Microsoft Dynamics 365

Dynamics 365 Customer Service

Implementation Resources

Presenters:
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Nuno Cruz – FastTrack Solution Architect
Avanthi Hanumanula – FastTrack Solution Architect

TechTalk Series

- *Implementation Resources – introduction (link)*
- *Channel Integration Framework 2.0 (link)*
- *Samples and tools (link)*
- *Testing for Service (link)*

- **Analytics for Service ←**

Community Blogs | Microsoft Dynamics 365 Community

Agenda

- Initialization
- DCCP analytics
- Extending OOB analytics
- Extending Analytics – ALM
- Q&A

Dynamics 365 Customer Service

Implementation Optimization Resources

aka.ms/d365csresources

Customer Service Implementation Resources

- Are these resources officially supported by Microsoft?
  - ✓ This is community content, offered “as-is” and not part of Microsoft products
  - ✓ Meant to be a starting point for you to implement your project
  - ✓ All code and solutions are starter samples for your implementation, not a final product
  - ✓ All samples, tutorials and guidance are in line with Microsoft’s best practices
- Can I contribute to these resources?
  - ✓ Some of the items will have a corresponding GitHub repo (e.g., code samples)
  - ✓ We’ll evaluate other forms of collaboration
- Can I submit my ideas for new resources?
  - ✓ Submit your suggestions in the Ideas portal
  - ✓ Leverage any FastTrack engagement you have on your project

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Initialization

Ashraf Omar

Build your strategy

Building Your Strategy - Before Kicking Off the Implementation and Initialization Phase

Broaden Your Analytics Vision

- Focus beyond call center & customer service.
- Include organizational stakeholders(management, sales, marketing teams…)
- Drive strategy with a company-wide vision.

Determine Key Performance Indicators (KPIs)

- Measure success with specific metrics.
- Examples: Average Handle Time, First-Call Resolution, Customer Satisfaction, Agent Productivity.

Best Practices for DCCP Analytics

- Start with out-of-the-box capabilities.
- Identify gaps for early action.
- Determine necessary tools & skill sets for report expansion.

Align Reporting Strategy with Business Objectives

- Ensure reports are actionable and insightful.
- Use insights to improve call center performance.

Fit-Gap Analysis for Out-of-the-Box Reports and Dashboards

Building Your Strategy - Before Kicking Off the Implementation and Initialization Phase

Understand Out-of-the-Box Capabilities

Start by comprehensively reviewing the existing reporting and dashboard features available in Dynamics DCCP analytics.

Perform Detailed Fit-Gap Analysis

Conduct an in-depth analysis to identify discrepancies between the current capabilities and the specific reporting needs of your organization.

Explore Alternative Solutions

Consider customizing the out-of-the-box Reports to bridge the identified gaps.

Plan Capabilities and Costs

Early identification of gaps allows for better planning regarding the necessary capabilities and the associated costs to meet the organization’s DCCP analytics goals.

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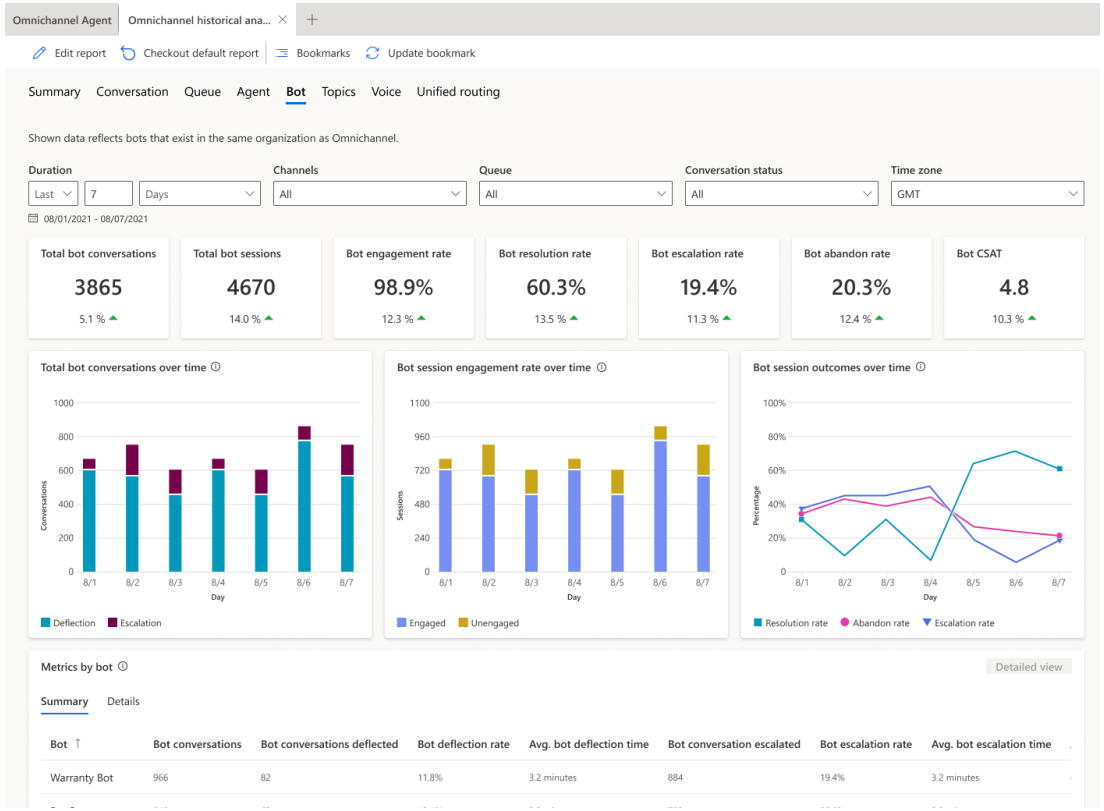
Overview of out-of-the-box reports capabilities

