# 20.01 Case to Resolution Scenario Board Discovery Workshop

The Case to Resolution scenario board discovery workshop is designed to help establish a comprehensive understanding of the end-to-end service case lifecycle using Dynamics 365 Customer Service and/or Contact Center. This workshop covers knowledge management, service operations, case intake, case resolution, and performance analysis. It also includes questions to determine whether Field Service or other Dynamics 365 products are required to meet business needs.

## Assumptions

* The Case to Resolution process is in scope for the Dynamics 365 implementation.
* The scenario board includes both customer-facing and internal service operations.
* The following stakeholders are available and actively contribute to the workshop:
  + Customer service managers – oversee case management and service delivery.
  + Knowledge managers – maintain and govern the knowledge base.
  + Contact center supervisors – manage agent performance and routing rules.
  + Field service coordinators – support escalations and on-site service needs.
  + IT and CRM administrators – configure and integrate Customer Service and related modules.
  + Compliance and quality officers – ensure service standards and regulatory compliance.
  + Executive sponsors – provide strategic alignment and decision-making support.

## Objectives

* Understand the customer’s case management model and service operations.
* Identify key scenarios and requirements across the case lifecycle.
* Document agreed business scope and supporting system needs.

## High-Level Agenda

* Introduction and objectives
* Overview of Case to Resolution process
* Discussion of each L2 process area:
  + 20.10 Establish a knowledge base
  + 20.20 Define customer and employee service operations
  + 20.30 Intake cases
  + 20.40 Manage and work on cases
  + 20.60 Analyze case performance
* Interactive Q&A session
* Wrap-up and next steps

## Key Questions

* How is the knowledge base structured and maintained?
* What are the approval and publishing workflows for knowledge articles?
* How are service operations defined for internal employees and external customers?
* What channels are used for case intake (e.g., email, portal, phone, chat)?
* How are cases routed and prioritized?
* What are the escalation and SLA policies?
* How are agents assigned and how is workload balanced?
* How are field service escalations handled?
* What tools are used to track case progress and resolution?
* How is customer feedback collected and analyzed?
* What KPIs are used to measure case performance?
* What historical case and knowledge data needs to be migrated?
* What systems need to integrate with Dynamics 365 (e.g., Field Service, ERP, telephony)?
* Are there real-time integration needs (e.g., CTI, omnichannel routing)?

## Storyboard

Following is a sample scenario board template for the Case to Resolution process.



The image is a flowchart titled Case to Resolution Scenario Board that outlines a business process from lead identification to quotation of sales. The top row depicts a basic flowchart of the business process areas for the Case to Resolution process. Below each process step there are one or more blue boxes that depict scenarios and key attributes of the business process area for discussion in the workshop. The bottom of the graphic includes horizontal or supporting processes that support the entire Case to Resolution process.

