Microsoft Social Engagement for Dynamics CRM

Gain real-time understanding of your customers and your business across the social web within Dynamics CRM.

Version 3.1





contents

This eBook covers:

- Why Social Engagement for CRM?
- <u>Create records in CRM from a post in Social Engagement</u>
- Set up Social Engagement dashboards and visuals in CRM
- Gallery of Social Engagement visuals
- Next steps and help resources



gain valuable social insights right in CRM

Sales, marketing, and service organizations can link posts to Microsoft Dynamics CRM and gain insights right within CRM.

Social Insights¹ lets you add charts and graphs to dashboards right in CRM, or add them to the forms for different types of records, such as accounts, contacts, or competitors.

Link posts from Social Engagement to Dynamics CRM²

lets you create any type of CRM record (entity) from a post in Social Engagement.

Read more about how Social Engagement works and how it can help your business in the <u>eBook:</u> <u>Introducing Microsoft Social</u> <u>Engagement</u>.



Add social dashboards and charts to view and act on social media events in CRM

¹ Available in Microsoft Dynamics CRM Online Spring '14 and CRM 2013 Service Pack 1 (SP1) or later

² Available in Microsoft Dynamics CRM Online 2015

lead generation and social insights for sales

Social buying signals

Create real-time alerts for key purchasing signals and generate leads from the social web.

Competitive intelligence

Gain important insights about your competitors' weaknesses and strengths.

Target account tracking

Monitor key developments and decision makers at your top accounts.



51% of salespeople who use social selling techniques outperform their sales peers. (Source)

real-time social listening for marketing

Brand & product sentiment

Gain insight and learn what people really think and feel about your business.

Campaign monitoring

Measure the effectiveness of marketing campaigns on social channels.

Top influencer tracking

Identify and monitor the top influencers in your industry, company, and customer base.



75% of B2B buyers are likely to use social media to influence their purchase decisions. (Source)

extraordinary social care for service

New standard in social care

Engage customers, on their terms, across the social web and create cases in CRM.

Global sentiment analysis

Track social care cases in up to19 languages. For more information, see the <u>Translation</u> <u>Guide</u>.

Real-time social case resolution

Improve resolution time creating alerts to quickly identify customer issues, and identify trends early on.



72% of customers expect a response to a complaint within 1 hour on social media. (Source)

link social data to CRM records*

Open up the social channel to Sales, Marketing, and Service functions in CRM by associating social posts in Social Engagement with CRM record types – leads, opportunities, cases, or custom record types.

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	ID: 0123456789	Priority: Owner: High Corrine Espinoza	
	Response By: 4:21 PM, 4/21/2015	Status: In progress	
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Tip

Before you can create records in CRM, an administrator needs to <u>set</u> <u>up the connection to CRM</u> and <u>configure the rules to process social</u> <u>activities</u>.

* For eligiblity information, see Microsoft Dynamics CRM pricing and licensing.



link a post from Social Engagement to CRM

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	You can ad	d up to 250 characters of notes	for other users to see i	in Social Engagement when interacting with thi	s post.
				4	Create

From Social Center or the Posts view in Analytics, click this icon to create a new record in CRM.

1

Select the CRM instancethat you want to create the record in.

Select the record type

- **3** you want to create and add optional notes.
- Choose Create totrigger the creation of a CRM record.

view CRM record in Social Engagement

	Microsoft Social Engagement 🗮 Analytics	From Social Center or
\lor	isual Studio Code 🗸 🎭 💿	Posts view, click the Link to CRM icon
O	erview Conversations Sentiment Location Sources	
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⊳	Show Notes 4 Unlink	Social Engagement.
	Tip	Choose Unlink to

You can click the owner or customer

to open the owner or customer record in Dynamics CRM.

4 remove the link to the

CRM record.

let's try it in CRM!

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To use Social Engagement in CRM, you'll need:

- Access to the Social Engagement app in Office 365. (For CRM Online admins: Social Engagement and CRM Online must be on the same tenant.)
- User licenses for both CRM and Social Engagement. More information: <u>Assign a license to a user</u>
- A connection between CRM and Social Engagement. More information: <u>Connect to Microsoft Social Engagement</u>

If you have questions about these items, please contact your system administrator.



show Social Engagement widgets in CRM

Now that you know a bit more about what Social Engagement can do, you're probably ready to add your own visuals or set up searches.

There are two places where you can see the Social Engagement visuals in CRM:

- Dashboards
- Forms (account, contact, or competitor forms or on other types of records, depending on how your system is set up)

For our example, first we'll add the **Analytics Summary** visual to a dashboard.

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Los Angeles, KA 2059	93	Microsoft Social Engag	ement			

add a Social Engagement visual to a new dashboard



The **Analytics Summary** is a good place to start because it gives you a quick summary of the number of posts, how your search topics are trending, and the breakdown of positive, negative, and neutral posts.

