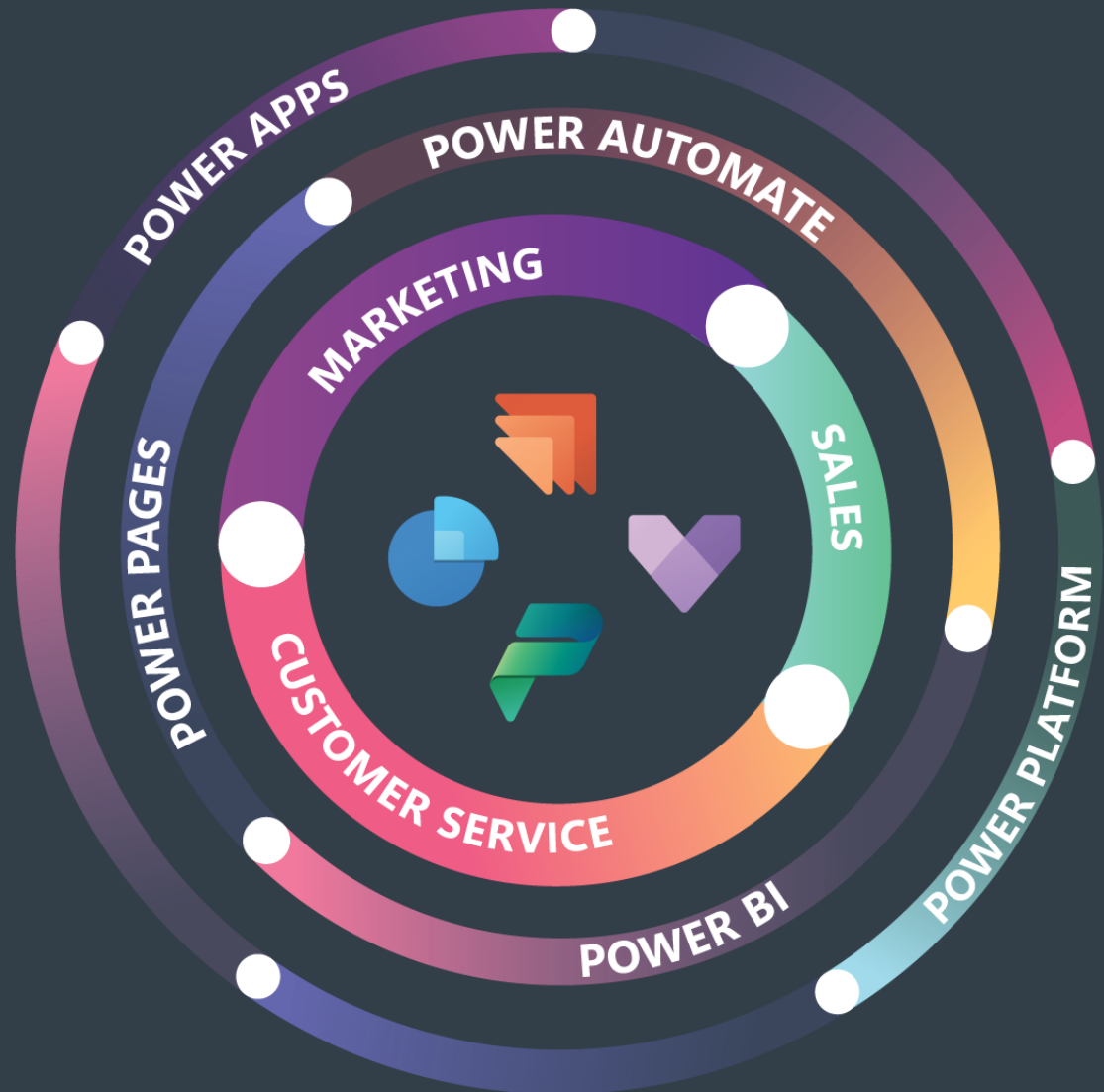


# CRM connect

Customer Service Excellence  
in 2024



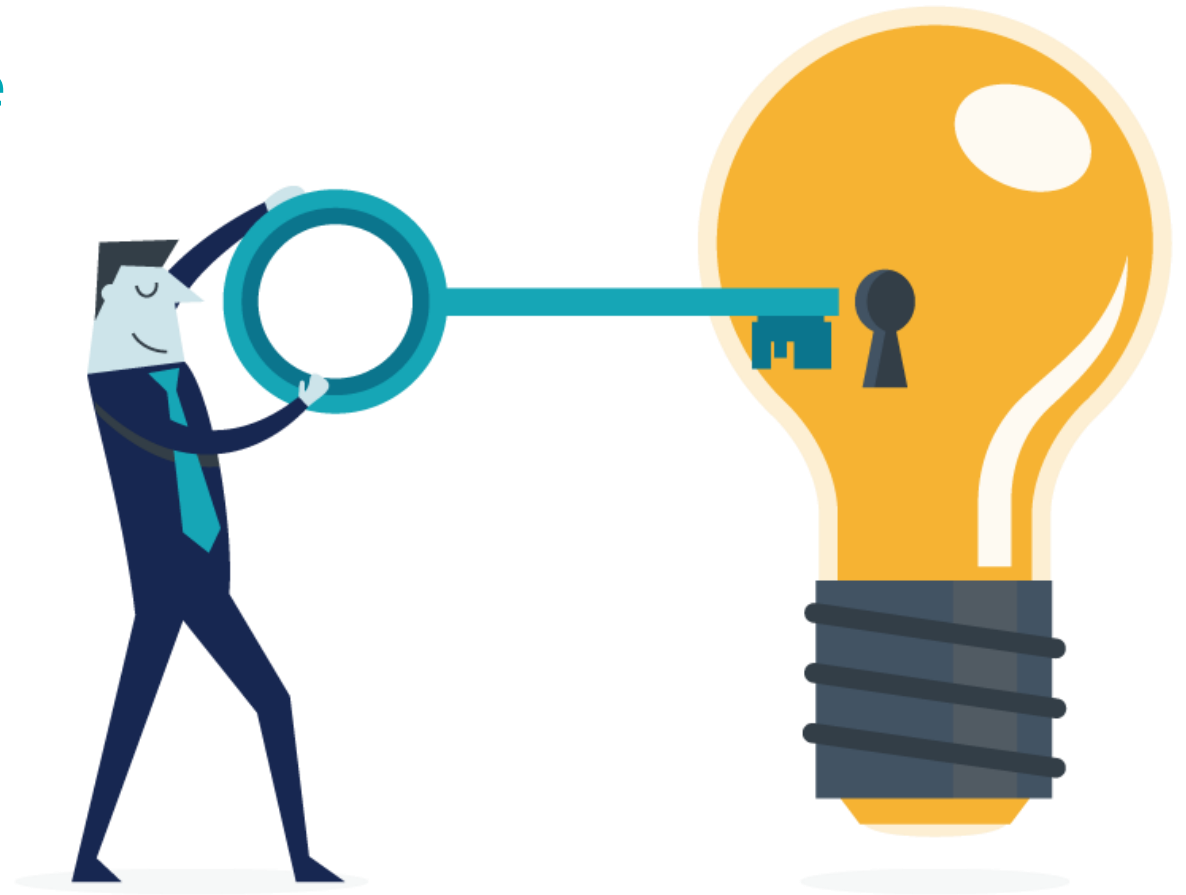


Hi!  
Ellie & Ben

# What we'll cover

## Delivering Customer Service Excellence

1. Introduction to the Customer Service Workspace
2. Unified routing – What is it?
3. Why you should be using unified routing
4. Setting up unified routing - prerequisites & considerations
5. Case forecasting to predict trends using AI



