



Microsoft Power Platform **CONFERENCE**

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10 User Adoption Tips

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Whova



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10 USER ADOPTION TIPS IN 25 MINUTES

A close-up photograph of a small, fluffy dog with light-colored fur, possibly a Pomeranian or similar breed. The dog is looking slightly upwards with its mouth open, showing its tongue and teeth. The background is blurred, suggesting an outdoor setting like a park.

QUICK INTRODUCTION SLIDE!

- Hi, I'm Heidi Neuhauser!
- I've worked with Dynamics 365 / Microsoft CRM since 2010.
- I have 4 cats, 1 dog, a cockatiel and 2 fantastic kids.
- I chair the Philadelphia D365 & Power Platform User Group.



SOME GREAT USER ADOPTION GOALS



- Involve your users throughout the life of D365 CRM
- Automate what you can
- Simplify & streamline
- Help guide users & standardize processes
- Eliminate duplicate data entry points
- Minimize required fields



THE 10 TIPS WE WILL DISCUSS TODAY

1. Gather a team of users to become your advocates
2. Find the pain
3. Keep it simple system admin: KISS Principle
4. Focus on data quality
5. Model-driven apps
6. Copilots
7. Teams & Outlook integration
8. Training materials
9. Role-based training
10. Ongoing learning

End User Tips

Configuration Tips

Training Tips



TIP #1: FORM A GROUP OF END USERS

- Create a team of end users
- Include varied skill levels
- Involve this group right from the start
- Include this group in your requirements phase

TIP #2: FIND THE PAIN

- Why aren't they using it?
- What is the resistance?
- Is there a task they perform that is very manual that takes up a lot of their time?

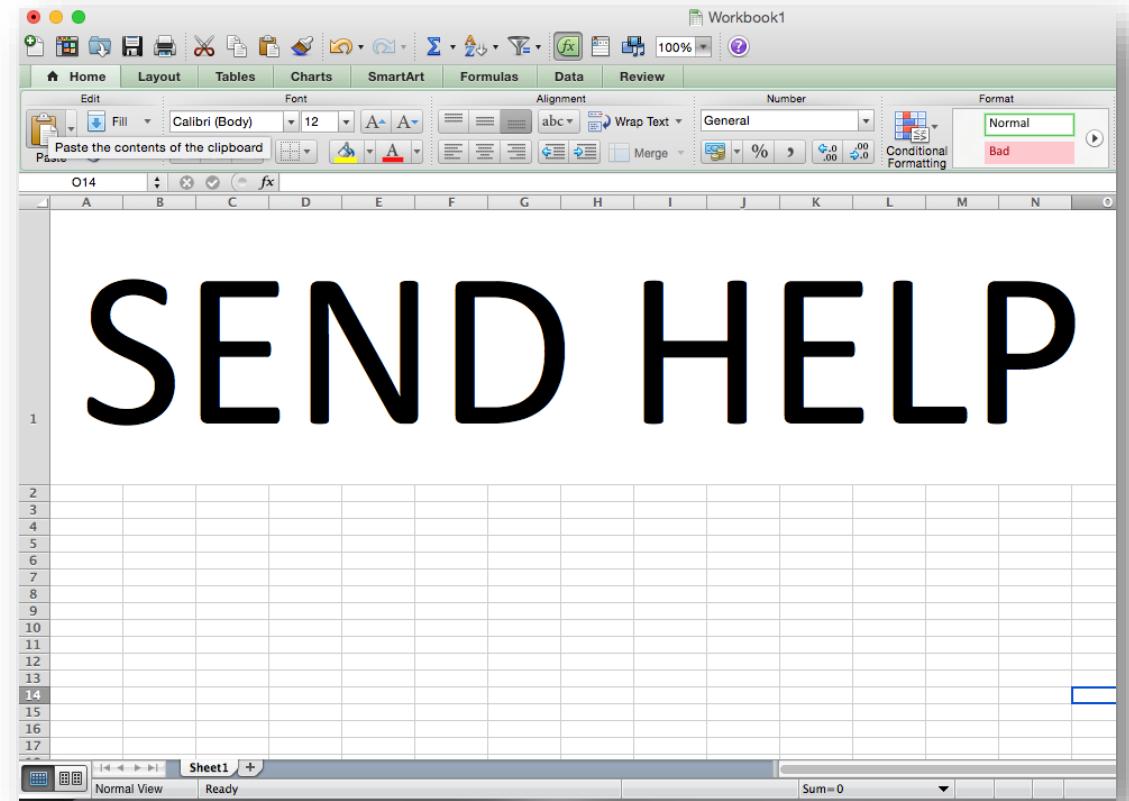


Once you've found the pain:

- How can you use the tech stack to automate the pain & solve their issue?