Ashraf Omar

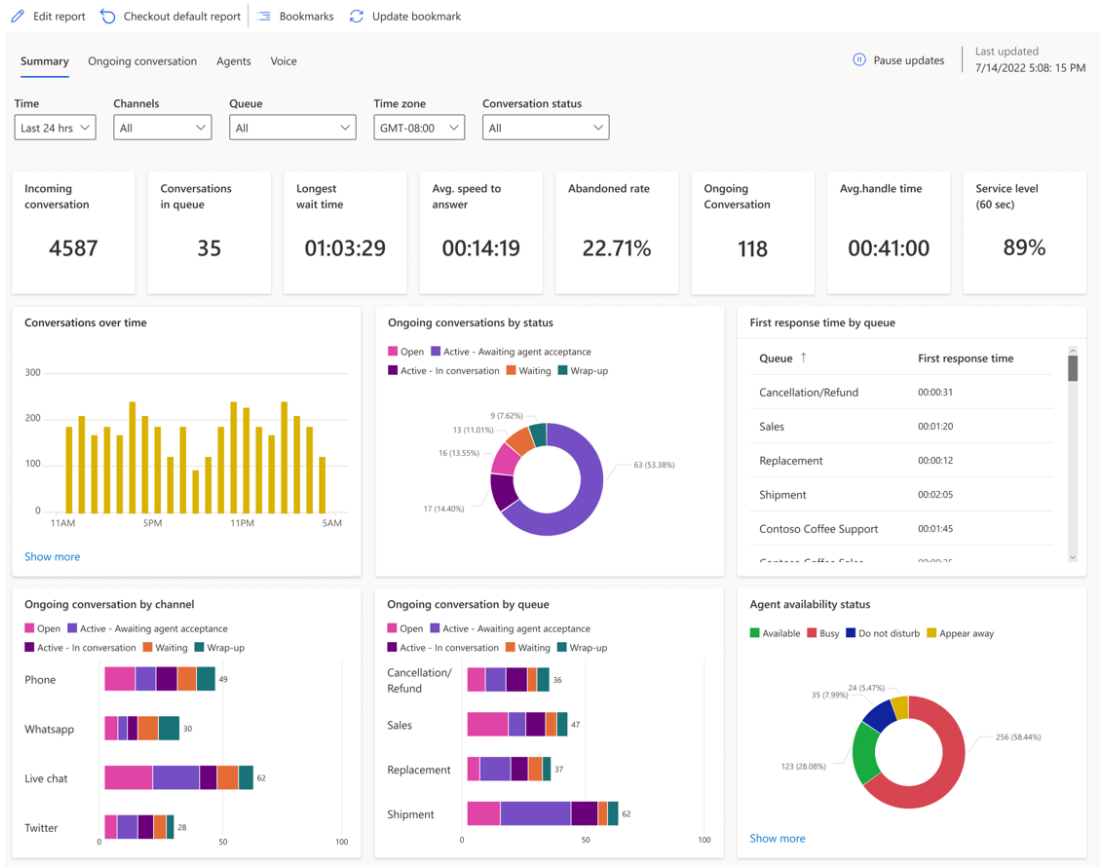
Leveraging Historical Analytics in Omnichannel



Key Features:

- Average Handle Time
- First-call Resolution
- Agent Productivity
- Customer Satisfaction Scores

Omnichannel real-time analytics



Key Features:

- Real-Time Dashboard.
- Real-Time Monitoring and Interventions.
- Agent Performance Metrics.
- Conversation Management.

Historical analytics and real-time analytics

Historical Analytics

- Analyze past performance data to identify trends and patterns.
- Help make strategic decisions for long-term improvements (by default supports 2 years historical data).
- Useful for evaluating agent performance, customer satisfaction, and overall operational efficiency over time.

