



MICROSOFT TRAINING

Microsoft Dynamics 365 Customer Service Workshop Implementation

Master Microsoft Dynamics 365 Customer Service implementation. Learn to configure, customize, and manage solutions for superior customer engagement.

DURATION

8 Hours

LEVEL

Intermediate

FORMAT

Instructor-Led

- Globally Recognized Certification

- Expert-Led Hands-On Training

- Flexible Scheduling

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COURSE OVERVIEW

The Microsoft Dynamics 365 Customer Service Workshop Implementation course is designed for IT professionals, consultants, and power users eager to master the deployment and optimization of Dynamics 365 Customer Service. This hands-on workshop dives deep into the platform's capabilities, covering everything from core case management and service level agreements (SLAs) to advanced features like unified routing, omnichannel engagement, and AI-driven insights. Participants will learn how to configure the application to meet specific business needs, ensuring seamless customer interactions and efficient service delivery across various channels. You will gain practical experience in tailoring the customer service hub, managing queues, and automating workflows to enhance operational efficiency and customer satisfaction. The core technologies explored include Dynamics 365 Customer Service applications, Dataverse, Power Automate for business process flows, and integration concepts. Through practical exercises and real-world scenarios, attendees will develop the skills to implement robust and scalable customer service solutions that drive tangible business value. This course empowers you to transform customer support operations, reduce resolution times, and elevate the overall customer experience.

Duration	8 Hours
Level	Intermediate
Vendor	Microsoft

COURSE CURRICULUM

01 Module 1: Introduction to Dynamics 365 Customer Service

- Overview of Dynamics 365 Customer Service capabilities
- Understanding the Customer Service Hub interface
- Core components: Cases, Accounts, Contacts
- Introduction to Dataverse and security roles
- Navigating the service process lifecycle

02 Module 2: Core Case Management and Configuration

- Configuring Case Management settings (case types, priorities, origins)
- Creating and managing queues for case distribution
- Implementing Service Level Agreements (SLAs) and Entitlements
- Setting up automatic record creation rules
- Working with knowledge articles and knowledge base management

03 Module 3: Advanced Service Automation and Routing

- Developing advanced routing rules for cases
- Configuring business process flows for service processes
- Implementing Power Automate flows for service automation
- Introduction to Unified Routing for omnichannel engagement
- Setting up skill-based routing and agent profiles

04 Module 4: Omnichannel Engagement and Agent Productivity

- Implementing Omnichannel for Customer Service (Chat, Voice, SMS)
- Configuring channels and workstreams
- Setting up agent scripts and macros for productivity
- Utilizing conversation intelligence for agent assistance
- Integrating with external communication platforms

05 Module 5: Reporting, Analytics, and AI Insights

- Creating and customizing dashboards and charts
- Utilizing out-of-the-box Customer Service analytics
- Implementing AI-driven insights for case prediction and resolution
- Understanding service management reports
- Exporting and analyzing service data

06 Module 6: Implementation Best Practices and Deployment Considerations

- Strategies for successful Dynamics 365 Customer Service implementation
- Data migration best practices for customer service data
- User adoption strategies and change management
- Security roles and team management for customer service agents
- Performance optimization and troubleshooting common issues

CAREER PATHWAYS

Graduates of this program are prepared for the following roles:

- > **Microsoft Dynamics 365 Customer Service Functional Consultant**
- > **CRM Solutions Architect (focusing on Customer Service)**
- > **Customer Experience (CX) Technology Manager**

FREQUENTLY ASKED QUESTIONS

Q: What prior experience with Microsoft Dynamics 365 is recommended before taking this implementation workshop?

While this workshop covers implementation extensively, a foundational understanding of basic CRM concepts and prior exposure to the Dynamics 365 interface (even another module like Sales or Marketing) is highly beneficial. Familiarity with Dataverse, Power Apps, and Power Automate will also be advantageous, as these technologies are integral to customizing and extending Dynamics 365 Customer Service.

Q: How does this workshop specifically help in optimizing a company's customer service processes using Dynamics 365?

This workshop focuses on practical implementation strategies, teaching you how to configure features like automatic case creation, Service Level Agreements (SLAs), and unified routing. By mastering these, you can automate repetitive tasks, ensure timely responses, and intelligently route customer inquiries to the most qualified agents, directly leading to reduced resolution times, improved agent efficiency, and higher customer satisfaction.

Q: Will this course cover best practices for migrating existing customer service data into Dynamics 365 Customer Service during an implementation?

Yes, Module 6 extensively covers implementation best practices, including crucial considerations and strategies for data migration. While it won't be a deep dive into specific data migration tools, it will outline the key steps, challenges, and recommended approaches for bringing existing customer service data, such as historical cases and customer records, into Dynamics 365 Customer Service effectively and efficiently.

ABOUT COMPUTER PRIDE



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With over 15 years of excellence, Computer Pride delivers globally recognized certification programs from leading technology vendors. Located on Kenyatta Avenue in Nairobi's CBD, our state-of-the-art facilities and expert instructors have empowered thousands of professionals across East Africa.

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Take the next step in your technology career.

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