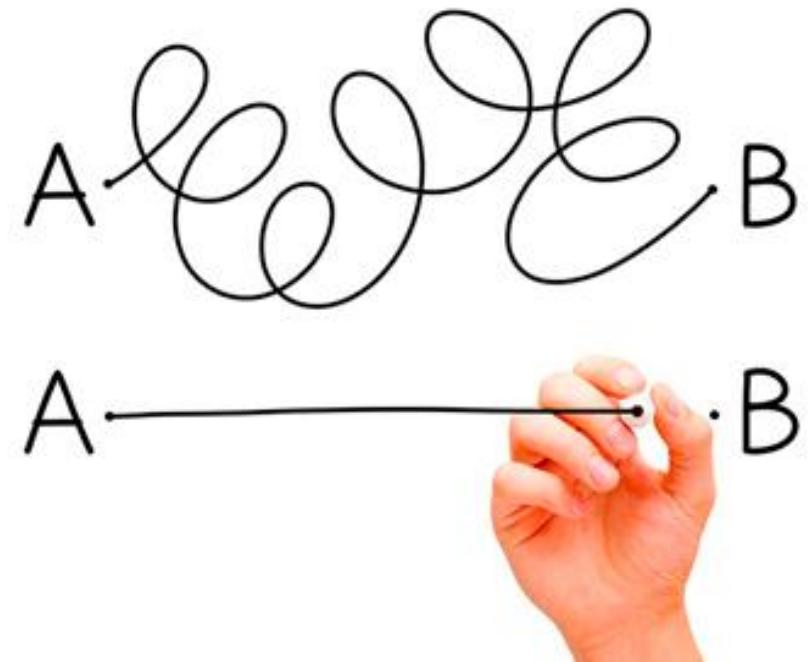
HOW CAN YOU FIND THE PAIN?

- Job shadow (customer service reps, inside sales reps)
- Ride alongs (sales reps)
- Look for manual Excel reporting they provide to their manager
- Listen, observe and record
- Resist the urge to solution!!



TIP #3: KISS PRINCIPLE

- Streamline your business processes
- Minimize required fields on a form
- Select appropriate field/column types
- Keep forms clean



SOME SIMPLICITY STRATEGIES

Goal	Tools
Streamline your business processes	Business process flows; Power Automate
Minimize required fields on a form	Business rules
Select appropriate field/column types	Column creation
Keep forms clean	Form design; tabs; business rules



TIP #4: DATA QUALITY



Data is King, or....

We'll figure out data quality in Phase Two.

SOME TOOLS TO HELP WITH DATA QUALITY

Start with clean
data

Pick the right
field/column
type

Field validation
rules

Tooltips

Field Mapping

Duplicate
Detection Rules

Data Validation
(In Preview) for
email addresses
in Sales

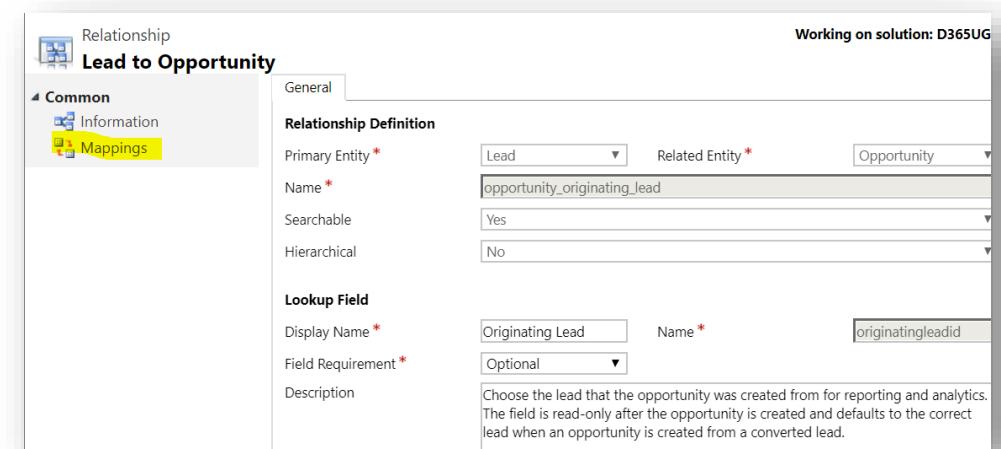
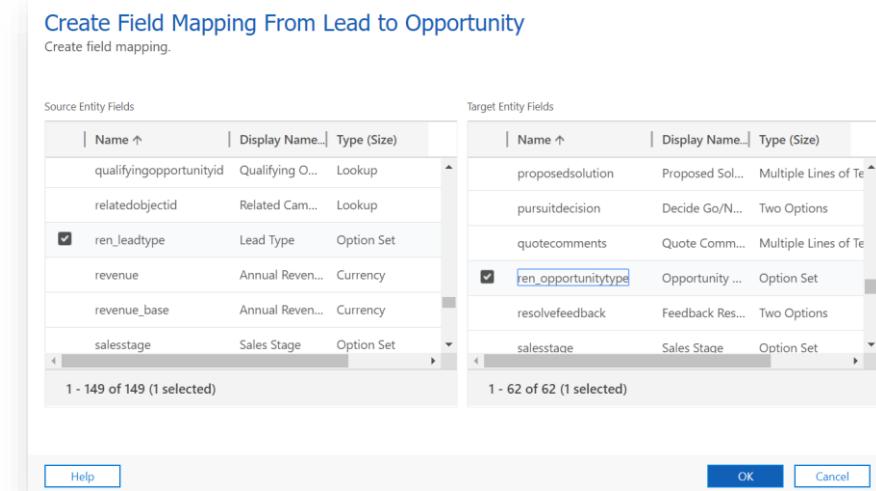
Power Automate