1. **20.10 Establish a knowledge base**
   1. Scenarios  
      i) Internal knowledge for agents  
      ii) External/self-service knowledge for customers  
      iii) AI-suggested articles during case resolution  
      iv) Product or service-specific knowledge  
      v) Community or crowdsourced content
   2. Compliance  
      i) Content approval workflows  
      ii) Accessibility standards  
      iii) Data privacy and retention
   3. Policies  
      i) Article lifecycle management  
      ii) Translation and localization  
      iii) Version control  
      iv) Feedback and rating mechanisms
   4. Migration & Integration  
      i) Migration of legacy knowledge base content  
      ii) Integration with product documentation systems  
      iii) Use of Copilot or AI-generated content
2. **20.20 Define customer and employee service operations**
   1. Channels
      1. Chat
      2. Voice
      3. Email
      4. Social
   2. Scenarios  
      ii) Tiered support models (L1, L2, L3)  
      iii) Agent scripting and guided flows  
      iv) Escalation and handoff processes  
      v) 24/7 or follow-the-sun support
   3. Compliance  
      i) Call recording and consent  
      ii) Data residency and retention  
      iii) Accessibility and language support
   4. Policies  
      i) SLA and response time targets  
      ii) Agent productivity and performance metrics  
      iii) Case ownership and reassignment rules  
      iv) Customer satisfaction (CSAT) tracking
   5. Integration & Product Fit  
      i) Integration with telephony or contact center platforms  
      ii) Use of Dynamics 365 Omnichannel for Customer Service  
      iii) Integration with HR or ITSM systems for internal support  
      iv) Use of Field Service for dispatching technicians
3. **20.30 Intake cases**
   1. Scenarios  
      i) Manual case creation by agents  
      ii) Self-service portal submissions  
      iii) Email-to-case automation  
      iv) Chatbot or virtual agent escalation  
      v) IoT or system-generated cases (→ Field Service)
   2. Compliance  
      i) Consent for data capture  
      ii) Case classification and tagging standards  
      iii) Secure handling of sensitive data
   3. Policies  
      i) Case routing and assignment rules  
      ii) Duplicate detection and merging  
      iii) Case prioritization logic  
      iv) Customer identification and verification
   4. Migration & Integration  
      i) Migration of open and historical cases  
      ii) Integration with CRM or ERP for customer data  
      iii) Integration with external ticketing systems
4. **20.40 Manage and work on cases**
   1. Scenarios  
      i) Case resolution by tiered agents  
      ii) Collaboration across departments  
      iii) Use of knowledge articles and AI suggestions  
      iv) Escalation to Field Service for on-site resolution  
      v) Case linking to opportunities or orders
   2. Compliance  
      i) Audit trails and activity logs  
      ii) Case closure documentation  
      iii) Regulatory reporting
   3. Policies  
      i) Case reassignment and escalation  
      ii) Resolution time tracking  
      iii) Customer communication protocols  
      iv) Reopen and follow-up rules
   4. Integration & Product Fit  
      i) Field Service work order integration  
      ii) Integration with Finance for billing or refunds  
      iii) Integration with Supply Chain for parts or returns  
      iv) Use of Copilot for agent assistance
5. **20.60 Analyze case performance**
   1. Metrics  
      i) First contact resolution  
      ii) Average handle time  
      iii) SLA compliance  
      iv) Case backlog and aging  
      v) CSAT and NPS
   2. Reports  
      i) Agent performance dashboards  
      ii) Channel performance reports  
      iii) Case volume trends  
      iv) Root cause and issue categorization
   3. Policies  
      i) Reporting frequency and ownership  
      ii) KPI targets by team or region  
      iii) Continuous improvement loops
   4. Integration & Data Strategy  
      i) Integration with Power BI   
      ii) Data warehouse or data lake integration  
      iii) Historical data migration for trend analysis

# 20.02 Case to Resolution Storyline Design Review Workshop

The Case to Resolution storyline design review workshop is a critical step in validating the proposed solution design for managing service cases in Dynamics 365 Customer Service and/or Contact Center. This session focuses on reviewing the 'happy path' scenarios across the case lifecycle, conducting a fit-to-standard review, and identifying any gaps or design decisions.

## Assumptions

* The agreed business scope from the scenario board workshop is finalized.  
  • Dynamics 365 is configured for the selected storyline scenarios.  
  • The following stakeholders are available and actively contribute to the workshop:
  + Customer service managers – validate case handling workflows and SLAs.
  + Knowledge managers – review knowledge article integration and usability.
  + Contact center supervisors – validate routing, queues, and agent experience.
  + Field service coordinators – confirm escalation and dispatch scenarios.
  + IT and CRM solution architects – review system configuration and integrations.
  + Executive sponsors – ensure strategic alignment and sign-off.

## Objectives

* Demonstrate Dynamics 365 capabilities for case lifecycle management.
* Validate the solution design for each L2 process area.
* Identify gaps, risks, and decisions.
* Define next steps for configuration and testing.

## High-Level Agenda

* Introduction and objectives
* Demonstration of storyline scenarios (Case to Resolution lifecycle)
* Fit-to-standard discussion
* Q&A and feedback
* Wrap-up and next steps

## Key Questions

* Does the solution support your case management model effectively?
* Are there any gaps in functionality or integration?
* How are knowledge articles surfaced and used during case resolution?
* How are SLAs, escalations, and routing rules configured?
* How are field service escalations and handoffs managed?
* Are there any concerns with usability, scalability, or compliance?
* What changes are needed to align with your service strategy?

