



Customer Engagement

A DYNAMICS CON PRESENTATION

dynamicscon.com/virtual

The Shifting Landscape of the Dynamics 365 User Interface & User Experience

The DynamicsCon Virtual Edition



Speaker Bio: Sharon Smith

- Dynamics 365 Solution Architect
- 8+ Years Experience with Dynamics 365 Apps
- Working both Global and National projects
- Specializing in Customer Experience and Customer Service
- Lead Architect on ANS Group's Microsoft FastTrack Portfolio Program



"There's no such thing as Normal"

#Squirrel Club Power



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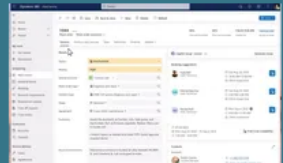
Today's Agenda

- Where were we in Part 1?
- Where were we in Part 2?
- Spotlight on: Dwell Times
 - Copilot Immersive Homepage
 - Copilot for Sales & Project Sophia
- The Future: AI and Autonomous Agents



Meet: The Shifting Landscapes

- aka 'Relegated Timelines and Replaced Business Process Flows'



20 November 2023 | Dynamics 365 First Party Apps

Relegated Timelines and "replaced" Business Process Flows

Are these changes signposting a fundamental transformation in the way we work with the out-of-the-box Microsoft Dynamics 365 Business Applications? 🤔

[Continue Reading](#)



Part 1: 28 February 2024

Microsoft's London Offices in Paddington



Dynamics 365 &
Power Platform
UK User Groups



First Hints: 2023 Release Wave 2: Dynamics 365 Field Service

The image displays two screenshots of the Dynamics 365 Field Service user interface. The left screenshot shows a 'Work Order (35 D)' form with a 'Next Stage' button. The right screenshot shows a 'Work order (preview)' form with a 'Details' tab selected, displaying status, priority, and service account information.

Left Screenshot: Work Order (35 D)

- GENERAL**
 - Work Order Number: Sample_WO13799
 - Service Account: Eourth.Coffee
 - Billing Account: Eourth.Coffee
 - Functional Location: ---
 - System Status: Scheduled
 - Substatus: ---
 - Work Order Type: Diagnosis and Repair
 - Price List: Regular Price List
 - Work Hour Template: ---
 - Work Order Summary: Assess the water flow in Cafe Duo machine. Clean machine. Conduct repairs as required.
- Related**
 - Service Account: Eourth.Coffee
 - Billing Account: Eourth.Coffee
 - Primary Incident Type: Water flow issues
 - Priority: Urgent
 - Work Order Type: Diagnosis...
- CUSTOMER DETAIL**
 - Primary Contact: Sharon Smith
 - Email: claudia@pmgdemo.onmicrosoft.com
 - Address Phone: ---
- INCIDENTS**
 - Water flow issues in Cafe Duo-Device Control Sample_WO13799
- BOOKINGS**
 - Sample_WO13799: 3/1/2024 9:00 AM

