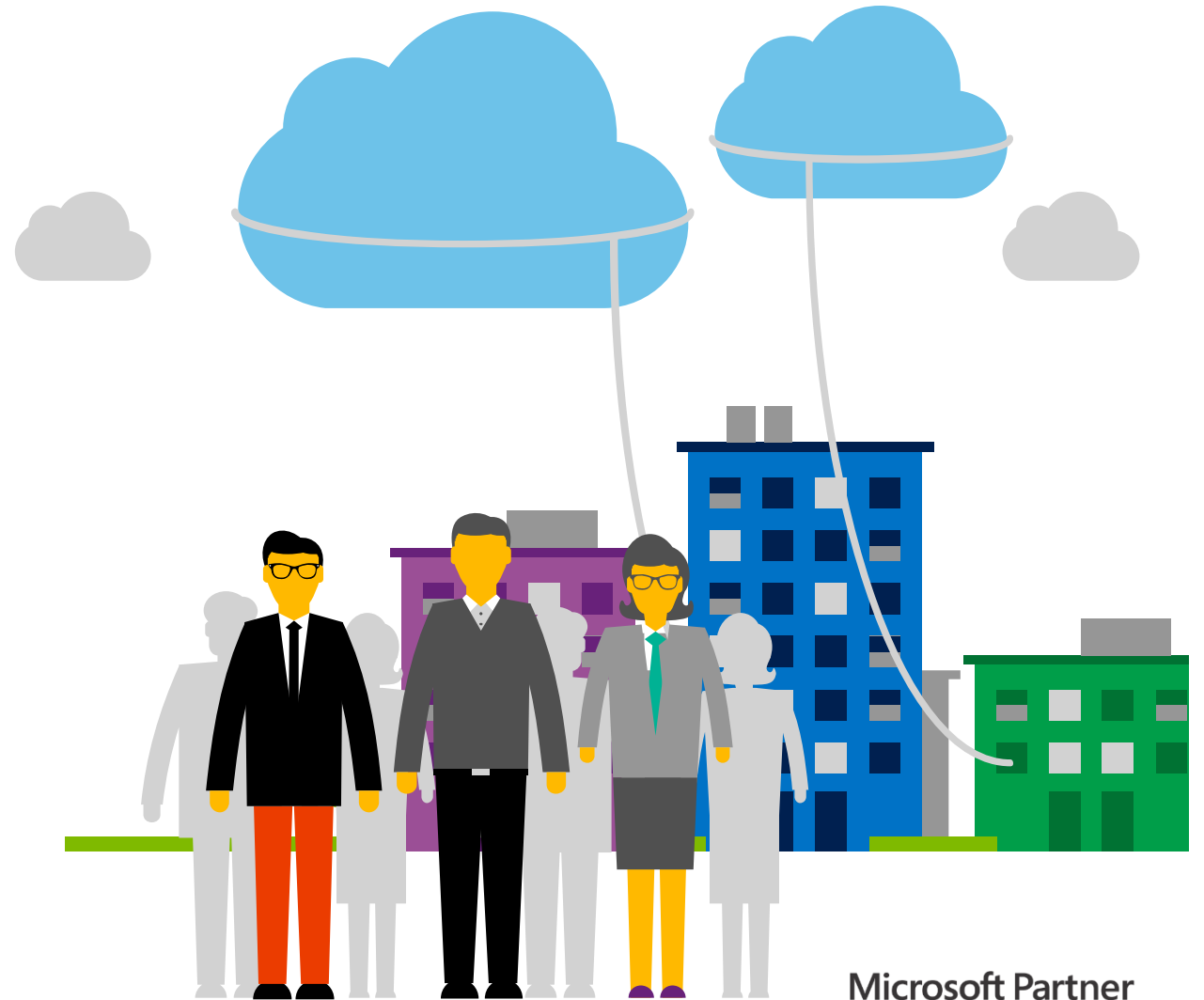


Microsoft Business Applications Dynamics 365

SMART CONSULTING
Marcelo Patroni





18

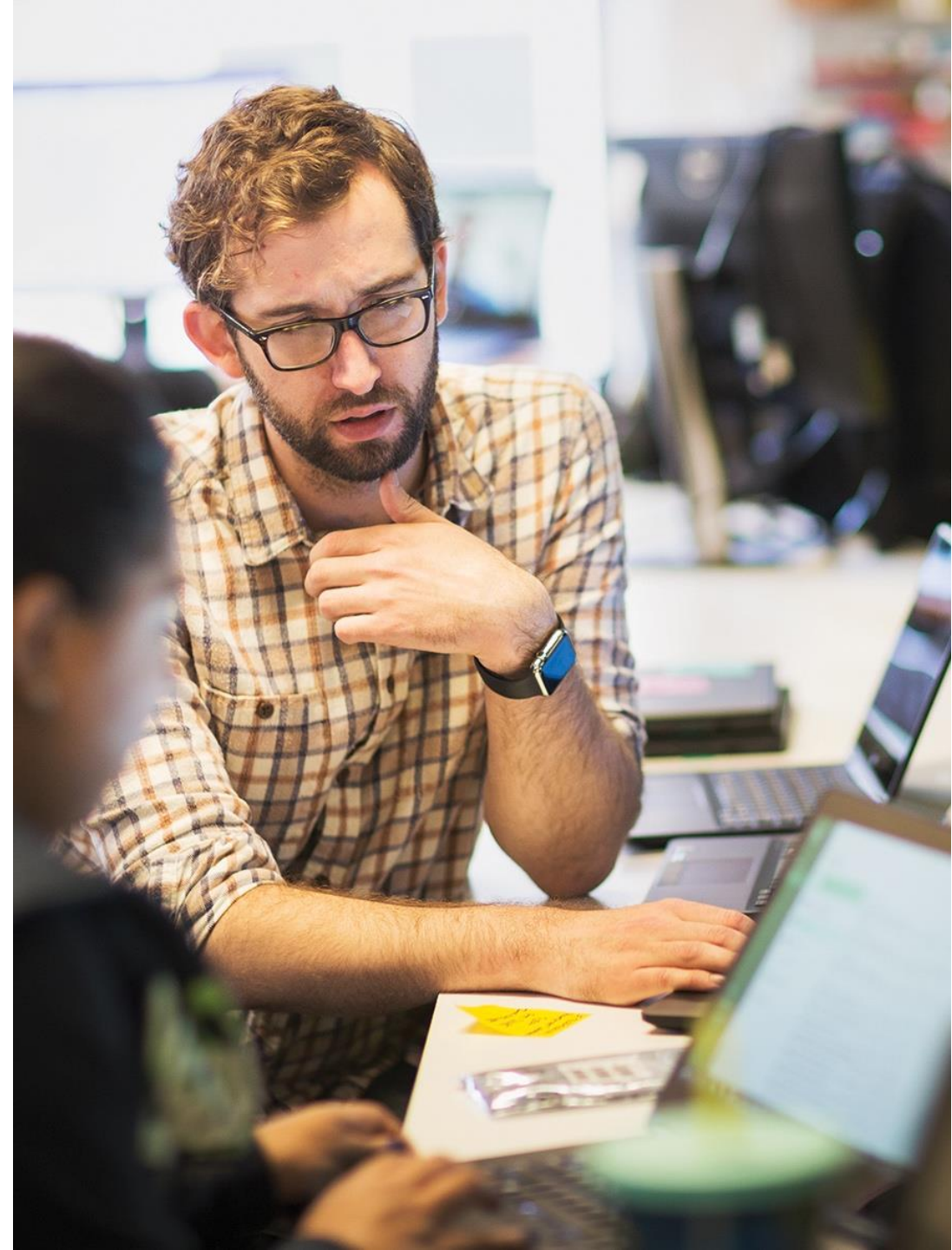
Anos de Experiência

+500

Projetos transformadores entregues

+60

Profissionais comprometidos com seu sucesso



Competências Microsoft

- Cloud Business Applications
- Data Analytics
- Application Development



Diferenciais e Posicionamento



- Consultoria em Dynamics 365 (CRM) e Power Platform
- Desenvolvimento de Software
- Implantação / Projeto
 - Tradicional
 - Ágil
- Migração / Atualização
- Sustentação / Sucesso do Cliente
- Treinamento

Tecnologias

- Dynamics 365 Customer Engagement
 - Vendas
 - Atendimento ao Cliente
 - Marketing
 - Project Service Automation
 - Field Service
 - USD
 - Portals
- Power BI / Data Insights / Azure AI
- PowerApps & Power Automate

