

**DYNAMICSCON PRESENTATION**

# **DYNAMICSCON LIVE**



**SEPTEMBER 14-16,  
2022**



# Increase User Adoption in Dynamics 365

Presented by:

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CEO | VisualSP



The 'DynamicsCon LIVE' logo, featuring the text in a bold, yellow, blocky font with a blue outline. It is set against a dynamic background of blue and white splashes and dots. A small 'DUG' logo is visible in the bottom right corner of the splash.



The image features a black background with a blue and white jagged, lightning-bolt-like shape. The shape is composed of several sharp, angular segments. The background is filled with a halftone dot pattern, which is a grid of small, dark circles. In the bottom-left corner, there is a cluster of larger, blue, irregular shapes that resemble splatters or bubbles. The text "The Challenge" is written in a bold, yellow, sans-serif font with a blue outline, positioned on the right side of the white jagged shape.

# **The Challenge**



# Almost 50% of CRM projects fail – Yikes!

## #1 Challenge: User Adoption

- Dynamics is Very customizable so it's always unique to a company
- No off the shelf training can be provided to users
- Users struggle when they have questions
- Dynamics continues to evolve as Microsoft as well as your company makes changes to it



# The usual Dynamics 365 CE implementation

1. The internal team or an external consulting company creates the Dynamics environment for the company based on their needs
2. When the environment is being deployed, a training is conducted for the future users
3. The recording of the training as well as any documentation is provided to the users for future reference



**Dynamics 365 interfaces and processes change frequently making it difficult for administrators to continuously support and train their users**

**The Challenge**





# Agenda

**Understand the challenge of supporting Dynamics 365 users at their moment of need**

**Explore the trend that Microsoft and other vendors are using to train and support people within the *flow of work***

**Learn how to implement contextual learning and support in Dynamics 365 to increase adoption and reduce support tickets**

**Understand the pros and cons of this approach**





# About me - *Asif Rehmani*



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## Conference Speaker

Ignite  
ESPC  
SP Fest (EduCon)  
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Learning Conferences  
And many more...

## Microsoft MVP

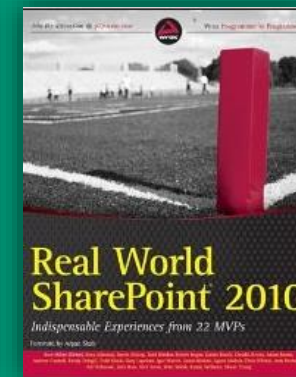


Since 2007

## CEO

  
**VisualSP.**  
Digital Adoption  
Platform (DAP)

## Author





# Built in Dynamics 365 help is not useful for everyday users

The screenshot displays the Dynamics 365 Sales Hub interface for the 'Adventure Works (sample)' account. The left sidebar contains navigation options: Home, Recent, Pinned, My Work, Sales accelerator, Activities, Dashboards, Customers, Accounts (selected), Contacts, Sales, Leads, Opportunities, and Competitors. The main content area shows account details: Account Name (Adventure Works (sa...)), Phone (555-0152), Fax (---), Website (http://www.adv...), Parent Account (---), Ticker Symbol (---), Relationship Type (---), and Product Price List (---). The right pane shows a 'Timeline' with a search bar and a list of events, including auto-posts and opportunity completions by the System Administrator.

**Account Information:**

Field	Value
Account Name	Adventure Works (sa...)
Phone	555-0152
Fax	---
Website	http://www.adv...
Parent Account	---
Ticker Symbol	---
Relationship Type	---
Product Price List	---

**Timeline:**

- Search timeline
- Enter a note...
- Auto-post on Some interest in our JJ line of products (s... System Administrator won Opportunity for Account Adve... 6/3/2022 5:05 AM
- Opportunity Completed by System Administrator \$94,800.82 6/3/2022 5:05 AM
- Auto-post on Some interest in our JJ line of products (s... Opportunity: Created by System Administrator for Accou... 6/3/2022 5:05 AM
- Auto-post on Adventure Works (sample) Account: Created By System Administrator. 6/3/2022 5:04 AM

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# The current way that Dynamics users get help at their moment-of-need

1. Looking at docs or info they have on hand
2. Asking a colleague or manager
3. Searching on the web

Or... giving up and going back to their old way of doing things using spreadsheets, files and notes. Not good!



