



Customer
Conference

How to Optimize Your Survey Process:

Using Customer Voice, Power Platform & Innovia's VOICE Method

Feedback is one of the most effective tools for improving any aspect of your business, but do you get all that you need? Whether from customers, employees, shareholders, donors, or other stakeholders, if you want to push your organization forward, you need to know what they're thinking. **One of the best ways to get this insight is to offer a survey.**

But you can't just throw surveys together. **You need a plan, a process, a commitment to engaging with the data, and the right tool to deliver it.** That's where Dynamics 365 Customer Voice, Microsoft's high-powered survey platform, and the Use Your VOICE process come in.

Join this session to learn from Innovia's survey and Power Platform experts on how you can create, deploy, and act on an effective survey for your organization with Microsoft's full-featured set of tools. **We'll help you think through the method and the technology so you can start planning your survey today!**



Today's Presenters

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Presentation Outline

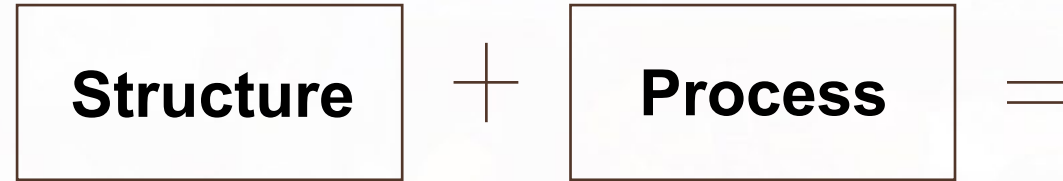
- ✓ Context: Voice of the Customer
- ✓ Survey Data as Management Metric
- ✓ D365 – Customer Voice
- ✓ Customer Voice in Action – Innovia College Football Poll
- ✓ Use the V-O-I-C-E Method
- ✓ Questions

Voice of the Customer

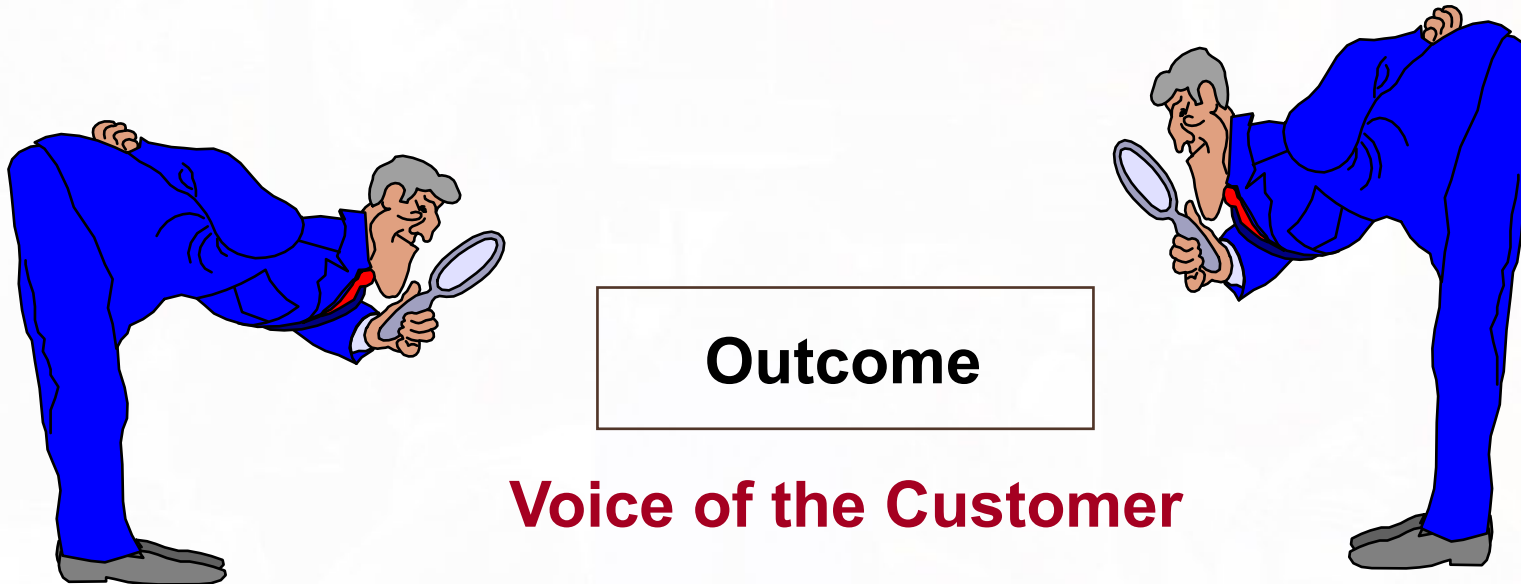
Designing the Customer Journey



Where is Your Emphasis?