3rd party tools

TIP 4.1

FIELD MAPPING FOR THE QUICK DATA WIN

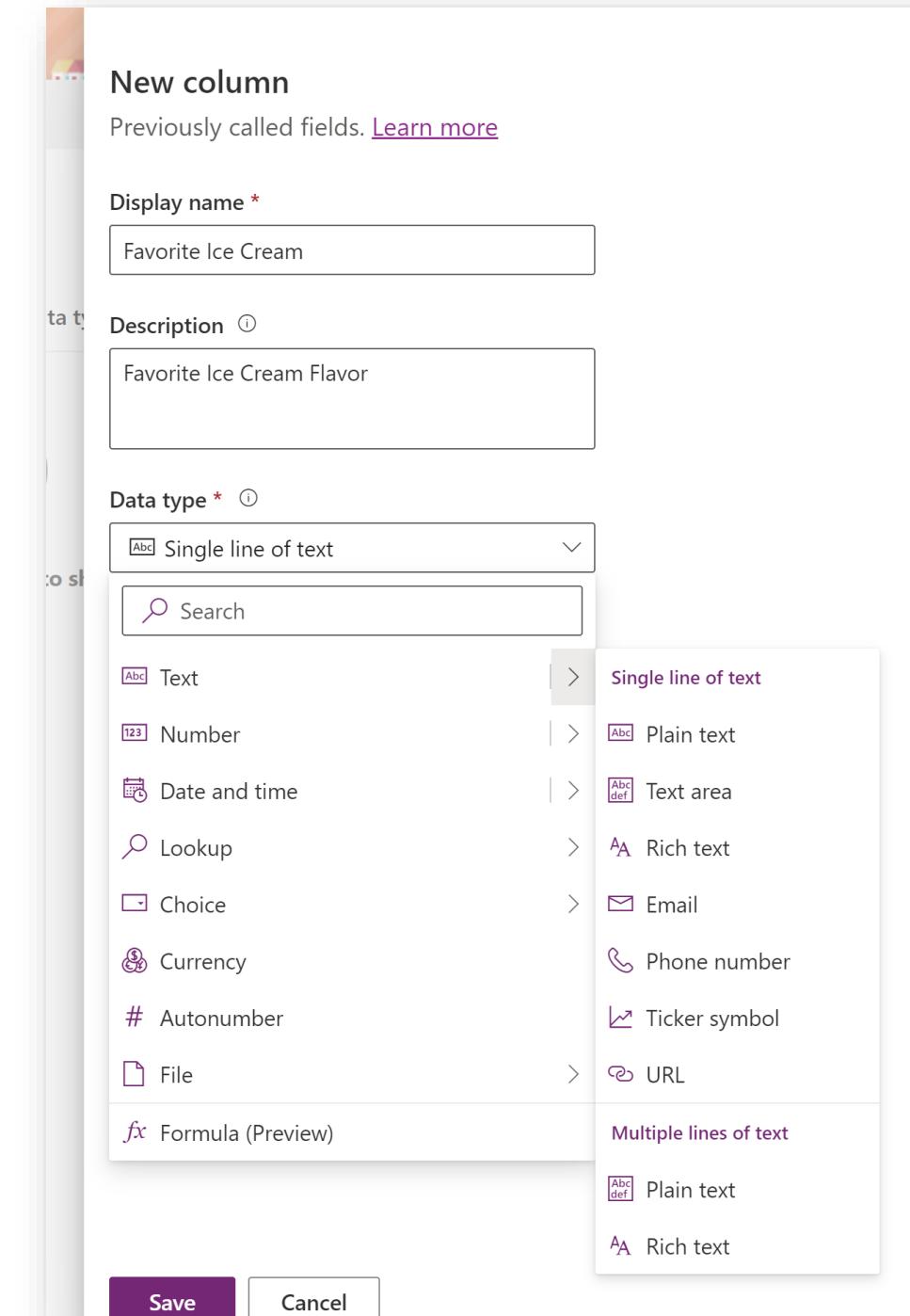
- Configure on 1:N or N:1 relationship
- Map field values from one entity to another
- **Switch to Classic**