Alguns Clientes



Dynamics 365
Customer Service



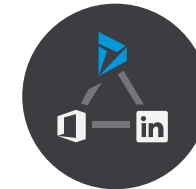
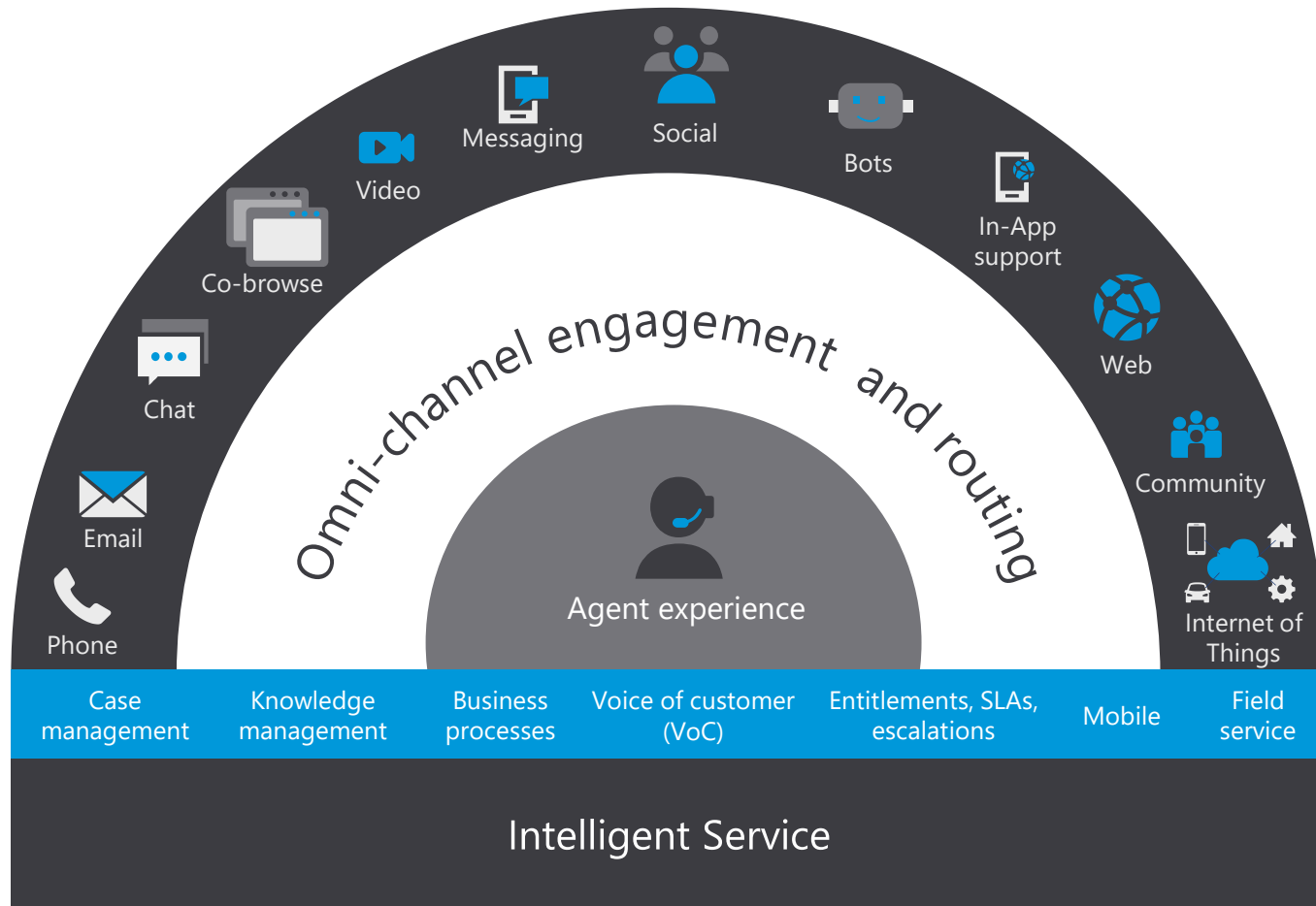
Atendimento, SAC e Garantia

- Base de Conhecimento
- Portais de auto atendimento e chat
- Analise de chamados com Inteligência artificial
- Omni Channel
- Visão 360

Processos Suportados pelo Dynamics 365

Customer Engagement	Sales	Actionable Insights	Personal Engagement	Customer Management	Sales Performance	Relationship Sales	InsideView Integration	LinkedIn Sales Navigator	Mobile Access	Outlook Integration	Gameification	Social Intelligence	Versium	Intelligence
	Customer Service	Case Management	Omni-channel engagement	Self-Service and Communities	Knowledge Base	Account Management	Workflow Automation	Next Best Action	Product Reccomendations	Customer Service Bot	Partner Portals	Intelligence		
	Marketing	Campaign Automation	Omni channel campaigns	Lead management	Event management	Segmentation	Sales Collaboration	Linked In Connector	Customer Portals	Voice of the Customer Surveys	Marketing Lists	Intelligence		
	Social Engagement	Social Campaigns	Social Analytics	Social Selling	Social Insights	Competitor Analysis	Social Monitoring	Social Sentiment	Social Engagement					
	Field Service	Optimized scheduling	Service agreements	Inventory management	Mobile productivity	Connected devices	Customer Communications	Intelligence						
	Project Service Automation	Solution selling	Project planning	Resource scheduling	Mobile productivity	Time + expenses	Customer billing	Intelligence						
	Power Platform	PowerBI	PowerApps	Microsoft Flow	Common Data Service									

