



LISTEN



UNDERSTAND



KNOW



CONNECT



C5insight

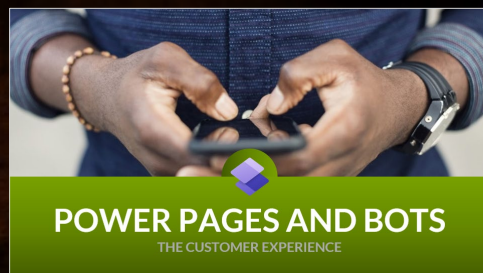
Dynamics 365 CRM

Self-Guided Customer Engagement Demo

Using the Demos

- *Most slides contain one or more demo links in orange, as you see below.*
- *Click the links to play short videos of each feature.*
- *Click your browser back button after each video to return to the presentation.*
- *Contact C5 Insight (www.c5insight.com) to get a full or custom demo tailored to your needs.*

DEMO TOPICS (CLICK ONE)



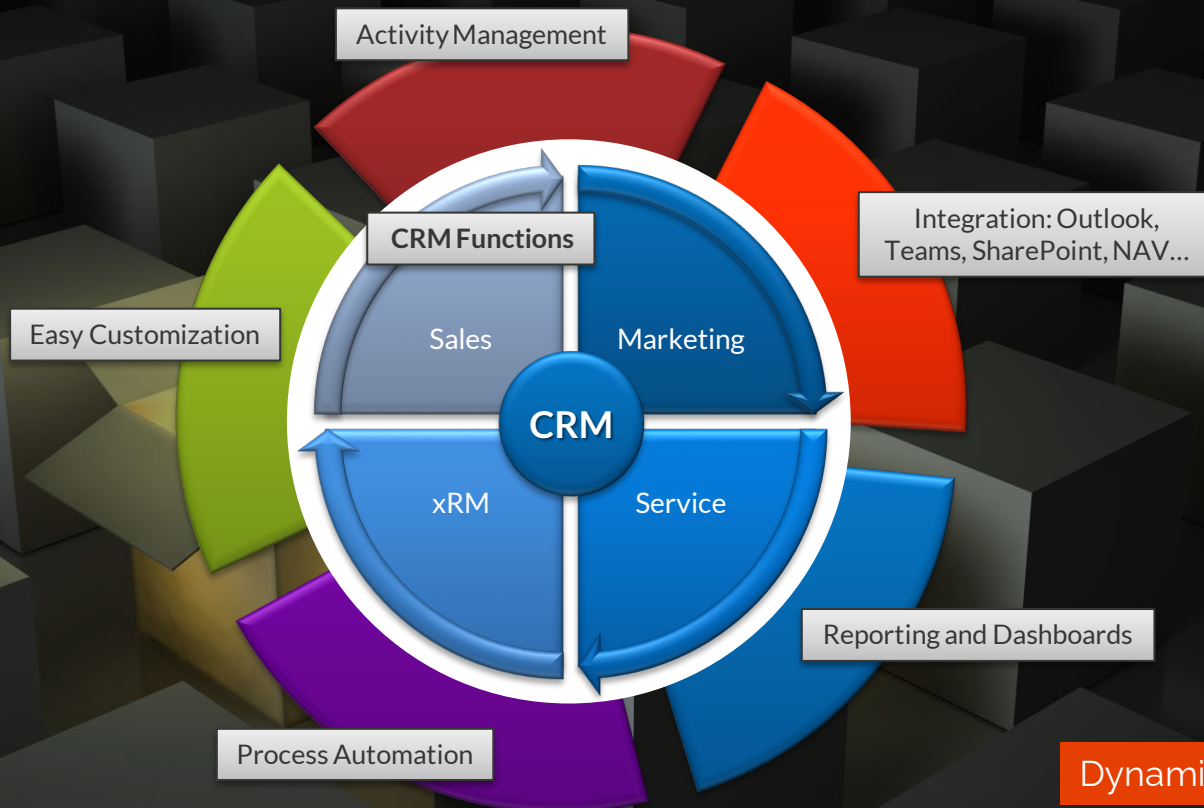


360 DEGREE VIEW

CUSTOMER RECORDS, DASHBOARDS, REPORTS AND
THE USER EXPERIENCE

Customer Relationship Management

Sales, Marketing, Customer Service and xRM Solution



Global Search

- Search all Tables in One Place
 - Includes text inside of documents
- Applies AI for Word Forms and Typos
- Prioritizes Results
- Can be Extended to SharePoint Search and Bing Search

Global Search – 0:27

SharePoint Dataverse Search – 1:46

360-Degree Customer View

- Accounts:
 - Companies and Organizations
 - 360-Degree View of the Account
- Contacts:
 - People
 - One Account can have multiple Contacts
- Timeline
 - All Activities in One Place

Accounts – 1:27

Contacts – 0:45

Activity Timeline – 1:30

Reports and Dashboards

- Charts and Dashboards
 - Charts visualize list data
 - Dashboards consist of charts and lists
 - Drill-down for more info
- Interactive Dashboards
- Easy to Create

Charts and Dashboards – 1:27

Dashboard Drill-Down – 1:33

Interactive Dashboards – 1:52

Creating a Dashboard – 0:43

Power BI

- Separately Licensed Product
- Add to Dynamics Dashboards
- Create from Dynamics 365
- Combine Data from Multiple

Power BI in D365 – 0:45

Excel and SSRS

- Excel
- Report Builder (SSRS)

Reporting with Excel – 1:15

SSRS Reports – 0:54

User Experience Overview

- Navigation

Navigation – 0:52

- Apps
- Tables and Modules
- Forms

- Tables and Views

Tables and Views – 0:59

- Lists of Records (contacts, activities, etc)
- Sortable, Filterable, Searchable

- Forms

Forms – 1:05

Keeping it Simple

- Customizable User Experience
 - Navigation
 - Views
 - Forms
 - Buttons
- Different Experiences for Different Users