- Examples: Average handle time, first-call resolution, agent productivity, customer satisfaction scores

Strategic Planning

Realtime Analytics

- Provide live insights into ongoing contact center operations.
- Enable immediate adjustments and interventions for optimal performance.
- Help supervisors manage agent workload and queues effectively in real time.

- Examples: Live queue monitoring, agent availability, real-time alerts, ongoing customer interactions

Immediate Action

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Extend data models of historical and real-time analytics reports

Nuno Cruz

Why extend OOB Data Model

Attend to specific KPI

Need more detail, Control or flexibility

Integration with other systems

Industry or Regulator compliance

Prerequisites for Data Model customization

Enable Historical or / and Real time analytics

Enable real-time analytics

Enable historical analytics

Admin Privileges

Customer Services

Power BI

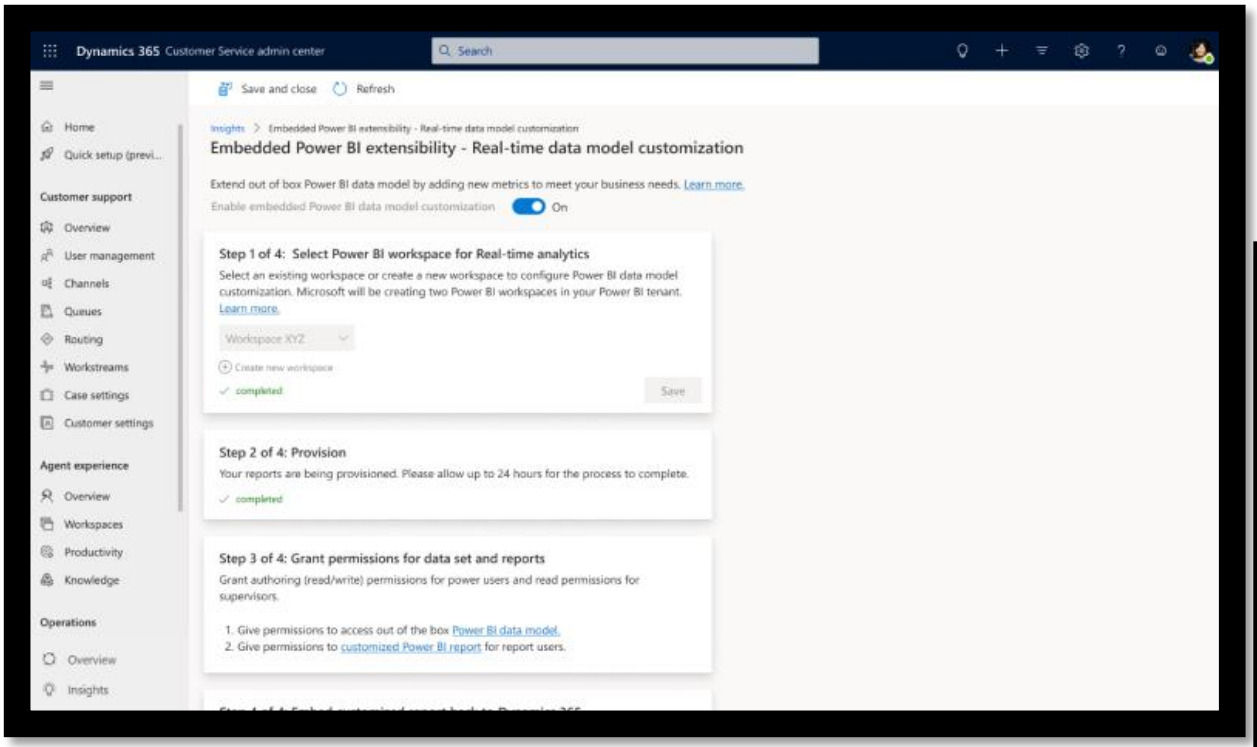
Power BI Skills

Learn PBI

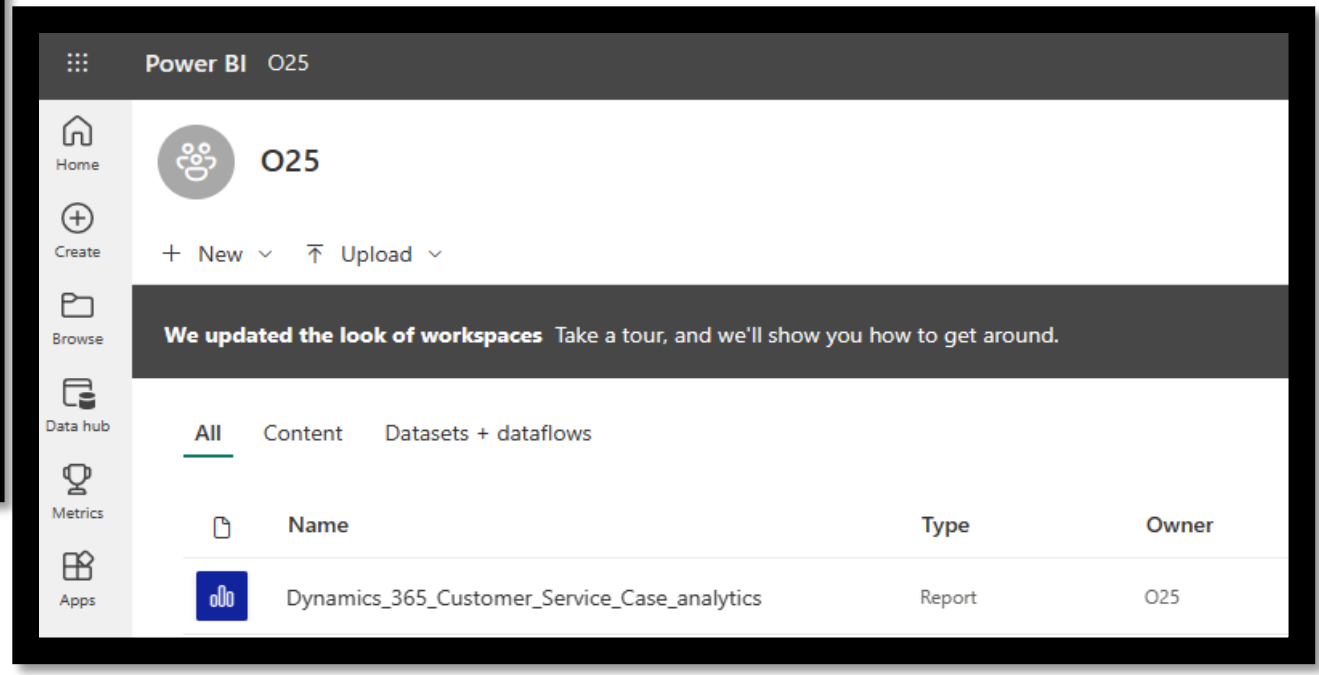
Power BI Professional or Premium license is required

TDS Endpoint must be Enabled

Provisioning Data Model



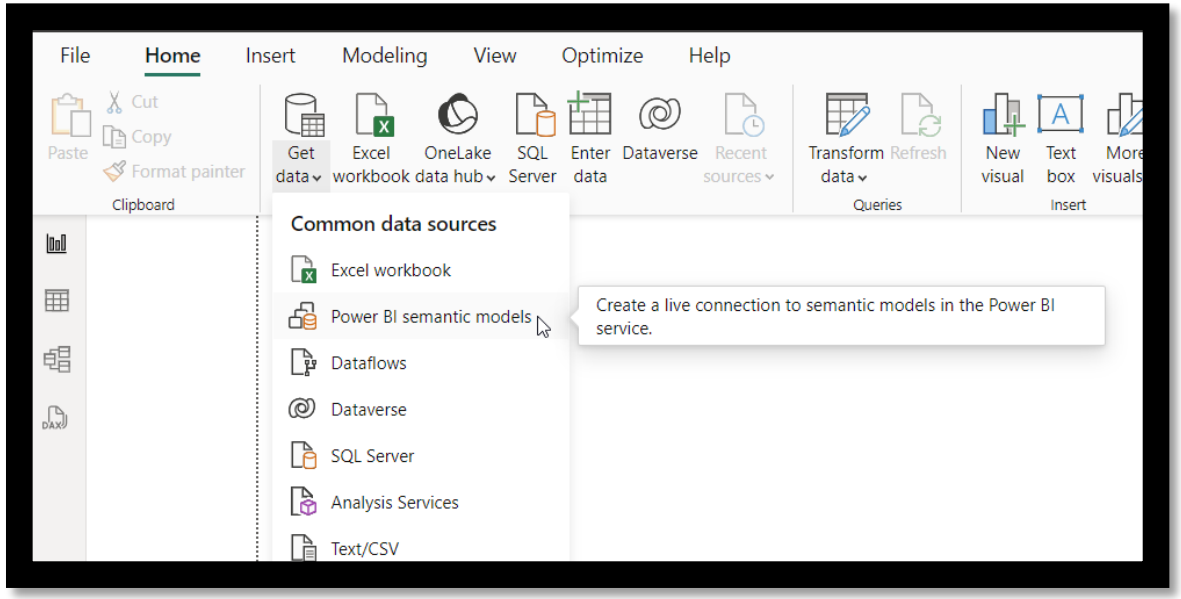
[Connect to PBI Workspace]