Voice of the Process



Voice of the Customer

Survey Data – Metrics for Managing and Decision-making

How survey metrics factor into successful organizations



Who to Survey & Reasons to Survey



Survey Audiences and Timing

- ✓ **Customers (General or specific)**
 - ✓ Executives
 - ✓ Users
- ✓ **Internal Customers**
- ✓ **Employees**
- ✓ **Vendors**
- ✓ **Prospects**
- ✓ **General Public**

- ✓ **Overall – Event-Based**
- ✓ **Point in Time - Ongoing**

SURVEYS & SAUSAGES



SURVEYS R US



What Is D365 Customer Voice?

Soup to Nuts – Survey Process



Dynamics 365 Customer Voice is an enterprise **feedback management application** you can use to easily keep track of the customer metrics that matter the most to your business.

With deep integration from the Dynamics 365 line-of-business applications and built on Microsoft Forms, Dynamics 365 Customer Voice adds rich insights by feeding real-time survey data into customer records.

<https://docs.microsoft.com/en-us/dynamics365/customer-voice/about>

<https://docs.microsoft.com/en-us/dynamics365/customer-voice/about>



Customer Voice

- ✓ Part of the Dynamics 365 platform
- ✓ Uses data from Dataverse (the database behind D365 Sales and Power Platform)
- ✓ Allows you to create and distribute surveys, drawing on the resources in Power Automate and Power Apps



Customer Voice Licensing

- ✓ Comes with 2,000 responses/tenant/month with option to purchase packs of 1,000/month for additional capacity.
- ✓ Customer Voice is included with some Dynamics 365 products, including:
 - ✓ Sales Enterprise
 - ✓ Customer Service Enterprise
 - ✓ Customer Insights
 - ✓ Field Service
 - ✓ Marketing
 - ✓ Human Resources
- ✓ It can also be purchased separately at \$200/tenant/month.



Simple Case Study: DUG Meet-Up Survey

Attendees Use Phone to Read QR Code During Meeting



Note: Post-Meeting: URL Link Sent via Email or Read QR Code



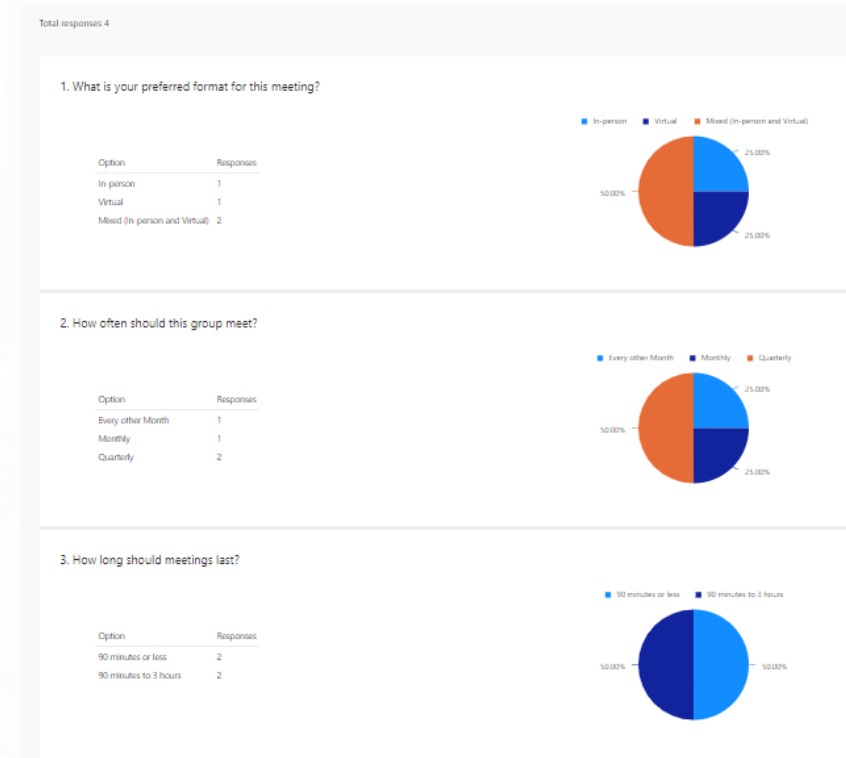
Attendees Receive and Complete Survey

A screenshot of a survey form titled "MICROSOFT DYNAMICS 365 TOLEDO, OH". The form includes a header with a cityscape image and the text "MICROSOFT DYNAMICS 365 TOLEDO, OH". Below the header, it says "Microsoft Dynamics 365 User Group - Toledo, OH" and "We need your ideas to help set the direction of this User Group. Please take 60 seconds and give us your feedback. Thank you." The survey consists of six questions:

- 1. What is your preferred format for this meeting? * (Radio buttons for In person, Virtual, Mixed (In person and Virtual), and Other)
- 2. How often should this group meet? * (Radio buttons for Monthly, Every other Month, Quarterly, and Other)
- 3. How long should meetings last? * (Radio buttons for 90 minutes or less, 90 minutes to 3 hours, and 3+ hours)
- 4. Do you have any suggestions for in-person meeting venues? * (Text input field)
- 5. Is there any content you would like to see in future meetings? * (Text input field)
- 6. What should this group be focused on? * (Radio buttons for General Microsoft, Break out into ERP systems, Mixed content, and Other)



