Sprinklr + Microsoft Dynamics 365 nurtures leads via social, through CRM to:

• Track and log customer engagement across sales, marketing and social media with a single customer ID
• Target ads based on customers’ expressed intent
• Interact directly with customer generated content and build new leads off learned criteria

Imagine better care

Modern Care on Microsoft Dynamics 365

Powered by Sprinklr
1. Why Modern Care?
   - Traditional vs Modern customer

2. Sprinklr + Microsoft
   - PBOs
   - Use Cases, Flow Diagram, Prerequisites

3. Sprinklr Installation

4. Authenticating Social handles

5. Setting up Keywords (Topics) to listen

6. Case Creation and Engagement on Social

7. Social Profiles Data in MS Dynamics 365
Imagine better care

“It takes 12 positive experiences to make up for 1 unresolved negative experience”
—Ruby Newell-Legner, Understanding Customers

“70% of buying experiences are based on how customers feel they are being treated”
—McKinsey

“Of the people you fail, you will lose 65% of their potential revenue within the next year”
—SDL

“A 5% increase in customer retention can increase a company’s profitability by 75%”
—Bain & Co

“76% of consumers say they view customer service as the true test of how much a brand values them”
—Aspect
Traditional Customer
- Trusts Brands
- Accepts Generic Treatment
- Values Price
- Was Forgiving

Modern Customer
- Trusts Each Other
- Expects Personalized Attention
- Values Experience
- Demands Instant Resolution

75% of online customers expect a reply within 5 mins

MCKINSEY
Sprinklr + Microsoft
Quickly Scale Customer Experience Anywhere

Sprinklr + Dynamics 365
Deepen customer engagement with personalized experiences
How we do it better

Microsoft Dynamics 365 for Care/Customer Serv.
• Case management in Dynamics 365
• Automated workflows and processes
• Consolidate customer view
• Leverage customer purchase history and preferences

sprinklr
• Identify, respond, and resolve cases in a unified platform at scale
• Auto-respond to customer inquiries outside business hours
• Real time reporting of NPS, CSAT, and case resolution
• Detect trending product or service issues as they emerge
• Add value to customers and up-sell as part of service interaction
• Analyze social data from 25+ social channels, 10 messaging apps

Positive business outcomes

Reduced time to complete case resolution
Cost savings through reduced resource from automation and bots
Mitigated risk from product and service issues outside of earned channels
Increased sales through service
Improved retention through data driven personalized engagement

...help to deliver great customer experiences
Use-Cases

• Create and update Dynamics cases from social channels and messaging apps
• Associate cases with contacts through search or new contact creation
• Sync social profile data with Dynamics contacts
• Automate case creation utilising the Sprinklr AI powered Intuition moderation model
• Set rules to create cases in Dynamics based on keywords
• Engage with your audience from Dynamics CRM
• Synchronize standard and custom case fields between Sprinklr and Dynamics

Languages Supported

English, French, German, Spanish, Portuguese, Chinese, Italian, Japanese, and Korean
The Sprinklr approach

- Expand reach and provide support to customers across 25+ social channels and 10 messaging apps
- Access a unified view of the customer by integrating social and CRM data, allowing brands to fully resolve care and support inquiries via the customers channel of choice
- The same standard objects Social Activity and Social Profile, which are used in the Social Engagement offering of MS Dynamics, are used in this connector

Pre-requisites

- MS Dynamics 365 cloud version 9.0 and above
- Whitelisted Sprinklr IP addresses
- Modern care user seat(s) of Sprinklr for every Dynamics user who want to use this connector
Flow Diagram

Sprinklr Intuition Moderation

Ingestion
Automation Engine

Integration Layer
Webhooks
API 2.0
Publishing

34+ Social & Messaging, Listening

Microsoft Dynamics 365

Case creation/updation
Social Conversation Tab
Case Response

*Social Activity: https://docs.microsoft.com/en-us/dynamics365/customerengagement/on-premises/developer/entities/socialactivity
Downloading and configuring the Sprinklr App in Dynamics 365
Reach out to your Sprinklr Success Manager or drop an email at support@sprinklr.com
Adding Social handles in Dynamics 365
Select Sprinklr from the Quick Menu drop down
1. Select Accounts