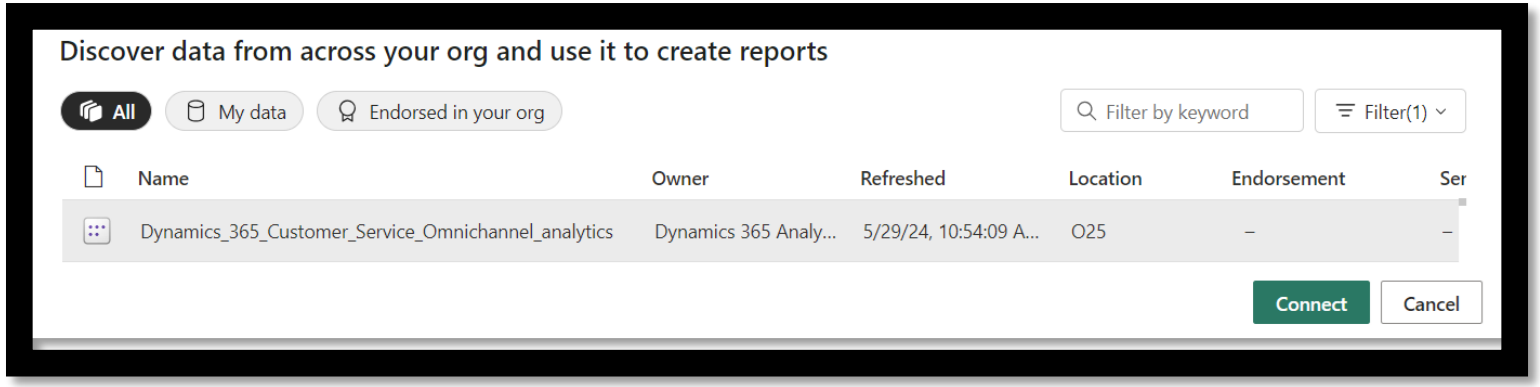
The Workspace gets the OOB Data model.

Create a new report based on OOB Data Model

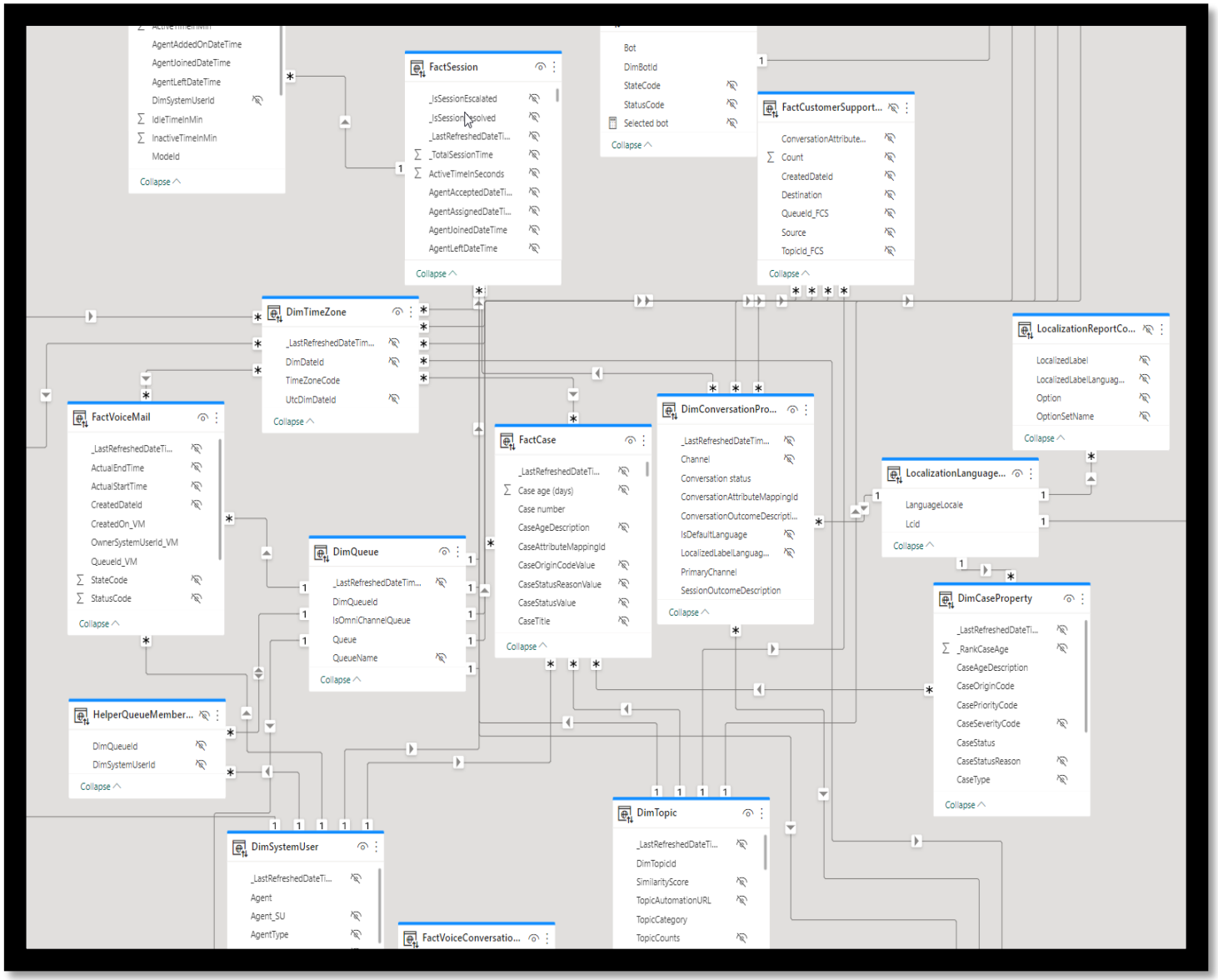
Using Power BI Desktop
Get Data > Power BI semantic models



