



Dynamics 365, tekoälyä ja analytiikkaa!

Jukka Niiranen & Markku Suominen 26.11.2018

Aamun agendalla:

- Dynamics 365 AI
- Microsoft Teams & Dynamics 365
- Dynamics 365 for Marketing



Markku
Suominen



Jukka
Niiranen



The background features a dynamic, abstract design composed of flowing, translucent blue and orange liquid or paint-like waves. The elisa logo is integrated into this design, with its white script font appearing to emerge from or be submerged in the blue liquid. Small, glowing blue spherical particles are scattered throughout the scene, some near the liquid waves and others on the white background.

elisa

Dynamics 365 AI

Yrityksillä on hyviä syitä investoida myynnin analytiikkaan, koska tutkimusten (*) mukaan analytiikan hyödyntäminen nostaa myynnin tuottavuutta 5% - 10% ja vähentää myyntihenkilöstön myynnin suunnittelun käyttämää aikaa kaksi kolmasosaa.

**Useimmat yritykset eivät usko olevansa
erityisen hyviä analytiikan hyödyntämisessä**

**Dynamics 365:n kaaviot ja koontinäytöt ovat hyviä
nopean yleisnäkymän saamiseen**

**Power BI on joustava ja monipuolin ratkaisu, mutta
vaatii osaamista ja ymmärrystä tietorakenteista**

**Tietojen vienti Dynamics 365:sta ulkoiseen
raportointiratkaisuun on mutkikasta**

Usein turvaudutaan tietojen Excel-vientiin

**Myyjät haluavat nähdä edistymisensä tavoitteisiin
nähden sekä hankkeet, joiden kanssa työskennellä
seuraavaksi -> Excel-kaavoja**

**Myyntijohtajien tulee raportoida koko myynnistä ja
laatia ennusteita -> Useita Excel-taulukoita, useita
kaavoja...**

Microsoftin AI-ratkaisut, koko kuva



Dynamics 365 AI -ratkaisut

Dynamics 365 AI for Sales



Empower sellers and sales managers to sell smarter and lead proactively with AI-driven insights

Provide embedded insights with Dynamics 365 for Sales to drive smarter selling and decision-making

Get started quickly with a prepackaged solution that works out of the box.

Nov. 1, 2018 embedded capabilities for sellers GA

Nov. 1, 2018 sales manager capabilities public preview

Dynamics 365 AI for Customer Service



Compile insights into one location for the entire support team including human and virtual agents

Enable automatic clustering of support cases by topic with natural language understanding

Combine the capabilities of virtual agents and customer service insights

Oct. 31, 2018 AI for Customer Service public preview

Coming Soon virtual agents public preview

Dynamics 365 AI for Market Insights



Know your customers better through social and search insights

Build your brand and enhance your reputation by engaging effectively with your audience

Gain competitive advantage by spotting trends and responding faster to market opportunities

Oct. 31, 2018 public preview release in US

Coming Soon Public preview release in more countries

Dynamics 365 AI for Sales: demo

Dynamics 365 AI for Sales: myyntijohdon työpöytä

Dynamics 365 AI | Sales | PREVIEW | ?

Kysymyksiin vastaukset visuaalisesti

Home

Tuesday, September 20, 2018 | Q2, 11 days left | ACTUAL REVENUE \$313K

Actuals

You may not hit your quota this quarter. Your team is \$87K below target with 11 days left

Actual revenue - today

\$313K

View report

Myyntihankkeiden "relationship score"

Pipeline

- 3 deals, worth \$180K, are closing soon and have poor relationship score

Opportunity relationship score - an hour ago

View report

Team calls

- Negative customer sentiment is above mean in 72% of calls

Overall sentiment - yesterday

View report

Riskihankkeet ja 1:1 - tapaamiset

Eric Boocock
Senior Sales rep

Send email | LinkedIn

AVG. D

Q2 performance

\$23K Actual revenue | \$34K Gap

\$57K Quota | \$20K Pipeline

View scorecard

Opportunities at risk

Opportunity name	Health	Act. revenue	Close date
Renewal for 2019	20	\$2.3K	9/28/20
New customer add for dynamics	20	\$4K	10/03/20
searching for dynamic365 sales...	35	\$3.6K	9/15/20
Upsell into new location	40	\$1.2K	11/20/20

Upcoming

1:1 with Eric

You have a meeting with Eric in 30 minutes

- Eric has achieved 60% of quota (lowest performer). Your connection at Contoso, Paul Cannon, might help on the "2018 order" deal.

