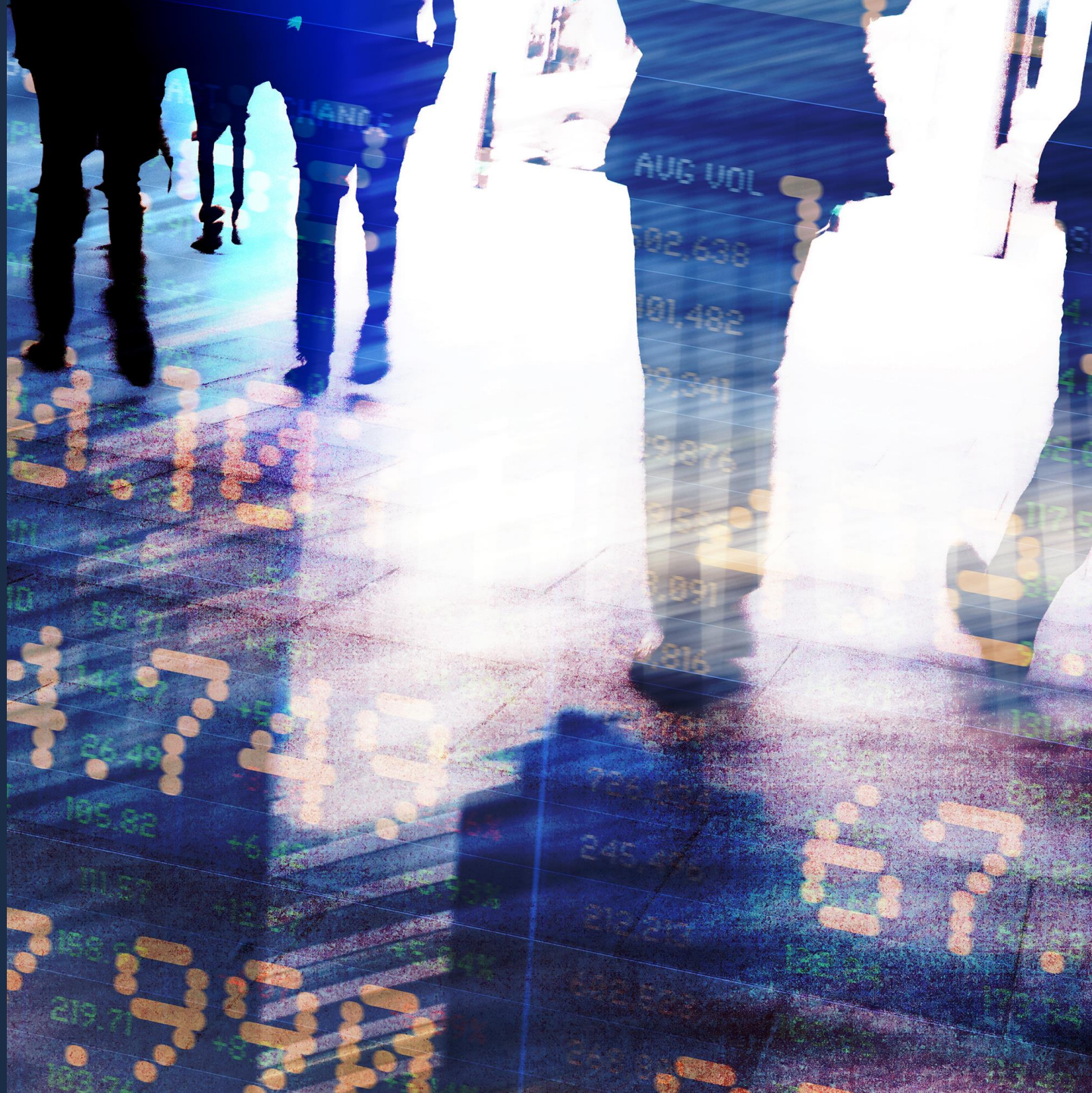




February 1st - 2nd, 2023



Training Agenda

Time zone: PST



Day 1

08:00 AM – 08:15 AM | Kickoff and agenda

08:15 AM – 09:00 AM | Microsoft Cloud for Financial Services overview

09:00 AM – 9:30 AM | Architecture and Data Model

09:30 AM – 10:00 AM | Q&A

10:00 AM – 10:15 AM | Break

10:15 AM – 11:15 AM | Lab 01: Unified Customer Profile

11:15 PM – 12:00 PM | Feature demos – Customer Intelligence

Day 2

08:00 AM – 09:30 AM | Lab 02: Customer Onboarding

09:30 PM – 09:45 PM | Feature demos – Intelligent Appointment

09:45 AM – 10:00 AM | Break

10:00 AM – 11:30 AM | Lab 03: Collaboration Manager for Loans

11:30 AM – 11:55 AM | Microsoft Cloud Solution Center

11:55 AM – 12:00 AM | Conclusion and survey

Microsoft Cloud for Financial Services In A Day Training Training Team



Tad Thompson
Cloud Solutions Architect



Sonal Bordia
Cloud Solutions Architect



Thomas Mathew
Industry Cloud Architect

Microsoft Cloud for FSI in a Day



ABOUT

An **8-hour foundational training course** that educates Microsoft customers, partners, and employees about the Microsoft Cloud for Financial Services and **how to implement and configure various scenarios** after installation.



VALUE

Proven and scalable method of upskilling engineering, sales, and supporting roles on Industry Cloud **offering, licensing, capability, and interoperability** with current and emerging standards



ACHIEVE

Functional and technical sessions that provide basis for working knowledge of offering, followed by a series of **step-by-step interactive labs** that demonstrate configurations to fit customer scenarios.



IMPACT

Globally scale out and upskill Microsoft customers, partners, and employees on the Microsoft Cloud for Financial Services. Create **opportunity for feedback** directly from the ecosystem to product engineering.