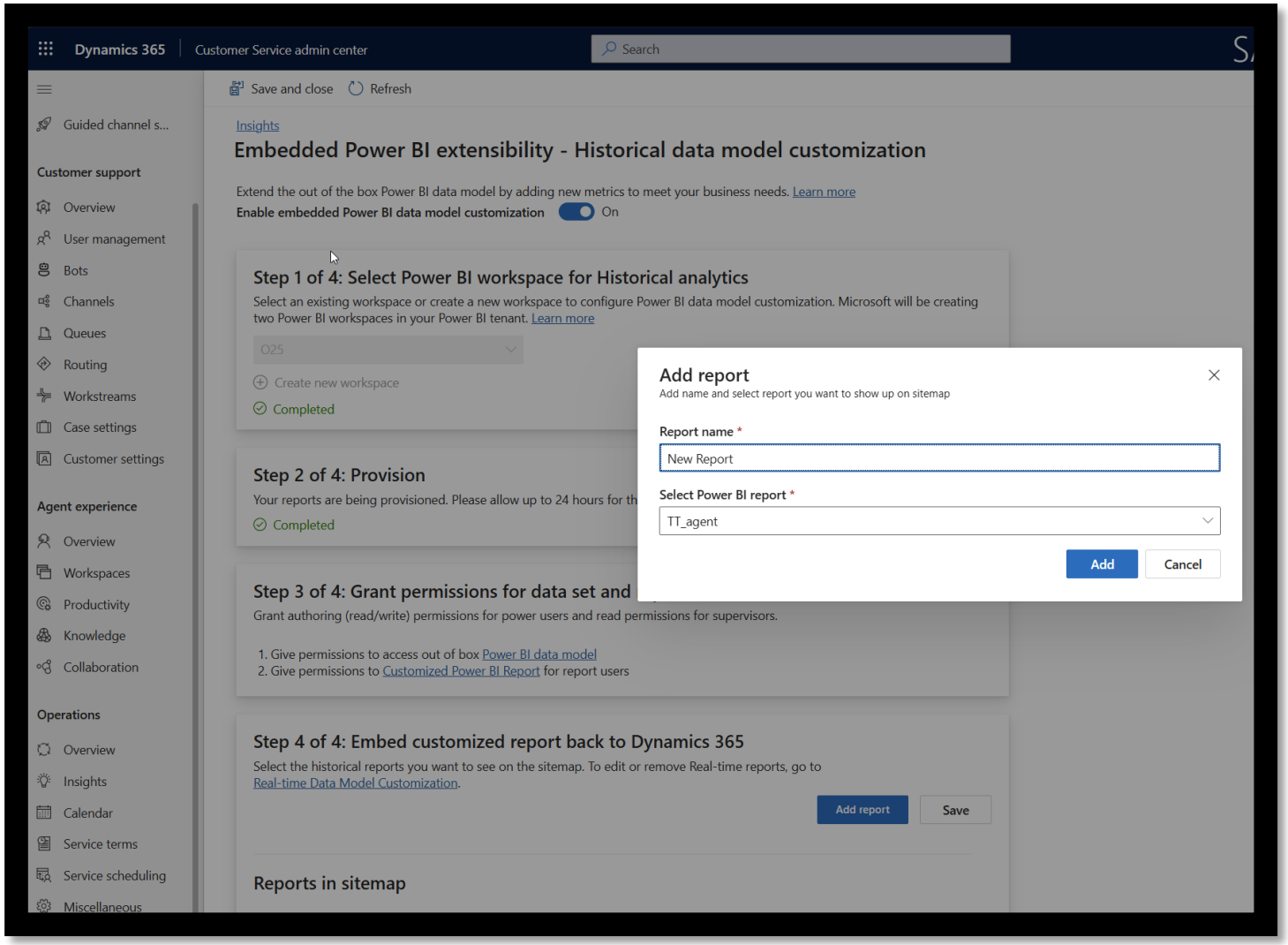
Select one of the provisioned data models