Sales rep actual - today

Recent insight

The screenshot displays the Dynamics 365 AI for Sales dashboard. At the top, there's a navigation bar with 'Dynamics 365 AI' and 'Sales' tabs, and a 'PREVIEW' indicator. A large blue callout bubble labeled 'Kysymyksiin vastaukset visuaalisesti' points to a section where common sales questions are listed with their answers. Another blue callout bubble labeled 'Myynnin mittarit' points to a summary of Q2 performance metrics. A third blue callout bubble labeled 'Riskihankkeet ja 1:1 - tapaamiset' points to an 'Upcoming' section. The main area shows 'Actuals' with a warning about not hitting the quota, a 'Pipeline' section with 3 deals worth \$180K, and 'Team calls' showing negative customer sentiment. On the right, there's a detailed view of a sales rep named Eric Boocock, including his profile picture, contact links, and a comparison of his actual vs. quota performance. Below that is a table of 'Opportunities at risk'. The bottom right corner features the 'elisa' logo.

Dynamics 365 AI for Sales: myyjän työkalut 1/2

Dynamics 365 for Sales (Enterprise)

General Availability



Salesperson

Email Engagement	Relationship Assistant
Auto Capture	

Dynamics 365 AI for Sales

General Availability



Salesperson

GA	Relationship Analytics	GA	Predictive Lead Scoring
New	Who knows whom	New	Predictive Opportunity Scoring
New	Talking Points	New	Notes Analysis

Public Preview



Sales Manager

New	Business Performance	New	Team Performance
New	Call Intelligence		

Dynamics 365 AI for Sales: myyjän työkalut 2/2

Relationship Assistant

Opportunity Closing Soon
Keyboard Sales
Opportunity closes on Wednesday, September 26, 2018.

Poor relationship and Declining

Next Interaction
Next Activity Not Scheduled

Last Interaction
Monday, January 1, 2001 12:00 AM
Follow up with customer

Icebreakers for John Miller

I really enjoyed the basketball game last night

11 days ago about Sports

Who Knows Whom



"Kuka tuntee kenen" - verkosto

"Suhdeavustaja" ja edellinen / seuraava toimenpide

Timeline

Enter a note...

TODAY

Note modified by Ryan Cunningham - Just now
Meeting with Anna
Just finished the call with Anna. She would like us to send the initial Proposal for the skyline Printers. She also introduced me to Shira from their legal team.

New Contact
Create a new contact Shira for Woodgrove Bank.
Create Edit and Create

Talking Points for Lidman Anna

After the busy week we did enjoy the game day supporting Seahawks. This was definitely some...
2h ago about Sports

The season and the travel is to be blamed. I am feeling much better now....
1w ago about Health

Summers is the time to be with family. This was a long pending vacation. Let's talk about work in a....
3m ago about Family

RECIPIENT ACTIVITY

5 Open 5 Attachment Views 5 Links Clicked 0 Replied

11:30 am Opened on iPhone 6 near Boston, NY | ↗
11:22 am Viewed [Litware #D Printer.pdf](#)
11:20 am Clicked [Hyperlink](#) to visit <http://www.liware.com>.

more...

Sähköpostien tapahtumaseuranta

Muistiinpanojen analyysi ja puheenaiheet

Opportunity scoring & Relationship health

Predictive Opportunity Scoring

Top Reasons

- Budget Amount is \$125000
- Final Proposal Ready is Not Complete
- Est. Close Date is 12/15/2018
- Est. Revenue is \$100000
- Identify Competitors is Complete
- Identify Sales Team is Complete
- Country is USA
- Opportunity Age is 87
- Number of Employees is 225
- Status is Active

87

Grade A
↳ Declining

Dynamics 365 Sales Hub Sales > Opportunities

My Open Opportunities by Relationship

Relationship Pipeline

Topic Est. Re... Relationship Health State (KPI) Relationship Healt... Account Time Spent by ... Time Engag...