Click to Return to Menu





DYNAMICS 365 SALES

The Default Sales Process



Lead

**Info about the
business**

**Info about the
person**

**Info about the
opportunity**

QUALIFY

DISQUALIFY



Account



Contact



Opportunity



Lead Generation

- Lead Entry
 - Web
 - Email (Integration)
 - Email (Automated Creation)
 - Business Card Scan
 - Import
 - Data Entry

Web-to-Lead – 1:16

Outlook-to-Lead – 1:17

The Lead Form

- Data Capture
- Next Activity
- Timeline
- Files
- Business Process Flow
- Everything is Customizable

Lead Management

- Planning and Tracking Activities
 - Sales Accelerator
 - Outlook Integration
- Working a Lead
 - Activities (and Teams Integration)
 - Process Flow
 - Lead Conversion

Sales Accelerator – 1:14

Outlook Calendar – 0:46

Working a Lead – 1:01

Opportunities

- Opportunities
 - Fields
 - Working with Activities
- Business Process Flows

Opportunities – 1:04

Business Process Flows – 1:17

Quotes, Orders and ERP Integration

- Product Line Items
- Quotes
- Converting to Orders
- ERP Integration:
 - Quotes
 - Orders
 - Invoices

Opportunity Line Items – 0:26

Quotes, Orders, Invoices – 1:45

Working With Documents

- Word Mail-Merge
 - Merge fields from Dataverse
 - 1 Click to Generate Document
- Creating PDFs
 - Create and Attach in 1 Step
 - Save to Hard Drive or SharePoint
- SharePoint Storage
 - Store and Access Documents in SharePoint

PDF Capabilities – 1:00

SharePoint Documents – 1:34

Mobile for Sales

- Home Page
- Meeting Details
- Speech-to-Text and Handwriting
- Search and Viewing Records
- Offline Availability

AI: Sales Insights - Basic

- Assistant
- Auto Capture / Activity Suggestions
- Email Engagement

Sales Accelerator

- Assignment Rules
- Sequences
- Segments

Conversation Intelligence / Teams

- Teams Calling

Teams Calls and Conversation AI (3:14)

- Requires Teams and Calling Plan
- Click-to-Call
- Premium: Transcription, call notes, key words, action items

Other Advanced AI

- Relationship Analytics
- Who Knows Whom
- Lead and Opportunity Scoring

LinkedIn Sales Navigator

- See LinkedIn record on lead, account, contact, opportunity
- Save CRM records to LI Lists
- Sync InMail to CRM
- Create new CRM records from LI
- Validate and update CRM record data
- Sync photo

The screenshot displays the LinkedIn Sales Navigator interface integrated with Dynamics 365. The top navigation bar shows the path: Sales > Opportunities > Contoso interested in digital transformation. The main header area includes the opportunity name, estimated close date (10.23.17), estimated revenue (\$1,000,000), status (In progress), and owner (Veronica Wang). Below this is a sales process timeline with stages: Research, Connect, Develop (current), Propose, and Close. The 'Summary' tab is active, showing the primary contact, Bruce Davis, and a timeline of recent activities including an InMail and a task added by Ken Ryan. The right sidebar displays the account section with recommendations for first, team, and second-degree connections.

Dynamics 365 | Sales > Opportunities > Contoso interested in digital transformation

OPPORTUNITY | Contoso interested in digital transformation | Estimated Close Date: 10.23.17 | Estimated Revenue: \$1,000,000 | Status: In progress | Owner: Veronica Wang

Sales Process | Active 25 Days | Research | Connect | **Develop** | Propose | Close

Summary | Activity Analysis | Product line items | Quotes | Related

Primary Contact

SALES NAVIGATOR | Profile | Icebreakers | More

Bruce Davis | 3rd | Director of Technology | Greater Seattle Area | 1619 connections

Current | Director of Technology at Contoso • 1 yrs 8 mos

Previously | IT manager at Litware • 1 yrs 8 mos

Education | University of Washington • 1990-1994

[View Profile](#) | [Save as Lead](#)

Timeline

Send InMail

TODAY

InMail to Bruce Davis - Wednesday Sept 10th
Hey Bruce, I am following up on Jenny's introduction. I was glad to know we went to the same school. It's always good to see...
[Open Message Thread](#)

Task added by Ken Ryan - Tuesday Sept 9th
Reach out to Bruce. Recommend and link Microsoft content page outlining approach to business apps.
[Assign](#) | [Delete](#)

Account

SALES NAVIGATOR | Recommend... | Profile | More

Your 1st degree connections (170)

Jenny Strand - 1st | IT Manager | Contoso | [Message](#)

Your TeamLink connections (35)

Carlos Walker - 2nd | IT Manager | Contoso | [View TeamLink](#)

Your 2nd degree connections (472)

Loretta Potter - 2nd | IT Manager | Contoso | [View Profile](#)

[Help](#) | [Privacy & Terms](#) | [LinkedIn](#)

Saved Just Now | [Save](#)

Other D365 Sales Capabilities

- Goals
- Playbooks
- Forecasting (Basic and Advanced)
- Deal Manager
- InsideView – Business Information

