

# Prepared for: Microsoft

Orlo & Dynamics Integration



Create powerful online experiences + emotional  
connections with your customers

## Harness human connection

# The ecosystem

## Customer Experience

Effortlessly inspire your customers with real-time conversations across social media and live chat - creating amazing customer experiences and driving revenue opportunities. A unique, seamless integration between social media, live chat and other CRM systems, provides fast, informed responses that encourage customers to see online as the most effective way to talk to you - and gives you complete visibility and control.



**Fully-integrated social media, Live Chat & CRM systems**

**Advanced, customisable automation**

**Performance dashboard of Customer Service reports**

**"Conversations" mode for large threads**

**Assign messages or add notes & tags**

**Permissions, workflows & audit trail**



**Organic social, paid advertising & intelligent boosting**

**Branded URL for enhanced click rate**

**Suite of reports track social metrics, web traffic, forms & purchases**

**Influencer tagging**

**Content calendar for visibility & consistency**

**Content generator, library, photo editor & mobile app**

## Marketing

Create and analyse all organic and paid social media campaigns in one place. Orlo recommends your best-performing posts for boosting based on your desired outcomes. inspire your audience to take action by turning online conversations into customers across social media and live chat.

# The ecosystem



**Advanced Media Monitoring  
& Social Listening**

**Online Brand Management**

**Customisable query builder filters  
out the noise**

**Monitor & manage important  
conversations**

**Calculate the PR value of  
online coverage**

**Download & share reports**

## Media Monitoring

Incredible customer experiences start with **understanding your audience**. **understand your customers and act quickly on the next big opportunity or crisis** by using insights to develop products, inform strategies and stay ahead of the competition.

## Analytics

A comprehensive suite of customisable reports will allow you to monitor and improve key customer service metrics down to team and individual level (across social media and live chat), while also understanding which of your marketing content is resonating with your audience. Link ecommerce sales, form completions and web traffic back to specific posts/campaigns, and track the social media metrics that link to your wider corporate goals.



**Marketing Report**

**Customer Service Report**

**Website Report**

**Campaign Report**

**Account Report**

**Team Report**

# Dynamics Within Orlo

## Linking Dynamics365 Instance

Manage apps		
		<a href="#">+ Create new</a> <a href="#">Back to Settings</a>
Name	URL	
Orlo Dynamics	https://orlo-dynamics-prod.firebaseio.com/entry.html	<a href="#">Settings</a> <a href="#">Remove</a>
Orlo Dynamics Test	https://orlo-dynamics.firebaseio.com/entry.html	<a href="#">Settings</a> <a href="#">Remove</a>

## Adding Dynamics365 Entities to view in Orlo

Microsoft Dynamics

Profile

Case

Please select what information to display for Profiles

☒

Telephone1

☒

Name

☒

WebSiteURL

☐

EEmailAddress3

☐

EEmailAddress2

☐

EEmailAddress1

☐

Address1 City

Close

Save

## Link an Account

The screenshot shows the HelloOrlo interface. On the left, there's a sidebar with '8430 Messages' and filters for 'All new', 'Filtered', and 'assigned'. The main area displays a list of messages from various users like Andrew, Tom Donohoe, and Gurdip Sodhi. The right panel shows a detailed view of a message from Gurdip Sodhi, including the text '@HelloOrlo @goals\_soccer @CDeePops - Great presentation, very insightful & some great new ideas to take away..!', the date 'Jul 4 2019, 14:37', and options to 'Assign message', 'Retweet', 'Unlike', and 'View on Twitter'.

The 'Let's get linked!' dialog box provides instructions: 'Simply type the customer's name in the search field, then hit "confirm" to link the CRM to their social profile.' It also offers a tip: 'Can't find who you're looking for? You can always create a contact here!'. The search field contains 'gurdip', and the results show 'Gurdip Sodhi'. Below the search results, there are fields for 'Name', 'Address', 'Telephone', and 'Email'. The 'Name' field is filled with 'Gurdip Sodhi'. At the bottom, there are 'Cancel' and 'Confirm & link' buttons.