Real-Time Basic Analysis of Survey Data



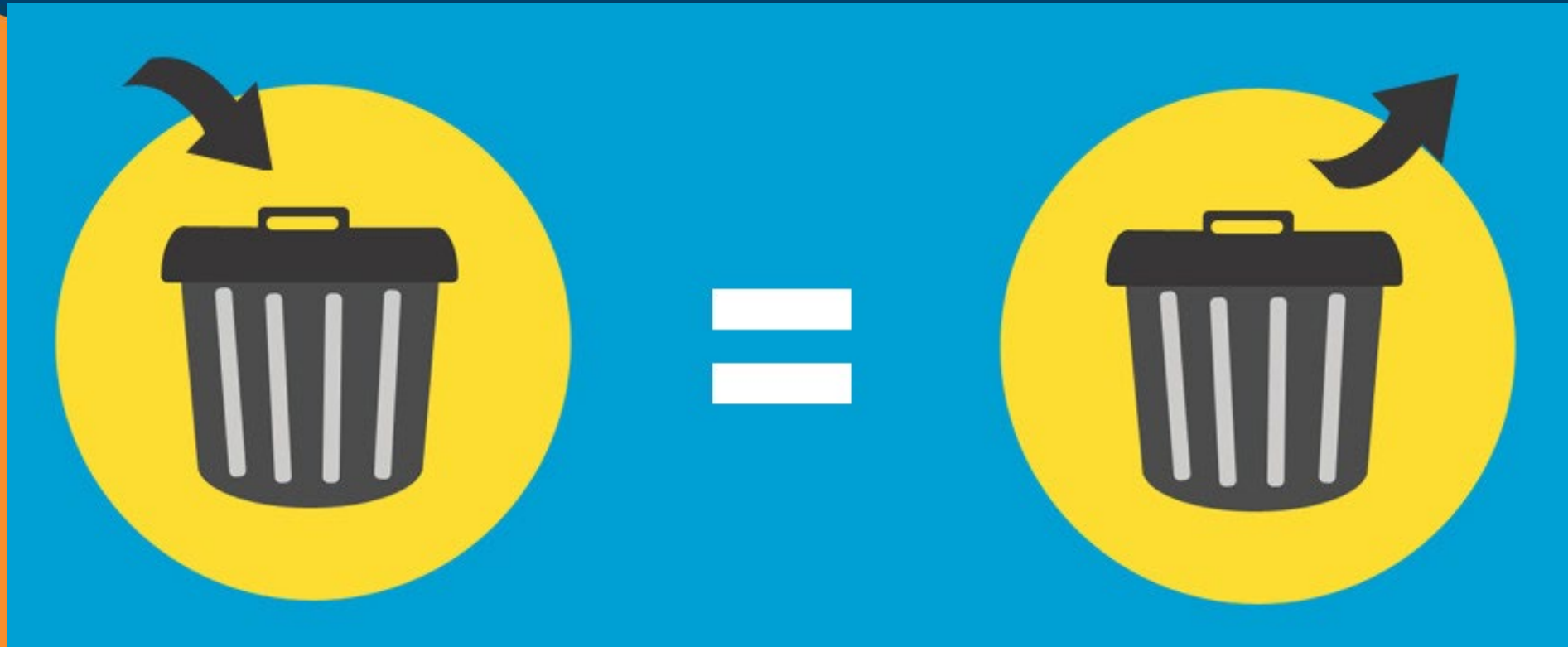
Innovia College Football Poll



Who takes home the trophy in LA in 2023?