Click to Return to Menu

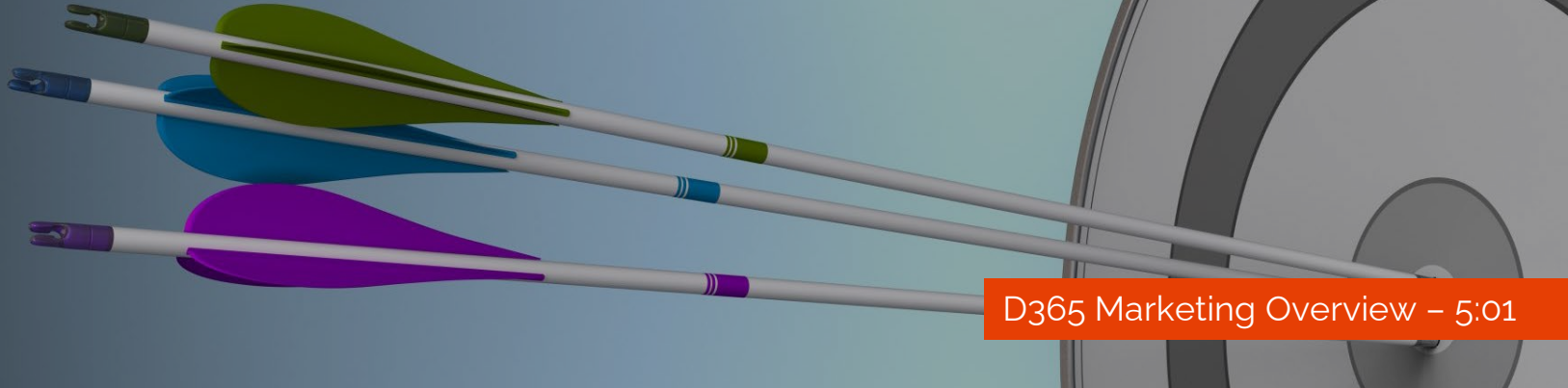




DYNAMICS 365 MARKETING

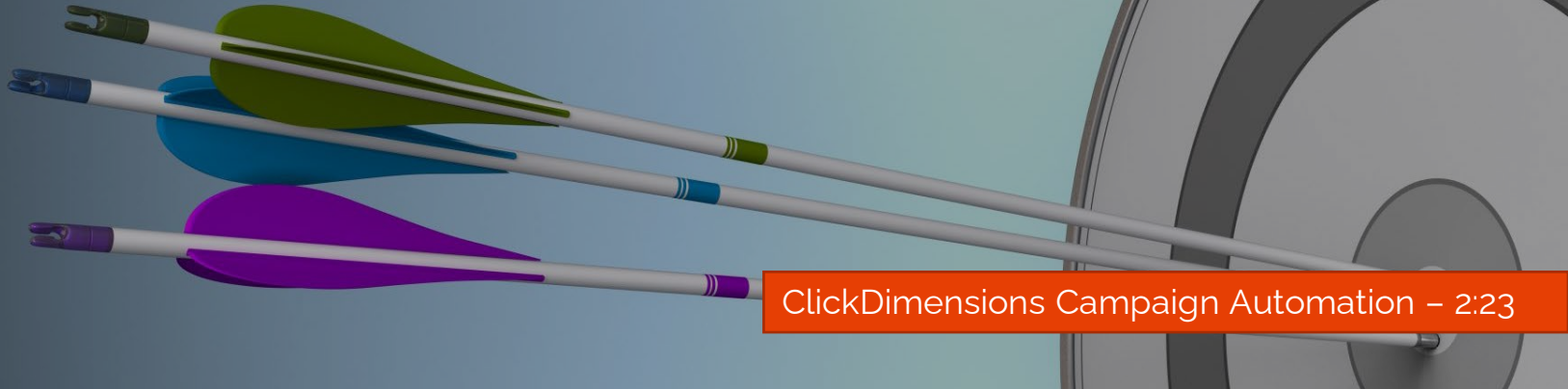
D365 for Marketing Overview

- User Interface
- Simplicity - Editing an Email
- Templates
- Metrics and Insights



D365 Mktg vs ClickDimensions

- 10/11, 9:40am



Segmentation

- Segments: Similar to Marketing Lists
 - Static
 - Dynamic
 - Includes Behavior (Event-Trigger)
- Model Scores: Rule-Based Models

Static Segments – 0:59

Dynamic Segments – 2:59

Model Scores – 1:21



Marketing Emails

- Templates: Sections, Drag/Drop, Components

Email Template Design – 1:29

- Personalization: Mail/Merge, Conditional Sections

Email Personalization – 1:40

- Preview: Desktop, Tablet, Phone, Record-Based


Email Preview – 0:27

- Send and Split Tests: A/B Design, Journeys

Email Send and Test – 1:04



Marketing Pages

- Forms: Templates, Drag/Drop, Design Components, Custom Code, Preview (Web/Mobile), Submission Text/Page/URL, Embedding, Auto-Matches to CRM Record
- Marketing Pages: Templates, Design, Add Forms
- Surveys:  Customer Voice



Marketing Form – 1:57

Marketing Page – 1:51

Customer Voice – 3:43

Marketing Events

- Events Overview
- Creating Events
- Event Pages / Portal
- Event Registration
- Event Streaming

