

# 2025 DYNAMICS CON



# Purrfecting Customer Service: A Cat's Guide to Dynamics 365



# HELLO!



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# Agenda

- Our Goal is to: Master Dynamics 365 Customer Service through a Live Interactive Build, we will get through as much as we can in 50 minutes
- Queue Management
- Routing Mechanisms
- Reporting
- Agents
- Q&A

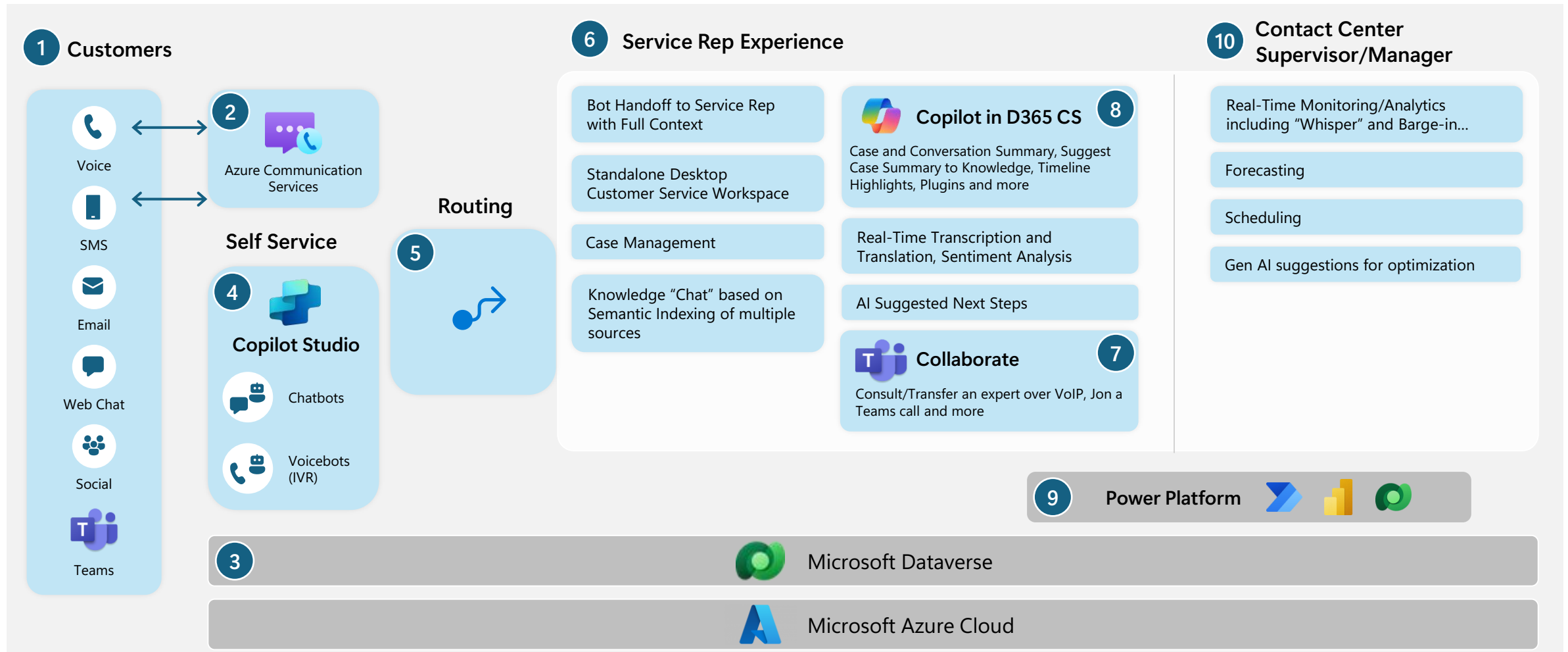


# Intro and Some Context

- We are talking Dynamics 365 Customer Service NOT Dynamics 365 Contact Center
  - Dynamics 365 Customer Service is a piece of the bigger platform, while talking about Contact Center, you will hear about existing CCaaS and CRM systems



