

COACHING SOLUTION FOR DYNAMICS 365

Feature that enables Organizations to make Knowledge Articles accessible to Users in the context their on-going work

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1 Overview

Coaching is a feature that enables an organization to make Knowledge Article easily accessible to its users in the context of their on-going work. In short, we want to enable knowledgeable administrator(s) to offer help to their users while they are working directly out of Dynamics CRM. One-to-one coaching may pose problems like high cost and scalability issues while coaching through Dynamics will allow N to N scenario where one (or many knowledgeable) employees can spread their explicit knowledge to their teams.

Coaching is a solution built on Dynamics 365 and seamlessly works on Dynamics CRM 2016 and above

2 Personas

| | |
|---|--|
|  <p>Nancy the Sales manager</p> |  <p>David the Sales Person</p> |
| <ul style="list-style-type: none">□ Has been with the company for many years and is consistently a source of advice for her colleagues on information for successfully managing and closing opportunities Has helped develop the Business Process flow so as to comply with the company and industry best-practice With many new employees, she does not have time to constantly coach each sales representative or point them in the right direction□ Wishes that the CRM could understand the context of the user's work and provide coaching and guidance wherever required | <ul style="list-style-type: none">□ Is new to the company□ Has been trained in the company's processes for managing opportunities□ Still needs help understanding certain intricacies of the process□ Does not want to bother Nancy as he knows she is very busy□ Wishes he could easily access relevant information without having to search through all the different Knowledge Bases the company has set up |

In the above scenario Coaching solution will empower Nancy to address the problem. She can work with her administrators to have Dynamics 365 configured to provide coaching and guidance to the sales representatives through contextual knowledge base articles.

The above scenario can be extended to other Dynamics feature areas including Service, Operations etc.

3 How does Coaching work?

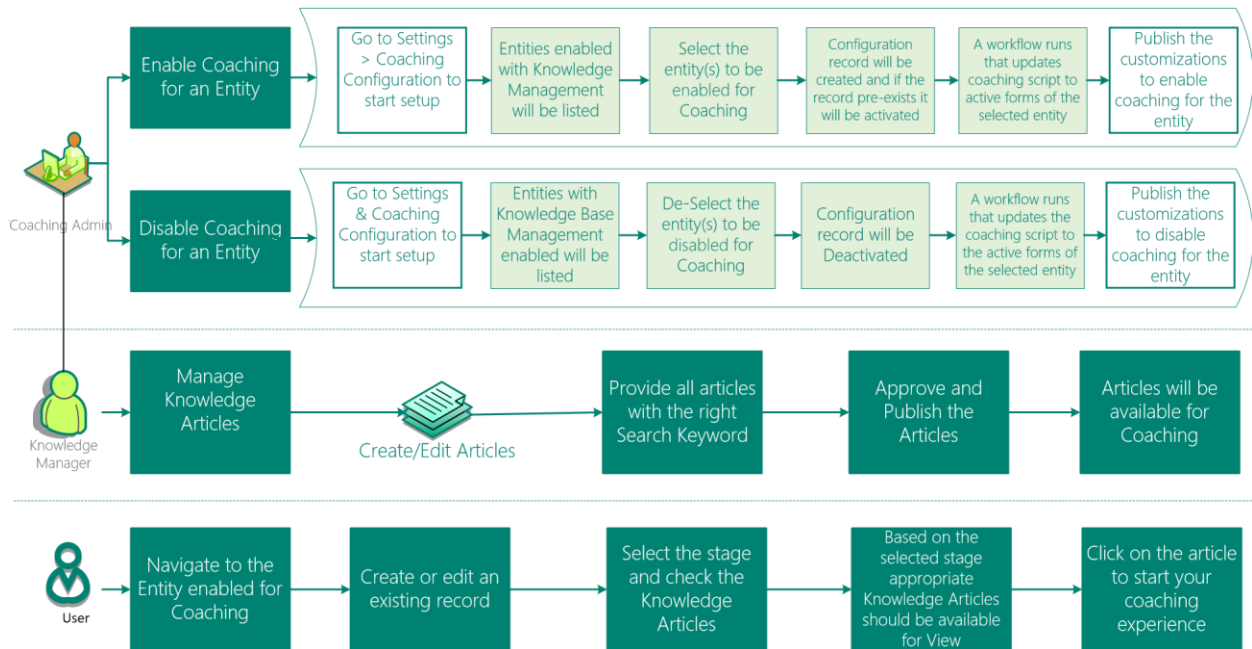
Coaching can be used for any system or custom entity that is enabled with Knowledge base management and Business process flow. Once downloaded from the Appsource to your Dynamics 365 application, the application owner would be able to decide on whether the system administrator needs to perform the configurations to make the solution ready to use OR to assign a different person by assigning security role 'Coaching Administrator' that comes along with the Coaching solution (recommended).