# Context Switching hurts productivity and adoption

**Context switching constantly can cost up to 40% drop in productivity**





**Less info *in-context* is better than more  
info *out of context***



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# **The Solution**



**Stop Training and  
Start Helping your users**



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# Provide Learning and Support in the *Flow of Work*

Support users at their moment of need and  
in-context of their own environment



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# Examples from the web of Learning and Support in the Flow of Work

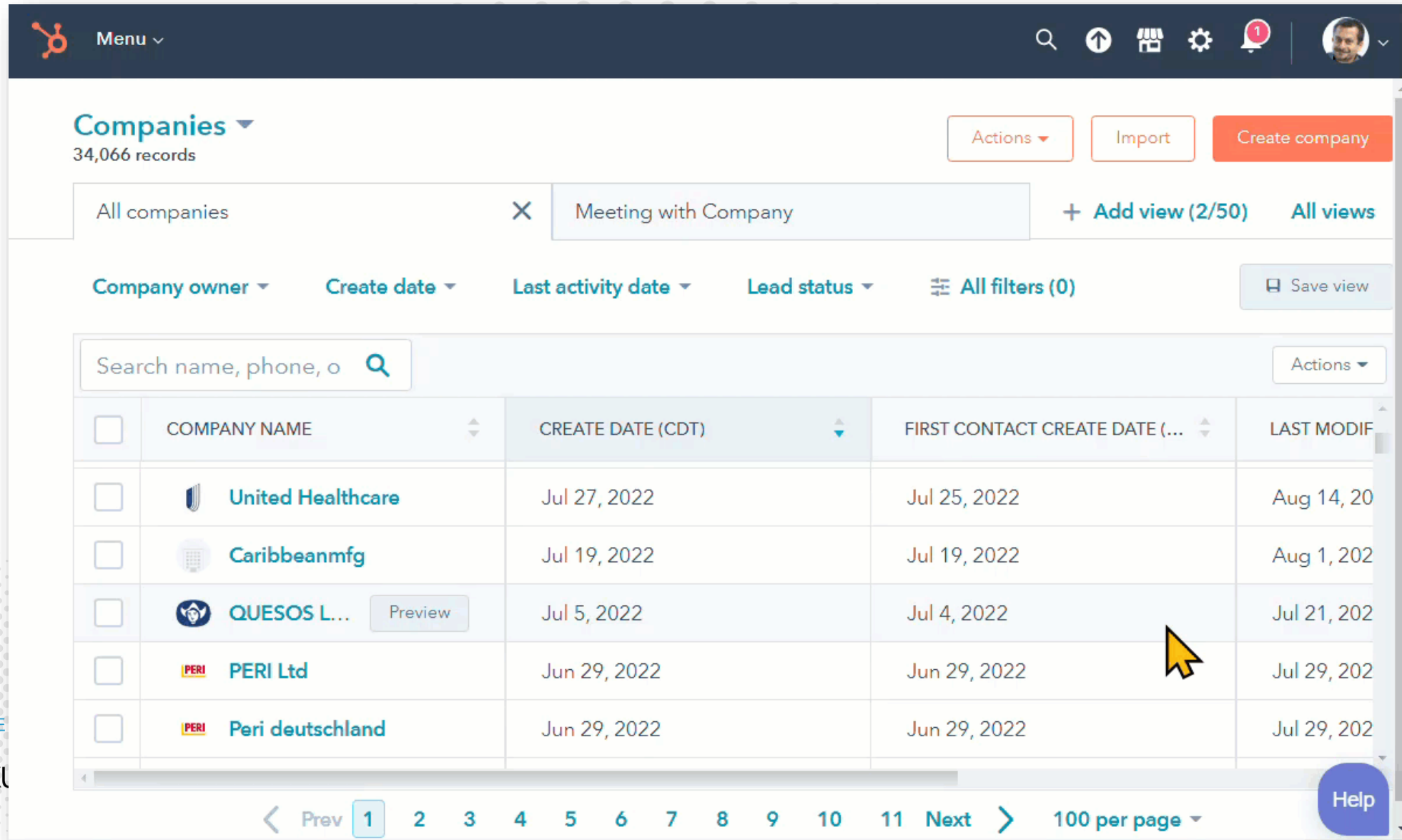


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# Contextual support and training



