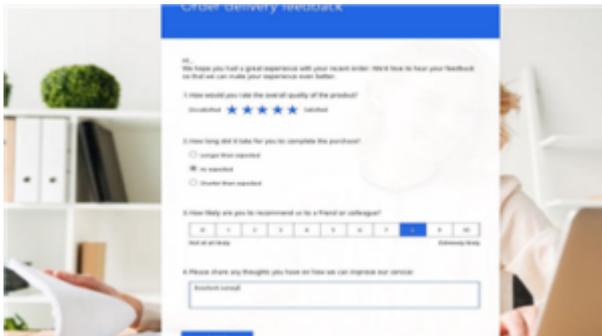




## Survey Analytics Customer Voice Dynamics 365 for Customer Service : 2 Day Workshop

### Description

## Survey Analytics Customer Voice Dynamics 365 for Customer Service : 2 Day Workshop



**Collect, analyze, and track real-time feedback in an easy-to-use, scalable feedback management solution. Customer Voice Dynamics 365 is an enterprise feedback management application you can use to easily keep track of the customer metrics that matter the most to your organization.**

### Overview

Dive into the power of Customer Voice Dynamics 365! This workshop includes hands-on activities for creating surveys with Customer Voice Dynamics 365. Plan, capture, analyze, and act on customer and employee feedback.

Listen to your customers where they are. Capture feedback immediately across channels with personalized surveys to continuously track customers' perception of your services and products. Integrate data across your organization and Build unified customer profiles in your customer data platform to align team members on recommended engagement decisions across all channels.

## Agenda:

### Day 1 :

- Collect input Quickly
- Easily create personalized surveys
- Gather timely feedback across engagement channels
- Understand what matters most
- Uncover valuable insights
- Tailor future interactions

### Day 2:

- Transform data management
- Share insights across applications
- Build unified customer profiles
- Accelerate response time
- Get automatic notifications
- Close the feedback loop

## Deliverables:

Attendees will get a thorough overview of Customer Voice functions, navigation and setting options. Multiple surveys created using enhanced templates. Surveys in the session will include all question types and custom properties like, branching and branding and more.

## Create your first project

The planning has been done and the purpose for a project is understood. Now, it is time to create the project. Several project templates are provided in Customer Voice Dynamics 365 . These templates are designed to give the user a quickstart with a suggested survey and processes that relate to a specific type of feedback.

The following project templates are suggested.

<b>Project Template</b>	<b>Template Purpose</b>
Periodic Customer Feedback	For regular feedback and relationship maintenance
Customer Visit Feedback	For feedback on Dynamics 365 Field Service delivery
Customer Feedback	For feedback on Dynamics 365 Sales delivery
Customer Service Feedback	For feedback on Dynamics 365 Customer Service