Garbage In - Garbage Out



Implementing a Survey Project

V Vet Your Ideas

O Organize the survey process

I Integrate the data

C Customer Voice – to create, distribute, record

E Engage with the data



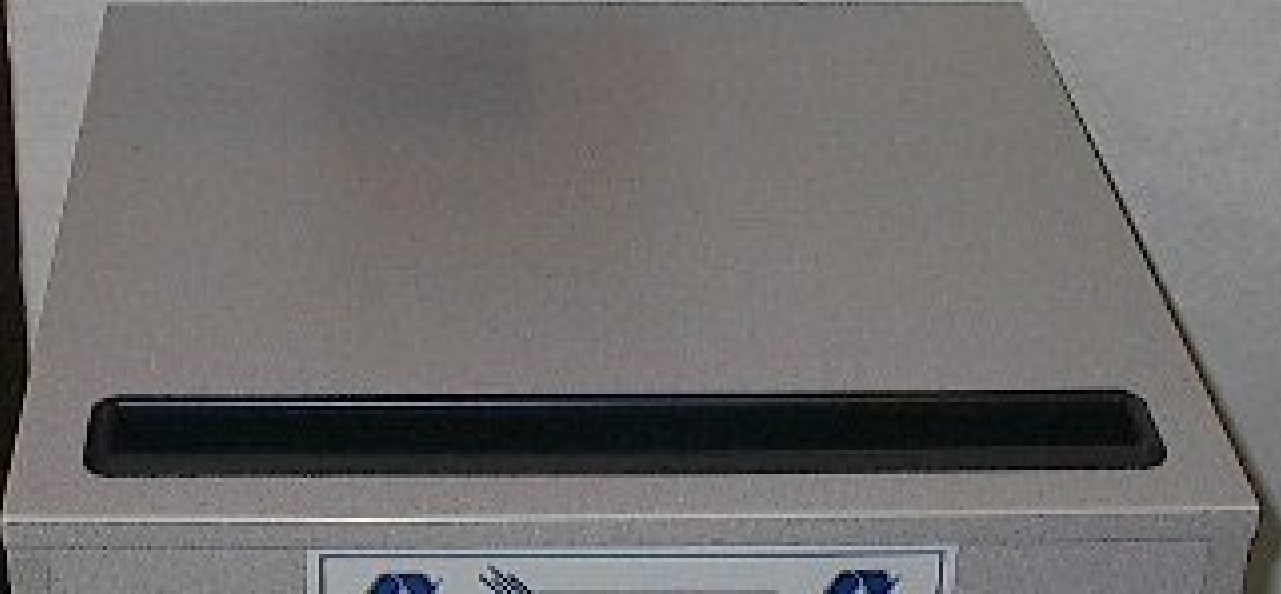
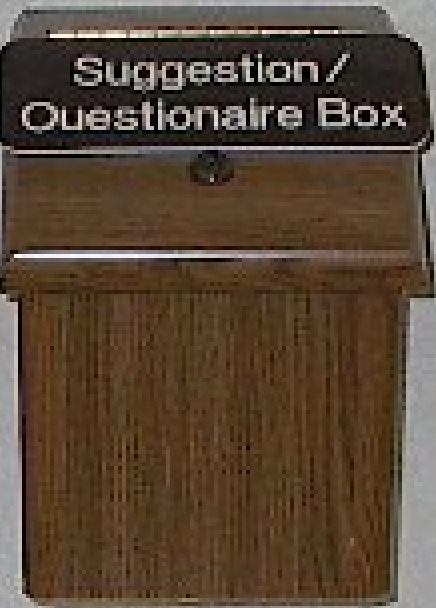
V

