

Enable Context Sensitive Support and Training in Dynamics CRM and Reduce Your Support Costs

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Microsoft MVP



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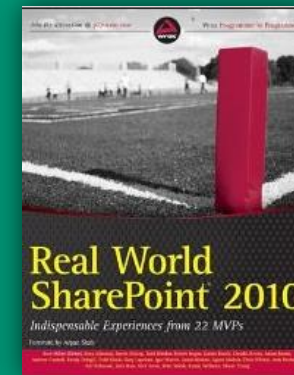
CEO



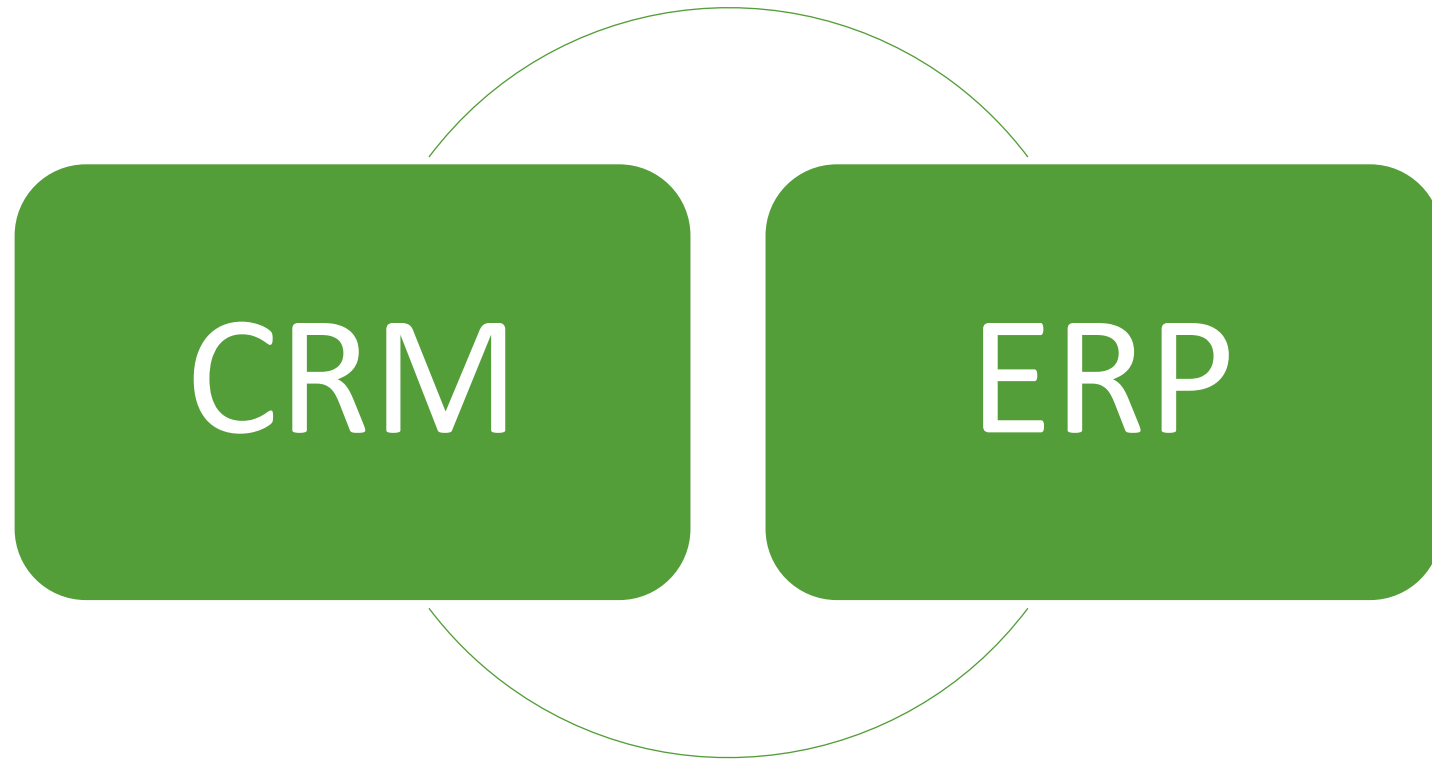
VisualSP