Dynamics 365 for Customer Service



Engajamento omni-channel

Engajar os clientes através de vários canais de forma integrada



Experiência do Atendente

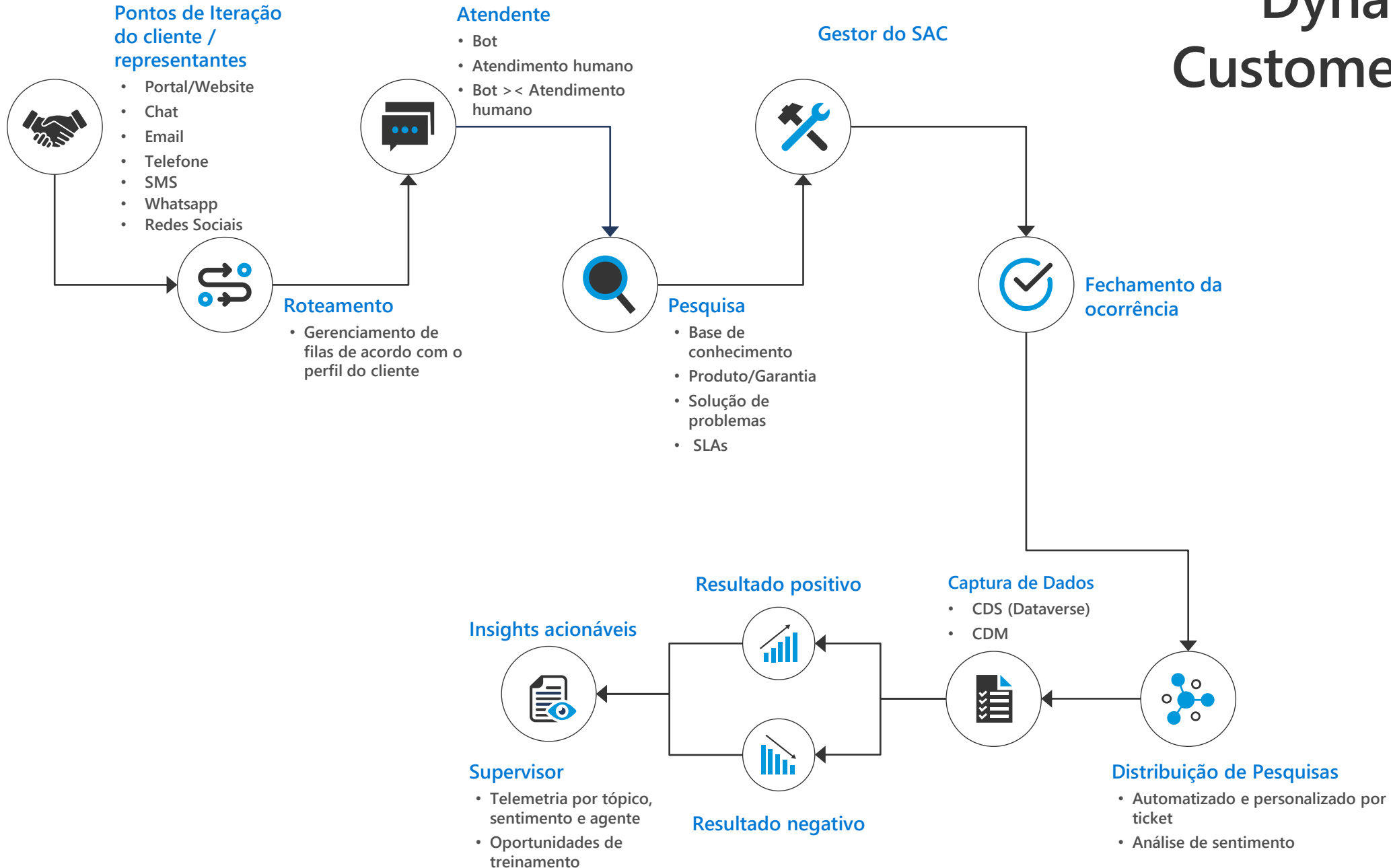
O omnichannel do D365 permite que os atendentes operem de forma eficiente, com uma visão unificada do cliente através de aplicativos e canais de contato integrados.