Vet Your Ideas



O

Organize the
Survey Process



Farcus

by David Waisglass
Gordon Coulthart

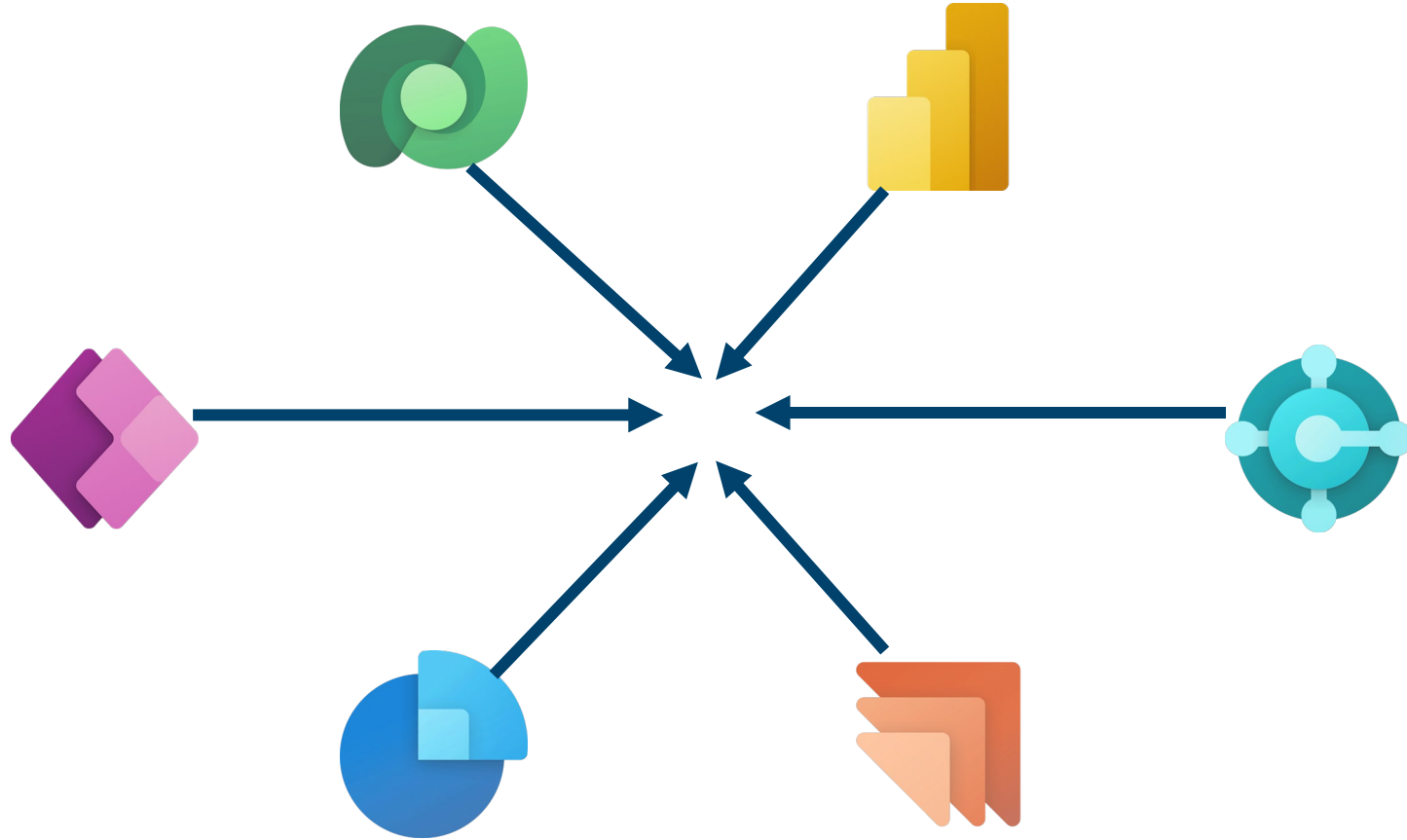


www.farcus.com

**“We need to improve morale ... any of you
boneheads have a good idea?”**

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CONSULTING



I

Integrate the Data

Drilling into the Data

- ✓ Begin with the end in mind.
 - ✓ What analysis (filters) would make sense in the reports.





C

Customer Voice for
Design & Deployment

Design and Deploy

- ✓ Survey design is similar to forms.
- ✓ Selection is based on criteria in BC.
- ✓ Email is done via BC. (QR code and link)
- ✓ Triggers can be set for thank yous and reminders.
 - ✓ Trigger based on results to a person for immediate follow-up.
- ✓ Initial results presented in Customer Voice.
- ✓ Power BI produces next level analysis.



Dataverse or
D365 Sales

Your Data



Customer Voice

Create Surveys

Distribute

Record Results
Back to Dataverse



Power Apps

Use a Model-Driven
App to Browse Surveys
and Responses



Power Automate

Distribute
Automatically
Based on a
Trigger

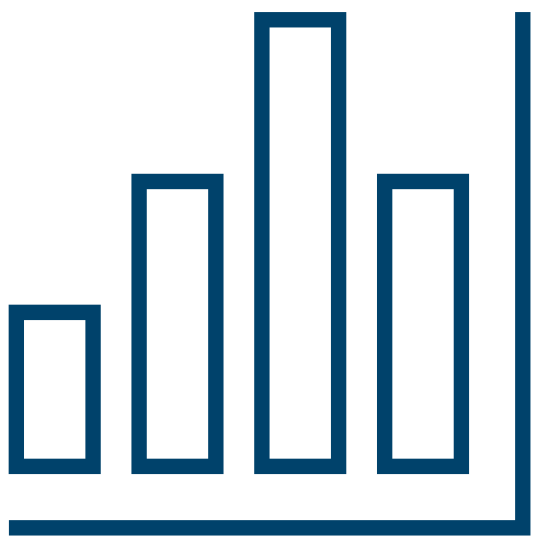
Create Follow-
Up Actions
Based on
Results

Innovia College Football Poll



✓ Who takes home the trophy in LA in 2023?





E

Engage with the Data

Survey Results

- ✓ Simple results in real time.
- ✓ Links to the data in the Dataverse.
- ✓ Use Power BI for analyses and reporting.
 - ✓ Can also dump data into other statistical programs.