Digital Adoption
Platform (DAP) for
M365 & D365

Author

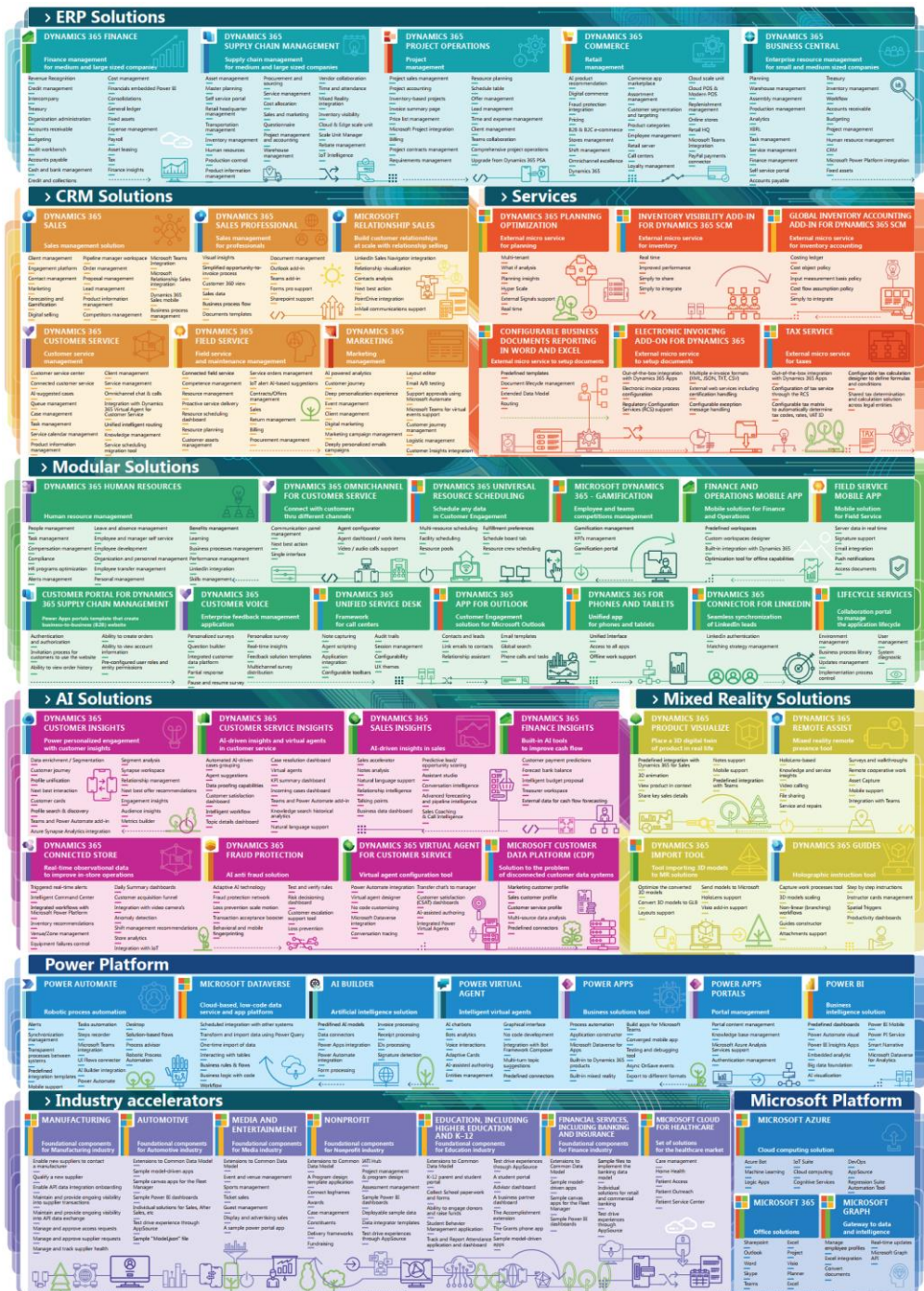


Dynamics 365 in Business



Various products in the Dynamics family

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Agenda

Understand the challenge of supporting Dynamics 365 users at their moment of need


