



Activate - Dynamics 365 Customer Service - Omnichannel

Proof of Concept

Duration: 3 Days [Remote | Onsite]

Difficulty Level: 200 - Intermediate

Description

Knowing your customers enables you to personalize each experience and optimizes your agents' productivity so you can earn customers for life. The agent experience is the heart of Dynamics 365 Customer Service. The key to improving satisfaction in service delivery is enabling agents to take customer requests from any channel, handle multiple sessions at a time, interact with multiple apps without losing context, and enhance their workflow with productivity tools.

Objectives

- Enable Customer Service features in your environment following best practices.
- Learn how to leverage and extend the features in Dynamics 365 to accelerate your business and continuously enhance the customer experience

Outcomes

- Set up Customer Service features in your environment following best practices.
- Learn by example and work closely with a Microsoft engineer to understand key capabilities of Dynamics 365 and Microsoft Teams

Methodology

Learn by example

Work closely with a Microsoft engineer to learn key concepts and best practices to enable a real-world deployment scenario.

Hands-on

Work closely with a Microsoft engineer to learn and implement the key capabilities of Dynamics 365 Customer Service

Scope

Activating Dynamics 365 customer service capabilities within a single tenant where all applications and environments are available.

Agenda

Day 1

- Module 1 - OmniChannel for Customer Service Intro
- Module 2 - OmniChannel Administration

Day 2

- Module 3 - Omnichannel Routing and Distribution
- Module 4 - Productivity Tools

Day 3

- Module 5 - Copilot Studio Connection

Delivery outline

Requirements

Participants

- Dynamics 365 Sales
- Dynamics 365 Customer Service App Users
- System Administrators

Skill Requirements

- Familiarity with Dynamics 365 Sales or Dynamics 365 Customer Service Apps.
- Familiarity with administering Dynamics 365 or Power Platform.

Time Commitment

- Three full-day engagement with relevant roles

Delivery Requirements

- Activate Dynamics 365 and Microsoft Teams environment.

Education	
Day 1	<ul style="list-style-type: none">• OmniChannel for Customer Service Intro• OmniChannel Administration
Day 2	<ul style="list-style-type: none">• Omnichannel Routing and Distribution• Module 4 - Productivity Tools
Day 3	<ul style="list-style-type: none">• Copilot Studio Connection

If you are interested in this engagement for your organization, contact your Microsoft Account Representative.