A custom entity named Coaching Configuration, a workflow and web resource script work in conjunction in the background to perform the actions selected by coaching/system administrator in the configuration page.

Enlisted below are the different roles in Dynamics 365 who are involved in this process.

1. Coaching Administrator –Perform the configuration activities.
2. Knowledge Manager – Life cycle management of knowledge base articles and is responsible to define the associated keywords for the published articles.
3. Dynamics 365 end User – Leverages the advantage of the contextual knowledge articles offered through Coaching solution.

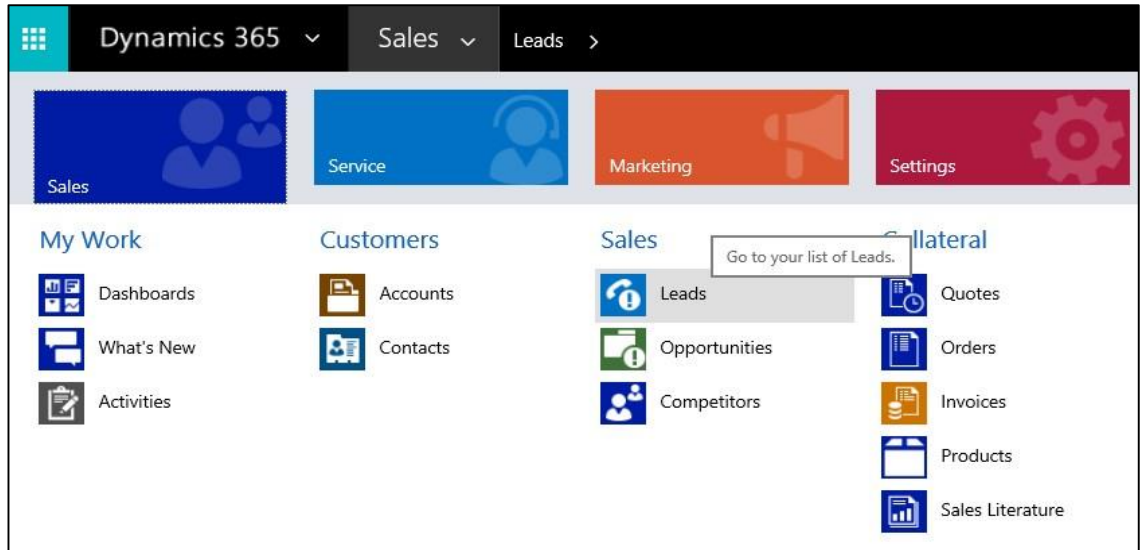
The below diagram summarizes the configuration and usage of Coaching solution and the processes that run in the backend.