## Case Management

The Case Management sidebar features three main actions: 'UPDATE A CASE' with a circular arrow icon, 'CREATE A CASE' with a plus icon, and 'CLOSE' with a left arrow icon.

The 'CREATE A CASE' form prompts the user to 'Please enter your case title and description below. Or you can update an existing case here'. The title field contains 'A case for Microsoft' and the description field contains 'Use Orlo'. At the bottom, there are 'Cancel' and 'Create Case' buttons.

The 'UPDATE A CASE' form shows a case titled 'Microsoft Dynamics' with a status of 'help'. At the bottom, there are 'Cancel' and 'Update Case' buttons.

## Create a Contact



Microsoft Dynamics

### Let's create a contact

Please enter the name of your contact then click confirm to be returned to the linking page

*Contact name here...*

Cancel

Create Contact

## A View of Cases in Dynamics created in Orlo

Summary Details Case Relationships SLA Related

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483716384933

What you missed (Click To Filter)

New activities (3)

LAST WEEK



Social Activity from **Technical team #** - Monday, June 24, 2019 12:00 PM

Message in Orlo  
blah blah blah blah



Social Activity from **Technical team #** - Monday, June 24, 2019 11:43 AM

Message in Orlo  
blah blah blah blah






he hello  
Active

As A second case from Orlo  
Active

bb blah blah name  
Active

An A new case with messages update  
Active

## DETAILS

Title	Message in Orlo		
Posted By	---		
Posted On	---		---
Posted To	---		
Received as	---		
Post URL	---		
Created On	---		---
Modified On	6/24/2019		12:00 PM
Owner	*  <a href="#">Technical team #</a>		
Regarding	 <a href="#">A new case with messages update</a>		

## Post Description

blah blah blah blah





# Orlo In Dynamics using CIF (POC)

## Minimised side panel view

The screenshot shows the Dynamics 365 Customer Service Hub interface. The top navigation bar includes 'Dynamics 365', 'Customer Service Hub', 'Service > Dashboards', and 'SANDBOX'. The left sidebar is minimised, showing icons for Home, Recent, Pinned, My Work, Dashboards, Activities, Customers, Accounts, Contacts, Social Profiles, Service, Cases, Queues, and Knowledge Articles. The main content area displays the 'Tier 1 Dashboard' for 'This Quarter 7/1/2019 To 9/30/2019'. It features four panels: 'Active Cases' (Filtered, 5 cases), 'My Resolved Cases' (Filtered, 0 cases), 'My Draft Emails' (Unfiltered, 0 emails), and 'My Activities' (Unfiltered, 0 activities). The 'Active Cases' panel shows three cases: 'help I Need Someone' (In Progress), 'hello hates me' (In Progress), and 'blah blah name' (In Progress). The right sidebar is also minimised, showing icons for various actions. A green box highlights the right sidebar area.

## Workflow Selector on full side panel

A workflow is to focus agents on certain accounts or brands.

The screenshot shows the Dynamics 365 Customer Service Hub interface with the side panel expanded. The top navigation bar is the same. The left sidebar is expanded, showing the same icons as the previous screenshot. The main content area displays the 'Tier 1 Dashboard' for 'This Quarter 7/1/2019 To 9/30/2019'. The 'Active Cases' panel shows the same three cases as before. The 'My Resolved Cases' and 'My Draft Emails' panels show 'No data available.' The right sidebar is expanded, showing a 'Workflow Selector' section. It includes a 'Select a workflow' button and a list of workflows: 'All accounts' (14 accounts) and 'Orlo' (14 accounts). The 'Orlo' workflow is selected, indicated by a checkmark.