TIP 4.2

PICK THE RIGHT FIELD TYPE

- Many data types
 - Text
 - Number
 - Date & time
 - Lookup
 - Choice
 - Currency
 - Autonumber
 - File
 - Power Fx (Preview)
- Tooltips in Description
- Requirement level
- Calculated / Roll-up available



TIP 5: MODEL-DRIVEN APPS

- Tailored, streamlined access for user groups
- Simplify the user experience
- Hide the noise
- Only show the necessary information
- Example: Sales Hub vs a customized model-driven app

The screenshot shows the Dynamics 365 Sales Hub interface. The left sidebar navigation includes Home, Recent, Pinned, My Work (Sales accelerator, Activities, Dashboards), Customers (Accounts, Contacts), Sales (Leads, Opportunities, Competitors), Collateral (Quotes, Orders, Invoices, Products, Sales Literature), Marketing (Marketing Lists, Campaigns, Quick Campaigns), Performance (Goals), and Sales (selected). The main content area is titled "My Open Leads" and displays a list of 15 leads. Each lead entry includes the name, topic, status reason, and creation date. The interface has a clean, modern design with a light gray background and blue header elements.

Name	Topic	Status Reason	Created On
Halle Griffiths	20 Airport XL Coffee Makers Long-term Lease for Northwind Traders	New	8/13/2023 3:57 AM
Harriet Parrish	15 Airport Duo Coffee Makers Short-term Rental for Lucerne Publishing	New	8/13/2023 3:57 AM
Rachel Michael	20 Airport XL Coffee Makers for Alpine Ski House	New	8/13/2023 3:57 AM
Alex Baker	5 Café A-100 Automatic	New	8/13/2023 3:57 AM
Lavona Field	15 Airport Duo Coffee Makers for Fabrikam	New	8/13/2023 3:57 AM
Lilly Pyles	3 Café Duo Espresso Machine Long-term Lease for A. Datum	New	8/13/2023 3:57 AM
Reuben Kidd	10 Airport Duo Coffee Makers for Proseware	New	8/13/2023 3:57 AM
Jabez Parker	5 Café Lite Espresso Machines for Proseware	New	8/13/2023 3:57 AM
Winford Asher	10 Airport Coffee Makers for Fabrikam	New	8/13/2023 3:57 AM
Josiah Love	10 Airport Duo Coffee Makers for Alpine Ski House	New	8/13/2023 3:57 AM
Harrison Curtis	5 Café Duo Espresso Machines for Fabrikam	New	8/13/2023 3:57 AM
Jermaine Berrett	5 Café Lite Espresso Machines for A. Datum	New	8/13/2023 3:57 AM
Gerald Stephens	10 Airport Lite Coffee Makers Long-term Lease for Alpine Ski House	New	8/13/2023 3:57 AM
Ivan Cashin	15 Airport XL Coffee Makers Long-term Lease for Northwind Traders	New	8/13/2023 3:57 AM
Gabriela Christiansen	5 Café Grande Espresso Machines for A. Datum	New	8/13/2023 3:57 AM



Pages

+ New

Search

Navigation

Customers

Accounts view

Accounts form

Contacts view

Contacts form

Prospects

Leads view

Dynamics 365



HN

← My Open Leads ▾



Halle Griffiths
HG
20 Airport XL Coffee Makers Long-term Lea...
New

Harriet Parrish
HP
15 Airport Duo Coffee Makers Short-term R...
New

Rachel Michael
RM
20 Airport XL Coffee Makers for Alpine Ski ...
New

Alex Baker
AB
5 Café A-100 Automatic
New

Lavona Field
LF
15 Airport Duo Coffee Makers for Fabrikam

Jabez Parker
JP
5 Café Lite Espresso Machines for Proseware
New

1 - 15 of 15

Page 1 →

MODEL-DRIVEN

APPS: TIPS &

TRICKS

Phone (411 x 731) ▾

- 107 % ↑

Leads

Views Charts Settings

In this app

+ New view

Closed Leads
Public ViewLeads: Influenced Deals...
Public ViewMy Open Leads
Public View (Default)Open Leads
Public View

Show more ▾

Not in this app

All Leads
Public ViewAll leads in current fisca...
Public ViewCampaign Leads
Public ViewExcluded Leads Campai...
Public ViewLeads Opened Last Week
Public ViewLeads Opened This Week
Public ViewLeads: No campaign Ac...
Public ViewLeads: Older Than 6 Mo...
Public View

Include all views in the app

- New page can be:

- Dataverse table

- Dashboard

- **URL!!**

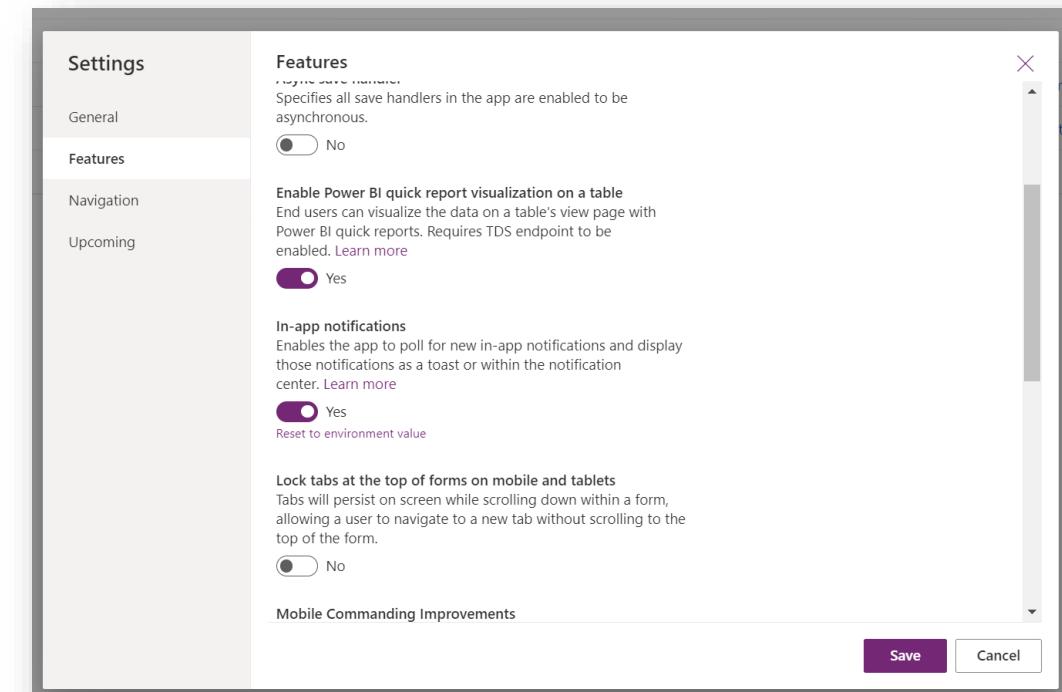
- Web resource

- Custom page

- Use Pages area to limit forms and views visible on an app

MODEL-DRIVEN APPS: APP SETTINGS

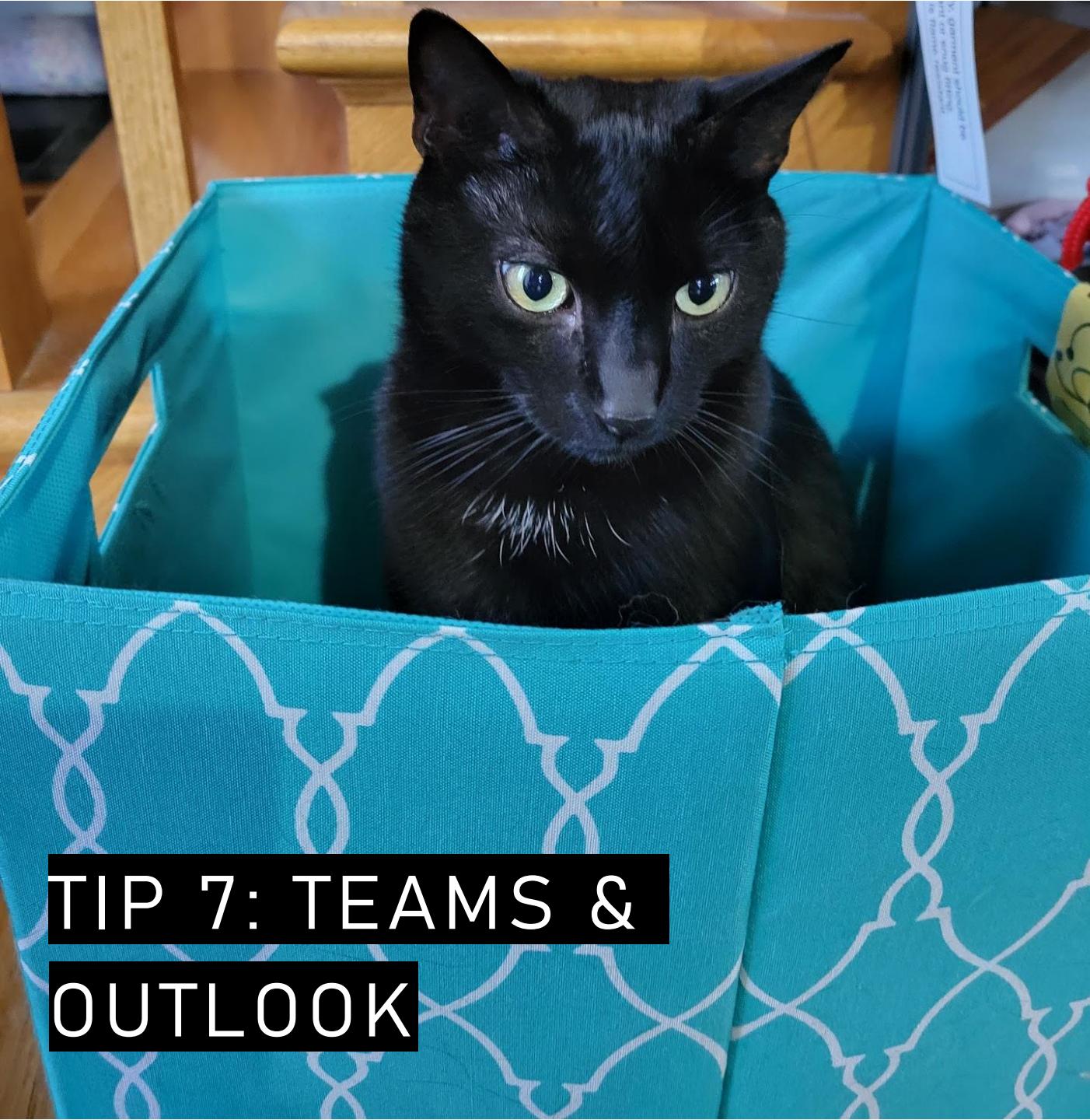
- Settings > General
 - App name, description, icon
- Settings > Features
 - Turn on **in-app notifications**
 - Enable **Power BI quick report visualization** on a table
- Settings > Upcoming
 - Early access features!