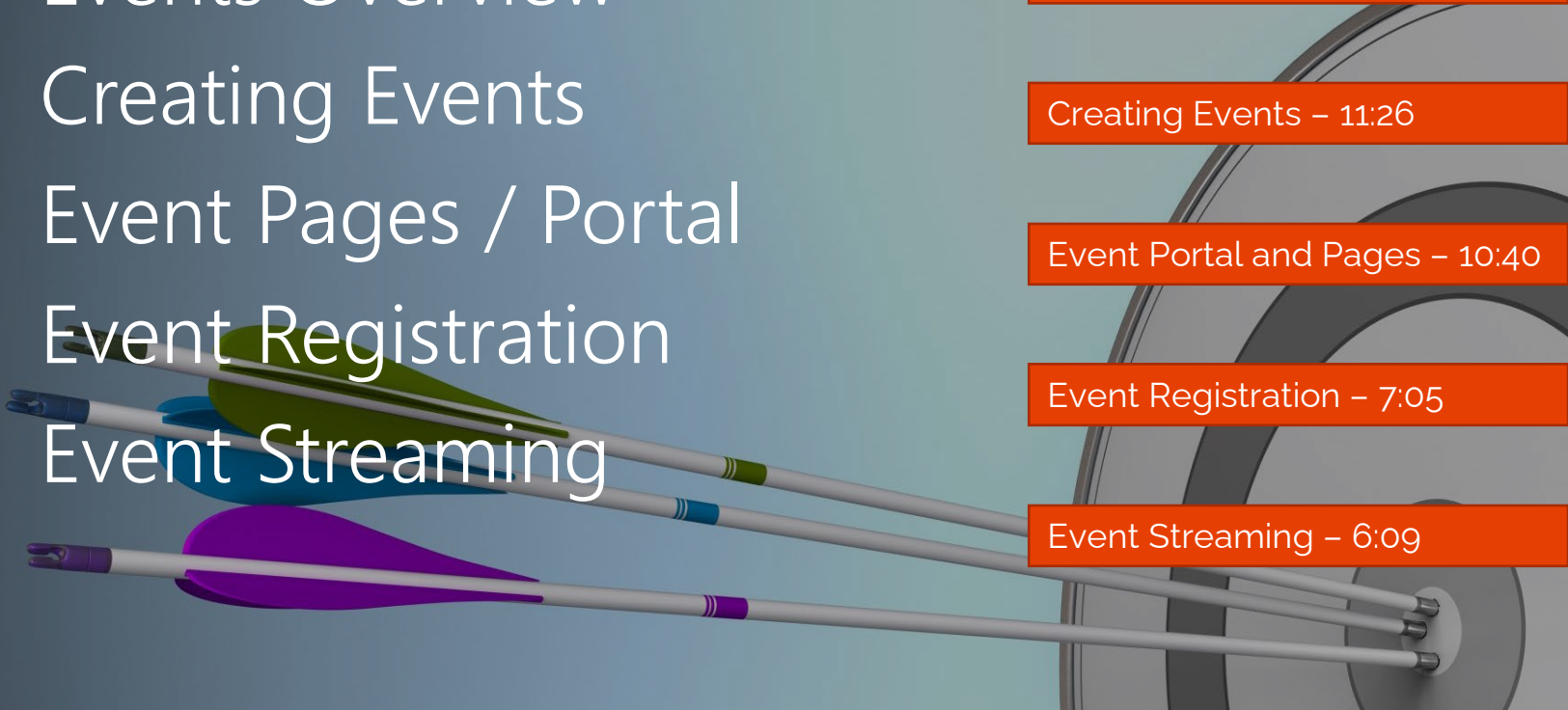
Events Overview – 4:16

Creating Events – 11:26

Event Portal and Pages – 10:40

Event Registration – 7:05

Event Streaming – 6:09



Customer Journeys

- Customer Journey Templates
- Audience Segments
- Sending an Email
- Engagement and Journey Paths



Customer Journeys – 2:59

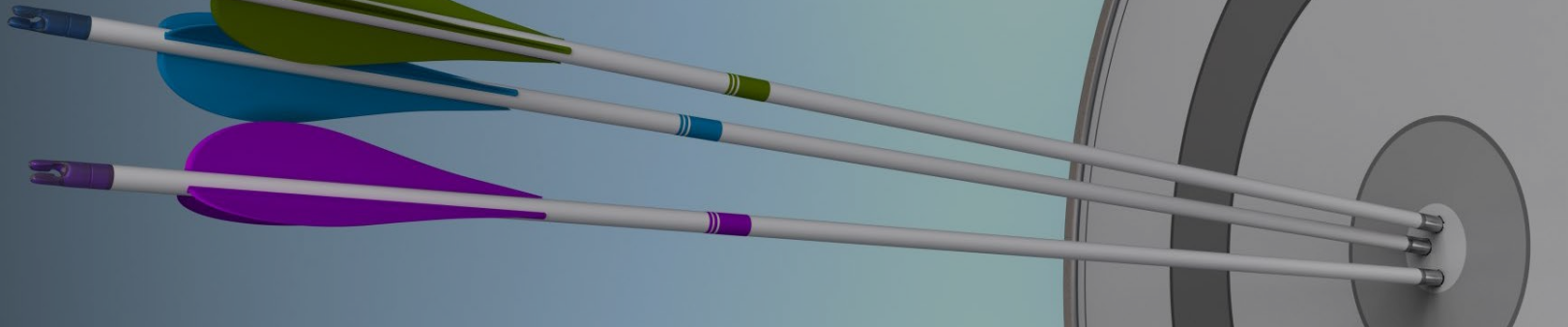
Customer Journeys (Extended Dance Version) – 6:07

Analytics

- Email Insights: Opens, clicks, timeline, geography, A/B
- Web Page Insights: Forms and pages
- Journey Insights: Email + Pages