# 20.10.001 Establish a Knowledge Base - Deep-Dive Discovery Workshop

This deep-dive discovery workshop is designed to define the strategy and requirements for establishing and managing a knowledge base using Dynamics 365 Customer Service and/or Contact Center. It includes the creation, maintenance, and retirement of knowledge articles, as well as the identification of common issues and the use of AI-assisted tools for knowledge management. The workshop will help determine how knowledge is captured, curated, and delivered to both internal users and customers.

## Assumptions

* The 20.10 Establish a Knowledge Base process is in scope for the Dynamics 365 implementation.
* The following stakeholders are available and actively contribute to the workshop:
  + Knowledge managers – responsible for defining and maintaining the knowledge base structure and governance.
  + Customer service managers – responsible for identifying common issues and ensuring knowledge articles support case resolution.
  + Support agents – responsible for contributing to and consuming knowledge articles during case handling.
  + AI and automation leads – responsible for evaluating and implementing AI-assisted knowledge tools.
  + IT and system administrators – responsible for configuring and integrating the knowledge base within Dynamics 365.
  + Compliance and content reviewers – responsible for validating the accuracy and lifecycle of published content.

## Objectives

* Define requirements for knowledge article creation, approval, and publishing.
* Identify common service issues and how they are documented.
* Determine processes for maintaining and retiring knowledge articles.
* Evaluate the use of AI tools for knowledge suggestions and automation.
* Plan data migration and integration needs for knowledge content.

## Agenda

* Introduction and objectives
* Review of current knowledge management practices
* Article creation and approval workflows
* Identifying and documenting common issues
* Knowledge maintenance and retirement
* AI-assisted knowledge tools
* Data migration and integration
* Wrap-up and next steps

## Key Questions

* Article Creation and Approval
  + Who is responsible for creating knowledge articles?
  + What templates or formats are used for articles?
  + What is the approval process before publishing an article?
  + Are there different article types for internal vs. external audiences?
* Identifying Common Issues
  + How are common issues identified and prioritized for documentation?
  + Are there analytics or reports used to detect frequently asked questions?
  + How do agents or users suggest new article topics?
* Maintaining and Retiring Articles
  + How often are articles reviewed for accuracy?
  + What is the process for updating or archiving outdated content?
  + Are there expiration dates or review cycles for published articles?
* AI-Assisted Knowledge Management
  + Are AI tools used to suggest articles during case resolution?
  + How are AI-generated articles reviewed and approved?
  + What role does automation play in tagging or categorizing content?
* Data Migration and Integration
  + Is there an existing knowledge base that needs to be migrated?
  + What formats or systems are currently used to store knowledge content?
  + Are there requirements for integration with other systems (e.g., case management, portals)?

# 20.20.001 Define Customer and Employee Service Operations Deep-Dive Discovery Workshop

This workshop is designed to define and refine the customer and employee service operations using Dynamics 365 Customer Service and/or Contact Center. It focuses on understanding how service teams are structured, how cases are routed and managed, and how performance is measured. The session will also explore collaboration, business process flows, and policies that govern service operations.

## Assumptions

* The Define Customer and Employee Service Operations process is in scope for the Dynamics 365 implementation.
* The following stakeholders are available and actively contribute to the workshop:
  + Service operations managers – responsible for defining service processes and team structures.
  + Customer service supervisors – responsible for managing queues, agent performance, and escalations.
  + Contact center leads – responsible for routing logic, operating hours, and KPI tracking.
  + IT and CRM administrators – responsible for configuring case management, routing, and integrations.
  + HR or workforce planners – responsible for defining agent skills and scheduling policies.
  + Compliance and quality assurance – responsible for service policies and audit requirements.

## Objectives

* Define service team structures, skills, and collaboration models.
* Identify routing rules, queues, and case handling workflows.
* Document KPIs, operating hours, and service policies.