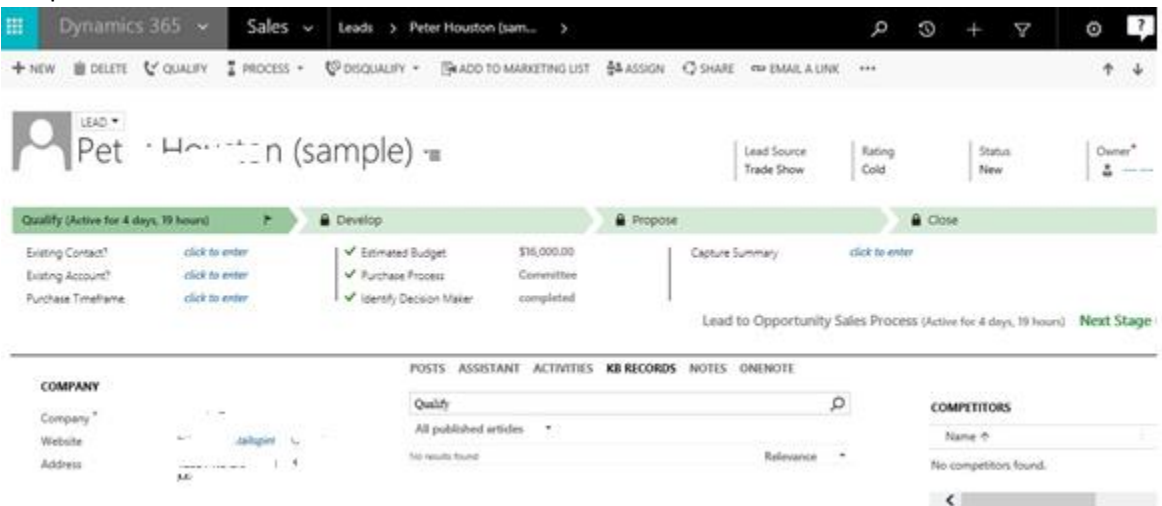
4 End User Experience

Once the Knowledge Manager and Coaching Administrator work together to enable Coaching, end users can benefit from the Coaching experience.

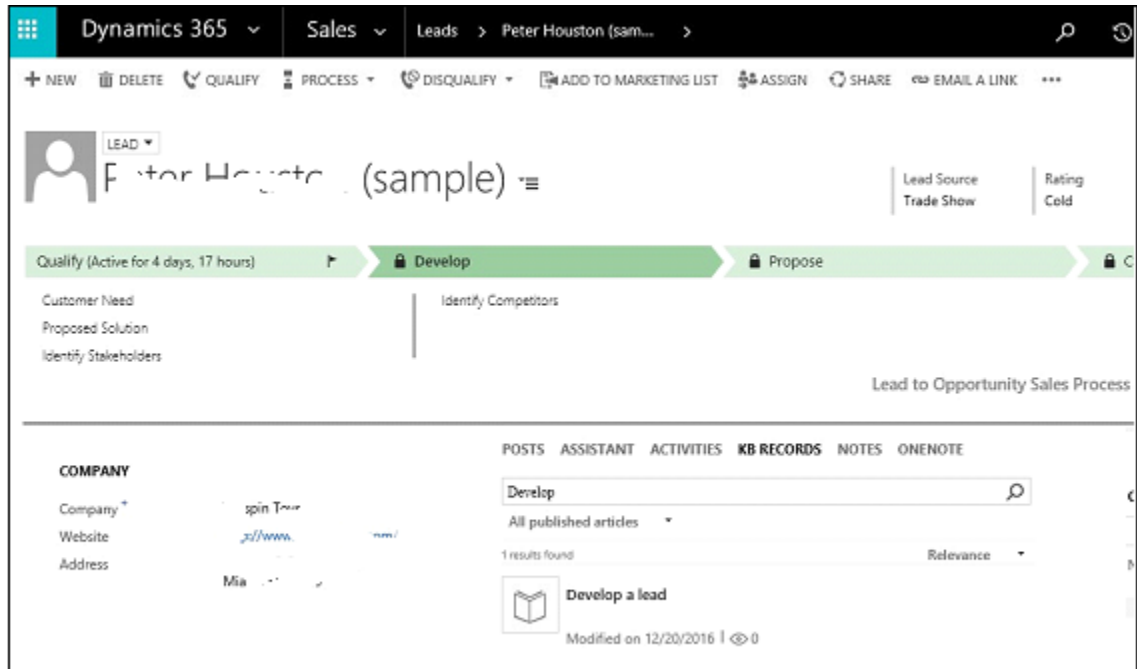
Assuming you are a Sales person like David and works out of Lead entity in CRM, after Coaching is enabled, once navigated to your Lead entity records, contextual help will be rendered. The below navigation illustrates the user experience of David and crew 1. Navigate to your entity (Lead in this case)



2. Open Lead record



3. Selecting a process stage or moving from one stage to another will populate the contextual knowledge articles in the Knowledge control(s).