Sample Size 100

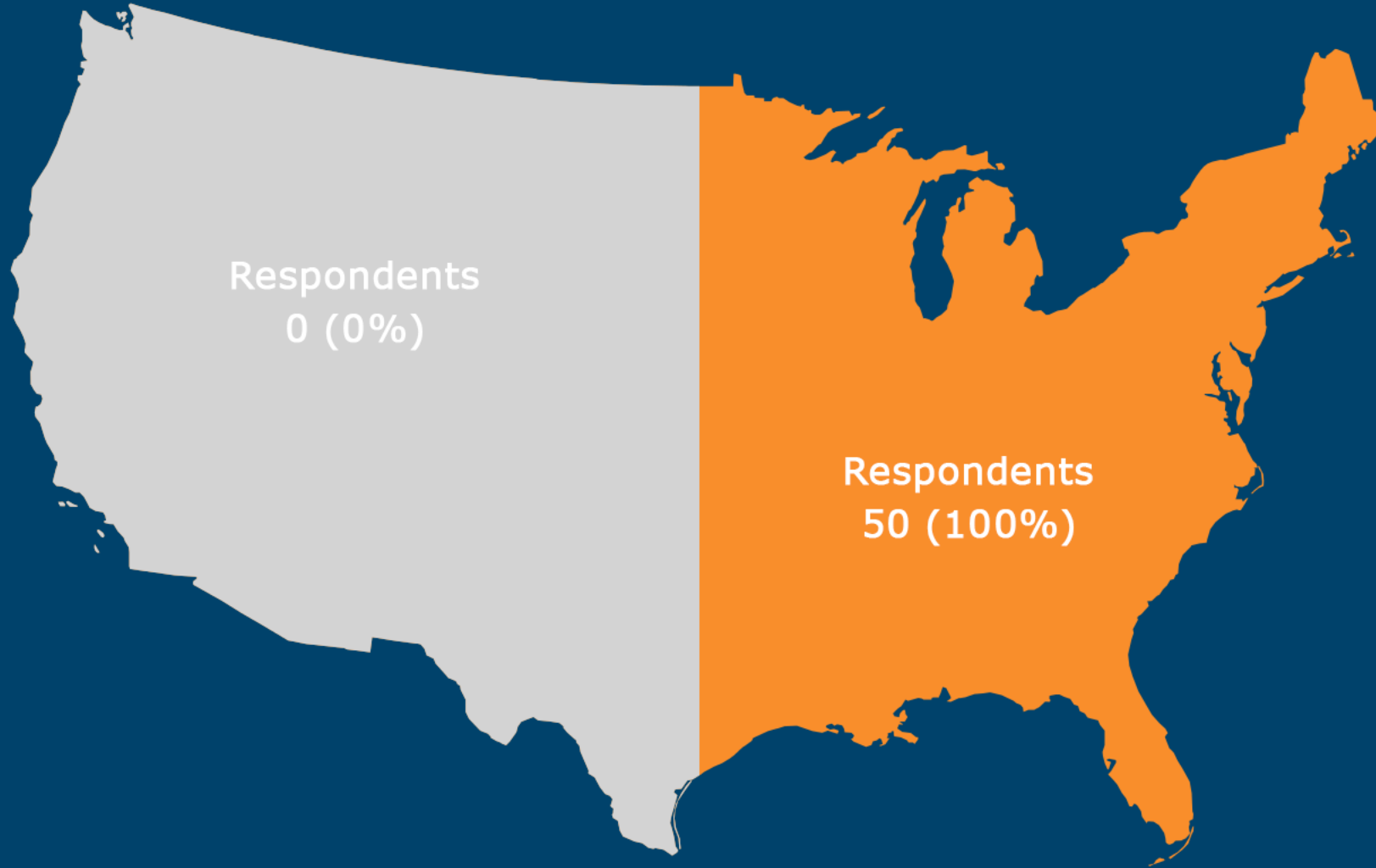
50%
West Coast



50%
East Coast

Sample Size 100

50%
West Coast



Respondents
0 (0%)

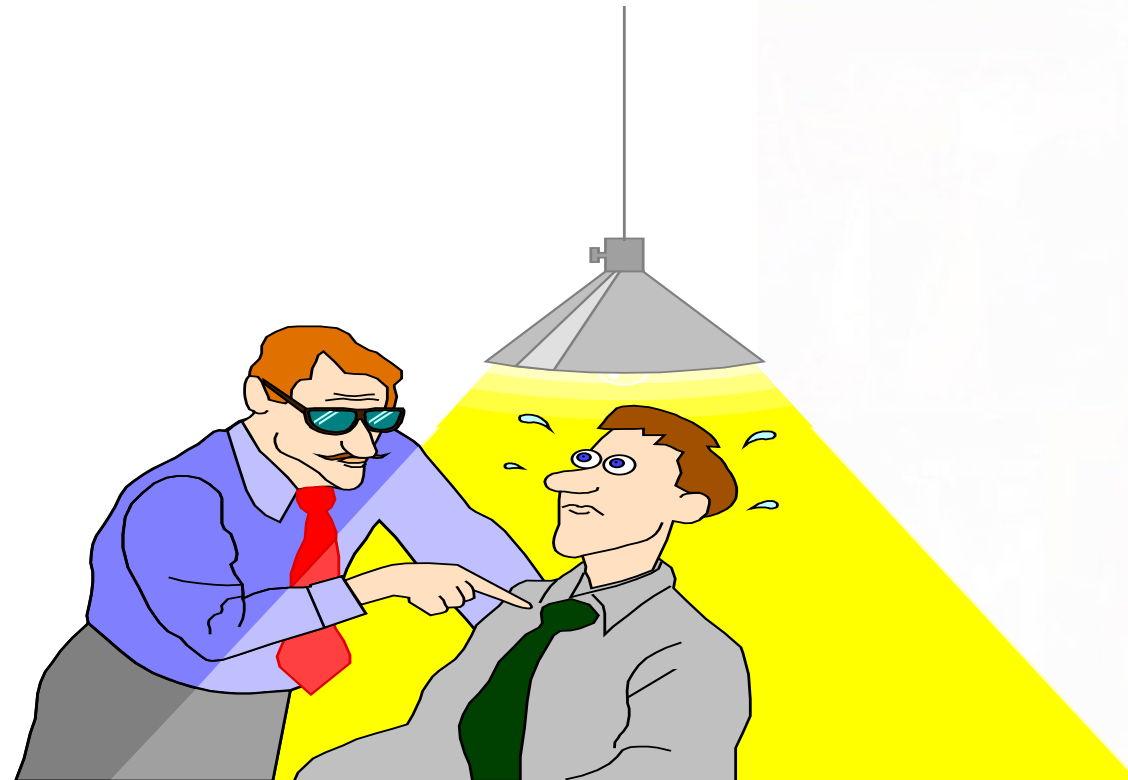
Respondents
50 (100%)

