service Team

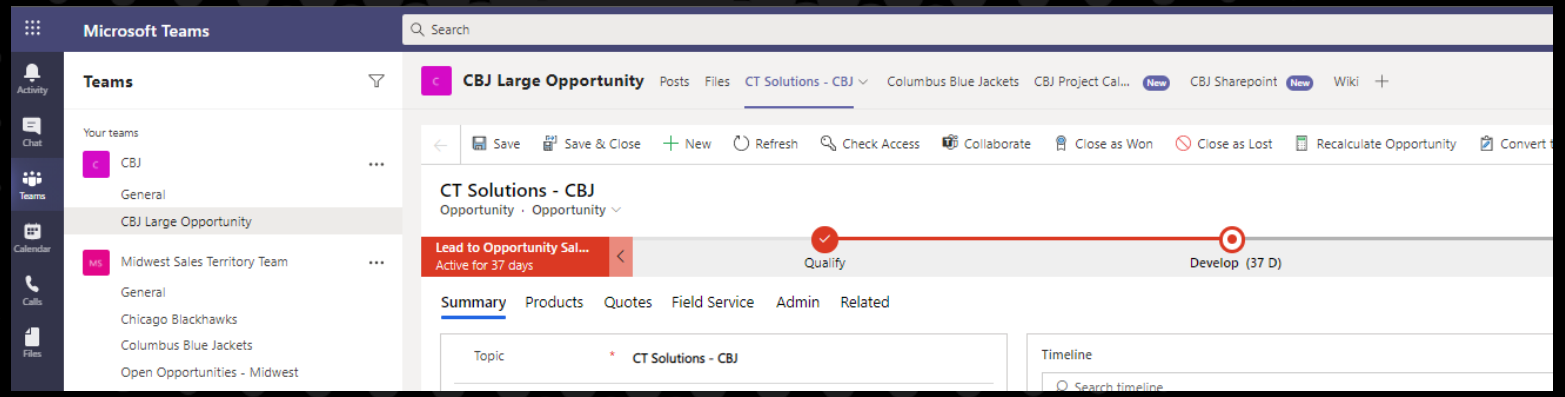
Scenarios of Teams Usage

Customer Service team collaboration –

- List of records to review – such as a daily review of cases that are/were escalated.
- Dynamics 365 charts to show key areas to review and exceptions.
- Individual cases to review and “keep on top of the stack”.

Scenarios of Teams Usage

Project management team focuses on a large opportunity, and the meetings necessary to get the project to a win.



Project Management Team

Scenarios of Teams Usage

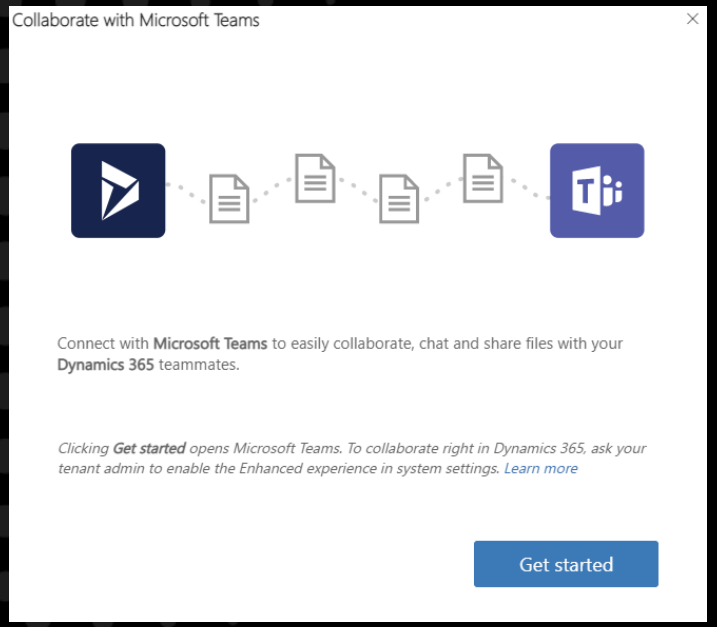
Project management team focus –

- Multiple records in one channel.
- Keep files on a large opportunity/project all in one place and easily accessible.
- Calendar for the project.
- Record of related meetings and recordings.

