Customer Voice Survey Analytics D364 Sales: 2Day Workshop

Length: 2 Days

Dynamics 365 Customer Voice is an enterprise feedback management application you can use to easily keep track of the customer metrics that matter the most to your organization.

 Overview

Dive into the power of Dynamics 365 Customer Voice! This workshop includes hands-on activities for creating surveys with Dynamics 365 Customer Voice. Plan, capture, analyze, and act on customer and employee feedback.

We begin with a planning session to determine what type of templates and question types to use. Best practices for design based on audience and desired results. Practice with start-to-finish examples to get your organization up and running with this amazing tool, Real-life surveys and designing Power Automate flows based on responses. Then, further analyze results using Power BI.

Agenda:

- Access Customer Voice.
- Review Survey Templates available.
- Create Survey's using Existing Templates.
- Create a Survey using a Blank Template.
- Plan a Survey.
- Learn the parameters of Customer Voice.
- Identify all available Question Types.
- Applying branching to a survey question.
- Add and configure Satisfaction Metrics.
- Apply organizational branding to Surveys.
- Customize Footer text and Post-Survey Message.
- Preview and Test a Survey.
- Work with Alerts
- Distribute a Survey:
    - o Using Email, Power Automate or Embedded in a Webpage.
    - o Using a QR Code, Link or from Dynamics 365
- Analyze Reports from Reponses
    - o Satisfaction Metrics Report
    - o Survey Response Report
- Overview of Power Automate

- Use Power Automate to route results to the right systems and decision makers customize surveys with advanced logic
- Use Power Automate for follow-up actions
- User Power Automate to work with your business process
- Overview of Power BI
- Use Power BI to build reports
- Dashboards and a Power BI App for survey results.

Deliverables:
Attendees will get a thorough overview of Customer Voice functions, navigation and setting options. Multiple surveys created using enhanced templates. Surveys in the session will include all question types and custom properties like, branching and branding. Surveys can be distributed using email and Power Automate. Survey responses received will be analyzed using Power BI.

About Dynamics Edge
Our expertise includes Dynamics 365, (CRM) (ERP), Azure and Power Platform.
Experience with GCC, GCC High Clouds, AI & ML, Data Analytics, Power BI, Power Apps & Power Automate, Microsoft 365, Office 365, SQL Server & Big Data.