# Dashboard on the Side Panel



Dynamics 365 | Customer Service Hub | Service > Dashboards | SANDBOX | Orlo

Technical team #

Home Recent Pinned

My Work

Dashboards

Activities

Customers

Accounts

Contacts

Social Profiles

Service

Cases

Queues

Knowledge Articles

Service

Show Visual Filter Show Global Filter Switch to Tile View Set As Default Refresh All

Tier 1 Dashboard This Quarter 7/1/2019 To 9/30/2019

Active Cases Filtered

5 Modified On

Normal Technical team #

help I Need Someone In Progress

hello hates me In Progress

blah blah name blah blah description

My Resolved Cases Filtered

0 Modified On

No data available.

My Draft Emails Unfiltered

0 Modified On

No data available.

Dashboard

Publish

Inbox

Outbox

Social wall

# Inbox In the side Panel

Dynamics 365 | Customer Service Hub | Service > Dashboards | SANDBOX | Orlo

Technical team #

Home Recent Pinned

My Work

Dashboards

Activities

Customers

Accounts

Contacts

Social Profiles

Service

Cases

Queues

Knowledge Articles

Service

Show Visual Filter Show Global Filter Switch to Tile View Set As Default Refresh All

Tier 1 Dashboard This Quarter 7/1/2019 To 9/30/2019

Active Cases Filtered

5 Modified On

Normal Technical team #

help I Need Someone In Progress

hello hates me In Progress

blah blah name blah blah description

My Resolved Cases Filtered

0 Modified On

No data available.

My Draft Emails Unfiltered

0 Modified On

No data available.

Inbox

Search

Simerdeep... 11:15, 05 Jul > nice... https://t.co/1mfnvEdvDq

Simerdeep... 11:14, 05 Jul > Lovely-Jubbly.!!! https://t.co/Oh7lUdHsD2

Simerdeep... 11:09, 05 Jul > @FriendSnaps Hey Sim, How's it going...? Don't worry it's...

Stuart Ban... 10:15, 05 Jul > Great to hear you got so much out of the day, Gareth. Thanks very...

Gareth Jon... 10:06, 05 Jul > It really was a very rewarding day. Thanks for hosting and for...

Andrew 17:10, 04 Jul > @HelloOrlo @richbassinder @Yorkshire\_BS What a brilliant...

Andrew 17:07, 04 Jul > @TomDonohoe5 @HelloOrlo @scottish\_water...

https://orlosandbox.crm11.dynamics.com/main.aspx?appid=4781e43f-a330-e911-a997-0022480031cc&pagetype=dashboard&id=d201a642-6283-4f1d-81b7-da4b1685e698&type=system&\_canOverride=true#



# Answering Social Messages via Orlo In Dynamics

The screenshot displays the Dynamics 365 Customer Service Hub interface. The top navigation bar includes 'Dynamics 365', 'Customer Service Hub', 'Service > Dashboards', and a 'SANDBOX' environment label. The left sidebar shows navigation options like Home, Recent, Pinned, My Work, Dashboards, Activities, Customers, Accounts, Contacts, Social Profiles, Service, Cases, Queues, and Knowledge Articles. The main content area is titled 'Tier 1 Dashboard' and shows three panels: 'Active Cases' (Filtered), 'My Resolved Cases' (Filtered), and 'My Draft Emails' (Unfiltered). The 'Active Cases' panel lists three cases: 'help I Need Someone', 'hello hates me', and 'blah blah name'. The 'My Resolved Cases' and 'My Draft Emails' panels show 'No data available.' On the right, the Orlo interface is visible, showing a 'View message' button and a list of messages from 'Simerdeep Riar' with timestamps and links.

## Social Walls Viewed in Dynamics via Orlo

Your social walls are your social channels

The screenshot displays the Dynamics 365 Customer Service Hub interface, similar to the first one, but with the Orlo social wall view. The top navigation bar and left sidebar are identical. The main content area is titled 'Tier 1 Dashboard' and shows the same three panels: 'Active Cases' (Filtered), 'My Resolved Cases' (Filtered), and 'My Draft Emails' (Unfiltered). The 'Active Cases' panel lists three cases: 'help I Need Someone', 'hello hates me', and 'blah blah name'. The 'My Resolved Cases' and 'My Draft Emails' panels show 'No data available.' On the right, the Orlo interface is visible, showing a 'Social wall' button and a list of social posts from 'friendsnaps\_test' with timestamps and images.