# Hands up, is anyone using Unified Routing?



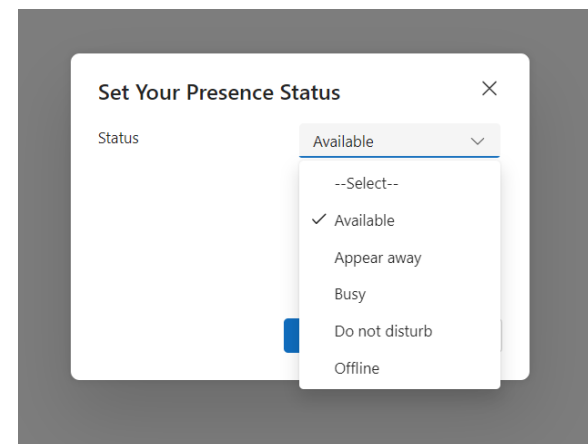
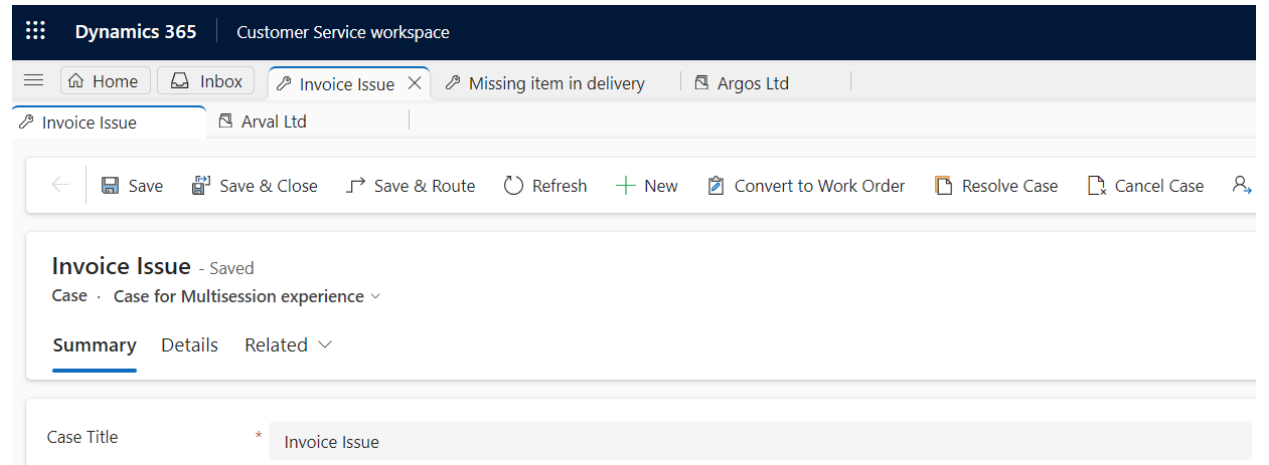


# Customer Service Workspace

# Customer Service Workspace

*Are you familiar with the Customer Service Workspace?*

- Ability to work on multiple cases and have multiple records open at a time.
- Ability to set user presence to ensure work can be picked up while you're busy (important for unified routing).
- Uses AI tools to help boost agent productivity.



# Legacy Case Routing – What is it?

- Cases routed manually based on pre-defined logic – requires user to click a button.
- Route to queue, user or team
- Time consuming when considering volume.
- Static setup – doesn't take user workload or availability into consideration.

➔ Save & Route

The screenshot shows the 'Rule Item' configuration page for 'Cases'. The interface includes a top ribbon with various actions like 'Save', 'Save & Close', 'Delete', 'Book', 'Smart Flows', 'Copy a Link', 'Email a Link', 'Run Workflow', 'Start Dialog', 'Flow', 'DocuSign', 'Word Templates', and 'Report'. The main content area is divided into sections: 'General' (containing 'Rule Item Information' with fields for Name and Description), 'Rule Criteria' (with a table for defining criteria), and 'Action' (with radio buttons for 'Queue' and 'User/Team', and a dropdown for 'Assign to User/Team').

