

Dynamics 365 Customer Service

“We use Dynamics 365 for Customer Service as the backbone for enhancing the patient experience and to provide frictionless access to Inspira clinical resources.”

Tom Pacek
Chief Information Officer
Inspira Health Network

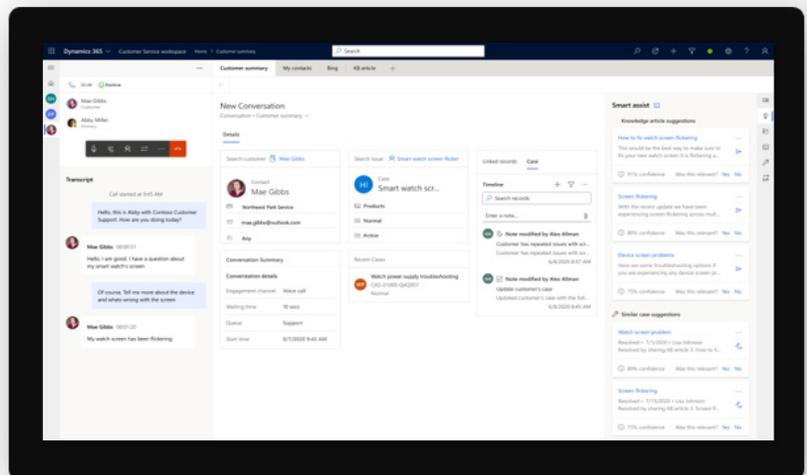


Enable always-on service

In today's socially distant environment, every service organization is facing new challenges in delivering proactive and personalized customer service. Dynamics 365 Customer Service empowers companies to provide a seamless, end-to-end customer service experience within a single solution, built on the Microsoft cloud, to deliver consistent, connected support across channels.

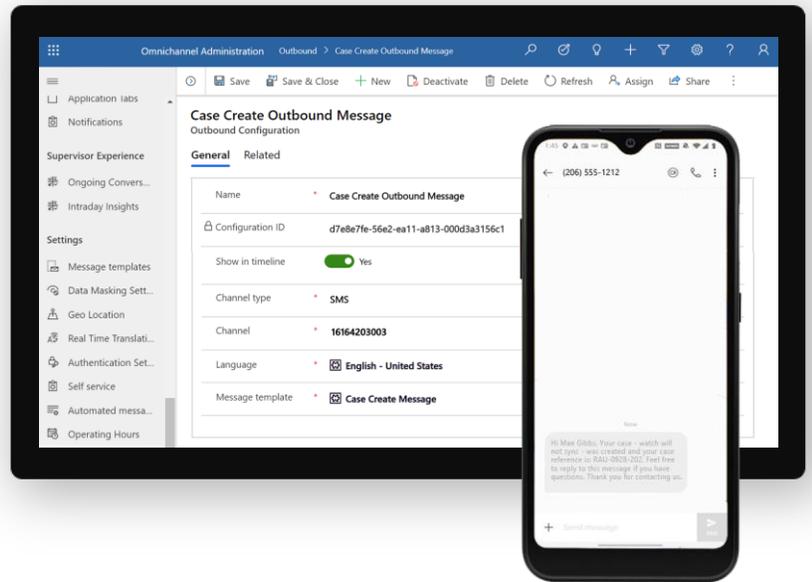
Personalize service

Consistently provide personalized service through the customer's preferred channel of engagement—whether it's voice, email, chat, SMS, or other digital messaging channels. Leverage self-service chatbots, portals, and knowledge articles to further personalize the customer experience. Create a single, connected service experience throughout the customer journey.



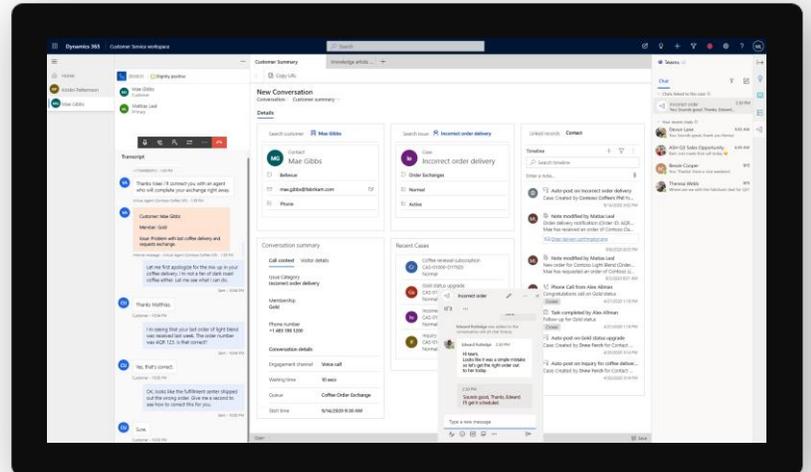
Proactively strengthen relationships

Delivering best-in-class service includes identifying issues before they happen with IoT alerts and signals embedded directly within the agent desktop. Additionally, stay connected with customers by automatically sending notifications for upcoming appointments, status of support tickets, and other communication needs. Easily create message templates and set triggers to automatically send messages.