Learn how to implement contextual learning and support in Dynamics 365 to increase adoption and reduce support tickets

Understand the pros and cons of this approach and 3rd party alternatives available



Almost 50% of
CRM projects fail

#1 Challenge: User Adoption

- Dynamics is Very customizable so it's always unique to a company
 - No off the shelf training can be provided to users
 - Users struggle when they have questions
 - Dynamics continues to evolve as Microsoft as well as your company makes changes to it
- 

The usual Dynamics 365 CRM implementation

1. The internal team or an external consulting company creates the Dynamics environment for the company based on their needs
2. When the environment is being deployed, a training is conducted for the future users
3. The recording of the training as well as any documentation is provided to the users for future reference

Dynamics 365 interfaces and processes
change frequently making it **difficult** for
administrators to continuously **support**
and train their users

The Challenge

Built in Dynamics 365 help is not useful for everyday users

The screenshot displays the Dynamics 365 Sales Hub interface for the 'Adventure Works (sample)' account. The left sidebar contains navigation options: Home, Recent, Pinned, My Work, Sales accelerator, Activities, Dashboards, Customers, Accounts (selected), Contacts, Sales, Leads, Opportunities, and Competitors. The main content area shows account details and a timeline of events.

Account Information:

ACCOUNT INFORMATION	
Account Name *	Adventure Works (sa...
Phone	555-0152
Fax	---
Website	http://www.adv...
Parent Account	---
Ticker Symbol	---
Relationship Type	---
Product Price List	---

Timeline:

- Search timeline
- Enter a note...
- Auto-post on Some interest in our JJ line of products (s... System Administrator won Opportunity for Account Adve... 6/3/2022 5:05 AM
- SA Opportunity Completed by System Administrator \$94,800.82 6/3/2022 5:05 AM
- Auto-post on Some interest in our JJ line of products (s... Opportunity: Created by System Administrator for Accou... 6/3/2022 5:05 AM
- Auto-post on Adventure Works (sample) Account: Created By System Administrator. 6/3/2022 5:04 AM

The current way that Dynamics users get help at their moment-of-need

1. Looking at docs or info they have on hand
2. Asking a colleague or manager
3. Searching on the web

Or... giving up and going back to their old way of doing things using spreadsheets, files and notes. Not good!

Context Switching hurts productivity and adoption

Context switching constantly can cost up to 40% drop in productivity

Less info *in-context* is
better than more info
out of context

Stop Training and
Start Helping your users

Provide Learning and
Support in the
Flow of Work

Examples from the web of Learning and Support in the Flow of Work

Contextual support and training

The screenshot displays a CRM interface for managing companies. At the top, there is a dark blue navigation bar with a logo, a 'Menu' dropdown, and various utility icons (search, upload, storefront, settings, notifications, and user profile). Below this, the main header area includes the title 'Companies' with a dropdown arrow and '34,066 records'. To the right of the header are buttons for 'Actions', 'Import', and 'Create company'. A filter bar shows 'All companies' and an active filter 'Meeting with Company'. Below the filter bar are sorting options: 'Company owner', 'Create date', 'Last activity date', and 'Lead status', along with 'All filters (0)' and a 'Save view' button. A search bar is positioned above a table of company records. The table has columns for selection, company name, create date, first contact create date, and last modified. A yellow mouse cursor is pointing at the 'FIRST CONTACT CREATE DATE' column of the 'QUESOS L...' row. The bottom of the interface features a pagination bar with 'Prev', page numbers 1 through 11, 'Next', and '100 per page'. A 'Help' button is located in the bottom right corner.