2. Click Add Account
Click on the Appropriate Social Channel Tile
Pop-up opens up wherein you need to authorise Sprinklr App
After authorisation, you return back to Dynamics 365 tab
Fill in Appropriate details and Click Save
Adding Topics (Keywords) to listen in Dynamics 365
Select Sprinklr from the Quick Menu drop down.
1. Select Accounts

2. Click Add Topic
Give a Topic Name

Topic Name
Add Topic Name

Include messages from
Select date

Include messages till
Select date

Query

ANY of these Keywords / Phrases should be present in the received messages
Select or enter keyword, phrase or group of words

ALL of these Keywords / Phrases must be present in the received messages
Select or enter keyword, phrase or group of words

Not Fetching

Save
Select the Time range of messages that you want to listen to

Include messages from: Select date
Include messages till: October 31, 2019
Add the keywords you want to listen to
Add the keywords that must be present in the messages.
Add the keywords that must not be present in the messages
Select the languages you want to listen to
You can include data from the authenticated social handles as well.
You can specify the locations

Locations

Restrict countries you want messages from

- Include
  - United Kingdom
  - United States
Click on Preview to quickly check the data flowing in.

Toggle this to start listening to the data.
Conversation stream gives you the message level details.
Top Words gives you the word cloud of all the trending keywords in the messages.
Estimated Volume gives the daily trends of the mentions
Estimated Distribution gives the distribution of mentions across various sources
Click Save
Quick Overview of the Topic Created

End Date
Oct 31, 2019

Query
(Sprinklr) AND (Social) NOT (Voice)

Accounts
Fa$hionStore

Languages
English

Countries Included
United Kingdom | United States
Automatic Case Creation using Sprinklr Intuition (AI)
Customer is @mentioning your brand on Twitter
@hionstore I need to process a return, can you help me?
Case gets auto-created in MS Dynamics. Click on Case to view details

<table>
<thead>
<tr>
<th>Priority</th>
<th>Origin</th>
<th>Customer</th>
<th>Owner</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>test case 1</td>
<td>Normal</td>
<td>---</td>
<td>Jay-Ready</td>
<td>application user</td>
</tr>
<tr>
<td>test case 2</td>
<td>Normal</td>
<td>---</td>
<td>Kartik</td>
<td>application user</td>
</tr>
<tr>
<td>test case 3</td>
<td>Normal</td>
<td>---</td>
<td>Kartik</td>
<td>application user</td>
</tr>
<tr>
<td>#5 Twitter @hionstore Can you p</td>
<td>Normal</td>
<td>---</td>
<td>Jay-Ready</td>
<td>application user</td>
</tr>
</tbody>
</table>
Summary tab has contact details of the social profile and case details
Social Conversations Tab has the conversation view of the message.
You can respond to your fan on Social directly from the Social Conversations Tab
You can add text, insert emojis, media, links etc when you respond
Brand (Agent) typing in the response to the customer

@hionstore I need to process a return, can you help me?

@JayReady7 • Mention • 9mins

Absolutely! Please let me know if you purchased in store, or online? Also include your order number (or receipt ID). If you like, DM us and we can wrap this up asap. 😊
Your responses align to the right side of the Social Conversations Tab

@hionstore I need to process a return, can you help me?

@JayReady7 • Mention • 12mins

Absolutely! Please let me know if you purchased in store, or online? Also include your order number (or receipt ID). If you like, DM us and we can wrap this up asap. 😊
The same is reflected on the native Tweet.
Customer responds on the native
Customer response is automatically captured and associated to the same case in Dynamics
Customer sends a direct message on Twitter in reply to the Tweet.
Customer’s DM is automatically captured and associated to the same case in Dynamics.
Brand (Agent) typing a response to the Customer’s DM

No problem at all. I see you purchased the jeans just last week. We’re sorry they didn’t fit. Here is your RMA #: FS548RMA645
Brand’s response sent to the customer as a DM

Hi! I’m following up on my request for a return. I did buy it online, and my confirmation # is FS252p75. Will you please provide me with an RMA so I can return it? It was the wrong size.