## Agenda

* Introduction and objectives
* Review of current service operations
* Discussion of agent skills and team collaboration
* Routing rules and business process flows
* KPIs, operating hours, and service policies
* Wrap-up and next steps

## Key Questions

* **Agent Skills and Team Collaboration**
  + What skills are tracked for agents and how are they assigned?
  + How are teams structured and how do agents collaborate on cases?
  + Are there escalation paths or tiered support models?
  + How is agent availability managed?
* **Queues and Routing Rules**
  + How are queues defined and managed?
  + What routing rules are used to assign cases to agents or teams?
  + Are there automated routing or skill-based routing requirements?
  + How are overflow or unassigned cases handled?
* **Business Process Flows**
  + What are the key stages in the case lifecycle?
  + Are there different process flows for different case types?
  + What approvals or escalations are required during case handling?
  + How are SLAs and response times tracked?
* **KPIs and Operating Hours**
  + What KPIs are used to measure service performance (e.g., FCR, AHT, CSAT)?
  + How are operating hours defined for teams and queues?
  + Are there different hours for different regions or channels?
  + How is after-hours support handled?
* **Case Types and Policies**
  + What types of cases are supported (e.g., technical, billing, general inquiries)?
  + Are there specific policies for handling sensitive or regulated cases?
  + How are case templates or categories managed?
  + Are there audit or compliance requirements for case handling?

# 20.30.001 Intake Cases Deep-Dive Discovery Workshop

This workshop is designed to explore the intake process for customer service cases in Dynamics 365 Customer Service and Contact Center. It focuses on how cases are created, assigned, and managed across various channels, including manual entry, email, chat, portals, and automated systems. The session also covers how customer notifications and communications are handled throughout the intake process.

## Assumptions

* The 20.30 Intake Cases process is in scope for the Dynamics 365 implementation.
* The following stakeholders are available and actively contribute to the workshop:
  + Customer service managers – responsible for defining intake workflows and case handling policies.
  + Contact center supervisors – responsible for managing queues, agent assignments, and routing rules.
  + IT and CRM administrators – responsible for configuring channels, automation, and integrations.
  + Marketing or digital engagement leads – responsible for managing customer-facing channels and portals.
  + Compliance and quality assurance officers – responsible for ensuring intake processes meet regulatory and service standards.

## Objectives

* Define requirements for case intake across all supported channels.
* Identify gaps in current intake processes and automation.
* Plan for data migration and integration needs related to case creation and communication.

## Agenda

* Introduction and objectives
* Review of current case intake processes
* Channel-specific intake scenarios
* Assignment and routing logic
* Notifications and customer communication
* Data migration and integration needs
* Wrap-up and next steps

## Key Questions

* Case Assignment
  + How are cases assigned to agents or queues?
  + Are there rules based on customer type, product, or priority?
  + How is agent availability or skill considered in assignment?
* Case Detail Capture
  + What information is required when a case is created?
  + Are there templates or forms used to standardize intake?
  + How are attachments or supporting documents handled?
* Case Creation Channels
  + What channels are used to create cases (e.g., email, chat, phone, portal)?
  + Are cases created manually by agents or automatically from incoming messages?
  + How are duplicate cases identified and managed?
  + Are there any third-party systems that generate cases?
* Customer Notifications and Communication
  + How are customers notified when a case is created?
  + What updates are sent during the case lifecycle?
  + Are communications automated or manually triggered?
  + How are customer preferences for communication channels managed?
* Data Migration and Integration
  + What historical case data needs to be migrated?
  + Are there legacy systems or CRMs that must be integrated?
  + How are channel integrations (e.g., email, chat, portal) currently handled?
  + Are there any compliance or audit requirements for intake data?

# 20.40.001 Manage and Work on Cases - Deep-Dive Discovery Workshop

This deep-dive discovery workshop focuses on the post-creation lifecycle of case management within Dynamics 365 Customer Service and/or Contact Center. It covers how agents manage, update, and resolve cases, including customer engagement, knowledge base usage, and case lifecycle actions such as merging, closing, and reopening. The session will also explore how similar cases and AI tools can support resolution and how updates are tracked and communicated.