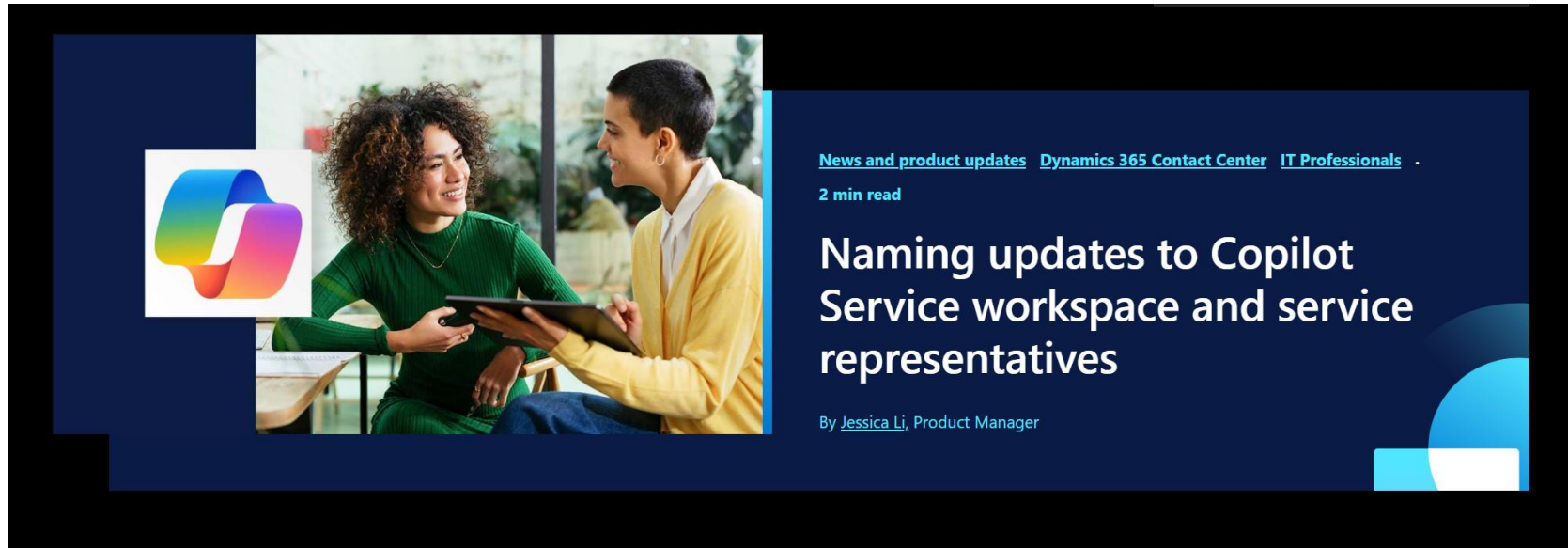
# Dynamics 365 Customer Service Premium for CCaaS and CRM





# And a Friendly Rename Reminder...

- Please be nice if we slip up on the names 😊



Ref: [Naming updates to Copilot Service workspace and service representatives - Microsoft Dynamics 365 Blog](#)



# Queue Management



Queues are used to collect and distribute workload among customer service representatives