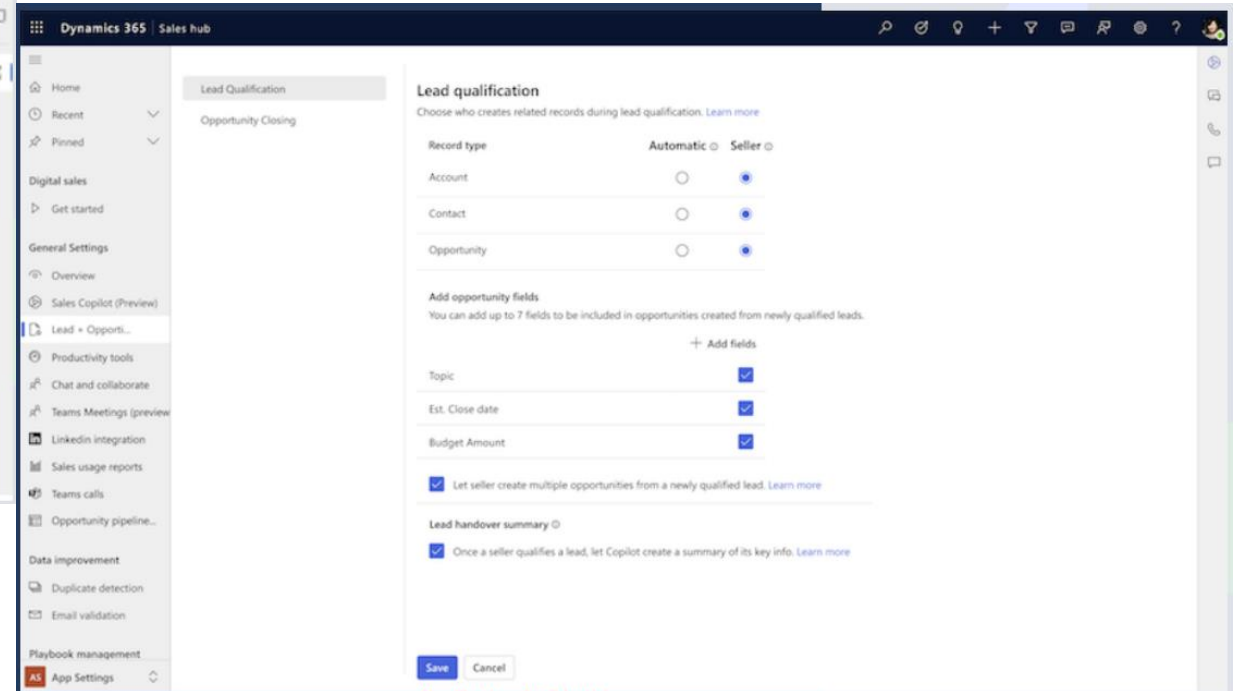
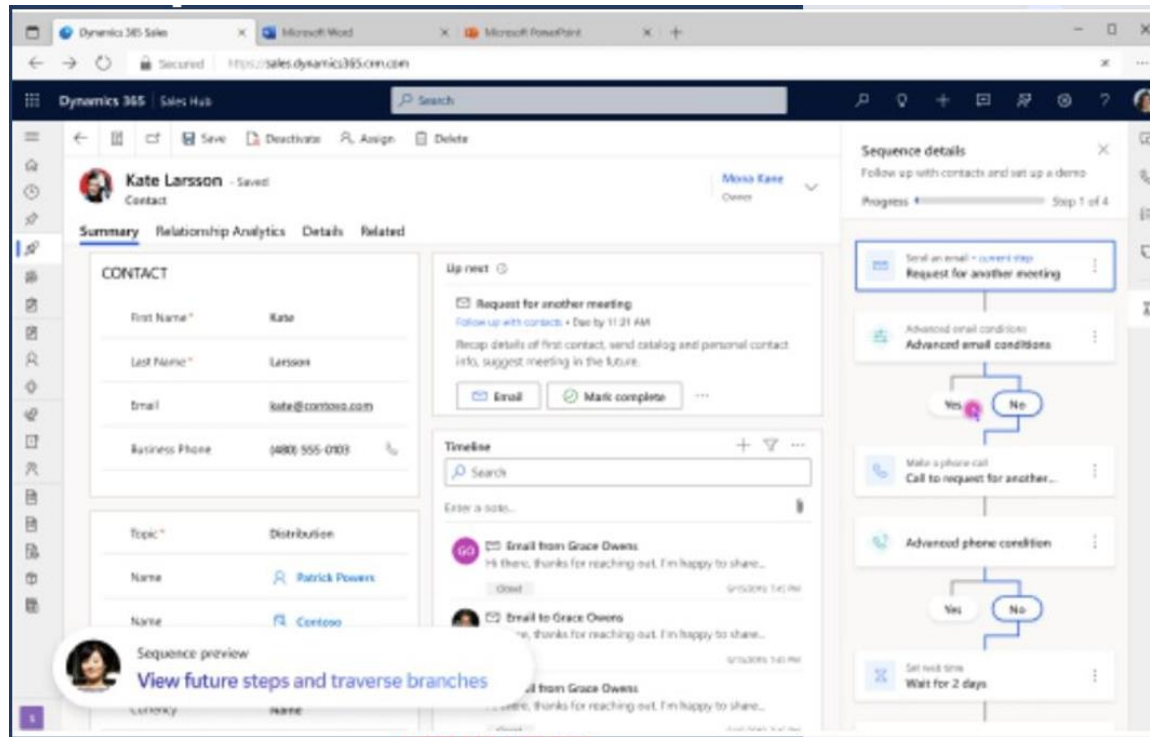
Right Screenshot: Work order (preview)

- Details**
 - Status: Unscheduled
 - Priority: High
 - Service account: Contoso Ltd.
 - Work order type: Diagnose and repair
 - Incident type: HVAC full system diagnosis and repair
 - Trade: Electrical
 - Agreement: 3 year HVAC maintenance
 - Summary: Assess the ductwork, air handler, coils, heat pump, and thermostats. Run all firmware upgrades. Replace filters over 6 months old. Conduct repairs as needed and under NTE. Quote approval required above.
 - Account instructions: Maintenance entrance is located on alley between NE 80th St. and Cleveland St. Call via keypad to enter.
- Booking suggestions**
 - Kadi Bell (HVAC Technician): Tue Aug 30, 2022, 10:00 AM-12:00 PM, 20min travel time
 - Maricel Bautista (HVAC Technician): Tue Aug 30, 2022, 3:00 PM-5:00 PM, 25min travel time
 - Renata Hall (HVAC Technician): Mon Sep 4, 2022, 9:00 AM-11:00 AM, 12min travel time
- Contacts**
 - Account: Robin Counts (Facilities Manager)
 - Phone: +1 260 555 0199