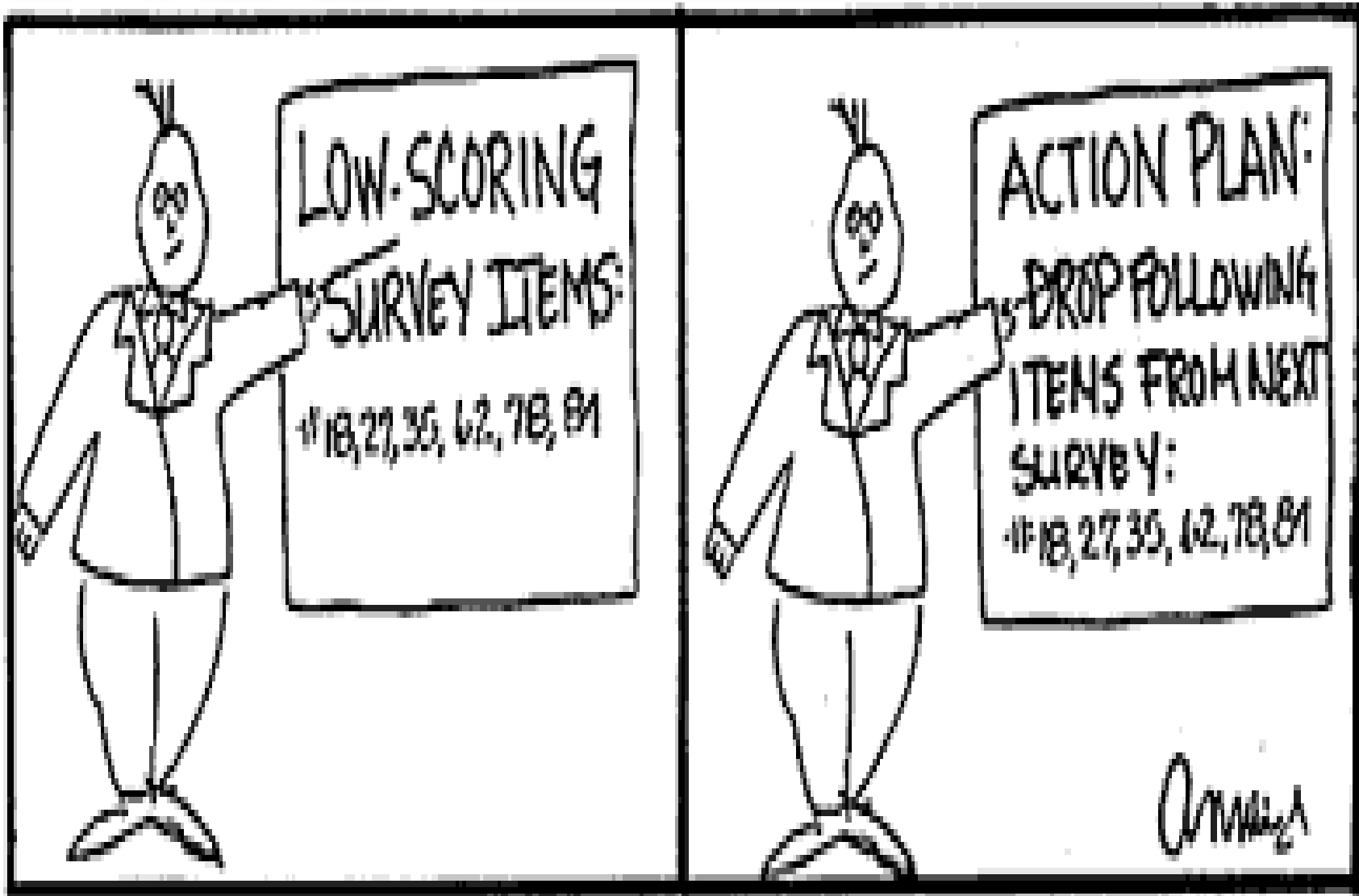
50%
East Coast

50 Total Respondents (50% Response Rate)

“If you torture data long enough,
it will confess.”