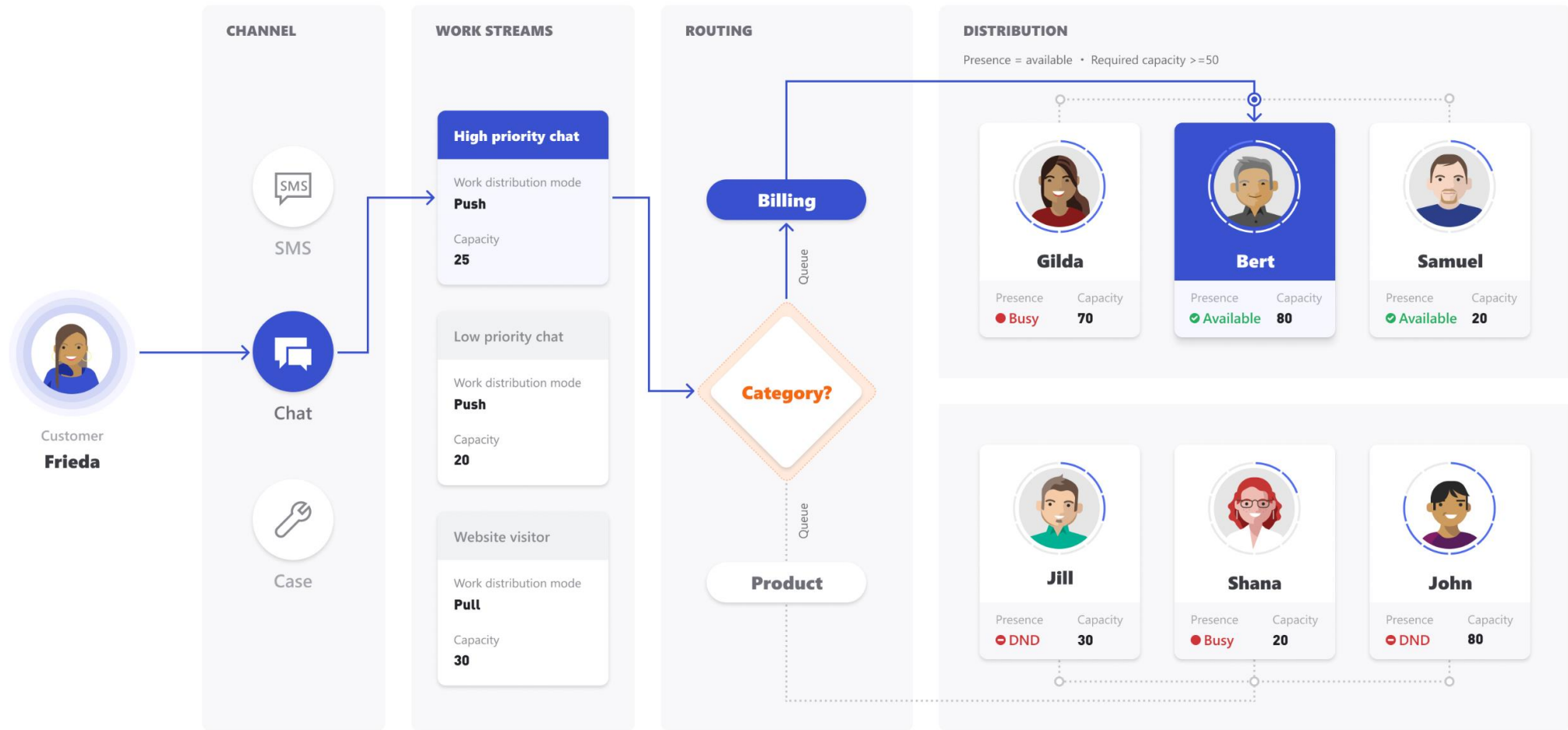
Serviços Inteligentes

Com o omnichannel do D365 o cliente passa a ter um atendimento personalizado, de forma proativa e preditiva através de interações humana e não humana.

Dynamics 365 Customer Service



Roteamento e Distribuição de Trabalho



Canais Disponíveis com Omnichannel

- SMS
- Whatsapp
- Chat
- Redes Sociais

The image shows a website for 'Contoso, Ltd.' with a header 'Base de Dados de Conhecimento' and a search bar. The main content area is titled 'AUTOATENDIMENTO PARA CLIENTES' and lists popular topics like 'Viagem com Reserva' and 'A Entrega Nunca Chegou'. An omnichannel chat window is overlaid on the right, titled 'Fale conosco!'. The chat history shows a virtual agent (SmartBot) greeting the user and asking for their name and company. The user has responded with 'lane' and 'lane'.

Contoso, Ltd. | Base de Dados de Conhecimento

AUTOATENDIMENTO PARA CLIENTES

Tudo ▾ | Pesquisar

Mais Populares

- Viagem com Reserva
- A Entrega Nunca Chegou
- Produtos com Danos ou Defeitos

Fale conosco! — ✕

Rolar para baixo Olá

Virtual Agent (SC Bot), 10:28
Olá, sou o SmartBot, irei fazer o seu pré-atendimento. Me ajude com algumas informações.

