Activate - Dynamics 365 Field Service - Copilot

Proof of Concept

Duration: 12 Hours [Remote | Onsite]

Difficulty Level: 300 - Advanced

Description

Activate - Dynamics 365 Field Service - Copilot is designed to enhance field service operations by integrating advanced AI capabilities. This Proof of Concept focuses on demonstrating how AI can optimize scheduling, improve resource utilization, and enhance customer communication, all within the Dynamics 365 Field Service environment.   Participants will explore how to leverage AI-driven insights to predict service needs, automate dispatching, and provide real-time assistance to field technicians. This hands-on workshop will also cover the setup and customization of the AI Copilot, ensuring it aligns with specific business processes and operational goals.

Objectives

- Understand Dynamics 365 integration
- Explore Field Service capabilities
- Configure Copilot features
- Implement workflow automation
- Test system functionalities
- Evaluate performance metrics

Outcomes

- Enhanced operational efficiency
- Real-time data integration
- Improved customer satisfaction
- Streamlined field operations
- Advanced analytics implementation
- Customized user training sessions

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 with a Microsoft engineer to configure and deploy a Dynamics 365 Field Service Copilot.

Scope

This offering is scoped to Dynamics 365 Field apps in a single environment.

Agenda

- Overview and Architecture
- Security
- Demo of Enablement
- User Experience
- Usage

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Delivery outline

Activate

Overview and Architecture	- Overview - Market Trends - Capabilities - Architecture
Security	- Field Service and Summary - Roles and Privileges - Data Sharing and Security
Demo of Enablement	Walk through Field Service Copilot
User Experience	- Optimize frontline manager workflows - Boost frontline worker productivity
Usage	Usage Data in Microsoft 365

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

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