- *Unknown IT professional*





CEO IN DENIAL

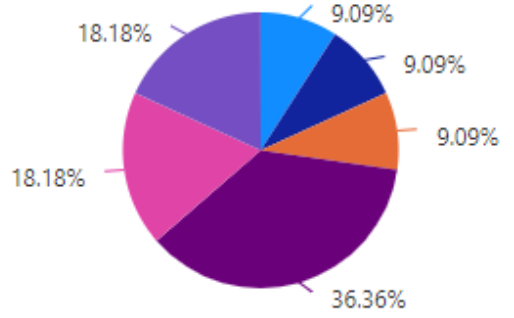
Key Takeaways

- ✓ Customer Voice lets you get the feedback you need and works with your existing data.
- ✓ Through Power Automate, you can both distribute surveys programmatically and have automated actions taken based on the results.
- ✓ A simple Model-Driven Power App is all you need to browse through your results.

1. Which of these teams do you think is most likely to win the 2023 College Football Championship?

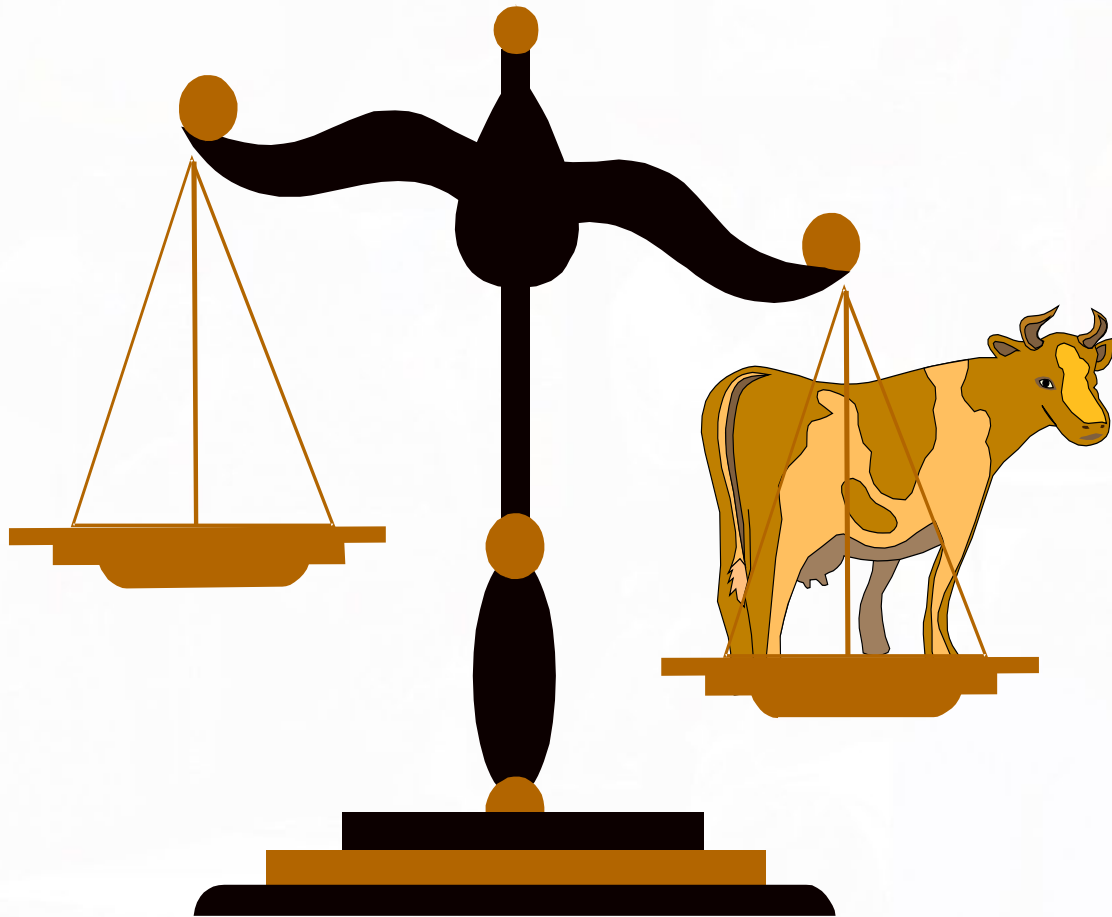
Option	Responses
Michigan Wolverines	1
Michigan State Spartans	1
Alabama Crimson Tide	1
Ohio State Buckeyes	4
Notre Dame Fighting Irish	2
Georgia Bulldogs	2

Michigan Wolverines Michigan State Spartans Alabama Crimson Tide
Ohio State Buckeyes Notre Dame Fighting Irish Georgia Bulldogs



“You can’t fatten a calf by weighing it...”

- Old Proverb



Ways to Prenotify Your Audience

- ✓ Email
- ✓ Company newsletter
- ✓ Mention it in conversation
- ✓ Put it in your email signature

