

# Accelerate - Value Realization from Copilot for Customer Service with Dynamics 365

## Adoption Service

**Duration:** 3 Days [Remote]

**Difficulty Level:** 200 - Intermediate

## Description

Work with Microsoft experts to accelerate your realisation of quantified business value and benefits, with support to overcome internal barriers and boost end user adoption of Copilot for Customer Service scenarios tailored to your business.

## Objectives

- Envision Copilot for Customer Service scenarios and extensions to deliver increased value to your sellers.
- Quantify expected and actual business value and benefits.
- Boost adoption through support with change management and compliance.
- Keep informed and influence the roadmap for Copilot for Customer Service with Dynamics 365.
- Get introduced to Copilot studio, and learn how it can help customize / enhance Copilot capabilities according to your needs

## Outcomes

- Copilot for Customer Service use-cases defined, including identification of extension scenarios.
- Expected and actual business value quantified according to agreed success measures.
- Internal control functions supported to approve adoption of Copilot for Service where necessary.
- Approach defined to drive user adoption.
- Understanding of the product roadmap and next steps.

## Methodology

### Envision

Understand your solution and goals and define how Copilot for Customer Service will be used to deliver business value.

### Adopt

Support the planning and execution of activities to overcome internal barriers and accelerate user adoption of Copilot for Customer Service, including weekly office hours.

### Assess

Quantify the business value and benefits achieved, gather feedback, and agree next steps.

## Scope

Customers who have completed initial activation of Copilot for Customer Service with Dynamics 365 (in either sandbox or production) and want help to accelerate adoption and maximise business value.

## Agenda Outline

The agenda and timeline will be tailored according to your current situation and needs, for example:

- Week 1: Envision
- Weeks 2-5: Adopt
- Week 6: Assess

## Delivery Outline

### Requirements

#### Participants

- Dynamics 365 architects, administrators, Customer Service Operations and Enablement Team/Decision maker/Early Adopter and Champions users

#### Skill Requirements

- Understanding of your Dynamics 365 business and Customer Service processes and administration activities
- Understanding of Microsoft 365 applications and Dynamics 365 Customer Service app

#### Time Commitment

- 3-day engagement with relevant roles
- Time usage is spread across 6 weeks

#### Delivery Requirements

- Access if needed to the targeted production or sandbox environment with Copilot for Customer Service for assessment.

### Assessment and Knowledge Transfer

<b>Scoping</b>	Welcome call	<ul style="list-style-type: none"><li>▪ Scope the engagement, review the prerequisites, and define roles and responsibilities</li></ul>
<b>Week 1-2</b>	Envisioning session	<ul style="list-style-type: none"><li>▪ Review of the overall planning</li><li>▪ Listening session with customer feedback questionnaire for customer to review and complete</li><li>▪ Create a Customer Service Copilot Adoption project team including early adopters and champions and establish preferred communication channel.</li></ul>
<b>Week 3-4</b>	Data analysis-Interactive discussion-Adopt	<ul style="list-style-type: none"><li>▪ Review of questionnaire and Interactive discussion with a Microsoft architect on ways to unlock blockers to drive adoption</li><li>▪ Prepare your organization and staff with the knowledge to implement Adoption practices based on Copilot for Customer Service capabilities useful for the business.</li></ul>
<b>Week 5-6</b>	Assess	<ul style="list-style-type: none"><li>▪ Prepare your organization and staff for series of 30-min planned Office hours with users to asks questions and provide feedback</li><li>▪ Track usage of Copilot for Customer Service</li></ul>

**For more information:** Please contact your Microsoft Representative for more details.