Topic	Est. Re...	Relationship Health State (KPI)	Relationship Healt...	Account	Time Spent by ...	Time Engag...
Surface Tablets	\$900,000...	Poor	Declining	Adventure ...	2.6	
Audio Video Syste...	\$745,000...	Good	Declining	Consolidat...	15.9	
Keyboard Sales	\$900,000...	Poor	Declining	Blue Yond...	2.6	
Desktop Service Pa...	\$100,000...	Good	Improving	City Power...	6.4	
Printer Purchase	\$280,000...	Fair	Steady	Margie's Tr...	4.3	
Computer Applian...	\$356,000...	Fair	Declining	Fourth Cof...	5.8	
Antivirus Software	\$765,000...	Good	Improving	Alpine Ski ...	6.1	
Kitchen Appliances	\$3,450,00...	Good	Improving	Coho Win...	14.1	

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

1 - 8 of 8 (0 selected)

Relationship Assistant

Email text extraction



Jill Frank mentioned "I'm interested in learning more about your service." in the email.

[Open Email](#)



Maria Cambell mentioned "shipment is delayed and this may affect project timeline" in the email.

[Create Case](#) [Open Email](#)



Rene Valdes mentioned "Proposal looks good. Can we meet tomorrow?"

[Create Meeting](#) [Open Email](#)



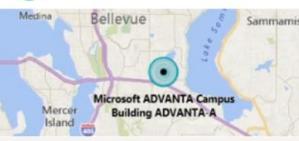
Rene Valdes mentioned "Proposal looks good. Can we meet tomorrow?"

[Add Competitor](#)

Upcoming activities



We'll review the proposal we sent last week and do a complete review of all issues raised for the proposal...



[Get Directions](#) [Email Attendees](#)



SEA 6:15AM ————— SFO 8:15AM

2pm Today
On site Demo



7 CUSTOMERS NEARBY

[Open Email](#)

Relationship Analytics



Opportunity "500 Printers for Litware" is at risk due to poor relationship score.

[Open Opportunity](#) [Send Email](#)



There's been no activity with this account since August 4, 2016.

[Open Account](#) [Send Email](#)



Your email "Updated Proposal" just got opened at 3:21pm from San Francisco, CA, USA.

[View Recipient](#) [Open Email](#)



There's been no reply to your email "New Brochure" since it was sent on Oct 09, 2016 at 3:20 pm.

[Open Email](#)

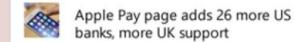
Web enrichment

STOCK ACTIVITY AT 3:14 PM EDT OCT 11, 2016



57.89 USD
 0.21(0.36%)

RELEVANT NEWS... UPDATED 10M AGO



Dynamics 365 AI for Customer Service



Tunnista aiheet sisäänrakennetun tekoälyn avulla



Ota käyttöön virtuaaliset asiakaspalveluagentit



Lisää tuottavuutta ja vähennä työmäärää

Dynamics 365 AI for Customer Service

KPI summary
Refreshed 11/15/2018 1:45:52 AM UTC (24h cycle)

Aiheet tekstinanalyysin kautta

Top case volume impactors

Topic	Volume	Total cases
3D Printer configuration is...	9.5%	4
Printer not printing PDFs	9.5%	4
3d Printer getting heated up	7.1%	3
3D Printer not working	7.1%	3
Product damaged (sample)	7.1%	3
Required Service scheduling	7.1%	3

Aineet valitulla ajanjaksolla

Emerging topics

Topic	Volume change	Total cases
Case Created from portal -...	1	
Dysfunctional Litware Lapt...	1	
from website	1	
Item defective on delivery	1	
Missing parts	1	