Example of a OOB data model Available on PBI



Publish Custom Reporting

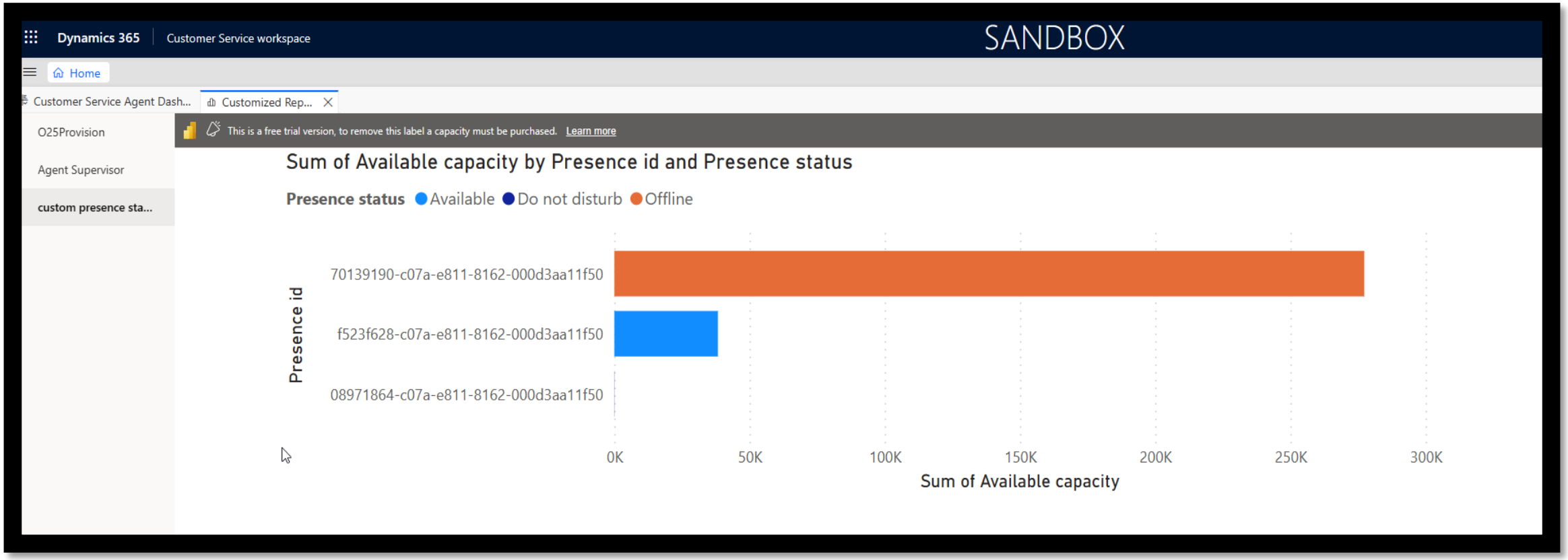


With our report already saved and publish from PBI Desktop, we can now add the report to Omnichannel sitemap

Insights > Embedded Power BI extensibility - Data model customization > Add report

[Embed customized reports back to Dynamics 365]

Visualize Custom Report



Untitled - Power BI Desktop

Search

Nuno Cruz

File Home Insert Modeling View Optimize Help

Share

Cut Copy Format painter Paste

Clipboard

Get data Excel workbook OneLake data hub SQL Server Enter data Dataverse Recent sources

Data

Transform data Refresh

Queries

New visual Text box More visuals

Insert

New measure Quick measure

Calculations

Sensitivity

Sensitivity

Publish

Share

Copilot

Copilot

Add data to your report

Once loaded, your data will appear in the **Data** pane.

Import data from Excel

Import data from SQL Server

Paste data into a blank table

Use sample data

Get data from another source →

Visualizations

Build visual

Values

Add data fields here

Drill through

Cross-report Off

Keep all filters On

Add drill-through fields here

Filters

Data

Page 1

Page 1 of 1

128%

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ALM for custom reports

Avanthi Hanumanula

https://optimize25dccpdev.crm.dynamics.com/main.aspx?appid=943b4e7e-cb9f-ed11-aad1-000d3a313da3