Connecting Data – Basic vs Enhanced

Basic Collaboration Experience:

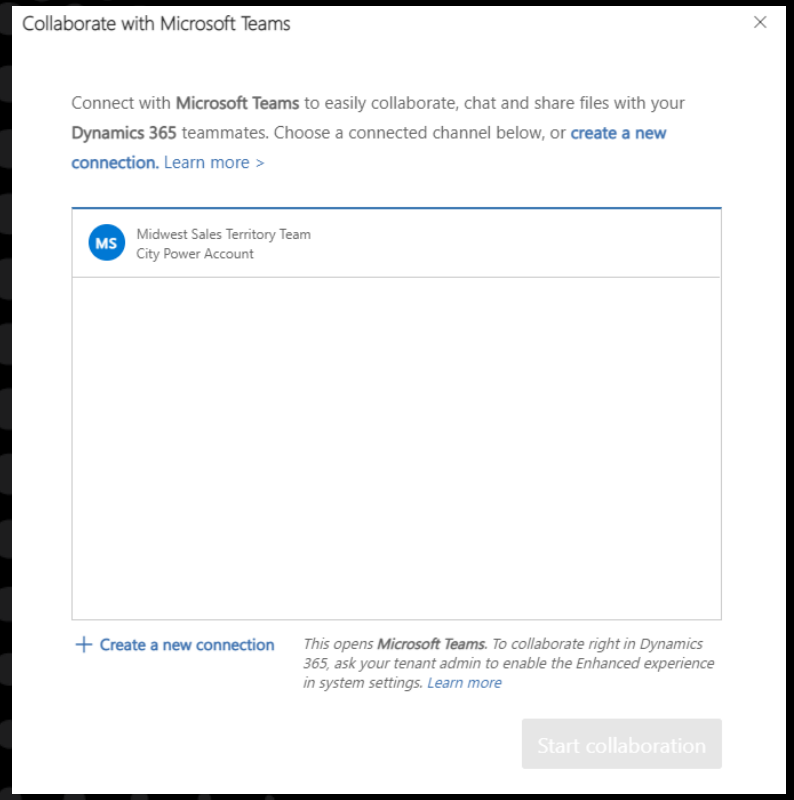
When you choose the **Collaborate** option in customer engagement apps (such as Dynamics 365 Sales and Dynamics 365 Customer Service) record page, the connection set-up process between the app record and Microsoft Teams collaboration channel happens **[only]** in Microsoft Teams.



Connecting Data – Basic vs Enhanced

Basic Collaboration Experience:

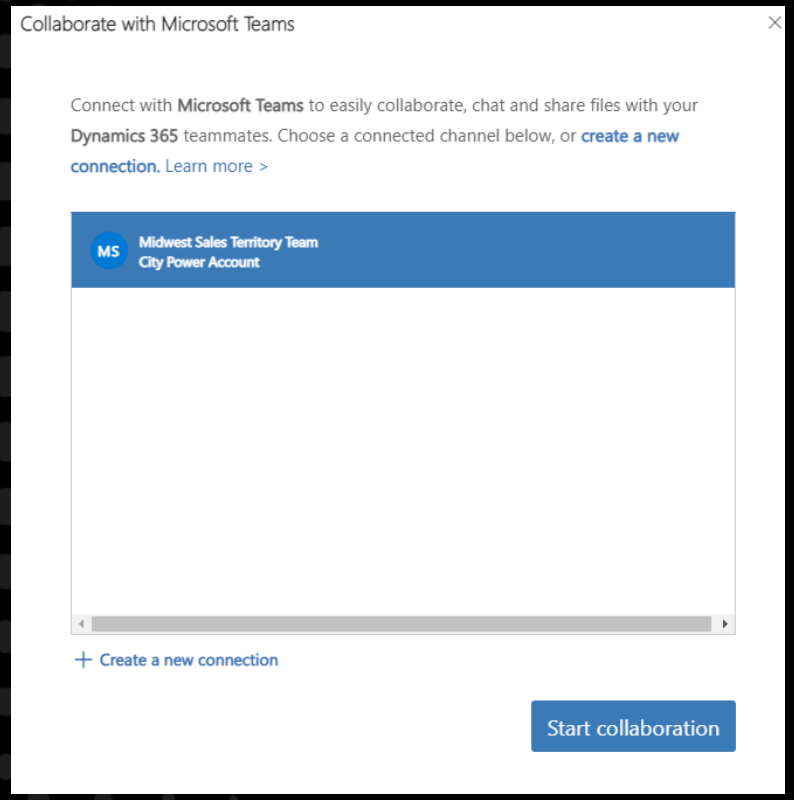
- Once connected to Teams, the **Collaborate** option will take you to Teams.



Connecting Data – Basic vs Enhanced

Enhance Collaboration Experience:

- Connect from D365 to Teams, or Teams to D365
- When you choose the **Collaborate** option in app record or view page, a **set-up wizard** will guide you through the connection set-up process between the app record or view page in customer engagement apps and Microsoft Teams collaboration.



Key Take Aways

Look for places where collaboration can be made more efficient.

Share, converse on, analyze, store…

- Can case resolution time come down?
- Can colleagues be kept up-to-date easily on a project, key account, territory, or product launch…
  - …Use your imagination!

Thank you!

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