Everything's Important...
...until it isn't



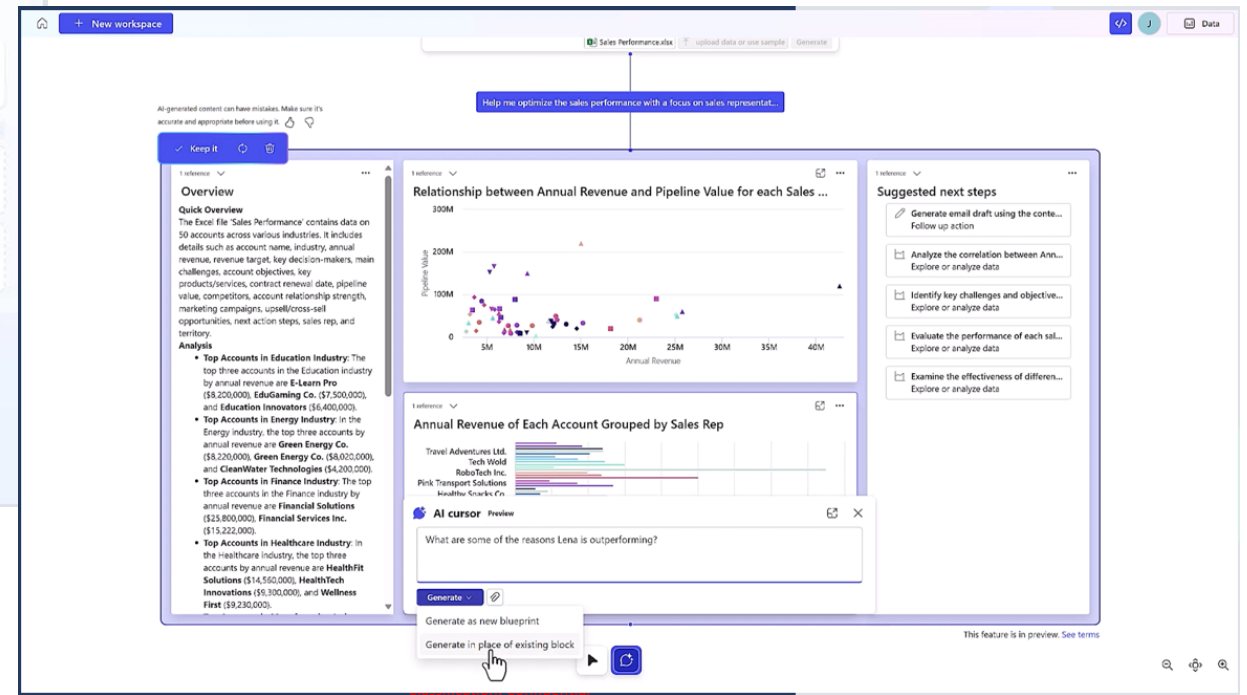
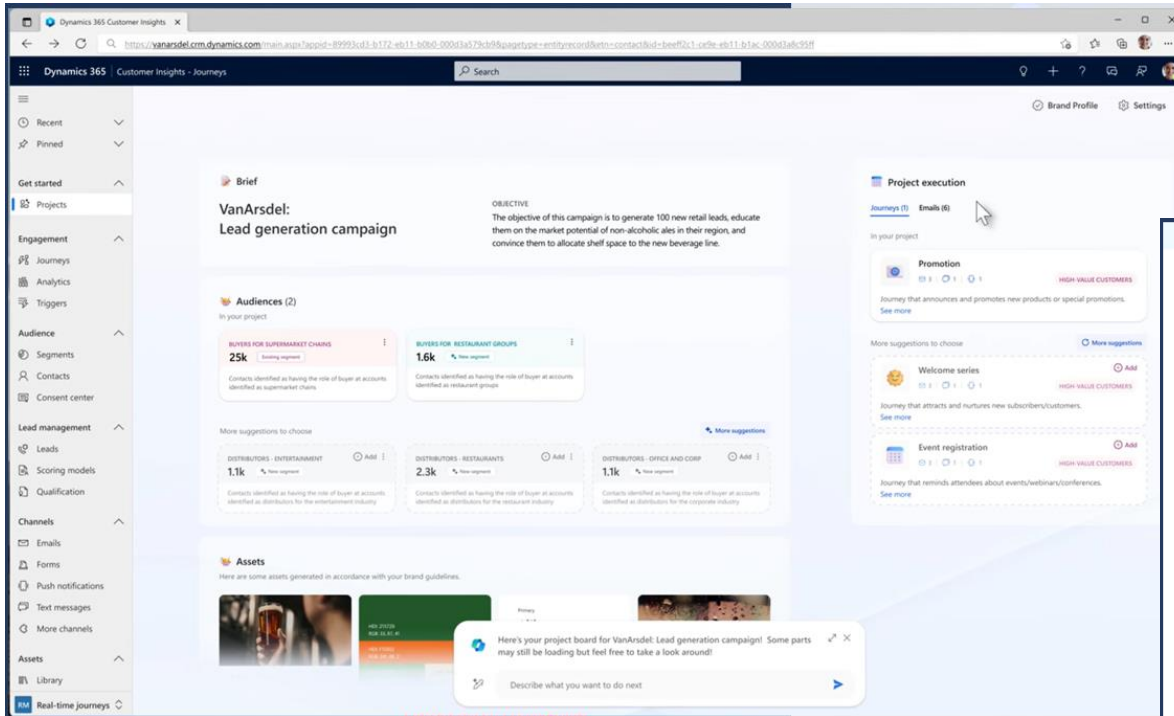
2024 Release Wave 1: Dynamics 365 Sales



Multiple Sequence Steps
“Agile” Lead Qualification



Early Waves: Transformational combination technologies



Customer Insights: Project Board

Project Sophia (spoiler alert!)



Part 2: 24 June 2024

Kings College London
Strand Campus, Safraville 'Hall'



Minding the Gaps: D365 Customer Service & Sales

Agent Scripts

Build out the steps for your Agent Script

The screenshot displays the Dynamics 365 Agent Scripts configuration page. The left sidebar shows navigation options like 'Get started', 'Customer support', and 'Agent experience'. The main area is divided into two panels. The top panel, titled 'Case trial agent script', shows a table of steps:

| Name | Order | Action type | Modified On |
|----------------|-------|-------------|------------------|
| Greet Customer | 1 | Text | 6/1/2024 5:28 PM |
| Update case | 2 | Macro | 6/1/2024 5:28 PM |
| Resolve case | 3 | Macro | 6/1/2024 5:28 PM |

The bottom panel, titled 'Greet Customer', shows the script content:

Hi {anchor._customerid_value@OData.Community.Display.V1.Format...}, Thank you for contacting Contoso Coffee Support. We will work together to find a solution that works for you.