# The Outbox

This shows recently posted and scheduled content

The screenshot displays the Dynamics 365 Customer Service Hub interface. The top navigation bar includes 'Dynamics 365', 'Customer Service Hub', 'Service > Dashboards', and a 'SANDBOX' environment label. The left sidebar shows navigation options like Home, Recent, Pinned, My Work, Dashboards, Activities, Customers, Accounts, Contacts, Social Profiles, Service, Cases, Queues, and Knowledge Articles. The main content area is titled 'Tier 1 Dashboard' and shows three panels: 'Active Cases' (Filtered, 5 items), 'My Resolved Cases' (Filtered, 0 items), and 'My Draft Emails' (Unfiltered, 0 items). The 'Active Cases' panel lists three cases: 'help I Need Someone', 'hello hates me', and 'blah blah name'. The right sidebar shows the 'Outbox' panel with a list of posts, including one from 'HelloOrlo' and another from 'Friendsnaps Showcase T...'. The bottom of the interface shows a 'Service' tab.

## Scheduling and Publishing content in Dynamics

We can schedule and publish across Facebook, Twitter, Instagram, LinkedIn, Google+ & YouTube. Like all our modules you can also set up permission so users can do this

This screenshot shows the Dynamics 365 Customer Service Hub interface with the 'Publish' button highlighted in the top right corner of the Outbox panel. The interface is similar to the previous one, but the 'Publish' button is now visible, indicating that the user can schedule and publish content. The 'Outbox' panel shows a list of posts, including one from 'HelloOrlo' and another from 'Friendsnaps Showcase T...'. The bottom of the interface shows a 'Service' tab.

## THEIR REQUIREMENTS

Staffordshire Police is regarded as a pioneer in its use of social media - and was acknowledged by Facebook for best use of their platform.

Their award-winning communications team needed a method of managing multiple accounts and empowering their officers on social media, while still delivering a quality service, professional excellence and value for money.

“

*"Orlo is a key tool in supporting our community engagement. We wanted a single platform where every single comment and tweet that mentions us is read by someone and responded to if necessary.*

*This is vital if we are going to do community engagement properly."*

*David Bailey*

Head of Corporate Communications



### ROI

Orlo enables Staffordshire Police to listen to what their community is saying and assign messages to the appropriate officer, delivering real-time community responses.

Social media keeps the community up to date with the work of Staffordshire Police.

Customisable permissions, validation and a clear audit trail of all incoming and outgoing activity, ensure new users can be introduced to social media with confidence.

## THEIR REQUIREMENTS

As the largest online only supermarket in the world, Ocado has over 680,000 active customers, processes around 320,000 orders, and delivers approximately 50 million food items every week.

As the business operates online only, its emphasis is on making customer experience as user friendly as possible. With over three million contacts per year across its traditional and digital channels, Ocado's social media and web chat team sought a solution to meet customers' constantly evolving needs.

“

*“Orlo's digital engagement platform is agile and fast-moving technology that effortlessly copes with our rapidly changing requirements. The efficiencies that Orlo's platform has brought with it has enabled our customer service team to offer a higher level of service and our customers are seeing quicker response times. As a key element of customer satisfaction, this in itself is a real benefit for Ocado shoppers.”*

*Ian Pattle*

General Manager for Customer  
Service Products + Strategy



### ROI

Increase in web chat use by  
7% from 2015-2018

Decrease in phone contacts by  
6% from 2015-2018

Strategy is to shift a further 10% of calls to web chat for resolution over the next three years, which would drive customer service labour savings of 5%.