You can also see which languages are used most often for posts.

First, because we want to monitor the social conversation right away when we sign in, we'll add the summary visuals to a new dashboard.

Tip

At the end of this eBook, we've included a <u>section</u> that shows you all of the visuals that are available. Feel free to use one of those, if you like. You follow the same basic steps to add any visual to a dashboard.

navigate to your area

If your screen looks like this (latest version):

On the nav bar, choose **Sales, Service, or Marketing.**



If you're the CRM admin at your

organization, and you want to create a dashboard that everyone can use, on the nav bar choose, **Settings.**



If your screen looks like this (older versions):

-OR- Choose Microsoft Dynamics CRM > Sales, Service, or Marketing.

Microsoft Dynamics CR	M ↓ Ales ↓	Dashboards \mid ~
SALES	کپر SERVICE	MARKETING

If you're the CRM admin at your organization, and you want to create a dashboard that everyone can use, choose Microsoft Dynamics CRM > Settings.

Microsoft Dynar	nics CRM 🗸 💼 🕴 sales 🗸	🗸 Dashboards 🗸	
SALES	SERVICE	MARKETING	🔅 SETTINGS
			\frown

go to dashboards

Admins and end users can set up their own dashboards. Optionally, admins can create new dashboards and share them with other users.

-OR-

If you're in sales, service, or marketing,
and want to create a dashboard for yourself,
choose Dashboards .



If you're the CRM admin and want to create a shared dashboard, choose Customizations > Customize the System > Dashboards.



create a new dashboard

We'll create a new dashboard for Social Engagement.

-OR-

If you're in sales,	service, or marketing	J,
choose New on th	ne command bar.	

Microsoft Dynamics CRM = Sales - Dashboards - Dashboards - Dashboards - Save AS Save AS EAVE Delete - Set AS DEFAULT S SHARE DASHBOARD

If you're the CRM admin, choose New on the toolbar.







choose the dashboard layout

3-Column	3-Column	4-Column	2-Column
Regular Dashboard	Multi-Focused Das	Overview Dashboard	Regular Dashboard
2-Column	<u>3-Column</u>	3-Column	This layout can accommodate components
Regular Dashboard	Overview Dashboard	Focused Dashboard	across two columns.

In our example, we'll choose the 2-column layout so that we can eventually include four Social Engagement visuals on the dashboard.

You can choose a different layout, if you like.

On the **Choose Layout** screen, choose **2-Column Regular Dashboard**, and then choose **Create**.

start the Social Engagement wizard

Microsoft Dynamics CRM = Sales v Dashboards v	Type a name for the
🗟 SAVE 🗶 CLOSE 🏟 PROPERTIES 🏟 EDIT COMPONENT 🏨 CHART 🗮 LIST 🤀 WEB RESOURCE 🚥	new dashboard.
Section	Next, we need to decide on the search topics to listen for on social networks. The Analytics summary visuals will report on these topics. There's a wizard to help with that. Choose this icon to start the wizard.

add your search topics



Choose **Search topic**, and then select **Create a new search topic**.

You'll see a screen with fields to use for your own search topics.

- 1 Switch between selecting from a list of topics, or setting up your own.
- 2 Searches may be grouped by category (record type), such as for accounts, competitors, or contacts.
- 3 Enter keywords, separated by commas. Keywords are exact, but not case-sensitive. Include variations ("phone" and "phones").
- 4 Narrow your search by requiring these additional keywords in results (think "AND").
- 5 Use exclusions to avoid overwhelming your results with irrelevant keywords. Posts that also contain these keywords will be excluded (think "NOT").

Tip

To learn more about how to set up your own search topics, see <u>Set up</u> <u>searches to listen to social media</u> <u>conversations</u>.

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Example: Microsoft, #microsoft Keywords that must be INCLUDED Example: Office	in results 4. Keywords that	must be EXCLUDED from results	5
Example: Microsoft, #microsoft Keywords that must be INCLUDED Example: Office Sources	in results 4 Keywords that Example: build Languages	must be EXCLUDED from results	5
Example: Microsoft, #microsoft Keywords that must be INCLUDED Example: Office Sources Blogs, Facebook, Twitter	in results 4. Keywords that Example: build Languages en, de	must be EXCLUDED from results	5

or, take advantage of pre-set search topics



select the search topic to listen for

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et search topic type Set search topic or Select visuals Pick a search topic Pick a search topic Create a new search topic earch topics list Mame Keywords rinter products ink jet, laser printer, all-in-one, photo printer roner cartridges remanufactured cartridges, refill kits D Computer-aided Design (CAD) CAD software, wireframe, design modeling Noter products flat bed plotter, drum plotter Back Next	Set up Socia	l Insights		? X
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pick a visual

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save the dashboard and close

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Choose Save , and then choose Close .
(Remember to choose Save , or you'll lose your changes.)

get a quick snapshot of trends

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Depending on your search topics, it only takes a moment to see updated data in your Social Engagement visuals.