Time period: Kaikki | **Product**: Kaikki | **Channel**: Kaikki
(Tyhjä) Email Facebook Others Twitter Web

Total cases: 42 | **Resolutions**: 3 | **Escalations**: 11

Total case breakdown: New: 42, Backlog: 0

Case priority: 78.6% Normal, 16.7% High, 4.8% Low

Web: 27

Case tracking: 21. lokakuuta, 28. lokakuuta, 4. marraskuuta

Unresolved: >= 0 day, >= 1 day, >= 2 days, >= 3 days, >= 4 days, >= 5 days, >= 6 days, >= 7 days



The background features a dynamic, abstract design of flowing liquid waves in shades of blue and orange. The word 'elisa' is written in a white, lowercase, sans-serif font, positioned centrally over the liquid waves.

elisa

Dynamics 365 for Microsoft Teams

Dynamics 365 –tietue Teams-välilehtenä

The screenshot shows a Microsoft Teams interface with a Dynamics 365 account record and a Teams channel.

1. Kanavaan kiinnitetty asiakastietue (Customer information pinned to the channel)

The Dynamics 365 account record for "Elisa Oyj" is displayed. Key details shown include:

- Annual Revenue: 1 787 000,00 \$
- Number of Employees: 4 700
- Owner: Antti Administ...

2. Dynamics 365:stä avautuva asiakaslomake (Customer form opening from Dynamics 365)

A blue callout points to the "Elisa Oyj" tab in the Teams navigation bar, which is currently active.

3. Asiakkaaseen liittyvä Teams-keskustelu (Customer-related Teams conversation)

The Teams channel "Elisa account team > General" shows the following messages:

- 9:08 AM: Tab conversation has begun.
- 9:18 AM: When do we have the next quarterly KAM meeting with Elisa account team & could I please get an invite to it?
- 9:29 AM: Antti: you're in luck since it's going to take place tomorrow morning! You've got an invite, but just feel free to join the meeting here on this channel 😊
- 9:29 AM: David So: Cheers, David! Looking forward to it! 👍

At the bottom right is the Elisa logo.

Teams-dokumentit Dynamics 365 -lomakkeella

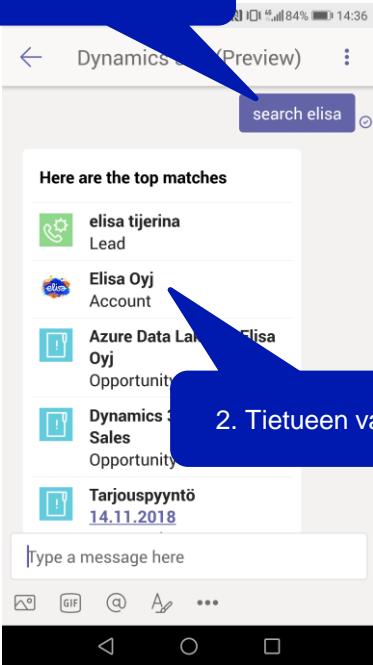
1. Teams-jäsenten käsittelemät dokumentit

2. Dynamics 365 – tietuelomakkeelta nähtävät dokumentit

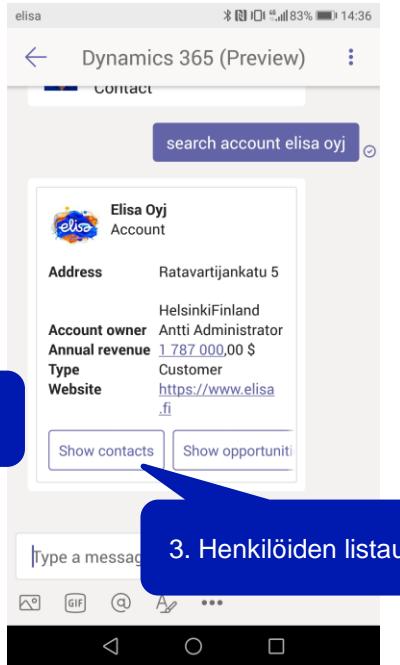
Name	Modified	Modified by
Azure Data Lake Gen2 for Elisa Oyj.pptx	22.11.2018 11.03	Antti Administrato
Elisa account plan 2018.docx	22.11.2018 11.06	Antti Administrato

