UNLOCK YOUR CUSTOMER DATA

CRM & POWER PLATFORM CUSTOMER DAY 2023

Collaborate centrally to resolve problems with Swarms and Teams!

WEDNESDAY 26 APRIL 2023

Hi!

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What we'll cover

1. How can Dynamics 365 & Microsoft Teams Integration benefit my business?

2. What is a Swarm?

3. What benefits can we get from using Swarms?

4. How do Swarms work?

5. The end-to-end process of setting up & creating a swarm - DEMO

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Dynamics 365 & Microsoft Teams Integration

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Microsoft Dynamics 365 & Microsoft Teams

Intelligent business applications including your CRM apps such as Dynamics 365 Sales & Dynamics 365 Customer Service

Communication platform that leverages real-time collaboration, communication, meetings and file sharing across an organisation and to external parties.

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What does integrating the two offer?

- Embedded Teams channels & Teams chats directly in CRM.

- Allows CRM users to view and edit records, dashboards and views directly within Teams.

- Allows anyone within an organisation to view CRM records in the context of a Teams chat.

- Non-CRM users only require a MS Teams licence to be able to view records shared with them.

- The ability to use Customer Support Swarming

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How can it benefit my business?
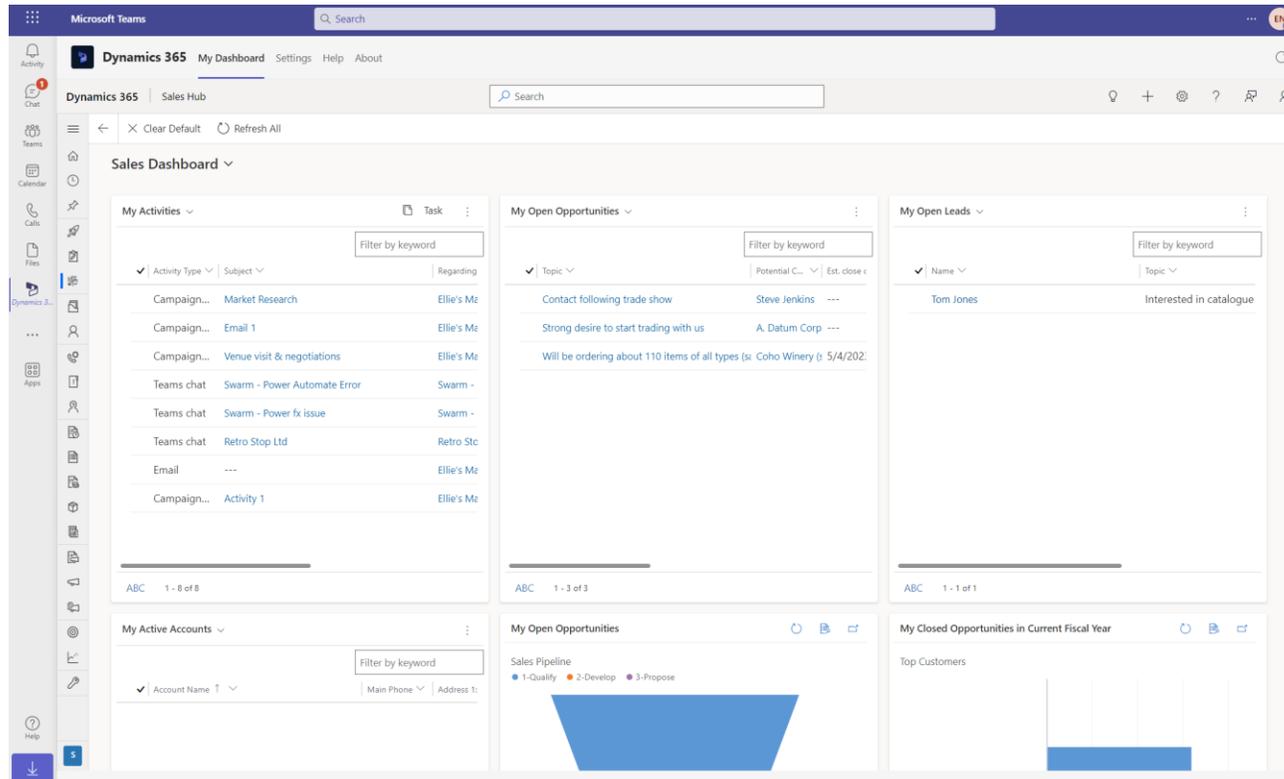
- Optimised business processes that make access to information quick, easy and user friendly

- Helps users across the whole organisation collaborate more efficiently

- Centralised access to files related to CRM records within a Teams channel. (This can be particularly beneficial if your organisation works with complex, ongoing projects).

Lets see how it looks...

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Swarms

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What is a Swarm?

- Swarms are an extension of Dynamics 365 & Teams integration that are specifically targeted towards Dynamics 365 Customer Service users/agents.

- Uses Automation and AI to bring together the required experts when working on complex Customer Service cases with the click of a button.

- Provides non-CRM users read access to key details of cases through automatically created Teams Channels.

- Assign employees with bespoke skills & create customisable condition rules to reach the right people at the right time.

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How can it benefit my business?

- More efficient use of time & resources when working on time-sensitive or complex cases.

- Can reduce lead times for reaching case resolutions.

- Improves and promotes collaboration across the whole organisation.

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How do Swarms work?

- Creating a swarm will automatically create a Teams channel where experts can view details of the case and collaborate their ideas.

- Separate & customisable case form for Swarms to ensure experts are able to view the relevant details of a case.

- Experts can be automatically notified when they have been invited to join a swarm using an OOTB Power Automate flow.

- Customisable skills that can be assigned to employees and graded accordingly.

- Set condition rules so AI can pick up key words from the Case or Swarm request in order to determine the skillset that is required to reach a resolution.

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Let's do a DEMO

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Thank you.

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