## Project Template

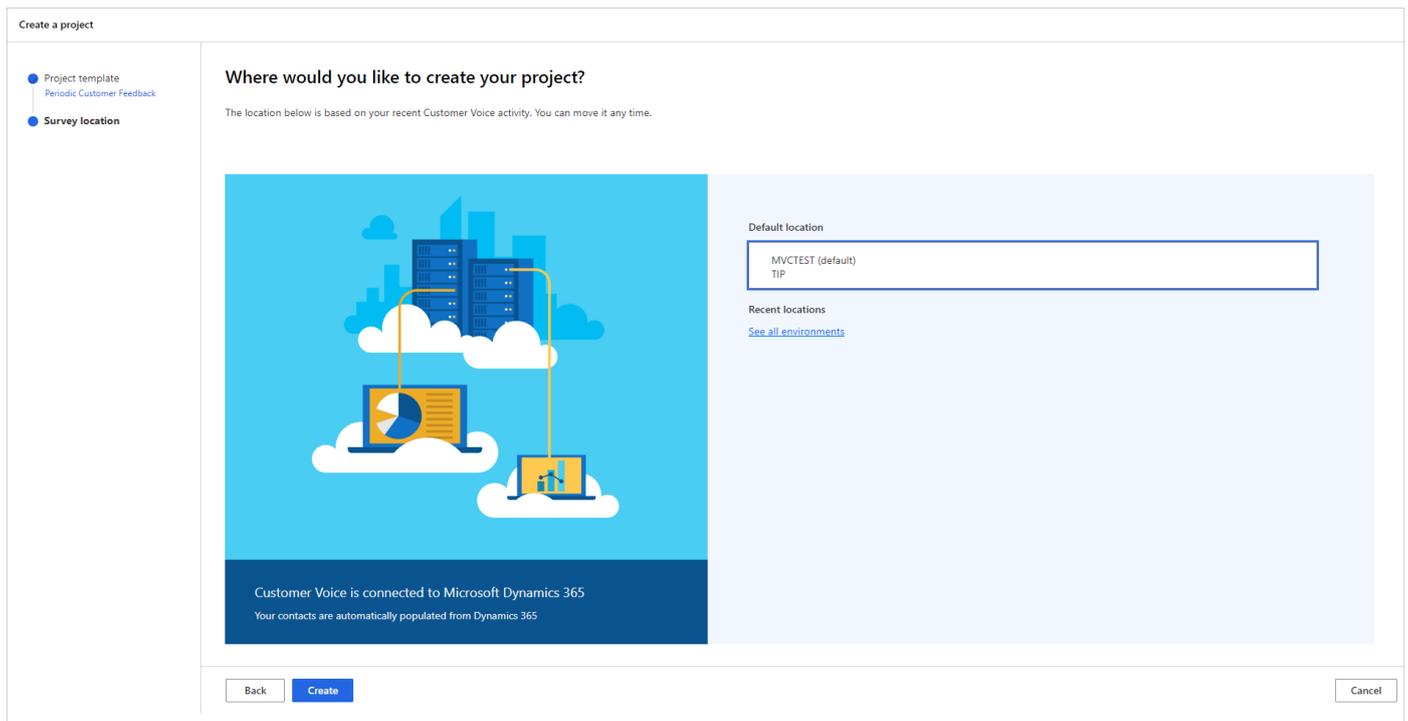
## Template Purpose

Blank

Start from the beginning and create a new survey

After selecting the most appropriate project template for an organization’s needs, the user should select the location of the project. The number of available locations to select from will be related to the number of different environments that are available to them in Microsoft Dataverse. If only Customer Voice Dynamics 365 is used, it will be the only available location to select from. However, if the organization has Dynamics 365 Customer Service, for example, a location will be displayed for each one that the user has access to. This environment might be PRODUCTION or SANDBOX. If the organization uses Dataverse and has created other model-driven Power Apps, these environments might also be listed.

A single *default environment* is automatically created and made available in Customer Voice Dynamics 365 . This environment can’t be deleted and can be used for adding projects. However, if the purpose of a project is to collect data that is based on triggers such as case closures or product purchases, and these triggers occur in a Dynamics 365 or other Dataverse environment, the same environment should be selected when the user is creating the project.