Dynamics 365 & Teams-botti mobiilikäytössä

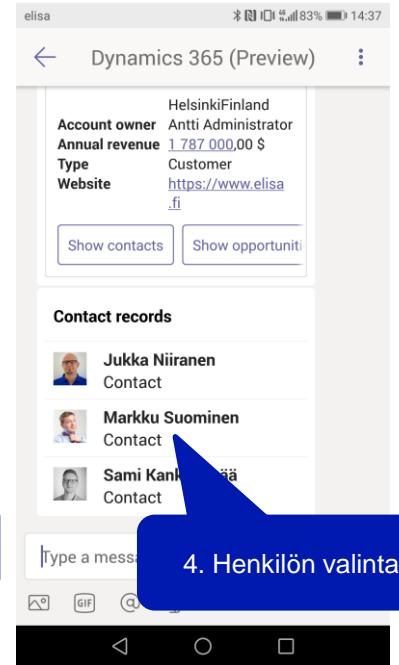
1. Vapaatekstihaku



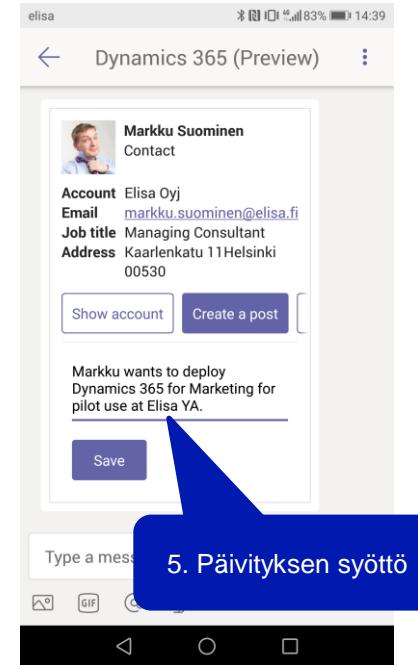
2. Tietueen valinta



3. Henkilöiden listaus



4. Henkilön valinta



5. Päivityksen syöttö

Teams-botti ja Dynamics 365 AI for Sales

The screenshot shows the Microsoft Teams interface. On the left, the Teams sidebar lists various channels: Favorites (Contoso), General (Mountain Bikes, Spring Campaign, 500 3D Printers), Tailspin Toys, Account Team, General, Accounting, Finance (FY2017 Planning, Strategy), and 6 more channels. The 'Mountain Bikes' channel is selected. The main area displays a Dynamics 365 AI for Sales card titled 'Who knows Contoso?' which shows a network graph of three people connected to a central blue node. Below this, another card shows a contact profile for 'Welly Lee' with a 'Strong Connection Strength' of 5/5, listing her job title as 'IT Manager, Contoso', email as 'welly.lee@contoso.com', and phone number '+1 555-768-1234'. Buttons for 'Email', 'Call', and 'Chat' are present. A message input field at the bottom says 'Type a message'.

1. Asiakkaan tuntevien työntekijöiden haku omasta organisaatiosta
2. Tulosten visualisointi verkostona
3. Suhteen vahvuuden indikaattori



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elisa

Dynamics 365 for Marketing

Liiketoiminnan markkinointihäasteita



Ei tarpeeksi
liidejä



Liidien laatu
huono



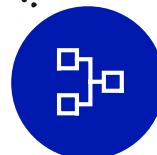
Ei yhteyttä
myyntiin



Liidien
“hoivamalli”
heikkoa

Dynamics 365 for Marketing yhdistää markkinoinnin ja myynnin

Monikanavaiset kampanjat



Liiden
hoivamalli



Tapahtumahallinta



Yhteinen data ja
yhteiset prosessit



Sisäänrakennettu
älykkys



Koontinäytöt ja
"Insights"