Case	Primary Category	Equals	Invoice & Billing
Select			

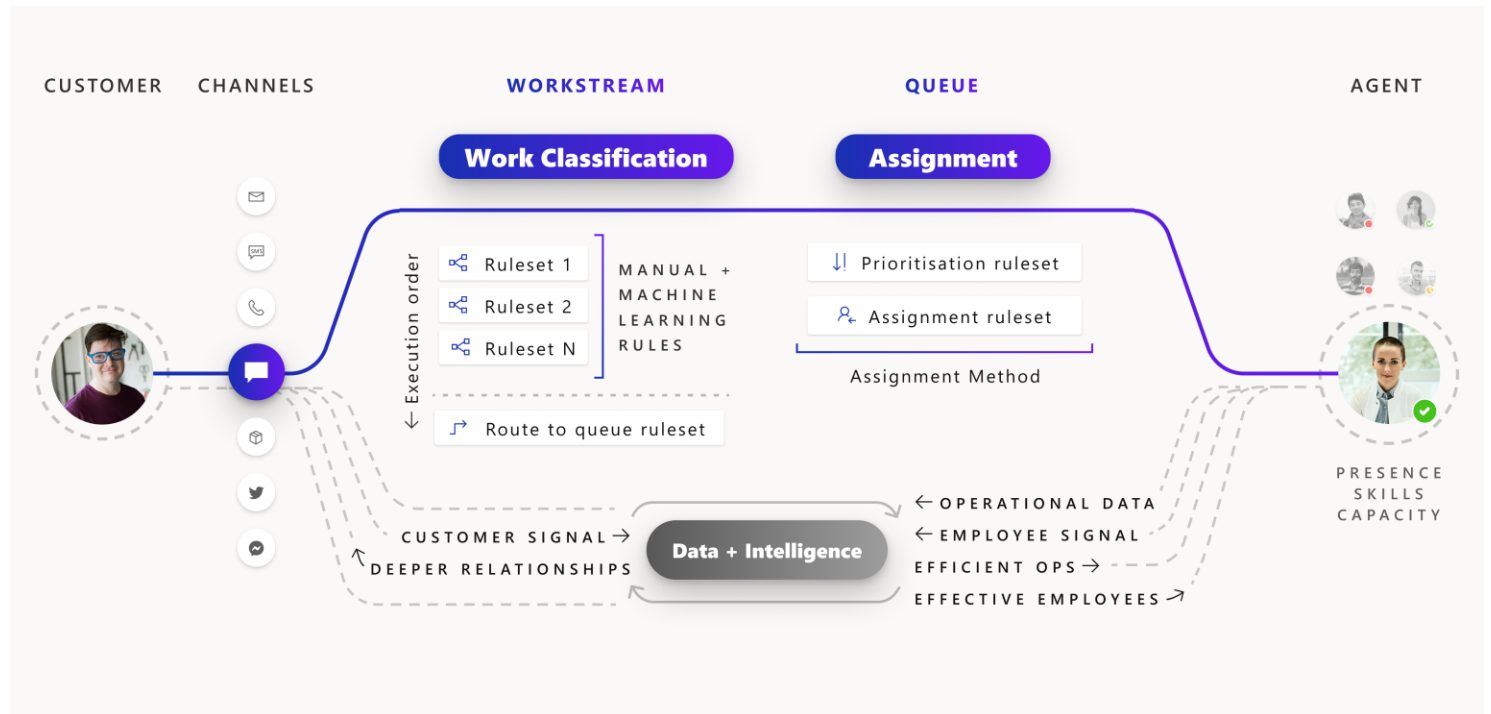
# Unified Routing – What is it?

- Pre-built feature which, when enabled & configured, automatically routes cases to the users who are equipped with the relevant skills to deal with the case.
- Cases can be routed to users based on user capacity and presence.
- Create custom rules to determine which types of cases should be routed to which team / individuals.
- Configure and assign specific skills to users and automatically route cases using a skill matching algorithm.
- Route cases to queues with custom operating hours to ensure the right support agent is available at the right time.



# Why should my business utilise unified routing?

- Saves time – eliminates the need for case distribution.
- Improved employee satisfaction through better management of workload.
- Improved customer satisfaction through faster case turnaround.
- Improved utilisation of resource / skills within your customer service team.



# Unified Routing Set Up – Key Points

## Workstream

- Intake rules – which cases do we want to be pushed to the workstream?
- Route to Queue - which queue is the case routed to based on attributes of the case.
- Fallback Queue - all agents included by default.
- Work distribution - capacity and allowed presence.

## Queue

- Agents need to have the customer service role/omni channel agent.
- Queue operating hours.
- Overflow handling - route to a different queue if out of hours.