TIP 6: COPILOTS (PREVIEW!)

- Save time by leveraging copilots throughout Dynamics 365!
- AI-generated content, suggestions, guidance to provide real-time assistance.
- Disclaimer: I know, they're **In Preview** still.
BUT STILL! They are awesome.

The screenshot shows the Microsoft Copilot (preview) interface. At the top, it says "Copilot (preview)" and "Get AI-powered help with solving customer issues." Below that, there are tabs for "Ask a question" (which is selected) and "Write an email". On the left, there's a sidebar with icons for Home, AI, Ideas, Books, and Help. The main area shows an email from "Power Platform Weekly - Issue #140" to Heidi Neuhauser. The email body includes sections like "Highlights" (with a suggestion to "Add ppweekly@substack.com as a contact to Dynamics 365") and "Draft with Copilot" (with options like "Describe the email you want", "Reply to an inquiry", "Make a proposal", "Address a concern", and "Summary of this email"). A large blue box highlights a question: "How much do we charge for the replacement switch?". To the right of this question, a text box provides an answer: "Prices for replacing switches typically range from \$65 to \$125. This varies depending on the type of switch and whether any changes are made to your home's wiring. Wiring a completely new fixture and switch could take several hours and cost \$400 or more." At the bottom, there are buttons for "Copy" and "AI generated", along with like and dislike icons.



TIP 7: TEAMS & OUTLOOK

- Basic & Enhanced Teams integration
- Dynamics 365 App for Outlook vs Sales Copilot: When to use each

TEAMS

> Sales Trial > Settings

INTEGRATION

Product

Behavior, Collaboration, Features, Languages

Business

Business closures, Calendar, Connection roles, Currencies

Users + permissions

Application users, Business units, Column security profiles, Hierarchy security

Audit and logs

Audit settings, Audit summary view, Entity and field audit settings, System jobs

Templates

Access team templates, Article templates, Contract templates, Data import templates

Updates

App update settings (Preview)

Email

Email settings, Email tracking, Mailboxes, Server prof

Integration

Document management settings ↗

Synchronization ↗ ⓘ

Teams integration settings ↗

Yammer ↗

Data management

Auto numbering, Automatic record creation policies,

Encryption

Data encryption

Resources

All legacy settings, Dynamics 365 App for Outlook

For the best experience viewing this content, open it in a specific application.

Microsoft Teams collaboration and chat

Seamlessly collaborate with Dynamics 365 team members.

Turn on the linking of Dynamics 365 records to Microsoft Teams channels

Let people in your org connect records and views to Teams channels, and let them open records in Teams during meetings. [Learn more](#)

Yes

Turn on Enhanced Microsoft Teams Integration

Allows pinning of records and views to a Teams channel directly from Dynamics 365 and suggests members to be added. Requires tenant admin permissions. [Learn more](#)

Yes

Turn on Confidential Labels

Create private Teams and add sensitivity/confidentiality labels in the Enhanced Microsoft Teams Integration.

No

Turn on Microsoft Teams chats inside Dynamics 365

Engage in Teams chats with coworkers right from Dynamics 365. [Learn more](#)

Yes

Show Teams chats on the connected record's timeline (Preview)

Sync Teams chat data with Dynamics 365 records. This will allow chat activity to show up on the timeline. [Learn more](#)

Yes

i Only a global administrator can turn on this setting.