The screenshot displays a CRM application interface. At the top, a dark blue navigation bar contains a 'Menu' dropdown, search and navigation icons, a settings gear, a notification bell with a red '1', and a user profile picture. Below this, the main content area is titled 'Companies' with a dropdown arrow and '34,066 records'. To the right of the title are buttons for 'Actions', 'Import', and 'Create company'. A filter bar shows 'All companies' with a close icon, an active filter 'Meeting with Company', and options to '+ Add view (2/50)' and 'All views'. Below the filter bar, a row of filters includes 'Company owner', 'Create date', 'Last activity date', 'Lead status', and 'All filters (0)', along with a 'Save view' button. A search bar with the placeholder 'Search name, phone, o' and a magnifying glass icon is positioned above a table. The table has five columns: a checkbox, 'COMPANY NAME', 'CREATE DATE (CDT)', 'FIRST CONTACT CREATE DATE (...)', and 'LAST MODIF'. The table lists several companies, with the fourth row, 'QUESOS L...', highlighted in light blue. A mouse cursor is pointing at the 'FIRST CONTACT CREATE DATE' cell for this row. The bottom of the interface features a pagination bar with 'Prev', page numbers 1 through 11, 'Next', and '100 per page'. A 'Help' button is located in the bottom right corner.

Menu ▾






Companies ▾  
34,066 records

Actions ▾ Import Create company

All companies × Meeting with Company + Add view (2/50) All views

Company owner ▾ Create date ▾ Last activity date ▾ Lead status ▾ All filters (0) Save view

Search name, phone, o 🔍 Actions ▾

<input type="checkbox"/>	COMPANY NAME	CREATE DATE (CDT)	FIRST CONTACT CREATE DATE (...)	LAST MODIF
<input type="checkbox"/>	 United Healthcare	Jul 27, 2022	Jul 25, 2022	Aug 14, 20
<input type="checkbox"/>	 Caribbeanmfg	Jul 19, 2022	Jul 19, 2022	Aug 1, 202
<input type="checkbox"/>	 QUESOS L... <a href="#">Preview</a>	Jul 5, 2022	Jul 4, 2022	Jul 21, 202
<input type="checkbox"/>	 PERI Ltd	Jun 29, 2022	Jun 29, 2022	Jul 29, 202
<input type="checkbox"/>	 Peri deutschland	Jun 29, 2022	Jun 29, 2022	Jul 29, 202

< Prev 1 2 3 4 5 6 7 8 9 10 11 Next > 100 per page ▾ Help



# Inline help & support



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Submit

## Proposal Title \*

Title should be no more than 10 words. Please use title case rather than all caps or sentence case. Titles may be edited by ATD.

Is Viva Learning the right solution for your organizational learning needs?

75 characters (0 max)  
11 words (10 max)

## Proposal Type \*

There are five proposal types: Byte-Sized Learning, Classroom Session, Hands-On Learning, On-Demand, and Panel.

Classroom Session

[View Proposal Type descriptions.](#)

Submit



**Actions**

Import

[Create contact](#)

ed contacts

+ Add view (3/50)

All views

 $(0)$ 

Save view

**Actions**

ER	PRIMARY COMPANY	LAST
	--	--
	--	--
	--	--
	--	--
	--	--



# Interactive Guides / Balloons

CONNECT TO CRM SAVE

Technology Signals & News Similar >

**Similar Companies**  
Companies like Galax include ChainCash, Invest Wisely and 8 more.

**ChainCash**  
New York · 112 Contacts · 251-520 employees · \$100M to \$500M  
Investment: FinTech +1 more

Galax and ChainCash share similar industries, funding stage, funding amount, employee size, revenue estimate, and description.

**Invest Wisely**  
Mountain View · 598 Contacts · 1001-5000 employees · \$100M to \$500M  
Investment: FinTech +1 more

Galax and Invest Wisely share similar industries, funding amount, and description.

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LEARN MORE

Discover more funding rounds

SA

**Collaboration Hub**

Click here to engage in your Teams chats and channels with your coworkers. Locate the collaboration hub in the global header. Collaboration content will appear contextually.