Training Goals



LEARN

Core functionality

Installation process

Architecture and Data model



IMPLEMENT

Configure solutions

Extend applications

Integrate with Azure & Microsoft 365

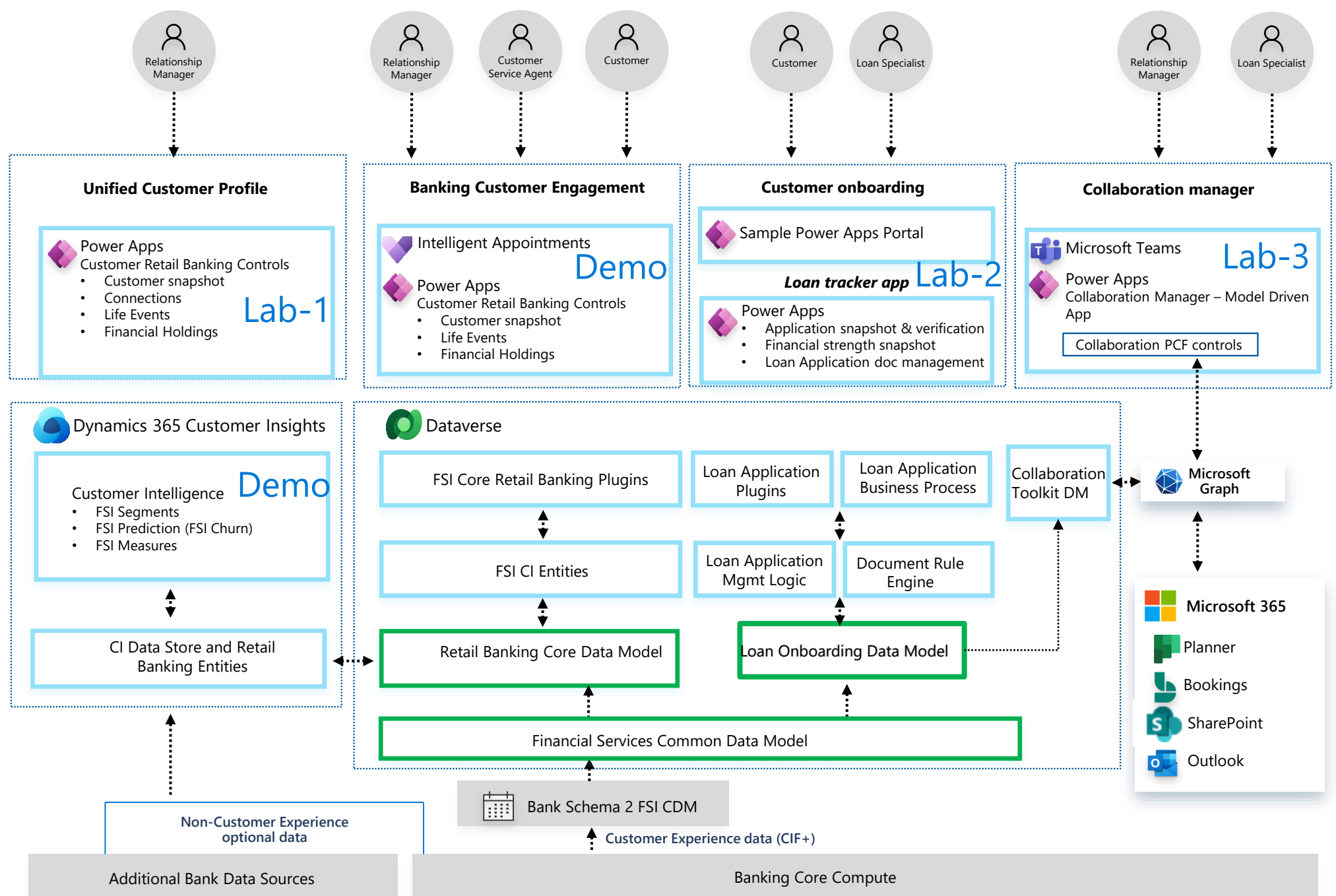


Lab Resources



- GitHub: Lab Documents and Resources

<https://github.com/microsoft/GPSIndustryCloud-MC4FS/>





Featured Demo

Intelligent Appointment



Intelligent Appointment Capability Demo

Intelligent Appointments

Applies for an appointment
with an advisor

Power Apps Portal

Receives a confirmation
email

Outlook

Logs into Teams

Teams

Notifies meeting has been
added to calendar

Teams

Logs into Scheduling admin
app

Scheduling Admin app

Reviews loan consultation
meeting type

Scheduling Admin app

Reviews communication
settings

Scheduling Admin app

Reviews resource setup

Scheduling Admin app

Logs into Scheduling admin
app

Scheduling Admin app

Reviews schedule board

Scheduling Admin app



Reviews Bruno's profile

Scheduling Admin app

Reviews resource
management

Scheduling Admin app

Demonstration Personas

| | Demo Persona Type | Name | Background |
|--|-------------------------------|----------------|--|
|  | Customer | Monica Thomson | <p>Monica is a current customer at Woodgrove Bank.</p> <p>She has been a customer there for several years and has recently started considering buying a second home.</p> |
|  | Advisor / Mortgage Specialist | Bruno Zhao | <p>Bruno is an advisor for Woodgrove bank.</p> <p>He wants to make getting a mortgage as seamless for a customer as possible.</p> |

Loan consultation



Monica Thomson

To: Monica Thomson



Thu 2/2/2023 1:00 AM

Hi Monica Thompson,

Your appointment to discuss "Mortgage loan" has been scheduled.

Here are the details:

Date: **Thursday, February 2, 2023**

Time: **8:15 AM Pacific Standard Time**

Location: [Teams meeting](#)

Advisor: **Bruno Zhao**

Meeting Preparation:

Please bring the following to the meeting: W-2 forms or other proof of income from the last two to three years. Federal and state tax returns from the last two to three years Pay stubs from the last two to three months All bank account information Credit card statements from the past 3 years Student loan statements for the past 3 years Home addresses for the last five to seven years

Here are the things you noted when you scheduled the meeting:

If you need to cancel or rescheduled this appointment, please contact us.

See you soon!

Woodgrove Bank



Reply



Forward



Administrator

Courtney Lynch

Courtney is a current administrator for Woodgrove Bank.

She decides which meeting types are covered as part of the services provided in the solution, the preferences, the type of available advisors, and their qualifications.



Resource Manager

Kiana Anderson

Kiana is a resource manager for Woodgrove Bank.

She acts as the day-to-day manager of the available advisors in the system. She caters to the advisors' availability, maps their roles and skills, and monitors the incoming meetings.

Products

- Exchange
- Power App Portal
- Intelligent Appointments
- Dynamics 365
- Dataverse
- Power Automate

Intelligent Appointments

- **Scheduling capabilities**
- **Appointment self-service**
- **Communications**
- **Schedule meetings on behalf of customers**
- **Scheduling administration:**

Intelligent Appointments

- [Configure Intelligent appointments | Microsoft Learn](#)
- [Intelligent appointments | Microsoft Learn](#)
- After deploying the Intelligent appointments solution, you must perform certain mandatory steps for the solution to work.
 - [Step 1. Enable background operations](#)
 - [Step 2. Set up online meetings through Teams](#)
 - [Step 3. Perform the basic Universal Resource Scheduling \(URS\) configurations](#)
 - [Step 4. Activate synchronizing mechanisms between Dynamics 365 and Exchange](#)
 - [Step 5. Power the sample data](#)



Microsoft Cloud for FSI in a Day
training course!

Please fill out a short survey to
provide feedback 😊 Thank you!

<https://aka.ms/AAj6hnr>