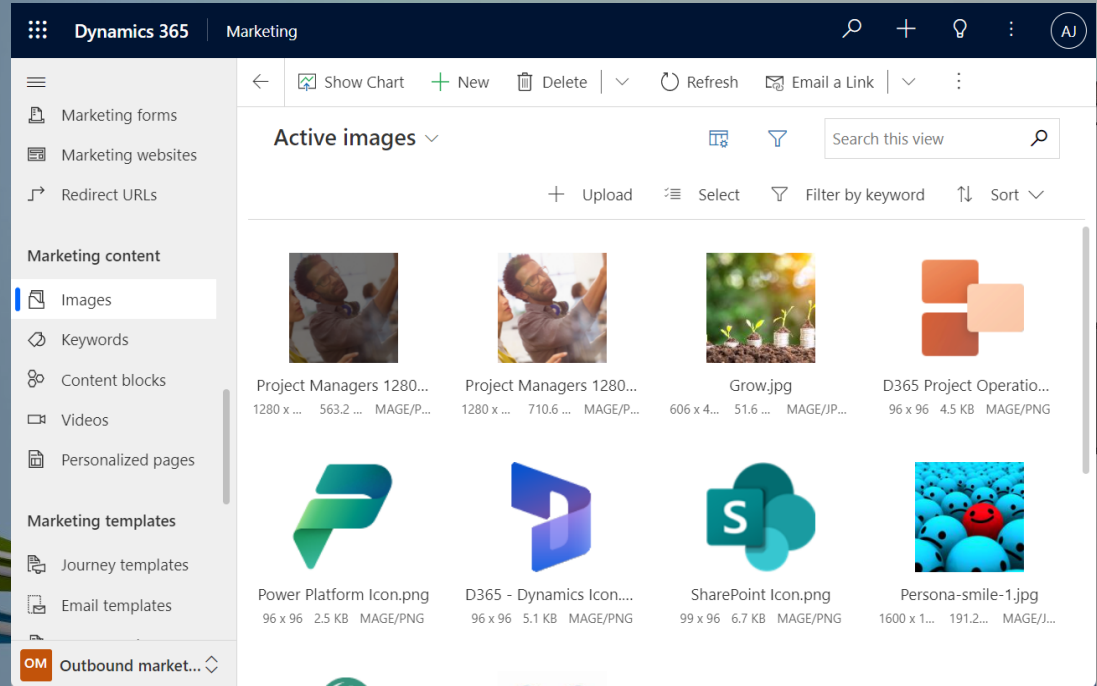
Email Insights – 0:47

Web Insights – 0:45

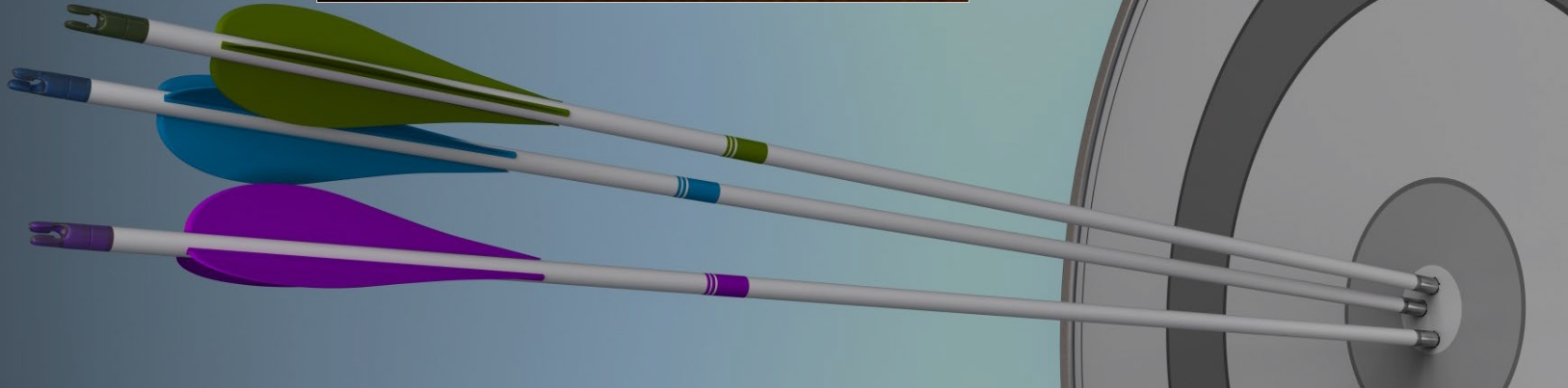


Digital Asset Management

- Content management area
- Images can be tagged and searched with keywords
- Content blocks are added to the list as they are created
- Videos for links and embed codes
- Personalized pages contain scripts for advanced page personalization



Click to Return to Menu





CLICKDIMENSIONS

ClickD Audience Targeting

- Outbound: One-off email and SMS Mktg Lists
- List Import: Import to a Marketing List
- Model Scores: Rule-Based Models
- User-Triggered: Quick Sends, Mktg Lists
- Event-Triggered: Launch based on an event

Outbound – 1:06

List Import – 0:46

Model Scores – 0:59

User-Triggered – 0:58

Event Triggered – 0:53



ClickD Messaging

- Templates: Layouts, Drag/Drop, Sections
- Personalization: Mail/Merge, Owner, Conditional Sections
- Preview: Desktop, Tablet, Phone, Record-Based
- Send and Split Tests: Quick Sends, Mktg Lists
- SMS: Bulk (personalized) and Individual

Email Template Design – 2:17

Email Personalization – 1:07

Email Preview – 1:18

Email Send and Test – 1:35

SMS Messaging – 1:24



ClickD Web Pages

- Forms: Drag/Drop, Design Components, Custom Code, Preview (Web/Mobile), Follow-Up Actions, Confirmation Text/Page/URL, Link or Embed, Auto-Matches to CRM Record
- Landing Pages: Cloning (Templates), Add Forms, Stand-Alone or Embedded
- Surveys: Question Types, Flow Logic, Follow-Up Actions Link or Embed

Forms – 2:27

Landing Page – 1:09

Surveys – 0:27



ClickD Event Management

- Uses 3rd party solutions required for event experience (Cvent, Eventbrite, Zoom Webinar, GotoWebinar, Webex Events, Teams Meetings)
- New events, registration and attendance from 3rd party solutions are auto-synced to Dynamics 365 tables