@JayReady7  •  Direct Message  •  4mins

No problem at all. I see you purchased the jeans just last week. We’re sorry they didn’t work out. Be sure you try our newest collection just launched today.

Here is your RMA # - FS548RMA645

@hionstore  •  Direct Message  •  Arpit Jain  •  just now
A follow-up is being sent by Brand (Agent) to make sure everything is fine
Brand’s response sent to the customer as a DM:

No problem at all. I see you purchased the jeans just last week. We’re sorry they didn’t work out. Be sure you try our newest collection just launched today.

Here is your RMA #: FS548RMA645

Is there anything else we can assist with today? It’s been my pleasure to assist you. 😊 - Arpit
The same is reflected on the native as well instantly
Customer responds back with a confirmation
The same gets associated to the case
Agent now decides to resolve the case
Fills in the details and clicks Resolve
<table>
<thead>
<tr>
<th>Case Title</th>
<th>Case Number</th>
<th>Priority</th>
<th>Issue</th>
<th>Customer</th>
<th>Owner</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>#942 Twitter @hionstore I need to...</td>
<td>CAS-01011-Z6J1P0</td>
<td>Normal</td>
<td>---</td>
<td>Kartik</td>
<td>Active</td>
<td>Resolved</td>
</tr>
<tr>
<td>test case2</td>
<td>CAS-01010-Z6V2...</td>
<td>Normal</td>
<td>---</td>
<td>Kartik</td>
<td>Active</td>
<td></td>
</tr>
<tr>
<td>test case1</td>
<td>CAS-01007-Q1G8...</td>
<td>Normal</td>
<td>Phone</td>
<td>Jay-Ready</td>
<td>Active</td>
<td></td>
</tr>
</tbody>
</table>

The same gets updated on the case as well in Dynamics.
Check out the Social Profiles created in Dynamics
Select **Sprinklr** from the Quick Menu drop down
You should be able to view all the Social profiles created by Sprinklr in Dynamics along with the details like Social Channel, Blocked status and Sprinklr Influence Score for that profile.

<table>
<thead>
<tr>
<th>Social Channel</th>
<th>Profile Name</th>
<th>Customer</th>
<th>Blocked</th>
<th>Influence Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>FACEBOOK</td>
<td>Bryan Clagett</td>
<td>Bryan Clagett</td>
<td>No</td>
<td>---</td>
</tr>
<tr>
<td>FACEBOOK</td>
<td>FOX Baltimore</td>
<td>FOX Baltimore</td>
<td>No</td>
<td>---</td>
</tr>
<tr>
<td>FACEBOOK</td>
<td>KCTV5 News</td>
<td>KCTV5 News</td>
<td>No</td>
<td>---</td>
</tr>
<tr>
<td>FACEBOOK</td>
<td>Emma O’Neill</td>
<td>Emma O’Neill</td>
<td>No</td>
<td>---</td>
</tr>
<tr>
<td>FACEBOOK</td>
<td>W Bradford Wilcox</td>
<td>W Bradford Wilcox</td>
<td>No</td>
<td>---</td>
</tr>
<tr>
<td>FACEBOOK</td>
<td>Robert Frick</td>
<td>Robert Frick</td>
<td>No</td>
<td>---</td>
</tr>
<tr>
<td>FACEBOOK</td>
<td>Cleveland Police UK</td>
<td>Cleveland Police UK</td>
<td>No</td>
<td>---</td>
</tr>
<tr>
<td>FACEBOOK</td>
<td>Hasani Hunter</td>
<td>Hasani Hunter</td>
<td>No</td>
<td>---</td>
</tr>
</tbody>
</table>
Once you click on any social profile, you’ll get the associated contact object in Dynamics along with social profile details.
Any Questions?

Please feel free to drop an email at support@sprinklr.com