1 of 3 Next



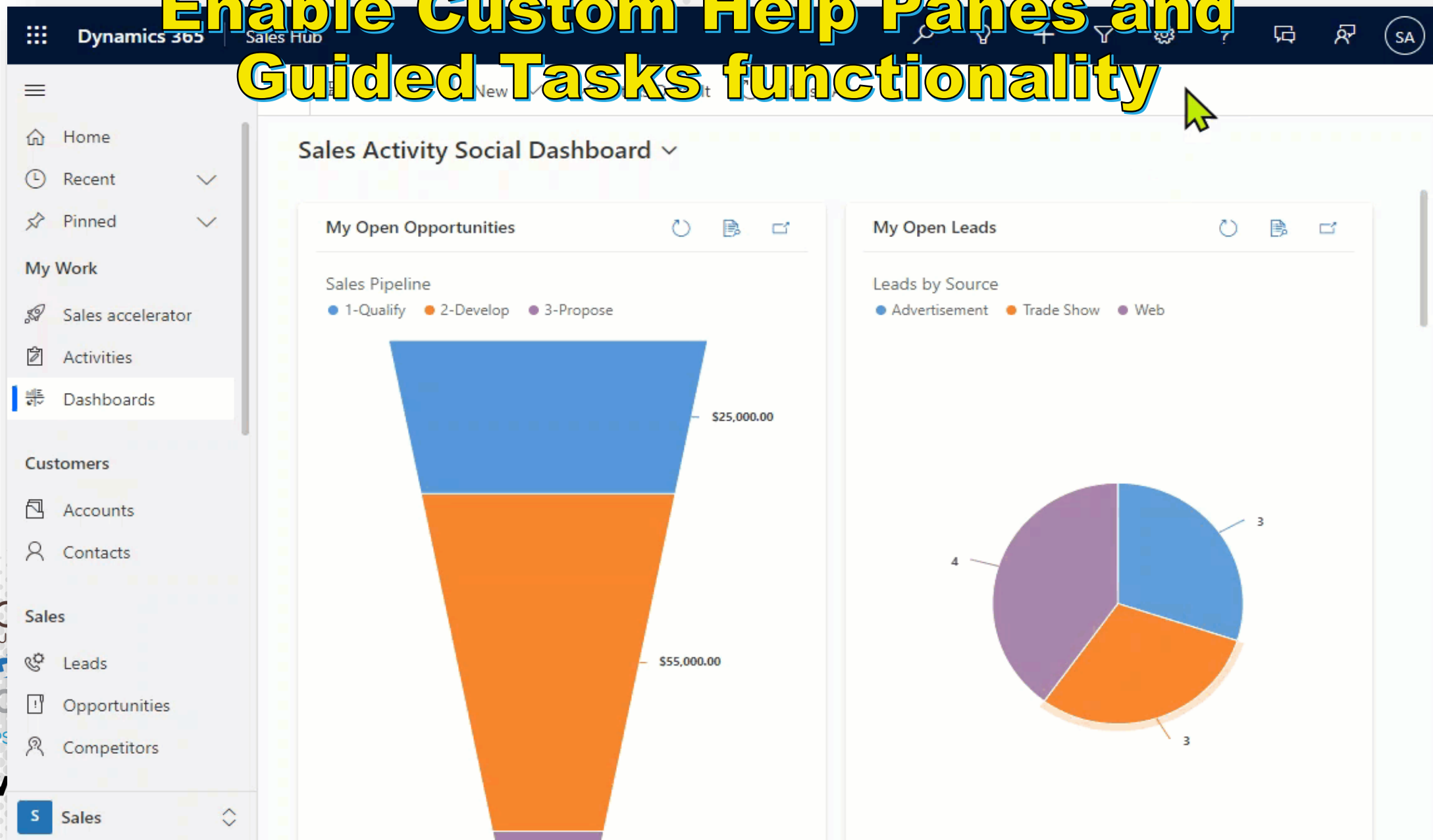
# Provide users learning and support in the flow of work using *custom help panes* and *guided tasks* functionality in Dynamics 365 CE

The Microsoft Solution





# Enable Custom Help Panes and Guided Tasks functionality





# Configure Custom Help Panes and Guided Tasks



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# Live Demo



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# **The Limitations**



# Limitations of Custom Help Panes and Guided Tasks functionality

1. Lack of official support from Microsoft
2. Images and videos integration has some bugs
3. No way to implement multi step guided balloons/walkthroughs
4. No way to draft items before publishing
5. No customization and branding options
6. No way to target items to specific user groups or scopes



# Summary

- Replace default help in Dynamics 365 to increase chances of user success and adoption
- Consider the built-in functionality called Custom Help Panes and Guided Tasks
- Understand the limitations of this functionality and plan accordingly



# Next Steps

Reach out to me with your questions

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