4. Use the pop out option on the article to read the full contents.
5. Please note that the keywords passed to search the article will depend on the configuration set by the Coaching administrator. The search criteria can be configured either based on the process stage name only OR as a combination of entity name + process stage name. Please contact your Coaching administrator to know more about this setting.

This can be extended to any roles/entity for which Coaching is enabled. In case you want to enable Coaching for a specific entity of your interest or have any issues or concerns using Coaching, please contact your designated Coaching Administrator.

5 Coaching Administrator Guide

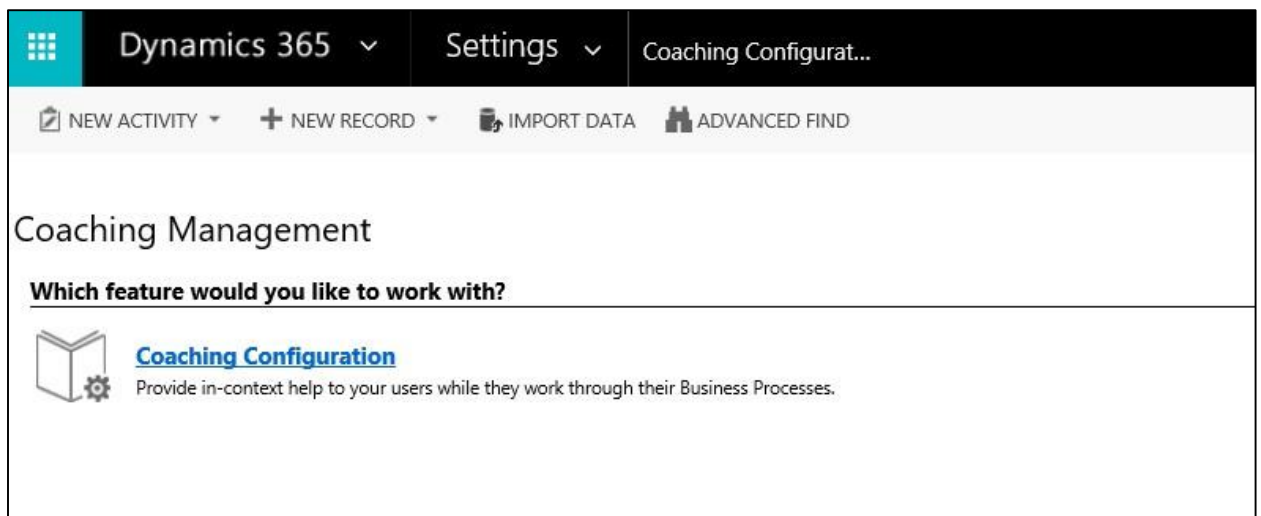
This section outlines the steps to be performed by a Coaching Administrator to make Coaching available to the end users.

Pre-requisites:

1. The Coaching solution is installed in your Dynamics 365 application
2. Knowledge base control is added to the entity forms where you want to enable Coaching experience

5.1.1 Navigation

1. Open Microsoft Dynamics 365
2. Navigate to Settings -> Extensions -> Coaching Configuration



3. Clicking the Coaching Configuration will open up the configuration page.

Note: Only the entities for which Knowledge Management & Business Process flow will be displayed here.

Coaching Configurations [Help](#)

Record Types
Select the record types for which you want to turn coaching on.

| <input type="checkbox"/> | Entities |
|-------------------------------------|-------------|
| <input checked="" type="checkbox"/> | Account |
| <input checked="" type="checkbox"/> | Case |
| <input checked="" type="checkbox"/> | Contact |
| <input checked="" type="checkbox"/> | KB Test |
| <input checked="" type="checkbox"/> | Opportunity |

Note: only record types where Knowledge Base (KB) is enabled will show up here.

To enable new record types for coaching please enable them first in: Settings > Service Management > Embedded Knowledge Search

Association of KB control keyword to KB article
In order to surface process-relevant and contextual KB articles, you must decide on a convention for article titles.