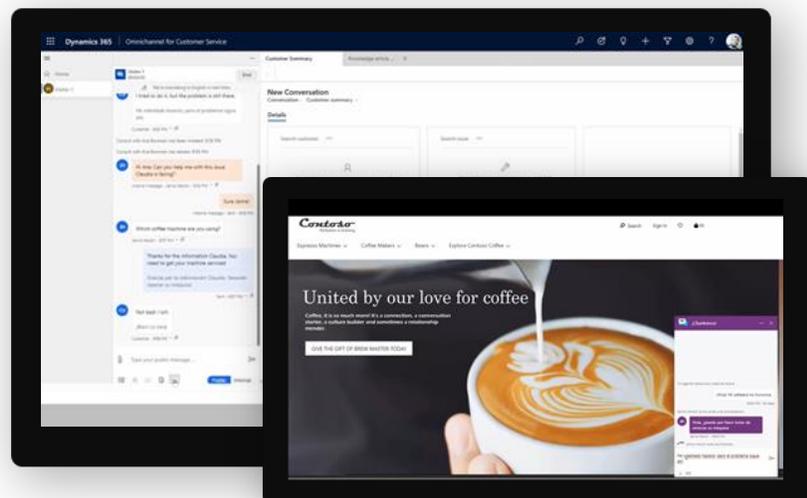
Increase agent productivity

Empower agents to easily collaborate with other agents, supervisors and experts to rapidly resolve issues using Microsoft Teams. Provide agents the ability to navigate across multiple open cases without losing context of existing work. Ensure consistency and efficiency across teams with agent scripts and create macros that automate routine tasks. Enable agents to accelerate issue resolution with a productivity pane that features AI-powered contextual suggestions for related knowledge articles and similar cases.



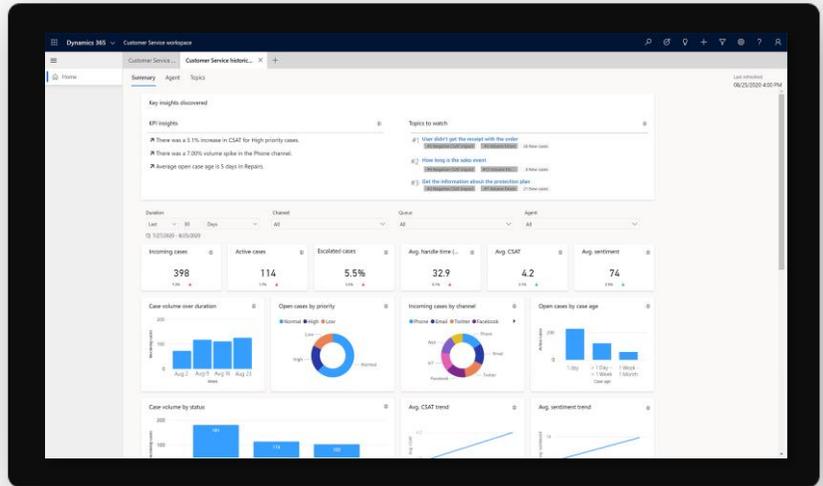
Provide the right tools

Lean on built-in AI to dynamically guide agents to the right action using tools such as real-time sentiment analysis, translation and transcription. Quickly resolve critical issues with video chat, co-browse, and remote assistance capabilities. Leverage virtual agents to resolve simple issues, saving time for agents to focus on more complex matters. Connect and access disparate databases outside of customer service with federated knowledge search.