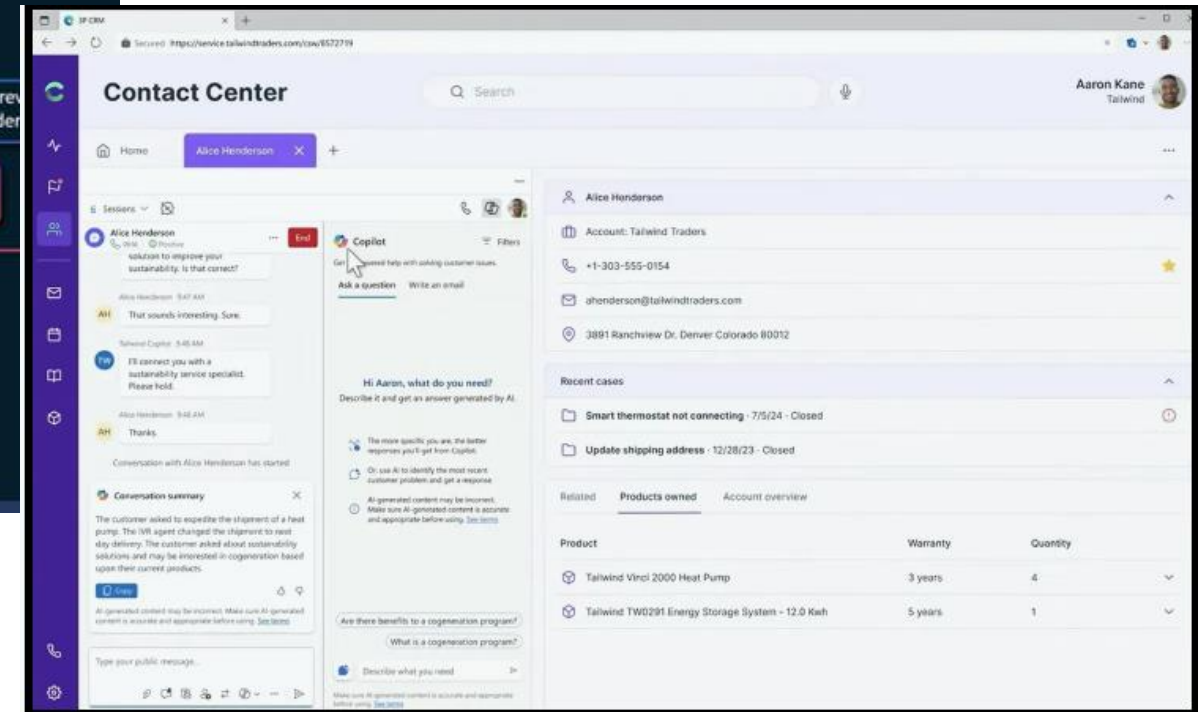
The screenshot shows the Dynamics 365 Copilot Home Page. The left sidebar lists navigation options like 'Home', 'Recent', 'My Work', 'Copilot', 'Sales accelerator', 'Activities', 'Dashboards', 'Customers', 'Accounts', 'Contacts', 'Sales', 'Leads', 'Opportunities', 'Competitors', 'Collateral', 'Quotes', 'Orders', 'Invoices', 'Products', 'Sales Literature', and 'Marketing'. The main area features several widgets:

- Get info**: Get latest news for accounts, Show my pipeline, Use the % menu for more suggestions.
- Ask questions**: What's newly assigned to me, What's new with my sales records.
- Stay ahead**: Prepare for sales appointments, Show emails that need follow up.
- Deal tracker**: A bubble chart showing the probability of deals closing by date. The chart includes a legend for deal stages: 1-Qualify, 2-Develop, 3-Propose, 4-Close.
- Sales funnel**: A list of sales opportunities, including '7 Cafe Corto Espresso Machines for Graphic Design Institute' and 'Low Waste Technology - Organic and Shade-Grown Coffee Beans'.

Customer Service Agent Scripts Copilot Home Page



New Stops: D365 Customer Service & Sales



Copilots with Agent capabilities Contact Center as a Service



New Stops: D365 Customer Service & Sales

Retirement of the three Dynamics 365 Sales and Customer Insights certifications and exams



ASSOCIATE CERTIFICATION

Microsoft Certified:
Dynamics 365 Customer
Experience Analyst
Associate

Three into one...
...does go? But where next?



Dwell Times: 2024 Release Wave 2

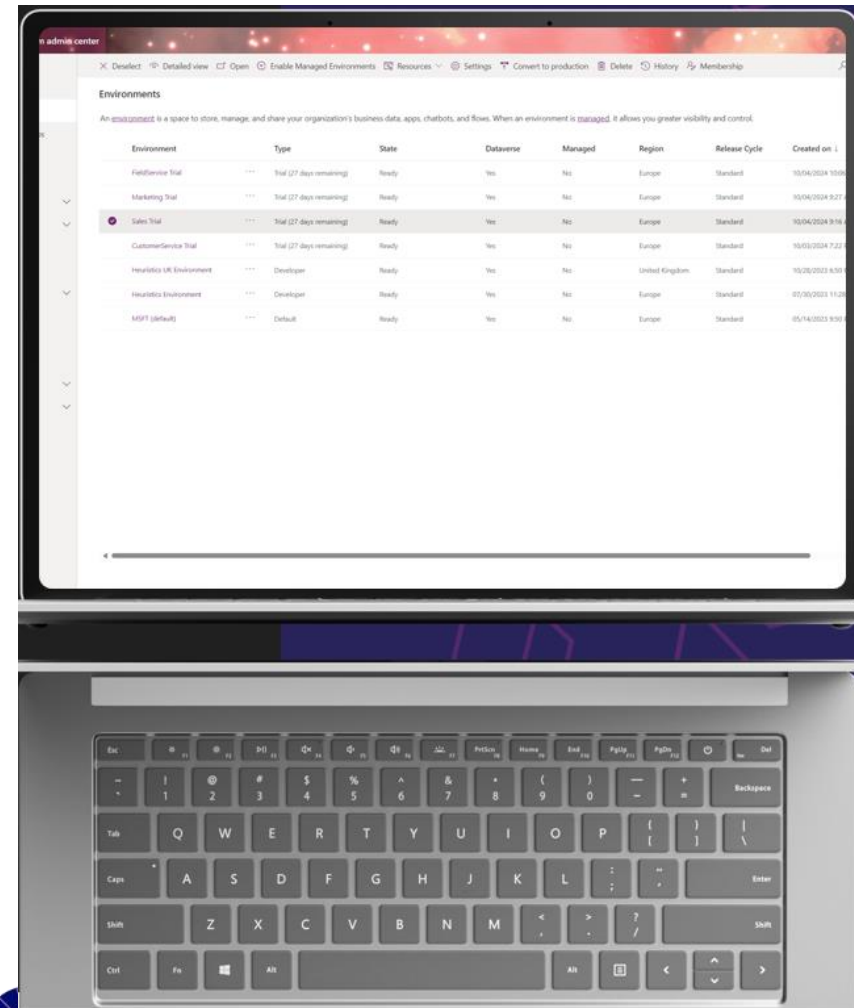
Deep Dives:

Customer Service and

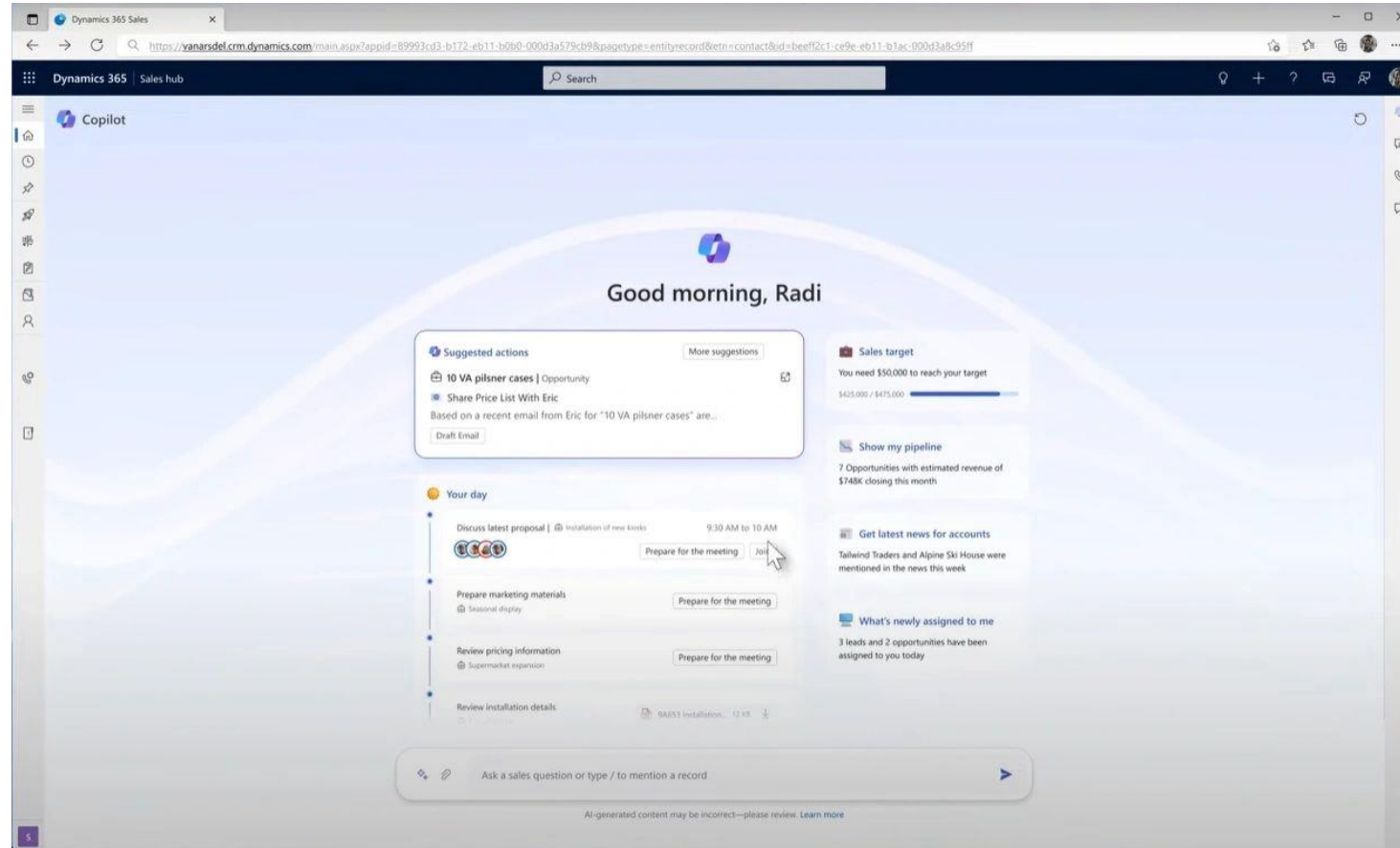
Customer Experience

2024 RELEASE WAVE 2

HeuristicDev
and the Shifting Landscape



2024 Release Wave 2: Dynamics 365 Sales



From 'Wrapper' to Copilot Immersive Homepage



2024 Release Wave 2: Dynamics 365 Sales

The screenshot displays the Dynamics 365 Sales Hub interface. On the left is a navigation sidebar with sections: Home, Recent, Pinned, My Work, Customers, Sales, Collateral, and Marketing. The 'My Work' section is active, showing a 'Copilot' button. The main area shows a list of sales opportunities with columns for status (1 Qualified, 2 Develop, 3 Propose, 4 Close). The first opportunity is '7 Café Corto Espresso Machines for Graphic Design Institute' with an estimated revenue of €110,000.00. Below this list, a red box highlights a Copilot-generated summary for this opportunity. The summary includes details about the estimated revenue, customer need, proposed solution, expected close date, annual revenue, and primary contact.