## Assumptions

* The 20.40 Manage and Work on Cases process is in scope for the Dynamics 365 implementation.
* The following stakeholders are available and actively contribute to the workshop:
  + Case management leads – responsible for defining and overseeing case handling procedures.
  + Customer service agents – responsible for working on and resolving cases.
  + Knowledge managers – responsible for maintaining and promoting use of the knowledge base.
  + Customer experience managers – responsible for ensuring consistent and effective customer engagement.
  + IT and CRM administrators – responsible for configuring and supporting case management tools.
  + Compliance and quality assurance officers – responsible for monitoring case handling standards and audit readiness.

## Objectives

* Define detailed requirements for managing and working on cases.
* Identify gaps in current case handling processes and tools.
* Plan for data migration, automation, and integration needs.

## Agenda

* Introduction and objectives
* Review of current case management practices
* Case lifecycle actions and updates
* Knowledge base and AI-assisted resolution
* Customer engagement and communication
* Wrap-up and next steps

## Key Questions

* How do agents engage with customers after a case is created?
* What are the standard follow-up procedures and SLAs?
* How are updates to the case documented and communicated?
* How are cases merged when duplicates are identified?
* What is the process for closing a case, and what validations are required?
* Under what conditions can a case be reopened, and how is that tracked?
* How do agents use the knowledge base to assist in case resolution?
* Are similar or historical cases surfaced to assist agents?
* How are service notes, attachments, and communications logged?
* What tools are used to collaborate on cases across teams?
* How are escalations handled and tracked?
* What reporting is needed on case handling performance?
* What data needs to be migrated related to case history and resolution notes?
* What systems need to integrate with case management (e.g., Field Service, ERP, email, chat)?
* Are there audit or compliance requirements for case handling and closure?

# 20.60.001 Analyze Case Performance Deep-Dive Discovery Workshop

The Analyze Case Performance deep-dive discovery workshop is designed to help organizations understand how to measure and improve the effectiveness of their case management operations using Dynamics 365 Customer Service and/or Contact Center. This session focuses on identifying key metrics, reporting needs, and performance trends related to case handling, knowledge base usage, call center efficiency, and case load distribution.

## Assumptions

* The 20.60 Analyze Case Performance process is in scope for the Dynamics 365 implementation.
* The key stakeholders are available and actively contribute to the workshop. The following stakeholders are recommended:
  + Customer service managers – responsible for overseeing case handling and agent performance.
  + Call center supervisors – responsible for monitoring call center KPIs and agent workloads.
  + Knowledge managers – responsible for tracking knowledge base usage and effectiveness.
  + Business analysts – responsible for analyzing trends and generating performance reports.
  + IT and reporting specialists – responsible for configuring dashboards and integrating data sources.
  + Executive sponsors – responsible for aligning service performance with strategic goals.

## Objectives

* Define key performance indicators (KPIs) for case management and service operations.
* Identify reporting and analytics requirements for case performance.
* Understand how knowledge base usage and case trends impact service quality.
* Determine integration and data migration needs for performance analysis.

## Agenda

* Introduction and objectives
* Review of current case performance metrics and tools
* Discussion of case patterns and knowledge base usage
* Call center performance and case load analysis
* Reporting and dashboard requirements
* Wrap-up and next steps

## Key Questions

* Case Patterns
  + What are the most common case types and issues?
  + How are recurring issues identified and tracked?
  + Are there seasonal or regional trends in case volume?
* Knowledge Base Usage
  + How often are knowledge articles used during case resolution?
  + How is article effectiveness measured (e.g., resolution rate, feedback)?
  + Are agents and customers able to easily find relevant articles?
* Call Center Performance
  + What KPIs are tracked for call center operations (e.g., average handle time, first contact resolution)?
  + How is agent performance monitored and reported?
  + Are there SLAs in place for case resolution and response times?
* Case Loads
  + How are cases distributed among agents and teams?
  + Are there workload balancing or escalation rules in place?
  + How is backlog or aging of cases monitored?
* Data Migration and Integration
  + What historical case data needs to be migrated for performance analysis?
  + What systems need to integrate with Dynamics 365 for reporting (e.g., BI tools, legacy CRM)?
  + Are there any challenges with data quality or consistency across systems?