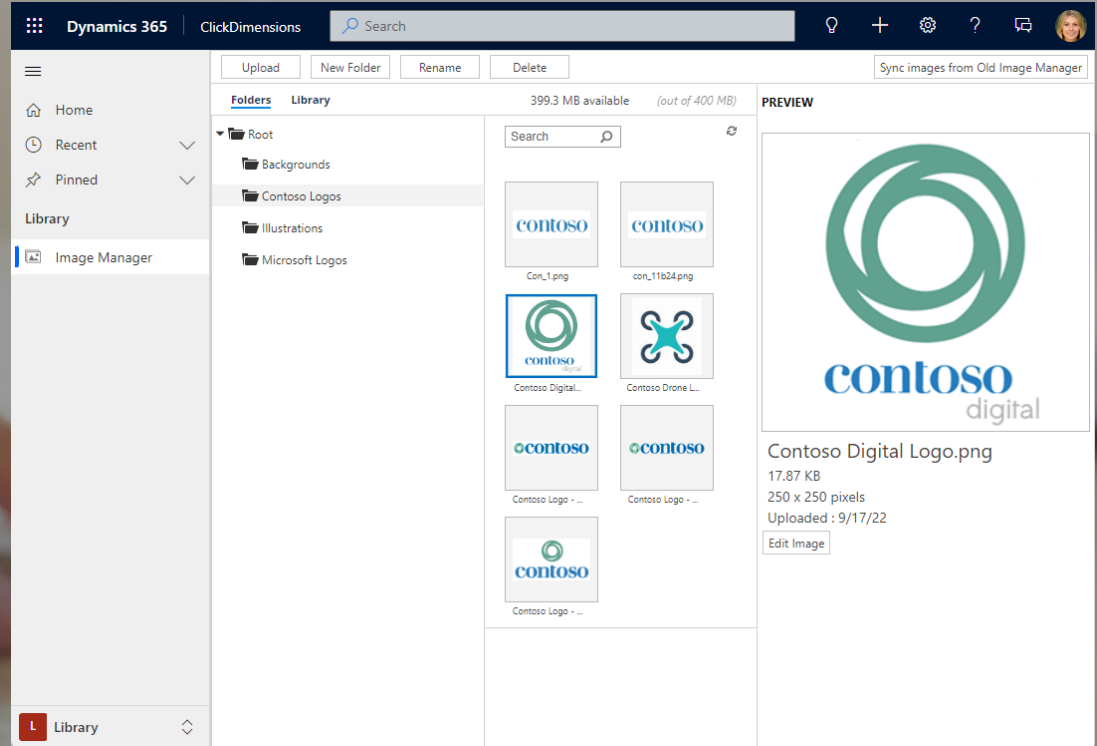
ClickD Campaign Automation

- Triggers/Actions
- Drag/Drop
- Decision Trees, Sub-Triggers, Goals
- Statistics and Participants Views




ClickD Digital Asset Mgmt

- Image Manager Library
- Hierarchy/folder based
- Available within email and web page designer
- Does not use Dataverse storage
- Images only (PDF, MP4, etc, not allowed).
- Video should be hosted externally (such as YouTube), and linked.
- Download links from emails are managed separately.





ClickD Mktg Analytics

- Email: Custom table with delivers, opens, clicks, web visits
- Web: Forms, Surveys, and all web traffic
- D365 Campaigns: Roll unlimited items under Campaigns
- Intelligent Dashboards:  Additional cost product

Email Analytics – 0:50

Web Analytics – 1:20

D365 Campaigns – 0:26

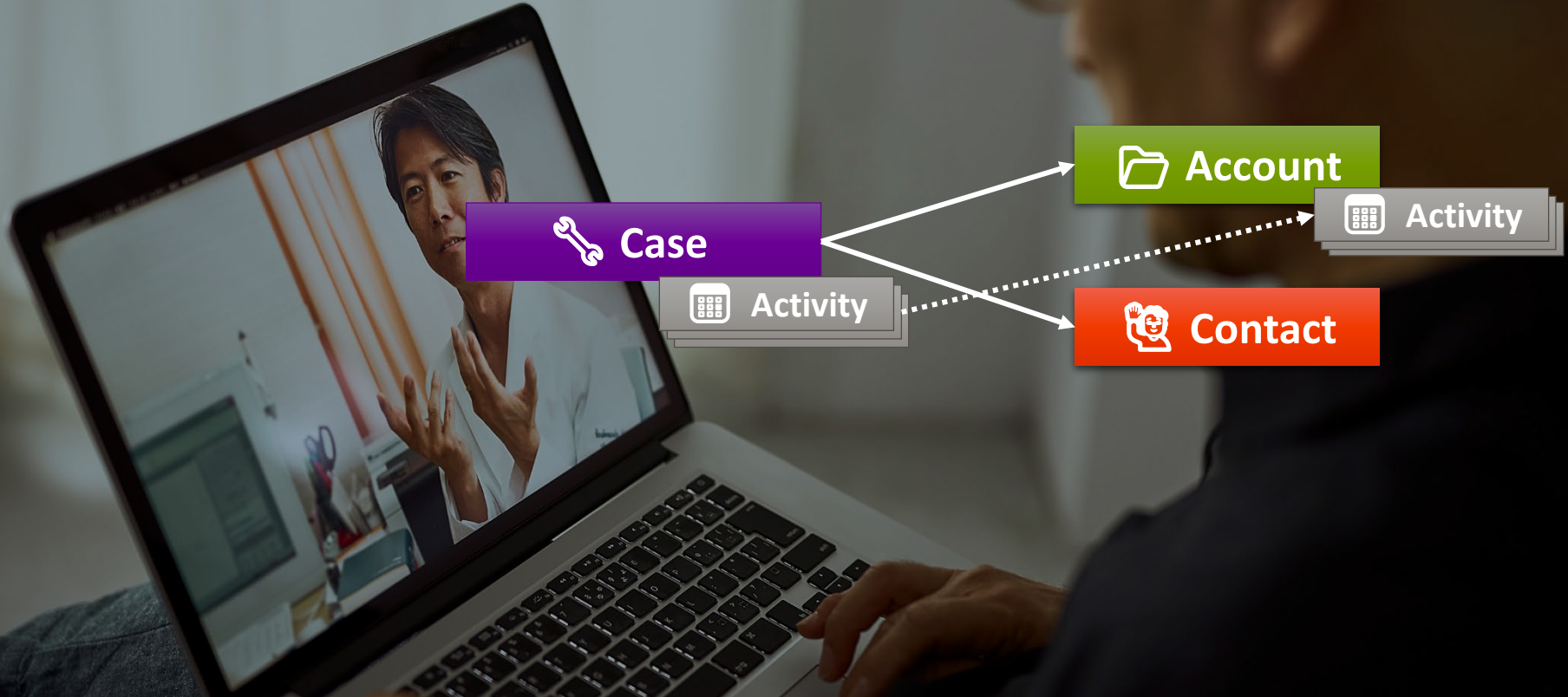
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DYNAMICS 365 CUSTOMER SERVICE