Copilot Summary:

Summarize opportunity "7 Café Corto Espresso Machines for Graphic Design Institute"

Here's the opportunity summary for 7 Café Corto Espresso Machines for Graphic Design Institute.

- The **Est. revenue** for the opportunity is €110,000.00, which helps in revenue forecasting.
- The **Customer Need** is that the customer wants to outfit their offices with automatic espresso machines.
- The **Proposed Solution** for the opportunity is Café Corto Espresso Machines meeting the customer's requirements.
- The expected **Est. close date** of the opportunity is 6/3/2024 for accurate revenue forecasts.
- The **Annual Revenue** for the account linked to this opportunity is \$120,000,000.00 under the Account entity.
- The **Primary Contact**: Aurora Badillo, from the Account entity serves as quick access to contact details.
- Aurora Badillo holds the job title of a Sales Manager under the Contact entity.

Ask a question about the data in the app. Use / to reference data.

Make sure AI-generated content is accurate and appropriate before using. [See terms](#)

Conversation with Copilot in the Immersive Workspace



2024 Release Wave 2: Dynamics 365 Sales

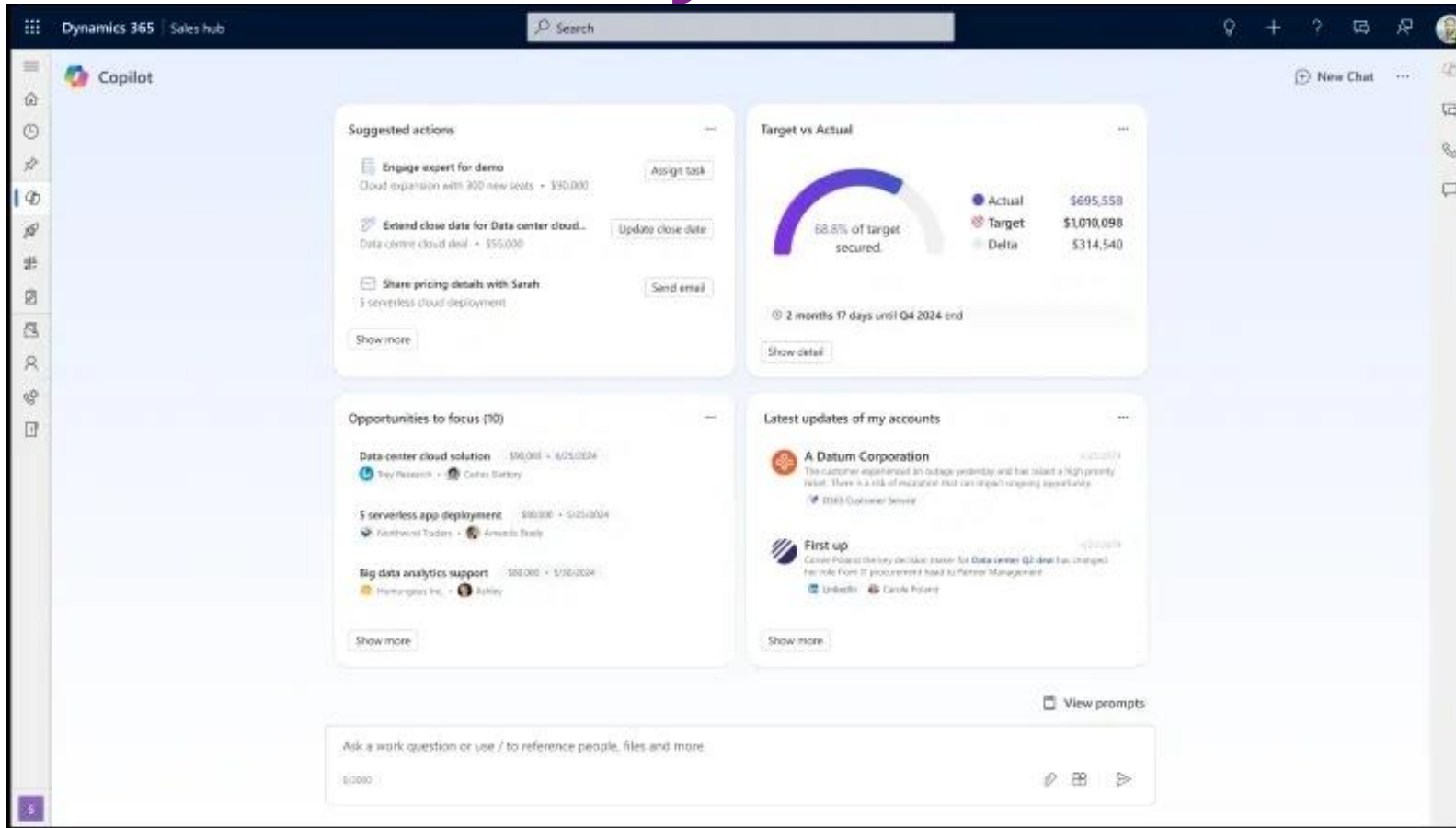
The screenshot displays the Dynamics 365 Sales Hub interface for an opportunity titled "7 Café Corto Espresso Machines for Graphic Design Institute". The interface is divided into several sections:

- Left Navigation Pane:** Includes Home, Recent, Pinned, My Work, Copilot, Sales accelerator, Activities, Dashboards, Customers (Accounts, Contacts), Sales (Leads, Opportunities, Competitors), Collateral (Quotes, Orders, Invoices, Products, Sales Literature), and Marketing (Sales).
- Opportunity View:** Shows the opportunity details, including the Sales Process (Active for 12 days), Qualify (12 D), Develop, Propose, and Close stages. The Summary tab is selected, showing key details like Topic, Contact (Aurora Badillo), Purchase timeframe (This Quarter), Currency (Euro), Budget amount (€110,000.00), Purchase process (Committee), and Description (Buying new machines for their current offices).
- Up next:** A section for managing activities, including a "Connect sequence" button and a "Create activity" button.
- Timeline:** A section for tracking the opportunity's progress, with a "Search timeline" button and a "Enter a note" field.
- Opportunity score:** Displays a score of 89 (Grade A) and includes details like Estimated budget (\$110,000.00), Purchase timeframe (this quarter), Decision maker identified, and Purchase process (committee).
- Copilot Side Pane:** Contains a chat window with a summary of the opportunity and a list of key details. A red box highlights the Copilot chat content, and a red circle highlights the "Ask a question" button.

Conversation transferred to the Copilot Side Pane



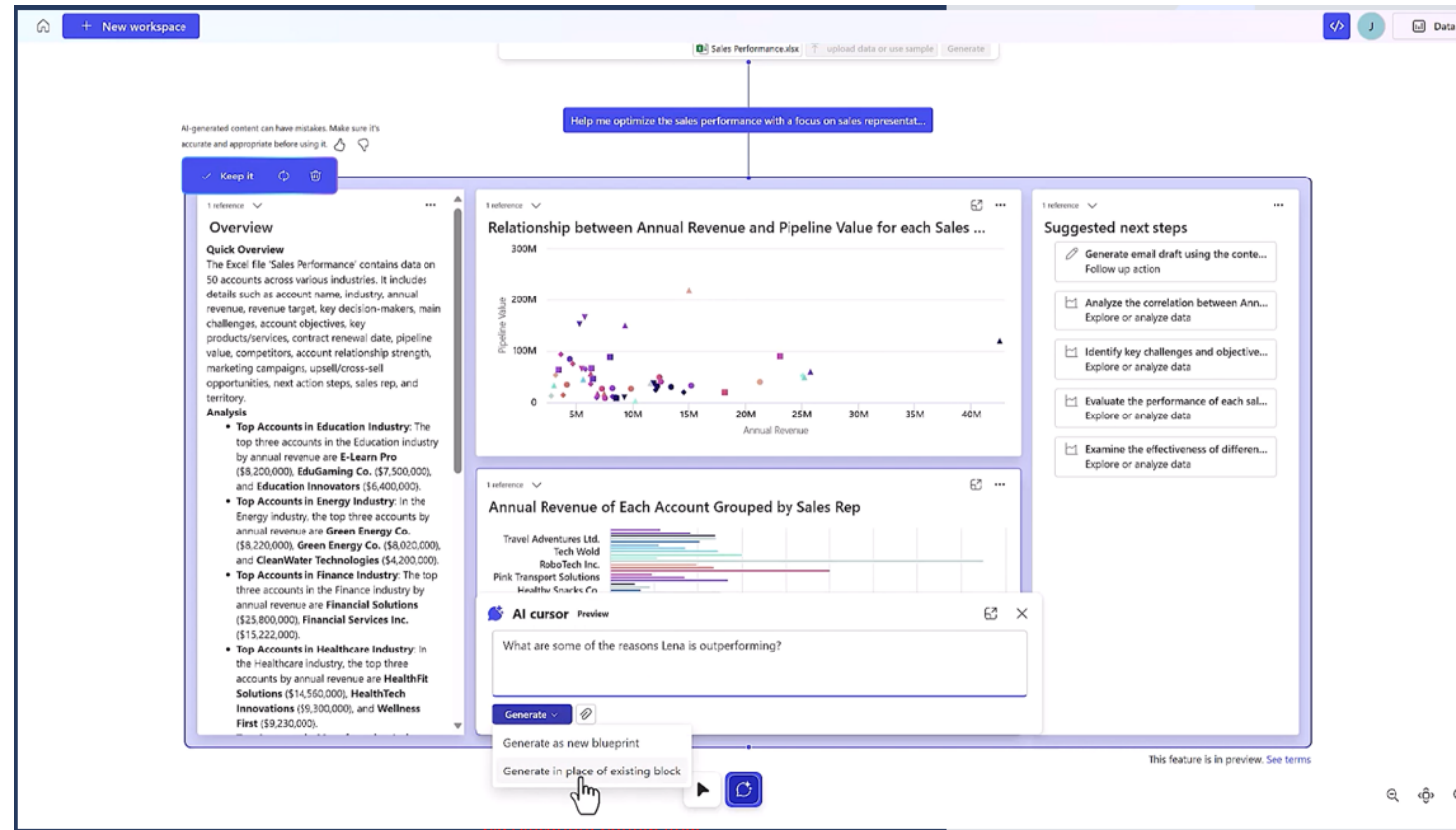
2024 Release Wave 2: Dynamics 365 Sales



Copilot Immersive Homepage 'Dashboard'