Virtual Agent (SC Bot), 10:28
Qual o seu nome?

10:28
lane

Virtual Agent (SC Bot), 10:28
Qual a sua empresa?

Digite para conversar... ➤

Omnichannel

Múltiplas sessões de atendimento

The screenshot displays the Dynamics 365 Omnichannel for Customer Service interface. The main window shows a chat session with Mae Gibbs, including messages from the Contoso Bot and the customer. A 'New Conversation' panel is open, showing details for a 'Device Noise Issue' case. The panel includes a search bar, contact information for Mae Gibbs, and a list of recent cases. A 'Chat request from Alex Wu' notification is visible in the top right corner.

Customer Summary

Search customer: Mae Gibbs

Contact: Mae Gibbs
Redmond, Washington
mae@humongousinsurance.com
Email

Search issue: Device Noise Issue

Case: Device Noise Issue
Query: Normal
Active

Conversation summary

Pre-chat survey	Visitor details
Authenticated	No
Location	Bellevue, Wa
Browser	Chrome
Operating system	Windows
Visitor language	en-us
Device	Desktop
Engagement channel	Live Chat
Waiting time	12 secs

Recent Cases

- Device Noise Issue (DN) CAS-01005-C0C87 Normal
- Having issues setting up Printer (HI) CAS-01010-C1D757 Normal
- Insurance Renewal for Laptops (IR) CAS-01001-L2L9H4 High
- Missing Delivery (MD) CAS-01006-S3F5D4 Normal
- Need help with printer set up (NH) CAS-01011-P0T2H6 Normal

Chat request from Alex Wu

Comment Incoming conversation
Wait time 120 secs
Accept Reject

Linked records Contact

Timeline

Title: Chat notes 06/24 - device noise
Note: Printer was 5 yrs old, reset to default settings fixed, have offered an exchange deal to customer
Cancel Add note

LAST WEEK

- Email from Lilly Michael - Friday 11:19 AM
Inspection Feedback Dear Mae, Assign Add to Queue
- Auto-post on wall Device Noise Issue - Wednesday 4:23 PM
Case Created by Lilly Michael for Contact Mae Gibbs. Like Reply
- Phone Call from Lilly Michael - Wednesday 12:08 AM
Inspection schedule information Inspection scheduled. Assign Close Activity

Power Virtual Agents

Bots configurados para realizar o atendimento com uma base de dados facilmente personalizável.

The screenshot displays the Power Virtual Agents interface, divided into two main sections: a chat window on the left and a configuration canvas on the right.

Chat Window (Left): Titled "Test bot", it shows a conversation with a bot. The bot asks, "If you'd like to speak to a human agent, let me know at any time." and "So, what can I help you with today?". The user asks, "Are there any stores around me?". The bot responds, "I'd be glad to help find a store near you." and "Which location are you interested in?". The user provides the location "Kirkland". The bot responds, "Our Kirkland is located in downtown Kirkland. The address is: 1234 Central Way, Kirkland, 98321." and asks, "Did that answer your question?". The user has "Yes" and "No" buttons at the bottom.

Configuration Canvas (Right): Titled "End of Conversation", it shows a flowchart configuration. The flow starts with a "Trigger Phrases" step, followed by a "Question" step with the text "Did that answer your question?". Below this is an "Identify" step set to "Boolean" and a "Save response as" step set to "PRR Survey Question (Boolean)". The flow then branches into two "Condition" steps, both set to "PRR Survey Question (Boolean) is equal to". The left condition is set to "True" and leads to a "Redirect" step labeled "Confirmed Success". The right condition is set to "False" and leads to a "Redirect" step labeled "Confirmed Failure".