Menu ▾

Companies ▾
34,066 records

Actions ▾ Import Create company

All companies X Meeting with Company + Add view (2/50) All views

Company owner ▾ Create date ▾ Last activity date ▾ Lead status ▾ All filters (0) Save view

Search name, phone, o 🔍 Actions ▾

<input type="checkbox"/>	COMPANY NAME	CREATE DATE (CDT)	FIRST CONTACT CREATE DATE (...)	LAST MODIF
<input type="checkbox"/>	United Healthcare	Jul 27, 2022	Jul 25, 2022	Aug 14, 20
<input type="checkbox"/>	Caribbeanmfg	Jul 19, 2022	Jul 19, 2022	Aug 1, 202
<input type="checkbox"/>	QUESOS L... Preview	Jul 5, 2022	Jul 4, 2022	Jul 21, 202
<input type="checkbox"/>	PERI Ltd	Jun 29, 2022	Jun 29, 2022	Jul 29, 202
<input type="checkbox"/>	Peri deutschland	Jun 29, 2022	Jun 29, 2022	Jul 29, 202

< Prev 1 2 3 4 5 6 7 8 9 10 11 Next > 100 per page ▾ Help

Inline help & support

atdk NEW ORLEANS
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START A NEW PROPOSAL

Submit

Proposal Title *

Title should be no more than 10 words. Please use title case rather than all caps or sentence case. Titles may be edited by ATD.

Is Viva Learning the right solution for your organizational learning needs?

75 characters (0 max)
11 words (10 max)

Proposal Type *

There are five proposal types: Byte-Sized Learning, Classroom Session, Hands-On Learning, On-Demand, and Panel.

Classroom Session

[View Proposal Type descriptions.](#)

Submit

Actions

Import

Create contact



ed contacts

+ Add view (3/50)

All views

(0)

Save view

Actions

ER

PRIMARY COMPANY

LAST

--

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Interactive Guides / Balloons

CONNECT TO CRM SAVE

Technology Signals & News Similar >

Similar Companies

Companies like Galax include ChainCash, Invest Wisely and 8 more.

ChainCash
New York · 112 Contacts · 251-520 employees · \$100M to \$500M
Investment: FinTech +1 more

Galax and ChainCash share similar industries, funding stage, funding amount, employee size, revenue estimate, and description.

Invest Wisely
Mountain View · 598 Contacts · 1001-5000 employees · \$100M to \$500M
Investment: FinTech +1 more

Galax and Invest Wisely share similar industries, funding amount, and description.

Find Your Next Deal Faster With Similar Companies

Now, you can view similar accounts and possible competitors on company profiles so you never miss an opportunity.