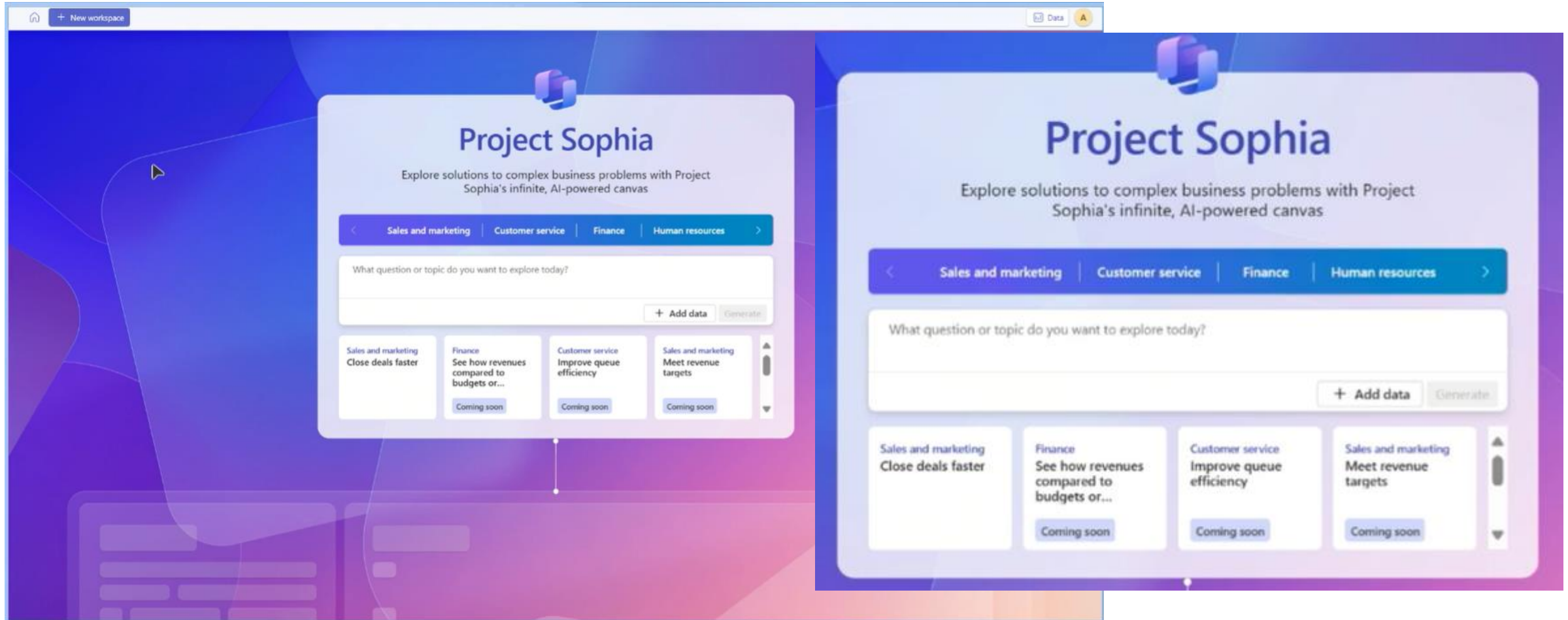
Copilot for Sales: Project Sophia



An Infinite Research Canvas



Copilot for Sales: Project Sophia



Copilot for Sales: Project Sophia

The screenshot displays the Copilot for Sales interface with a sidebar menu and a main content area. The sidebar menu includes options like 'New workspace', 'Account planning', and 'Domain: Sales and marketing'. The main content area shows a list of account planning data with columns for Name, Status, Date modified, Type, and Size. A file explorer window is open, showing the 'Per - Microsoft' folder structure, including 'Sample dataset' and 'Demo Guides'. The 'Sales History Demo Data' file is selected, showing its details: Type: Microsoft Excel Comma Separated Values File, Size: 2.57 KB, Date modified: 2/7/2024 3:20 PM, Availability status: Available on this device, Activity: Shared.

Account plans may help account managers and sellers effectively meet targets and grow revenue. To get started, upload one or more recommended below. You can always add more data later!

- Sales (e.g., revenue, units sold, usage, geography or territory, customer information)
- Pipeline (ideally with status indicators: proposed, active, and closed)
- Customer information (e.g., support case history, customer satisfaction, acquisition dates)

See file requirements

Recent

- Default
- Sales D365

Use data from

- Dataverse
- Dynamics 365 Sales
- Dynamics 365 Customer Service

Upload files (.csv, .xlsx, or .pdf)

+ Add data Generate

Open

Per - Microsoft > Sample dataset > Demo Guides > Account Planning Data

Search Account Planning Data

Organize New folder

Home Gallery

Per - Microsoft

Desktop Documents Microsoft Edge Microsoft Teams Notebooks Pictures Recordings Sample dataset Shared Documents Shared Documents Snagit

| Name | Status | Date modified | Type | Size |
|--|--------|--------------------|------------------------|------|
| Accounts demo data | ✓ R | 10/13/2023 9:43 AM | Microsoft Excel Com... | 4 KB |
| Pipeline demo data | ✓ R | 3/8/2024 9:50 AM | Microsoft Excel Com... | 7 KB |
| Sales History Demo Data | ✓ R | 2/7/2024 3:20 PM | Microsoft Excel Com... | 3 KB |
| Type: Microsoft Excel Comma Separated Values File Size: 2.57 KB Date modified: 2/7/2024 3:20 PM Availability status: Available on this device Activity: Shared | ✓ R | 10/12/2023 9:21 AM | Microsoft Excel Com... | 1 KB |

File name: Custom files

Upload from mobile Open Cancel

Copilot for Sales: Project Sophia