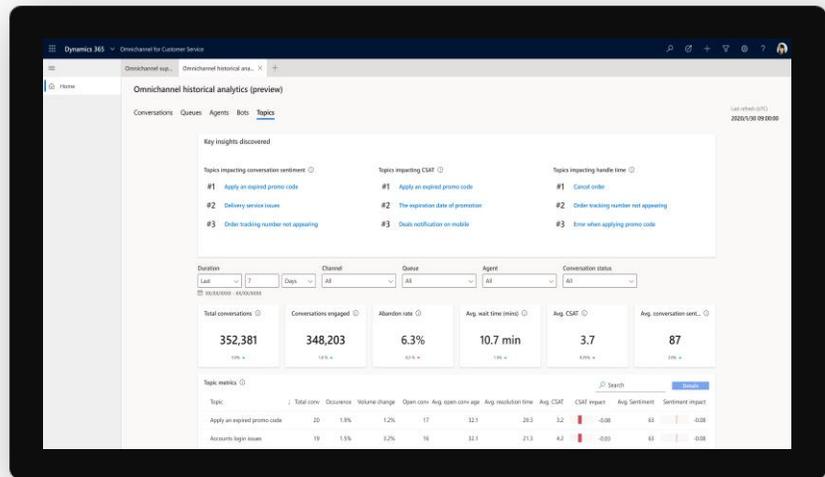
Identify opportunities to improve

Seamlessly weave built-in, AI-driven analytics and insights into all facets of customer service to optimize performance. Easy to view analytics are integrated within the context of the agent and supervisor experience. Drive innovation by improving every customer interaction with deep insights that empower agents to guide customers to positive outcomes.



Optimize with AI

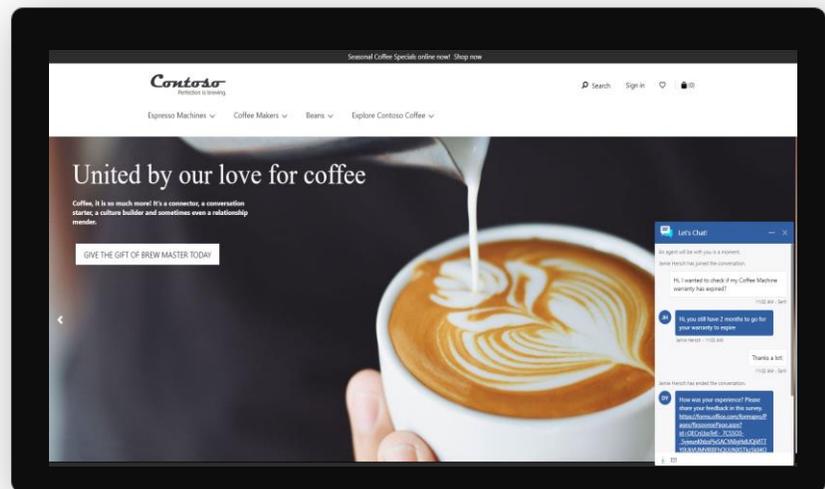
Eliminate the need for queue supervision with intelligent routing, a combination of AI models and rules, to assign incoming requests to the best-suited agents. Automatically group cases into topics using Natural Language Understanding to discover current trends and emerging issues across all channels. Improve customer satisfaction and agent performance with aggregated insights that show which trends are impacting core business metrics the most and receive suggestions on next steps that can help mitigate these issues.



Learn through customer feedback

Leverage Dynamics 365 Customer Voice to consistently exceed customer expectations by automatically triggering post-conversation surveys. This feature also supports inline surveys for web chat, embedded link-based surveys and offline surveys.

For more information on Dynamics 365 Customer Service, visit: aka.ms/CustomerService.



Customer Service plan comparison

	Dynamics 365 Customer Service Professional	Dynamics 365 Customer Service Enterprise
Unlimited named users	●	●
Case management	●	●
Knowledge management	●	●
Mobile	●	●
Unified service desk		●
Embedded intelligence		●
Context-driven suggestions		●
Service gamification		●
Analytics & KPI reporting		●
Leads (creation only)	●	●
Multisession support		●
Microsoft Power BI ¹	●	●
Portals		●
Customization and extensibility ²		
Application customizations	Limited	●
Custom applications ³ (Microsoft Power Apps)		●
Workflow automation ⁴ (Power Automate)		●
Microsoft 365 integration		
Outlook	●	●
Exchange	●	●
Excel	●	●
OneDrive/ SharePoint	●	●
OneNote	●	●
Add-in capabilities		
Digital messaging ²		Add-in only
Chat		Add-in only

● Included

¹ Customer Service application subscriptions include an option to embed PowerBI content. A separate PowerBI license may be required to configure access to the content.

² For more information, please see the [Dynamics 365 Licensing Guide](#)

³ Applies to customer applications within the same environment as the Dynamics 365 application.

⁴ Applies to Flows that map to the context of the Dynamics 365 application