Dynamics 365 Customer Service



Case Creation

- Creation Channel Scenarios
 - Incoming Call
 - Email
 - Auto-Creation Rules (Email, Social, etc)
- Extended Case Creation Options
 - Web Portal
 - Omnichannel
 - Other Telephony Integration Options

Call-to-Case – 1:37

Email-to-Case – 0:54

Auto Creation – 1:07

Prioritizing and Working Cases

- The Case List
- Interactive Dashboards
- The Queue
 - More on this later

Managing the Case List – 2:01

Working a Case

- The Case Form
 - Data capture
 - Activity timeline
 - Case tools
 - Tabs
 - Outbound calling with Microsoft Teams
- Case Processing and Resolution
 - Business Process Flows
 - Assigning and Routing
 - Case Resolution

The Case Form – 2:26

Outbound Calling – 0:22

Case Processing and Resolution – 3:08

Customer Service Workspace

- Multi-Session / Multi-Tasking
- Productivity Pane
 - Matching articles and cases
 - Scripts and macros
 - Knowledge search
- Multi-Channel Integrated Inbox
- Workspace Power BI Dashboards
 - Conversations, Daily Stats, Historical
 - Intraday Insights
- Multiple Workspace Configurations

Knowledge Articles

- Creating Knowledge Articles
- Publishing
- Using Articles on Cases
 - Search
 - Linking, Copy URL, Send Email
 - Portal Integration

Entitlements and SLAs

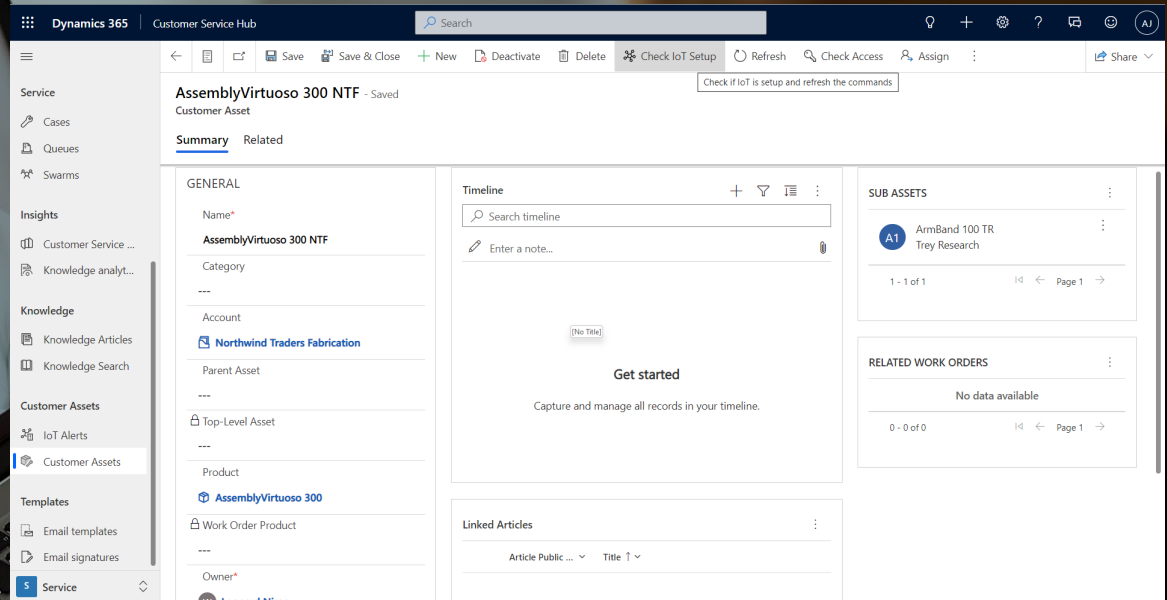
- Response and Resolution Time
 - Standard Service Level Agreement (SLA)
 - Entitlement
 - Failure and Warning Times
 - Escalating
 - Tracking in Microsoft Teams
- Other Entitlement Features
 - Number of Cases or Hours

Advanced Case Assignment

- Workstreams
 - Intake Rules
 - Classifications (i.e. skill set)
- Rules
- Queues

Customer Asset Tracking

- Assets, or inventory, associated to a customer
- Related:
 - Activities
 - IoT Alerts
 - Work Orders
 - Other Assets
 - Knowledge Articles



The screenshot displays the Dynamics 365 Customer Service Hub interface. The left sidebar shows navigation options: Service (Cases, Queues, Swarms), Insights (Customer Service, Knowledge analytics), Knowledge (Knowledge Articles, Knowledge Search), Customer Assets (IoT Alerts, Customer Assets), and Templates (Email templates, Email signatures). The main content area is titled 'AssemblyVirtuoso 300 NTF - Saved' and shows the 'Summary' tab. The 'GENERAL' section lists fields: Name* (AssemblyVirtuoso 300 NTF), Category (---), Account (Northwind Traders Fabrication), Parent Asset (---), Top-Level Asset (---), Product (AssemblyVirtuoso 300), Work Order Product (---), and Owner* (---). The 'Timeline' section shows a search bar and a 'Get started' button. The 'SUB ASSETS' section shows one asset: ArmBand 100 TR by Trey Research. The 'RELATED WORK ORDERS' section shows no data available. The bottom of the screen shows a keyboard and a person's hand typing.