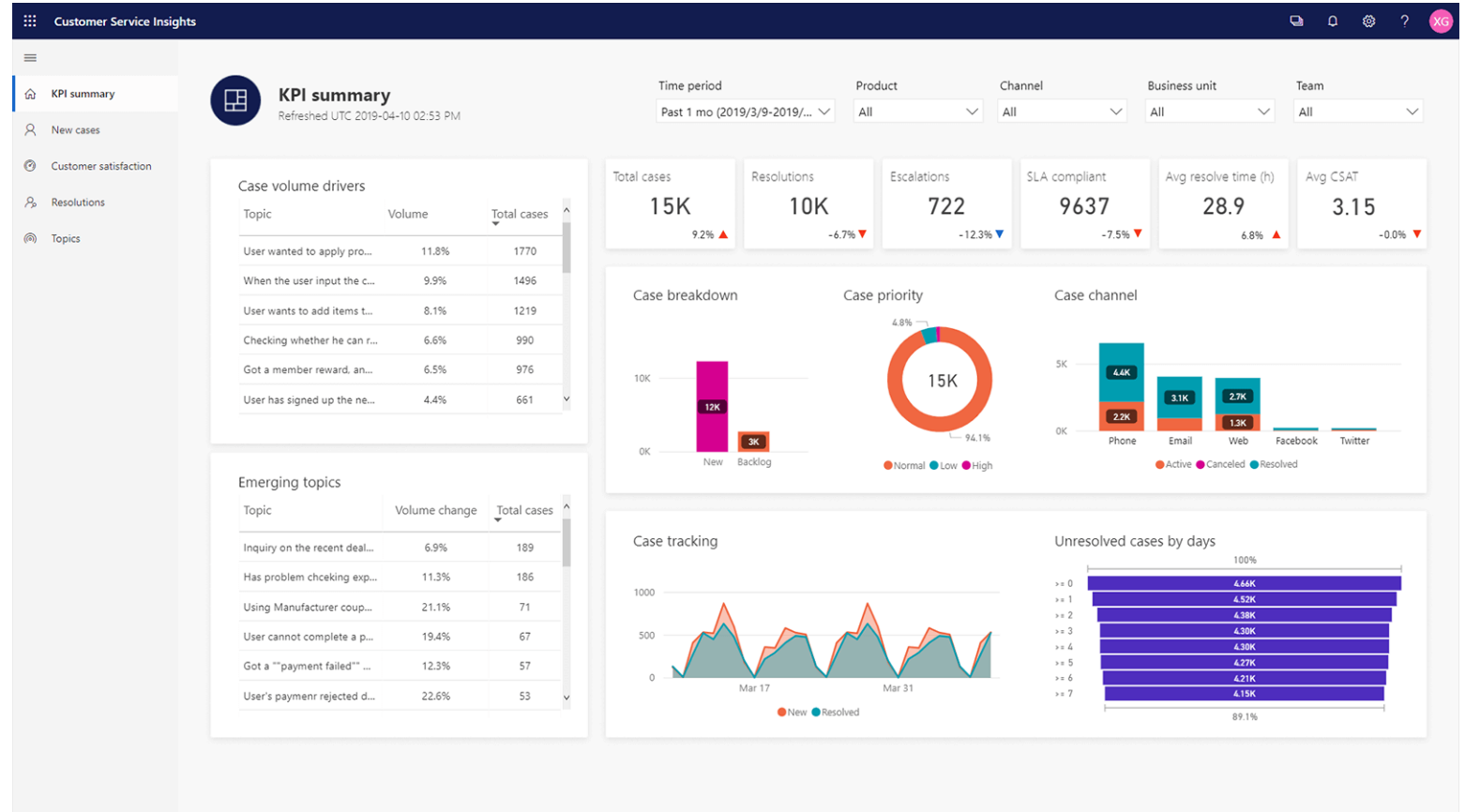
Gerenciamento de Casos

- Visualização rápida dos dados do cliente
- Réguas de relacionamento personalizadas, conforme necessidade: por tipo e natureza do chamado
- Base de conhecimento para o agente
- Visão 360° dos clientes

The screenshot displays the Microsoft Dynamics 365 Omnichannel for Customer Service interface. The top navigation bar includes 'Dynamics 365' and 'Omnichannel for Customer ...'. The main header shows the case name '3D Printer warping issues' and the account 'Northwind Printers'. A progress bar indicates the case is in the 'Identify' stage (9 Hrs). The interface is divided into three main sections: 'GENERAL INFORMATION', 'TIMELINE', and 'RELATED'. The 'GENERAL INFORMATION' section shows the account name 'Northwind Printers', a contact number '425-228-2727', and the case title '3D Printer warping issues'. The 'TIMELINE' section shows two auto-posts on the wall: 'Auto-post on wall Printer Service Queue - Today 5:32 AM' and 'Auto-post on wall 3D Printer warping issues - Today 5:32 AM'. The 'RELATED' section shows search results for '3D Printer warping issues' with 33 results found, including '3D printer common Issues' and '3D printer issue resolutions'.