LEARN MORE

Discover more funding rounds

Collaboration Hub

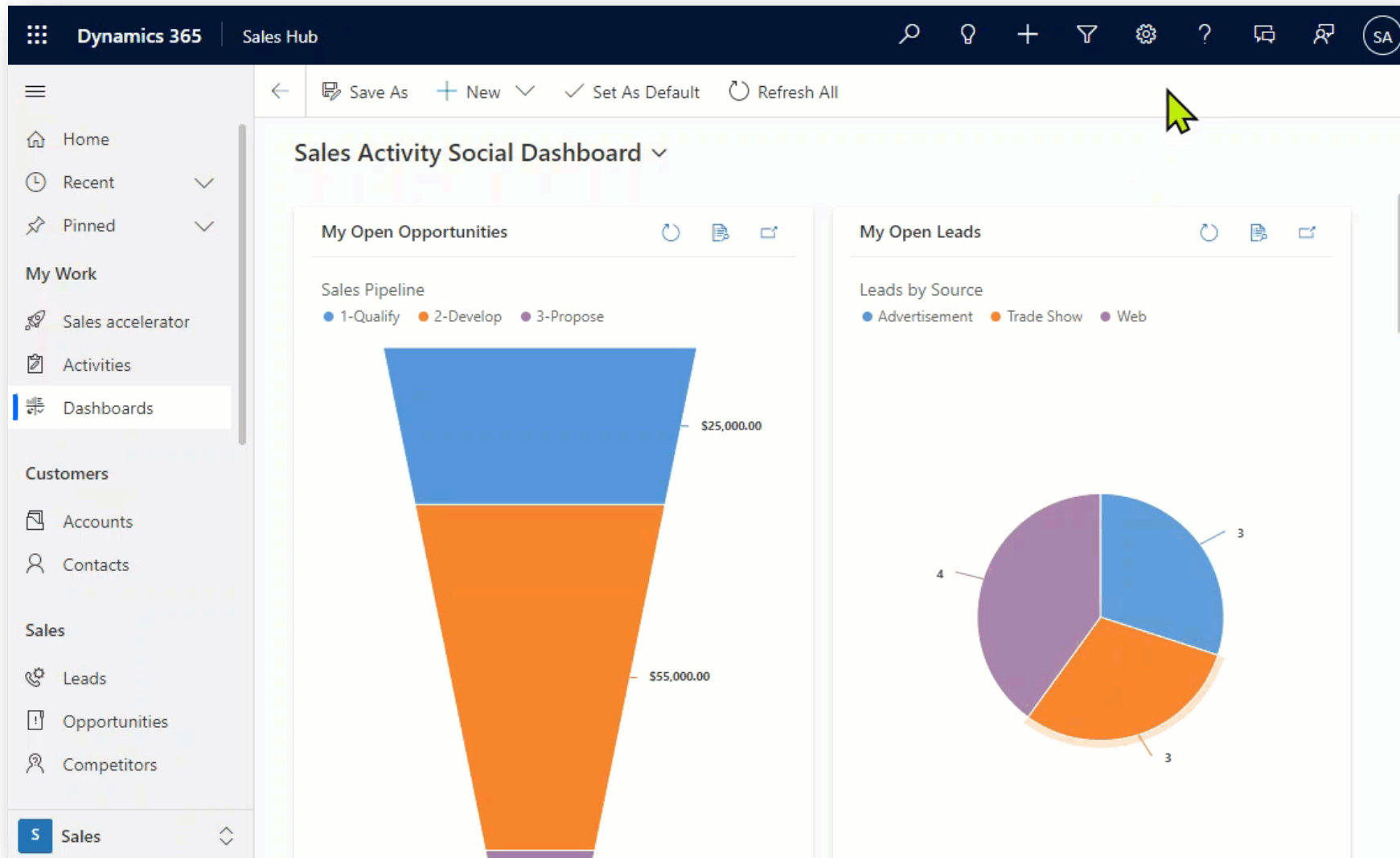
Click here to engage in your Teams chats and channels with your coworkers. Locate the collaboration hub in the global header. Collaboration content will appear contextually.

1 of 3 **Next**

Provide users learning and support
in the flow of work using custom
help panes and guided tasks
functionality in Dynamics 365

The Solution

Enable Custom Help Panes and Guided Tasks functionality



Configure Custom Help Panes and Guided Tasks



Live Demo

Limitations of Custom Help Panes and Guided Tasks functionality

1. Lack of official support from Microsoft
2. Images and videos integration has bugs
3. No way to implement multi step guided walkthroughs
4. No way to draft items before publishing
5. No customization and branding options
6. No way to target items to specific user groups or scopes



If Custom Help Panes
and Guided Tasks
functionality is limiting...



Implement a solid
Contextual Support Platform for
Dynamics 365 & Power Apps



Live Demo

Digital Adoption Platform choices

WalkMe

VisualSP

Tight integration with
Microsoft Dynamics 365 & M365

WhatFix

Pendo

and more....

End User Help Experience in Dynamics

The screenshot displays the Microsoft Dynamics 365 Sales Hub interface. The top navigation bar includes the Dynamics 365 logo, 'Sales Hub', and a 'Contact Support' button. The left sidebar contains navigation options: Home, Recent, Pinned, My Work (Sales accelerator, Dashboards, Activities), Customers (Accounts, Contacts), Sales (Leads, Opportunities, Competitors), and Collateral (Quotes). The main content area shows the account page for 'Blue Yonder Airlines (sample)'. The account details include an annual revenue of \$10,000.00 and 2,900 employees. The 'System Administrator' user is shown as the owner. The 'Summary' tab is selected, displaying account information such as the account name, phone number (555-0154), website (http://www.blueyonderai...), and parent account. A timeline on the right side shows two auto-posted messages: 'Auto-post on Needs to restock their supply of Product SKU AX305...' and 'Auto-post on Blue Yonder Airlines (sample)'. A yellow mouse cursor is pointing at the 'System Administrator' user name.