Routing Rules will then be setup to Route work to Queues



# Basic Routing

SaveSave & CloseCloseFlow

New Rule Item

Routing rule 1  
Routing Rule Set

GeneralNotes

Rule Item Information

Name\*

Rule item for printer issues

Description

Rule item for printer issues

Rule Criteria

And

☐ Case Title

Equals

Printer issues

☐ Customer

Contains data

And

☐ Case Type

Equals

Problem

+ Add

+ Add

Action

Route to

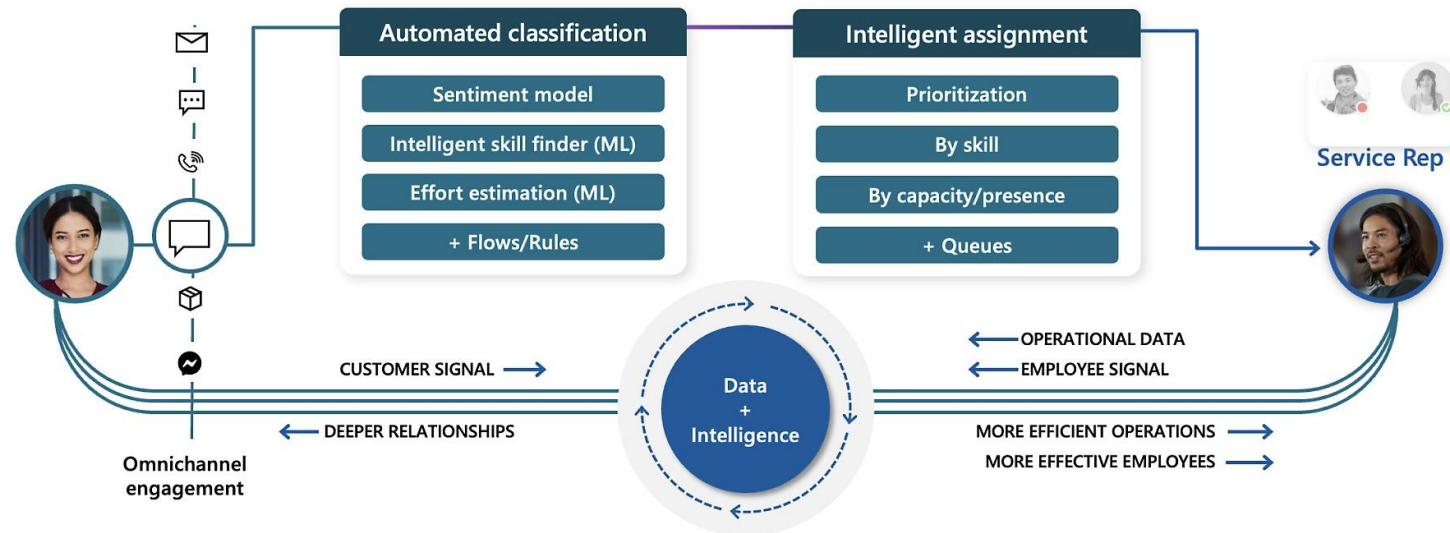
User/Team

Assign to User/Team

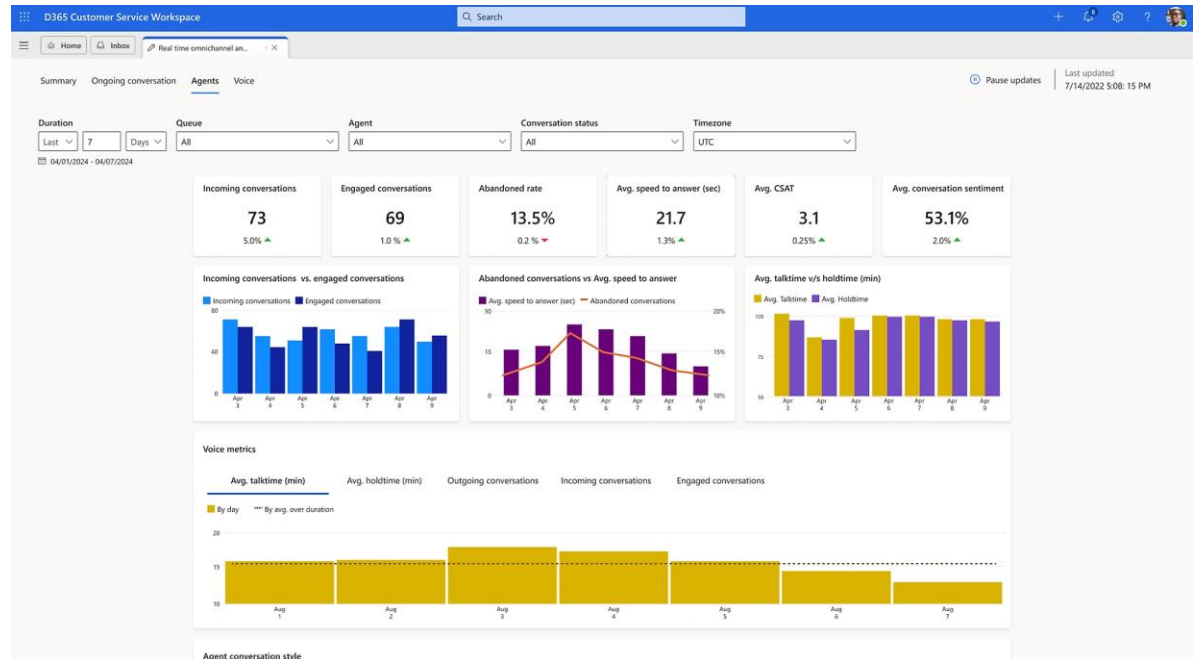
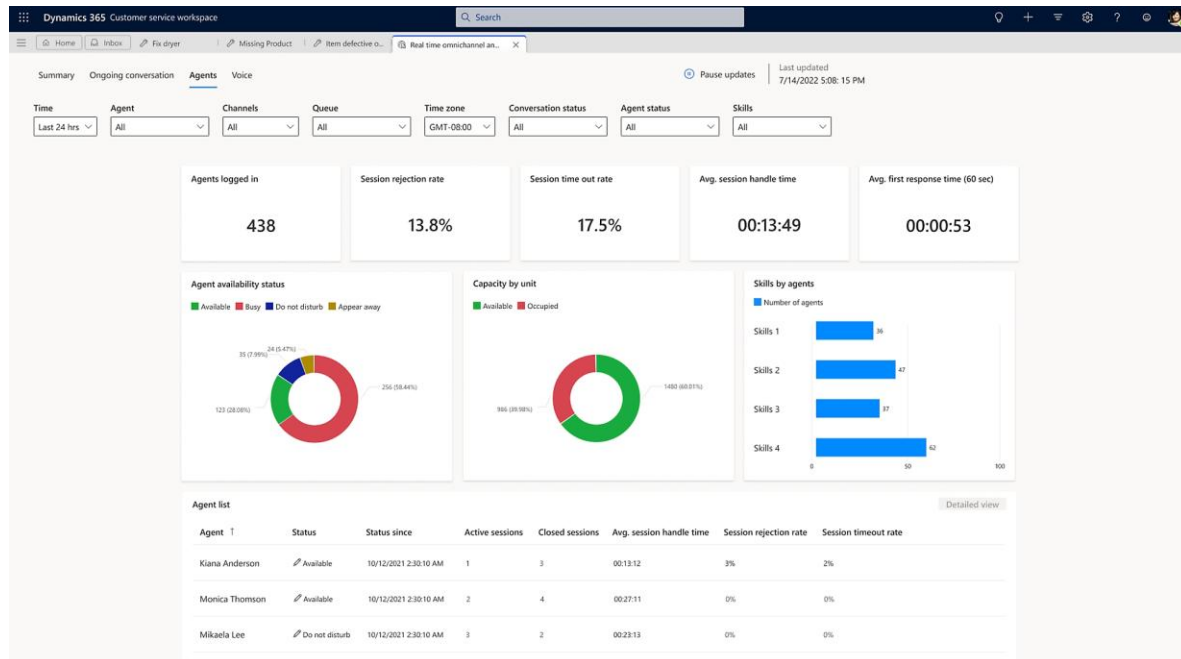
☐ Bert; Heir

A stylized logo for '2025 DYNAMICS CON' featuring a blue and yellow starburst shape with the text '2025 DYNAMICS CON' in bold, yellow, sans-serif font.