Markkinointi

Myynti

Dynamics 365 for Marketing

Markkinointitoiminnot
(sähköpostimarkkinointi,
asiakaspolut, liidien arvointi,
markkinointisivut ja www-
lomakkeet)

Dynamics 365 –
tapahtumaportaalit

Voice of the Customer
(kyselyiden hallinta ja
analysointi)

Dynamics 365 Connector for
LinkedIn Lead Gen Forms

Dynamics 365 Marketing Marketing > Dashboards

Marketing

Customer Journeys

Marketing Emails

Lead Management

Leads

Opportunities

Lead Scoring Model

Internet Marketing

Marketing Pages

Marketing Forms

Websites

Email Journey

Keywords

Redirect URLs

Files

Templates

Customer Journey Templat...

Marketing Email Templat...

Customer Journey Das...

Customer Journeys by Owner

Aatu Admin

Customer Journeys by Purpose

Email ma... (6) Event ma... (1)

Customer Journeys Starting Over Time

Stopped Live Draft

Count/All (Custom...) 5 2.5 0 2/14/2018 2/17/2018 Day (Start date and time)

Suppression Segment Utiliz...

LinkedIn Campaign Utiliz...

Customer Journey Das...

Customer Journeys by Owner

Aatu Admin

Customer Journeys by Purpose

Email ma... (6) Event ma... (1)

Customer Journeys Starting Over Time

Stopped Live Draft

Count/All (Custom...) 5 2.5 0 2/14/2018 2/17/2018 Day (Start date and time)

Suppression Segment Utiliz...

LinkedIn Campaign Utiliz...

Dynamics 365 for Marketingin hinnoittelu

Dynamics 365 for Marketing ja Customer Engagement Plan¹

Sisältää
2 000
yhteyshenkilöä³

Sisältyy

Dynamics 365 for Marketing ja Customer Engagement - sovellus²

Sisältää
10 000
yhteyshenkilöä⁴

Alkaen

632,50 €
kuukausittain

Vain Dynamics 365 for Marketing

Sisältää
10 000
yhteyshenkilöä⁵

1 264,90 €
kuukausittain

Hinnoittelu kontaktien mukaan, joiden kohdistetaan markkinointitoimintoja, ei enää kaikkien kontaktien mukaan



Dynamics 365 for Marketing, mitä uutta?

Älykkyyss

- Analysointi Power BI:n avulla
- “Social Insights”

Microsoft-integraatiot

- Kehittyneempi LinkedIn-integraatio
- Videomarkkinointi



Henkilökohtainen markkinointi

- Uudelleenkäytettävä sisältö
- Markkinointikalenteri

Parannetut perustoiminnot

- Kehittyneempi segmentointi
- Käyttöliittymäparannukset

Dynamics 365 for Marketing, laajennettavuus

Muokatut kanavat

Oma analytiikka

Tapahtumat, mahdollisuus
maksaa

The screenshot shows a Dynamics 365 for Marketing application interface. At the top, there is a navigation bar with links: Home > Contoso Ltd Conference, Speakers, Sessions ▾, Pass Information, and Event Registration. Below the navigation bar, the main content area is titled "Your shopping cart". It displays a single item: "Contoso Button" with a quantity of 1 and a total price of \$80.00. There are buttons for "-", "+", and "Remove". To the right of the shopping cart, there is an "Order Summary" section showing "Item total" as \$80.00 and "Total" as \$80.00 USD. Below the order summary, there are two payment options: a yellow "PayPal Check out" button and a "Check Out" button with the text "Pay without a PayPal account". At the bottom of the page, it says "Powered by **PayPal**". On the far right, there is a sidebar titled "FIELDS" which lists various entity names such as Account, Contact, Lead, and Opportunity.

elisa

Tekoälyn ja koneoppimisen hyödyntäminen Dynamics 365:n kanssa vasta alussa, tiimin missio:

**“ Empower sales organizations to turn their
observed customer data into closed deals ,”**



Kiitos!

yrityksille.elisa.fi/microsoft-dynamics-365