Gerenciamento de Casos – Insights

- Visualização rápida dos dados do cliente
- Réguas de relacionamento personalizadas, conforme necessidade: por tipo e natureza do chamado
- Base de conhecimento para o agente
- Visão 360° dos clientes

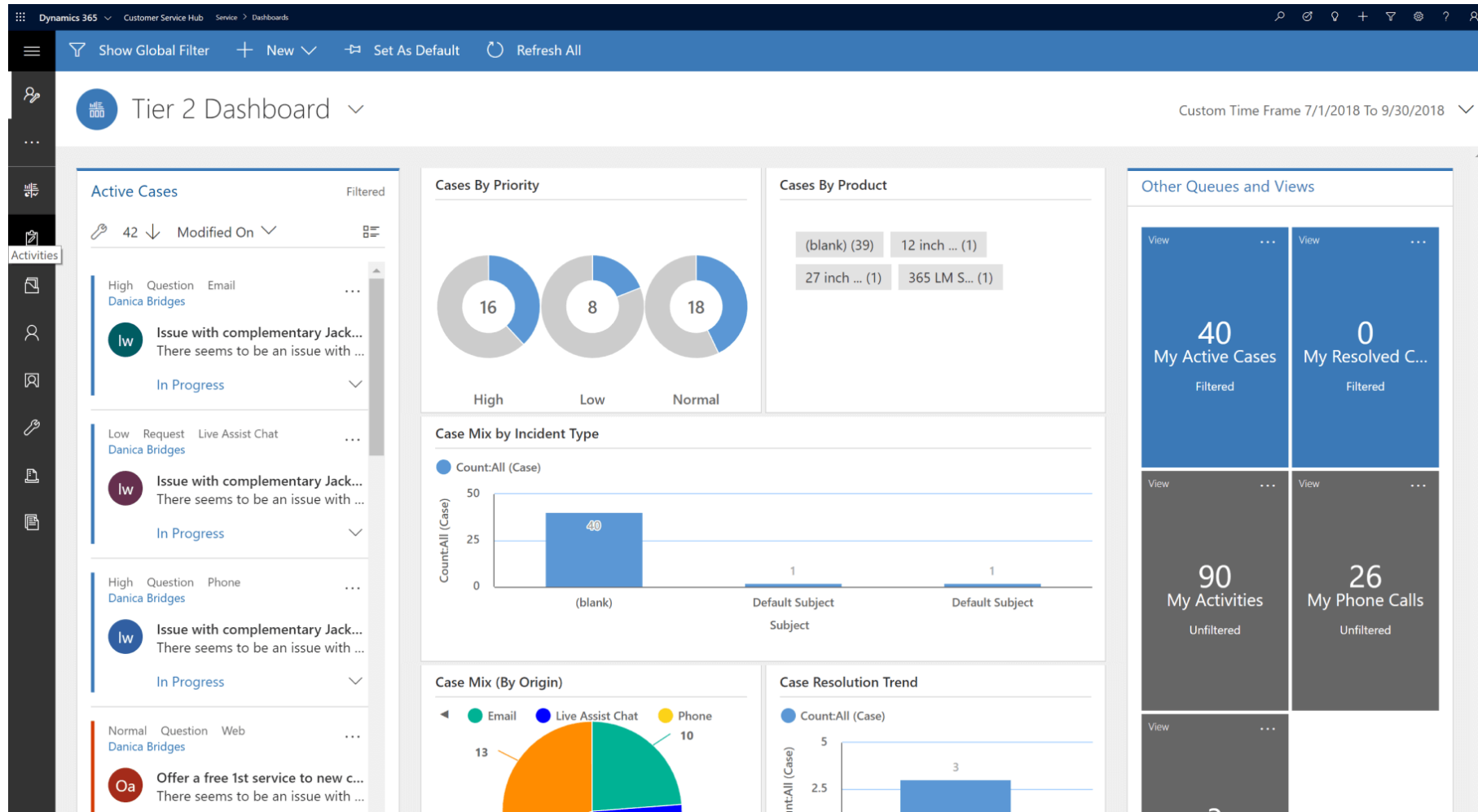


Base de Conhecimento

The screenshot shows the Microsoft Dynamics CRM interface for editing an article titled "Types of Coffee 1.0". The top navigation bar includes "Service Desk" and "Articles". The article's lifecycle is shown as a sequence of steps: AUTHOR, REVIEW, UPDATE, REVIEW, and PUBLISH. The current step is REVIEW, with a "Review Content" button and an "Approve" button. The article content includes a title, description, and a detailed paragraph about coffee varieties, specifically mentioning *Coffea arabica*. A comment section on the right shows a comment by Amanda Robicheux and a system message "Article V 1.0 was created".

The screenshot displays a knowledge dashboard with three main sections: "Stream", "Charts or visual filters", and "Tiles". The "Stream" section lists various articles such as "Process for reverse credit card charge" and "Upgrade Instructions". The "Charts or visual filters" section contains two charts: a bar chart titled "Views by Subject" and a pie chart titled "By Status Process". The "Tiles" section shows three summary cards: "My Published Articles" with a count of 7, "My Expired Articles" with a count of 1, and "My Articles Expiring This Month" with a count of 2.

Painéis – KPIs de Atendimento





Obrigado!

 **SMART Consulting**

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