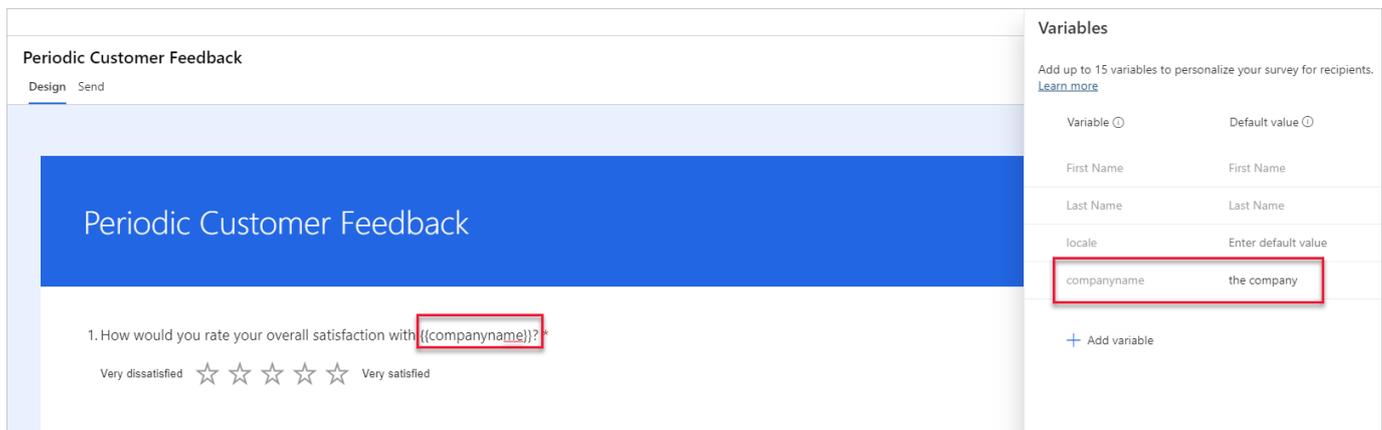


After the project is created, if one of the templates is used, it will be given a specific name that is related to the template chosen. The project can be renamed to something that aligns more with the organization’s objects, if necessary. A project can also be copied, shared, overwritten, and deleted. A project that is created from blank will show as **New project** until it is renamed to something more appropriate.

Selecting a project template also means that a survey template will be added as part of the project. For the Periodic Customer Feedback template, a survey is included with questions asking for feedback on the experience that a respondent has had in the last three months. The survey uses different types of

questions, including rating, Likert, and text questions. Included on each question are various settings, which determine if the questions are required, have any restrictions, or have a subtitle displayed. The elements can be adjusted for each question, if necessary. Consider that slight adjustments will be needed to ensure that the questions meet the requirements of the company that the project has been created for.

Additional features might be included within the delivered survey, such as the addition of a variable, as shown in the following figure. In this example, **companyname** has been added as a new variable, and it is then used in the question title and also in some of the statements within the Likert question. If this variable is to be used, the project creator must update the default value with the actual organization name so that any surveys sent using the variable are accurate and make sense.



The screenshot shows the 'Periodic Customer Feedback' survey design interface. On the left, the survey title 'Periodic Customer Feedback' is displayed in a blue header. Below the header, a question is shown: '1. How would you rate your overall satisfaction with {{companyname}}?'. The question is followed by a Likert scale with five stars, ranging from 'Very dissatisfied' to 'Very satisfied'. On the right side, a 'Variables' panel is visible. It contains a table with two columns: 'Variable' and 'Default value'. The table lists several variables: 'First Name', 'Last Name', 'locale', and 'companyname'. The 'companyname' variable has a default value of 'the company', which is highlighted with a red box. There is also an '+ Add variable' button at the bottom of the panel.

Variable	Default value
First Name	First Name
Last Name	Last Name
locale	Enter default value
companyname	the company

A project template could include further elements such as specific branding, branching rules, and other formatting. Selecting the blank option when you are creating a new project will provide a new survey without questions added. Though this blank survey provides no guidance for the survey creator, it is a good option to choose for someone who is experienced with creating surveys or who is comfortable with using Customer Voice Dynamics 365 and understands the concepts of a project and all the elements of a good quality survey.

## Exercise – Create a basic project

In this exercise, you will create your first project in Dynamics 365 Customer Voice. You can complete this exercise with or without having Dynamics 365 Sales enabled in your environment. However, if you want to complete the exercises in subsequent modules, you will need to complete these steps in an environment that also has Dynamics 365 Sales enabled. [See here..](#)

## Related Links:

[Microsoft Appsource Consulting Services](#)

[Dynamics Edge Customer Voice for Customer Service](#)

[Contact Us](#) or Live Chat if you have questions or concerns about Microsoft Technical Course.

#### **PRODUCT TYPE**

- simple

#### **PRODUCT VISIBILITY**

- featured

#### **PRODUCT CAT**

- Dynamics 365 Cloud Skills and Training
- Dynamics 365 Customer Voice
- Microsoft Services

#### **PRODUCT TAG**

- Customer Voice

#### **Date Created**

November 2021

#### **Author**

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