Article title format

Use Business Process Flow name + " - " + Stage (Ex: "Opportunity Sales Process - Develop")

Use Business Process Flow Stage (Ex: "Develop")

5.1.2 Enable and Disable Coaching for an Entity

5.1.2.1 Enable Coaching

1. Select the required entity
2. Select the radio button based on the search preference
 1. Search Keyword: <Business Process Flow Name> – <Stage name>
 2. Search Keyword: <Stage name>

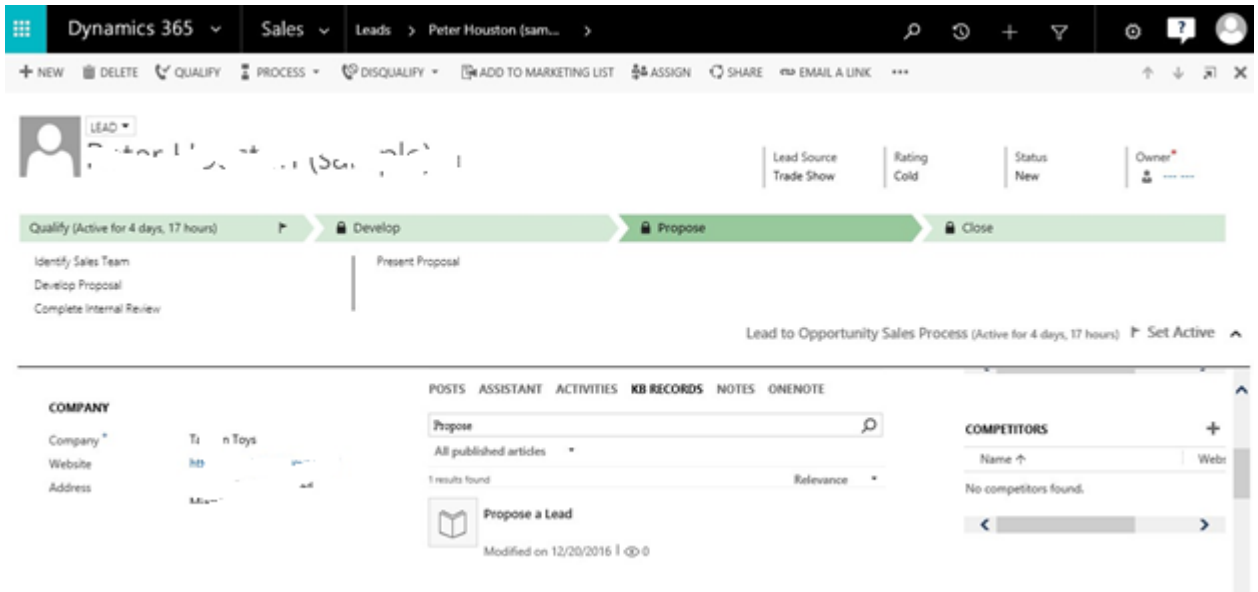
Note: The preference is an org level setting and will be reflected for all the entities where Coaching is enabled.

3. Click Save and 'OK' on the pop up. Ensure to read the message on the pop up



4. Navigate to Settings > Customizations > Customize the System and click 'Publish All Customizations' on the top menu bar

- Validate if coaching was successfully enabled by browsing to the entity record and observe the KB records section. Verify if the KB records are updated if Stages are changed accordingly



5.1.2.2 Disable Coaching

- Uncheck the check box against the entity for which Coaching need to be disabled.
- Click Save and 'OK' on the pop up. Ensure to read the message on the pop up
- Navigate to Settings-> Customizations -> Customize the System and click 'Publish All Customizations' on top bar
- Validate if coaching was successfully disabled by browsing to the entity record and observing the KB records section.

5.2 Troubleshooting Steps

Coaching Administrators can use the below quick tips for troubleshooting in case of any issues or concerns reported by end users.

- Ensure Knowledge articles are updated with required search keyword and the article is in published/approved state
- Navigate to 'Customize the System' and ensure you click 'Publish all Customizations'
- If the issue still persists, you will have to confirm if the configuration was successful. Refer below steps for details –
 - Go to Settings -> System Jobs -> Search for 'Coaching' and enter
 - If the configuration was successful, a job with name 'Coaching Configuration Deactivate/Activate' or 'Coaching Configuration Create/Update' will be recorded with status *Succeeded*

- c. If the configuration has failed, a job with name 'Coaching Configuration Deactivate/Activate' or 'Coaching Configuration Create/Update' will be seen as *failed*.
- d. In case the status is *failed*, please try the configuration setup again and verify the job status