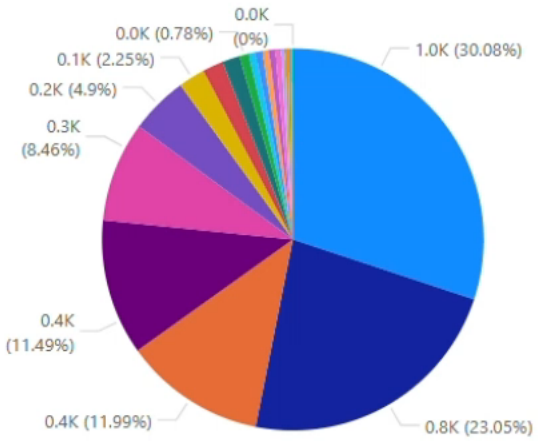
Dynamics 365 | Customer Service workspace | Search | SANDBOX | New look | AH

Home | Inbox

Customer Service Agent Dash... | Omnichannel Ongoing Conve... | Customized Report

TT_Agent

Agent total login time (hrs) by System user id



System user id

- 84939ce4-d6a3-ed11-aa...
- a7ee7f33-dda3-ed11-aad...
- 1d84e227-e3a3-ed11-aa...
- 044736b2-f3a3-ed11-aad...
- 1ed878fe-e2a3-ed11-aad...
- 7f0867b9-e3a3-ed11-aad...
- faf3f225-ce19-ee11-8f6d-...
- 316363de-e3a3-ed11-aa...
- 768d3995-e3a3-ed11-aa...
- c7440fb3-e3a3-ed11-aad...
- fe7292a6-e3a3-ed11-aad...
- 81d37c51-c1bc-ed11-83f...
- 56f2fe31-e3a3-ed11-aad...
- 2863824c-ddd9-ed11-a7...
- f7a4108f-f81f-ee11-9cbd...
- 5190761d-e3a3-ed11-aa...
- 29903286-e3a3-ed11-aa...
- f5c1cc59-949f-ed11-aad1...

Filters

Search

There aren't any filters to display.

Application lifecycle management for analytics on data model customizations

- Advantages of having ALM for custom reports is reducing overall deployment cycle
- The ALM utilizes
  - Power Platform Build Tools export and import data
  - Custom PowerShell script to update report references.
- Detailed steps are provided in [ALM for analytics on data model customizations - DCCP | Microsoft Learn]

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Resources

Additional resources

- Enable real-time analytics & Enable historical analytics
- Learn PBI
- Enabled TDS
- Connect to PBI Workspace
- Embed customized reports back to dynamics 365
- Analytics ALM Custom Reports
- Dynamics-365-FastTrack-Implementation-Assets/Customer Service/Power-BI/ALM at master · microsoft/Dynamics-365-FastTrack-Implementation-Assets · GitHub

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  - https://aka.ms/D365TechTalksSubscribe

QUESTIONS

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Dynamics 365 FastTrack - Upcoming TechTalks

Featured

20 May 2024 FastTrack for Dynamics 365

Upcoming TechTalk: Copilot Capabilities in Dynamics 365 Finance and Supply Chain M...

Alejandra Cabrales (3)

16 May 2024 FastTrack for Dynamics 365

Upcoming TechTalk: Implementation Optimization resources - D365 Customer Service (...

LutzE (0)

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Upcoming TechTalk: Copilot Capabilities in Dynamics 365 Finance and Supply Chain Management

Review the Copilot features that are currently available in Dynamics 365 Finance and SCM or will be released with the 10.0.40 Update. PRESENTERS Beatriz Nebot Garcia, Senior Product Manager Jodi Christiansen, Senior Program Manager Eric Wang,

20 May 2024 Alejandra Cabrales (3)

Upcoming TechTalk: Dynamics 365 finance and operations apps UI performance testing with JMeter

Before attending this event, take some time to explore our Performance testing with Jmeter blog series [https://nam06.safelinks.protection.outlook.com/?url=https%3A%2F%2Fcommunity.dynamics.com%2Fblogs%2Fpost%2F%3Fpostid%3D587b9524-30c9-422c-a5f8-4e37

29 Mar 2024 Alejandra Cabrales (2)

TechTalk: Dynamics 365 Automated Regression Testing with Leapwork | August 30 or 31, 2023

Regression testing is an absolute must in the Dynamics 365 ecosystem. It enables teams to accelerate release cycles, increasing testing coverage, improve time and cost efficiency and ensure bugs are detected proactively as early as possible. There ar

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Dankie Faleminderit **Shukran** Chnorakaloutioun Hvala Blagodaria

Děkuji **Tak** Dank u Tänan Kiitos **Merci** Danke Ευχαριστώ A dank

Mahalo ՇՆՈՐՀ. **Dhanyavād** Köszönöm Takk Terima kasih **Grazie** Grazzi

Thank you!

감사합니다 Paldies Choukrane Ačiū **Благодарам** ありがとうございました

谢谢 Баярлалаа **Dziękuję** Obrigado Mulţumesc **Спасибо** Ngiyabonga

Ďakujem Tack Nandri Kop khun **Teşekkür ederim** Дякую Хвала Diolch