# Unified Routing – Basic Set Up

The screenshot displays the Dynamics 365 Customer Service admin center interface. The browser tabs include 'Power Apps | Solutions - Custom', 'Sales Orders', 'Power Apps | Home', and 'Customer Service admin center'. The URL is <https://tecmannbe.crm4.dynamics.com/main.aspx?appid=bb252294-41be-ec11-9840-000d3ad7a876&pagetype=control&controlName=...>

The main content area is titled 'Apps' and shows a grid of 25 published apps. The apps are organized into categories on the left sidebar: 'Customer support', 'Agent expert', and 'Operations'. Each app card includes an icon, a title, a brief description, the publisher, and a 'UNIFIED INTERFACE' badge.

App Name	Description	Publisher	Interface Type
Dynamics 365 — custom	Provides access to the full suite of capabilities, including administration	Microsoft Dynamics 365	UNIFIED INTERFACE
Business Central Configur...	Business Central Configuration is a supplementary app on Microsoft	Microsoft First Party	UNIFIED INTERFACE
Channel Integration Fram...	Bring your communication channels and build immersive experience with	Dynamics 365	UNIFIED INTERFACE
Connected Field Service	Use Connected Field Service to monitor connected devices to make	Dynamics 365	UNIFIED INTERFACE
Customer Service admin ...	A unified app for customer service administration.	Dynamics 365	UNIFIED INTERFACE
Customer Service Hub	A focused, interactive experience for managing your customer service.	Default Publisher for tecmannbe	UNIFIED INTERFACE
Customer Service worksp...	Multi-session Customer Service with Productivity tools	Default Publisher for tecmannbe	UNIFIED INTERFACE
Dataverse Accelerator App	Discover the latest feature set available in Dataverse with more	Dynamics 365	UNIFIED INTERFACE
Dynamics 365 App for O...	Provides access to Dynamics 365 App for Outlook for enabled users.	Dynamics 365	UNIFIED INTERFACE
Engineer App Data		Default Publisher for tecmannbe	UNIFIED INTERFACE
Engineer App Data - Cust...		Default Publisher for tecmannbe	UNIFIED INTERFACE
Field Service	Field Service allows organizations to deliver intelligent, world class field	Dynamics 365	UNIFIED INTERFACE
Field Service Mobile	Dynamics 365 Field Service Mobile is a fully customizable, multi-device	Dynamics 365	UNIFIED INTERFACE
New Supplier Requests		Default Publisher for tecmannbe	UNIFIED INTERFACE
Omnichannel admin center	A simplified admin app that includes a live chat demo.	Dynamics 365	UNIFIED INTERFACE
Omnichannel for Custom...	A unified experience for your agents interacting across communication	Default Publisher for tecmannbe	UNIFIED INTERFACE
Portal Management	Configure and manage your online platform to communicate and	Microsoft	UNIFIED INTERFACE
Power Pages Management	Configure and manage your online platform to communicate and	Microsoft First Party	UNIFIED INTERFACE
Power Platform Admin Vi...		Power Platform Admin	UNIFIED INTERFACE
Project App		Default Publisher for tecmannbe	UNIFIED INTERFACE
Resource Scheduling	Provides access to the Resource Scheduling solution	Dynamics 365	UNIFIED INTERFACE
Sales Hub			
Sales Team Member			
Smart Flows			
Solution Health Hub			

# DEMO



# Prerequisites & Things to Consider..

- Elevated permissions are required to switch on unified routing.
- Once you have enabled unified routing at environment level, you **CANNOT** disable it.
- Always test in a sandbox environment to begin with before enabling in production.
- Some of the configuration can be solutionised.
- Users will need to be assigned the 'Omnichannel Agent' security role before cases can be routed to them.

# Case Volume Forecasting in Customer Service

- Forecast upcoming case volumes based on historical traffic.
- Visualise forecasted case volumes up to 6 months in advance.
- Slice and dice visualisations to get further insights i.e., by channel or by queue.
- Allow the system to detect seasonality from historical data and configuration.

# Call to Action

- Go try it!
- Get some training
  - Speak to your Account Manager
  - <https://learn.microsoft.com>
- Remember to configure in a test environment first!

Thank you.

CRM  
**connect**

THURSDAY 25 APRIL 2024