# Routing Mechanisms



# Reporting



# Quick Agent Setup





# So how will we accomplish this....



# Meet Our Cats... I mean team



Drifter Kenneth Ellen  
Parcell Lucifer  
Lawhorne  
Gray and White DSH  
Regional Manager, if  
you send him any  
tickets you are fired on  
the spot



Floofers  
Brown tabby with White  
Domestic Longhair  
Assistant to the  
Regional Manager



Lady Godiva  
Long hair,  
dilute Calico,  
Top Saleswoman the last  
100 years, could sell you  
your own car



Lady Kit Cat  
Medium hair,  
brown tabby,  
Head of support, wait  
time is approx. 2 hours  
while she gets her nails  
done





# The Rundown

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The Drifter Kenneth Paper Company needs to wrangle their support, Lady Kit Kat just can't handle the tickets while doing her nails

---

Floofers and Lady Godiva need to see and react to tickets from their Customers

---

As the boss, Drifter needs access but if he is EVER sent a ticket, whoever routed it will be fired on the spot

---

Obviously... Dynamics 365 Customer Service is here to save the Drifter Kenneth Paper Company



# LET'S BUILD



# Recap



Today, we saw how Dynamics 365 Customer Service helps you deliver purrfect customer experiences by using:



Queues to organize work and ensure no inquiry is forgotten



Routing to intelligently get each question to the best agent (the first time)



Reports and Dashboards to continually monitor and improve service performance



AI-driven Copilots/Agents to scale your support and assist both customers and agents



# How can you start purrfecting your own customer service?



Review your current  
processes



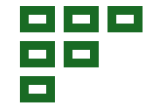
Enable Dynamics 365  
Customer Service  
trial or sandbox



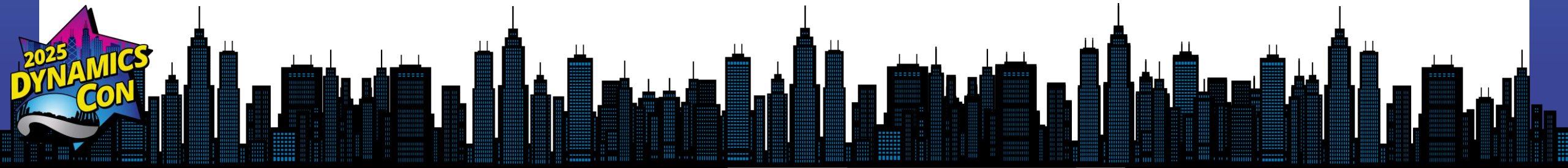
Consider AI quick  
wins



Plan unified routing  
rollout



Engage your team



# Questions?

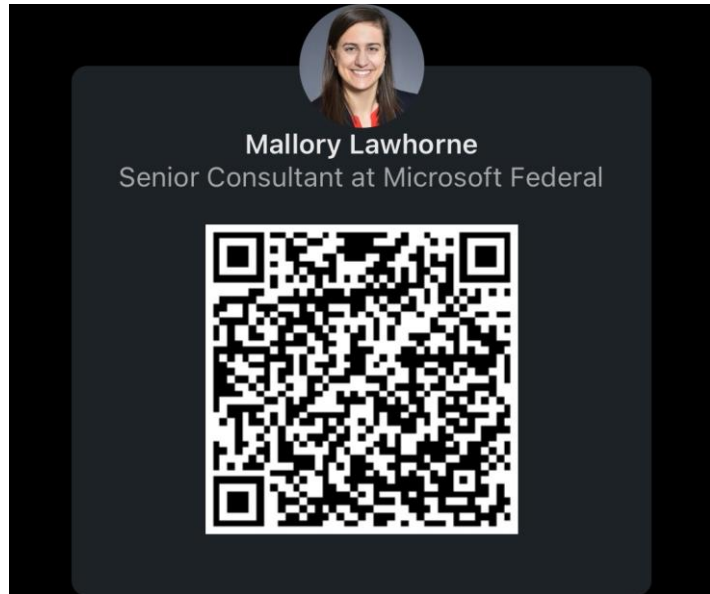


# Thank you for attending!

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