- Note security level requirements for some items
 - Link D365 to Teams channels
 - Turn on Teams chats inside D365
 - Turn on enhanced Teams integration

TEAMS INTEGRATION



Environment settings

OUTLOOK INTEGRATION

Search for:

Product

Behavior, Collaboration, Features, Languages

Business

Business closures, Calendar, Connection roles, Currencies

Users + permissions

Application users, Business units, Column security profiles, Hierarchy security

Audit and logs

Audit settings, Audit summary view, Entity and field audit settings, System jobs

Templates

Access team templates, Article templates, Contract templates, Data import templates

Updates

App update settings (Preview)

Email

Email settings, Email tracking, Mailboxes, Server profiles

Integration

Document management settings, Synchronization, Teams integration

Data management

Auto numbering, Automatic record creation policies, Bulk deletion,

Encryption

Data encryption

Resources

All legacy settings ↗

Dynamics 365 App for Outlook ↗

Getting Started with Microsoft Dynamics 365 App for Outlook

Microsoft Dynamics 365 App for Outlook is an Office add-in that you can quickly add to your users' mailbox so they can track communication and review Dynamics 365 for Customer Engagement applications' information in Outlook.

For users to be eligible for Dynamics 365 App for Outlook, they need to:

1. [Setup server-side synchronization](#) on their mailbox for incoming emails and for appointments, contacts and tasks. [Learn more](#)
2. [Approve](#) their mailbox. [Learn more](#)
3. [Tested and enabled](#) their mailbox. [Learn more](#)
4. Add the user to the **Dynamics 365 App for Outlook User** security role. [Learn more](#)

Automatically add Dynamics 365 App for Outlook to all eligible users. [See more](#)

Save

All Eligible Users ▾

Search for records 

 ADD APP FOR ALL ELIGIBLE USERS

Full name

Status

Enabled for Inc

Enabled for AC



0 - 0 of 0 (0 selected)

All # A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

- Server-side sync
- Mailboxes approved, tested and enabled
- Security role applied to user

OUTLOOK
INTEGRATION

OUTLOOK INTEGRATION

- Dynamics 365 App for Outlook
- ~~Viva Sales~~ Sales Copilot

Feature	Dynamics 365 App for Outlook	Sales Copilot
Create & edit customer CRM data in Outlook	✓	✓
Connect to CRM from Outlook	✓	✓
	Dynamics 365 only	Dynamics 365 or Salesforce
Link messages, meetings and appointments to any Dynamics 365 table	✓	✗ Limited only to Sales!
View information in context of Outlook email or meeting	✓	✓
Included with Dynamics 365 Sales Professional License	✓	✗
Collaborate across Teams	✗	✓
Use AI to track positive or negative sentiment of conversations	✗	✓
AI prompted actions	✗	✓
Auto-summary	✗	✓

TIP! SYNC CALENDARS (PREVIEW)

- Turn on Sync Calendars setting in your Teams integration details (*in App Settings*)
- Meetings created in Dynamics 365 will be added to calendars in Outlook & Teams
- **Pre-requisites:** server-side synchronization on for email, appointments, contacts and tasks.
- **Troubleshooting Tip:** there can be a delay of up to 15 mins before a new meeting appears on synched calendars.

The screenshot shows a configuration page for enabling Dynamics 365 data in Teams meetings. At the top right is a toggle switch labeled 'Yes'. Below it is a section titled 'Show Dynamics 365 data in Teams meetings (preview)' with a descriptive text: 'When a meeting is connected to a Dynamics 365 record, automatically show record details in Teams when the meeting starts. Only people in your org will see the record data in Teams.' A 'Learn more' link is provided. A red box highlights the 'Sync calendars' section, which contains the text: 'Teams meetings created in Dynamics 365 will show up on calendars in Teams and Outlook.' and a 'Learn more' link. Further down, another red box highlights the 'Add and join meetings' section, which includes the text: 'Let people create and join Teams meetings directly from Dynamics 365. Go to the Power Platform Admin Center, open the environment, navigate to Product > Feature, and turn on End users can add and join Teams meetings from appointments in model-driven apps.' and a 'Learn more' link. At the bottom is a 'Save' button.

Show Dynamics 365 data in Teams meetings (preview)

When a meeting is connected to a Dynamics 365 record, automatically show record details in Teams when the meeting starts. Only people in your org will see the record data in Teams. [Learn more](#)

For this setting to work, turn on this server-side sync setting too:

Sync calendars

Teams meetings created in Dynamics 365 will show up on calendars in Teams and Outlook.

[Learn more](#)

To create meetings from Dynamics 365, turn on this setting:

Add and join meetings

Let people create and join Teams meetings directly from Dynamics 365. Go to the Power Platform Admin Center, open the environment, navigate to Product > Feature, and turn on End users can add and join Teams meetings from appointments in model-driven apps.