Dynamics 365 | Sales Hub Contact Support

Get Started Save Save & Close New Open Org Chart Deactivate Connect Add to Marketing List

BY Blue Yonder Airlines (sample) - Saved \$10,000.00 Annual Revenue 2,900 Number of Employees **System Administrator** Owner

Summary Project Price Lists Assets and Locations Details Servicing Files Related

ACCOUNT INFORMATION

Account Name	* Blue Yonder Airlines (sample)
Phone	555-0154
Fax	---
Website	http://www.blueyonderai...
Parent Account	---
Ticker Symbol	---
Relationship Type	---
Product Price List	---

Timeline

Search timeline

Enter a note...

Auto-post on Needs to restock their supply of Product SKU AX305...
Opportunity: Created by System Administrator for Account Blue Yon...
1/5/2022 11:31 AM

Auto-post on Blue Yonder Airlines (sample)
Account: Created By System Administrator.
1/5/2022 11:31 AM

Onboarding New Users Efficiently

The screenshot displays the Microsoft Dynamics 365 Sales Hub interface. The top navigation bar includes the Dynamics 365 logo, 'Sales Hub', and a 'Contact Support' button. The left sidebar contains navigation options: Home, Recent, Pinned, My Work (Sales accelerator, Dashboards, Activities), Customers (Accounts, Contacts), Sales (Leads, Opportunities, Competitors), and Collateral (Quotes, Sales). The main content area shows the 'Blue Yonder Airlines (sample)' account, marked as 'Saved'. Key account details include an annual revenue of \$10,000.00, 2,900 employees, and a system administrator owner. A video onboarding overlay is active, featuring a 'Welcome to the team!' message and a video player showing a man speaking. A 'Next' button is visible at the bottom right of the video player. The background shows a list of account activities and a 'Product Price List' section.

Dynamics 365 | Sales Hub

Contact Support

Get Started

Save Save & Close New Open Org Chart Deactivate Connect Add to Marketing List

Blue Yonder Airlines (sample) - Saved

Account · Account

\$10,000.00 Annual Revenue

2,900 Number of Employees

System Administrator Owner

Welcome to the team!

1

0:00 / 0:46

Next

Product Price List

ADDRESS

Need Help?

Inline Help Throughout Your Interfaces

Dynamics 365 | Sales Team Member | Search

EL EDESIX LIMITED - Saved
Company · Company

Company Overview | Company Profile and Financials | Service Providers | Talent Network | Lead Feeder Visits | Related

COMPANY INFORMATION

Relationship Type	*	Target
Legal Name	*	EDESIX LIMITED
? Trading As	*	EDESIX LIMITED
UK/I Incorporated Company		<input checked="" type="checkbox"/> Yes
Registration No.	*	SC235672
Brief Description of Business	*	---
Sector		Technology
? Sub-Sector	*	IT Managed Servi...
? Company Ownership	+	---
BGF Office	*	Edinburgh

Deals + New Deal

Deal Name (x)	Pipeline P...	Create...	Deal Ty
EDESIX LIMITED (1)	1-Lead	19/02/20...	New

1 - 1 of 1

Total Deals: 1

Last updated: 21/09/2021 12:03

RELATIONSHIPS & DEAL SOURCES

Company Contacts

Full Name	Job Title	Functiona...
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Summary

Replace default help in Dynamics 365 to increase chances of user success and adoption

Consider the built-in functionality called Custom Help Panes and Guided Tasks

Understand the limitations of this functionality

Next Steps

Reach out to me with your questions on
context sensitive support and training

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