Swarming

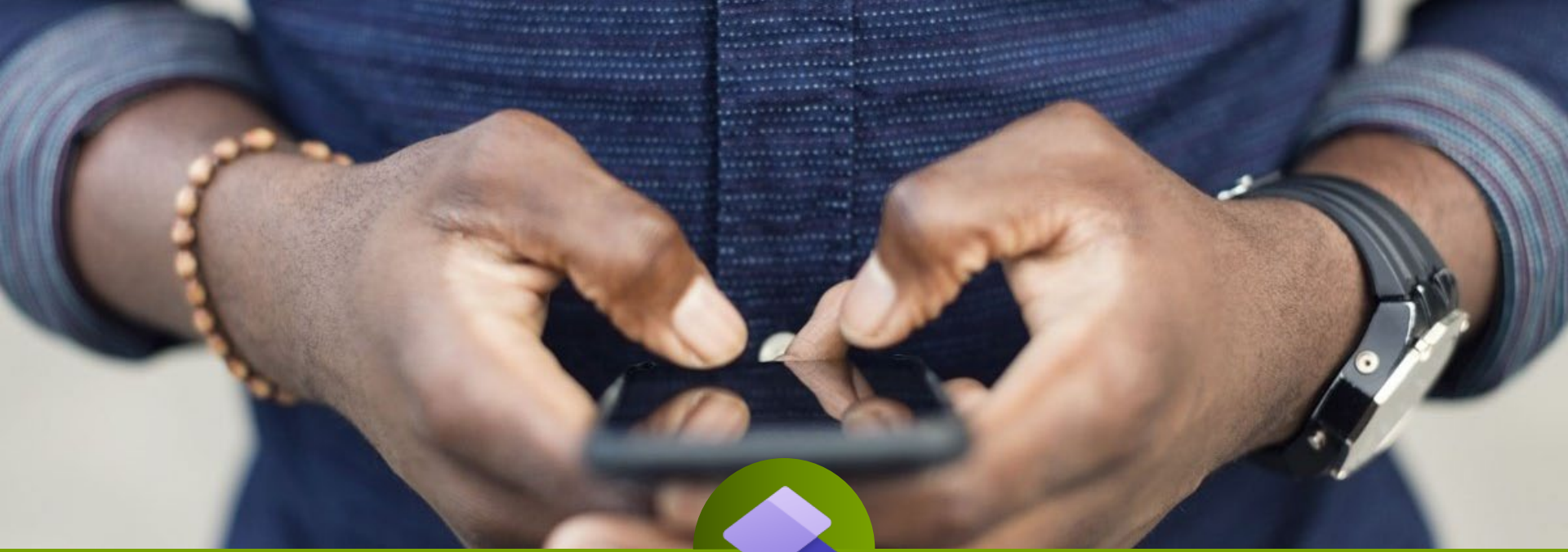
Preview Feature

- Integrates Teams and D365 Customer Service
- Internal “Swarms” for Complex Issues
 - Improved first contact resolution
 - Reduced average time to resolution
 - Accelerated on-the-job agent training

Email Templates and Send

- Email Templates
 - Metrics
 - Designer
- Email Multi-Tasking
- Email Template Search
- Email Engagement Features
 - Follow
 - Intelligent Send Time
 - Schedule Follow-Ups

DEMO TOPICS (CLICK ONE)



POWER PAGES AND BOTS

THE CUSTOMER EXPERIENCE

Self-Service Portals

- Enable customers to self-service, including:
 - Searchable Knowledge Base
 - Forums for Crowd-Sourcing Answers
 - Submit and Track Cases/Issue Management
- Includes content for users that are:
 - Unauthenticated
 - Authenticated

Case Management – 3:03

Knowledge Base – 2:23

Forums – 1:44

Partner Portals

- A web portal for B2B connections, such as dealers and distributors, to share customer, product and pipeline information.
 - Includes the features of Self-Service Portals
 - Customer Information Management
 - Opportunity Pipeline Management
 - Partner Profile Setup and Management
 - Integrated Dashboards

Customer Info Management – 1:41

Opportunity Pipeline – 2:13

Partner Profile Management – 1:07

Partner Setup – 2:36

Extending Portals and/or Pages

- Rich Toolset for Extension
- Intended to Easily Add Access to Dataverse Information
- Scenario
 - Contoso uses an external partner for Lead Qualification
 - They want them to directly update Dynamics 365 Leads
 - They do not want to purchase Dynamics 365 licenses for them
 - Solution: A custom Power Portal App

Lead Management – 0:46



CHAT BOTS and POWER VIRTUAL AGENTS

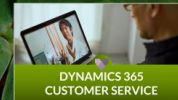
Chat Bots and Power Virtual Agents

- Power Virtual Agent – Customer Facing
 - The Customer Experience
 - Creating and Updating

The Chat Bot Experience – 0:55

Click to Return to Menu

DEMO TOPICS (CLICK ONE)





**OMNI-CHANNEL, VOICE, IoT,
FIELD SERVICE, PROJECT OPERATIONS**

Omnichannel

NOTE: Additional Cost Module, Requires D365 Customer Service Enterprise

- Omnichannels – Social, Chat, Phone, SMS
- Auto-Open Customer Record
- Quick Replies
- Smart Assist and Knowledge Articles
- Sending Article Links

Customer Voice

NOTE: Additional Cost Module

- Web or Kiosk Support Requests
- Customer Satisfaction
- Branching
- Survey Design
- Survey Sending and Automation

Internet of Things (IoT)

NOTE: May Require IoT Azure or other IoT Monitoring Service

- Device Readings, Dashboard and Alerts
- Creating a Case from a Device Alert
- Sending Device Commands
- Tracking Device Responses
- Checking Device Updates and Closing the Case

Field Service

- Field Service
 - Work Orders
 - Scheduling and Dispatch
 - Mobile

Field Service Intro – 3:22

Work Order Records – 1:03

Schedule Board Overview – 1:18

Scheduling – 0:40

Project Operations

- Project Operations
 - Deal Management
 - Project Planning
 - Time and Expenses, Invoicing

Click to Return to Menu

DEMO TOPICS (CLICK ONE)



360 DEGREE VIEW

CUSTOMER RECORDS, ACCOUNTS, REPORTS AND THE USER EXPERIENCE



DYNAMICS 365 SALES



DYNAMICS 365 MARKETING



CLICKDIMENSIONS



DYNAMICS 365 CUSTOMER SERVICE



POWER PAGES AND BOTS

THE CUSTOMER EXPERIENCE



OMNI-CHANNEL VOICE, IoT, FIELD SERVICE, PROJECT OPERATIONS



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