[Learn more](#)

[Go to the Power Platform Admin Center](#)

Save

TIP #8: CREATE A VARIETY OF TRAINING MATERIALS

- People learn differently
- Differentiate your content to reach more learners

Visual Learners	Aural Learners	Reading & Writing Learners	Kinesthetic Learners
<ul style="list-style-type: none">• Live training• Graphs• Diagrams• Flow charts• Demo• Webinar	<ul style="list-style-type: none">• Live training• Lecture• Discussion Groups• Webinar• Videos• Podcasts	<ul style="list-style-type: none">• Live training• PowerPoint• Quick Reference Guides• Job Aids• Labs• Handouts	<ul style="list-style-type: none">• Live training• Demos• One-on-one / small group• Coaching• Labs• Case studies

TIP #9: OFFER ROLE-BASED TRAINING

- Group users based on job role
- Core training topics for all users with specific training topics for different roles

Sales Users

- Sales Hub / custom app
- Lead to Opportunity Process
- Qualifying & Disqualifying Leads
- Winning & Losing Opportunities

Service Users

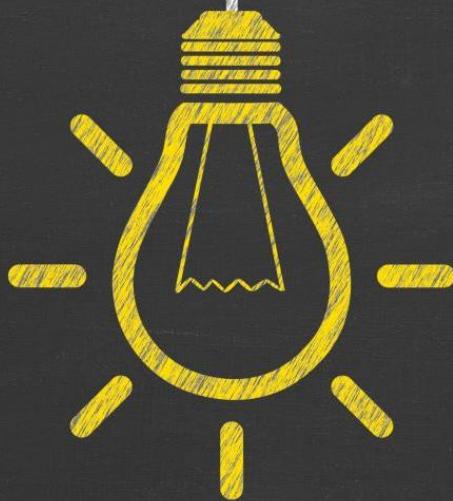
- Customer service workspace / custom app
- Case Management Process
- Escalation Process
- Knowledge Base

Marketing Users

- Journeys
- Segments & Triggers
- MQL & SAL

- ✓ Navigation
- ✓ Search
- ✓ Changing Views
- ✓ Sorting
- ✓ Filtering
- ✓ Advanced Find

TIP #10: OFFER ONGOING LEARNING OPPORTUNITIES

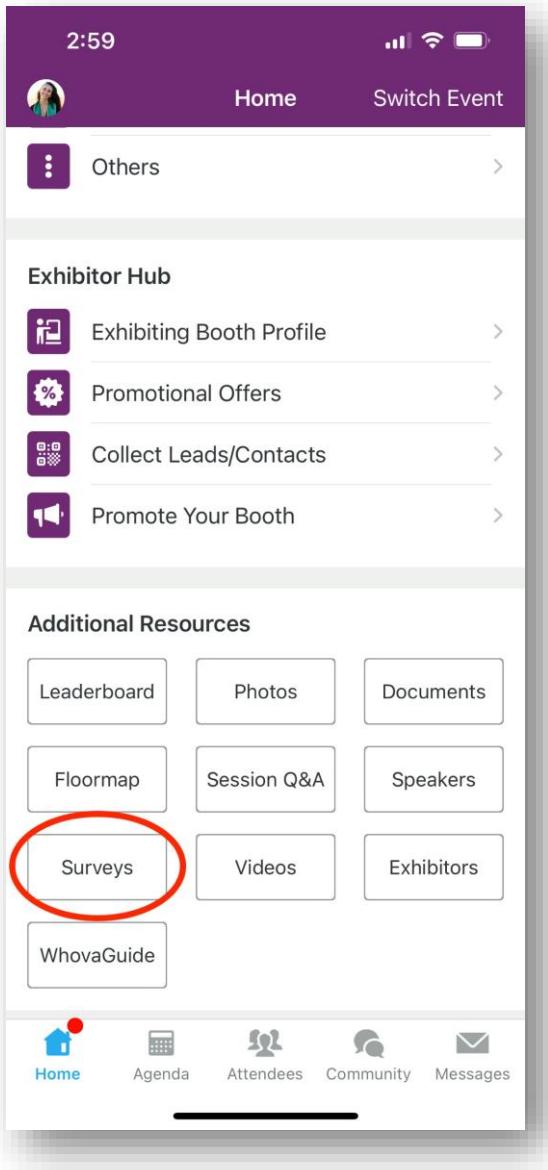


- Avoid the “Big Bang” approach
- Training isn’t just at Go Live
- Possible ideas:
 - Lunch & Learn
 - Tips & Tricks
 - D365 Newsletters
 - Video Library

A fluffy orange cat with green eyes is sitting in a white cat bed, looking towards the camera. The background consists of vertical stripes in various colors, including pink, blue, purple, red, orange, yellow, and teal, creating a vibrant and modern look.

THANK YOU!

Go be awesome advocates
for your users!



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- Click Session Feedback.*
- Scroll down to find this session title.*
- Complete the session feedback survey.*
- Finally, click 'Submit'*

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