To get a quick snapshot that shows how your search topics are trending each time you sign in, choose **Set as Default** (it's at the top of the screen, on the command bar).



 \bigcirc

filter your visuals on the fly



Filter options

Depending on how your search topics are set up, you can choose the Filter button 🕥 and change the time frame, the languages, and the sources. This constructs the data set for the visual you are looking at and lets the visual adapt to your selection.

from CRM to Social Engagement



add a visual to an account form

For our next example, see how to add the Analytics summary to the account form.

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9068 Muir Road Los Angeles, KA 20593		Microsoft Social Engage	ement		



go to accounts

You can add any of the visuals to the screen for your top accounts.

Тір

Depending on how your system is set up, you may also be able to use Social Engagement for contacts, leads, competitors, or other types of records.



If your screen looks like this (latest version):

On the nav bar, choose **Sales, Service, or Marketing > Accounts.**



If your screen looks like this (older versions):

Choose Microsoft Dynamics CRM > Sales, Service, or Marketing > Accounts.

Microsoft Dynamics	CRM	× ∩	SALES 🗸	Dash	boards 🗸			
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select an account

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\checkmark	Account Name 🛧	Main Phone	Address 1: City	Primary Contact	Email (Primary Contact)
	A. Datum Corporation (sample)	555-0158	Redmond	Rene Valdes (sample)	someone_i@example.com
	Adventure Works (sample)	555-0152	Santa Cruz	Nancy Anderson (sample)	someone_c@example.com
	Alpine Ski House (sample)	555-0157	Missoula	Paul Cannon (sample)	someone_h@example.com
	Blue Yonder Airlines (sample)	555-0154	Los Angeles	Sidney Higa (sample)	someone_e@example.com
	City Power & Light (sample)	555-0155	Redmond	Scott Konersmann (sample)	someone_f@example.com
	Coho Winery (sample)	555-0159	Phoenix	Jim Glynn (sample)	someone_j@example.com
	Contoso Pharmaceuticals (sample)	555-0156	Redmond	Robert Lyon (sample)	someone_g@example.com
	Fabrikam, Inc. (sample)	555-0153	Lynnwood	Maria Campbell (sample)	someone_d@example.com
	Fourth Coffee (sample)	555 0150	Renton	Yvonne McKay (sample)	someone_a@example.com
	Litware, Inc. (sample)	555-0151	Dallas	Susanna Stubberod (samp	someone_b@example.com

Choose the account name.

In our example, we'll add the **Analytics Summary** to Blue Yonder Airlines, so that we're up on the latest social trends before we contact them.

choose the link to start the wizard

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Blue Yonder Airlines (sample	ē) .≡	this account.
Summary		Choose Configure Social Insights to start the wizard
ACCOUNT INFORMATION	Social Insights	(The link might he in a
Account Name* Blue Yonder Airlines (sample) Phone 555-0154 Fax	Configure Social Insights	different location on your screen.)
Website http://www.blueyonderairlines.com/		I
Parent Account		
Ticker Symbol		

Тір

If you don't find the link at all, ask your system administrator to add the Social Insights component to the form.

take advantage of pre-set search topics



To save time, a system administrator can set up lists of common search topics for your accounts in advance.

Everyone shares them and can select from the same lists. For our example, we'll take advantage of these lists, instead of setting up our own search topics.

Choose **Search topic**, and then choose **Next**.

Tip for advanced users

You can also set up your own search topics to listen for on social networks, if you want. There's <u>an example showing you how</u> in this eBook.

To make use of all options when you set up a search topic, we recommend that you choose the Advanced option and work directly in Social Engagement.

select which topic to listen for

t search topic type Set search topic or Select visuals Pick a search topic O Create a new search topic arch topics list me Keywords nter products ink jet, laser printer, all-in-one, photo printer ner cartridges remanufactured cartridges, refill kits Computer-aided Design (CAD) CAD software, wireframe, design modeling	Set up Socia	l Insights		?	×
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pick a visual

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know the scoop before you contact someone

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Summary						
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Account Name *	Blue Yonder Airlines (sample)					
Phone	555-0154	Analytics summary				
Fax		.	->			United States
Website	http://www.blueyonderairlines.com/	• •	7			Germany
Parent Account		1,416	47.1%			United Kingdom
Ticker Symbol		202 per day Buzz	average 1,006 Trend	9.4 / +0.3 Sentiment	EN RU DE ES FR Languages	Australia Locations
ADDRESS						

9068 Muir Road Los Angeles, KA 20593 Now you'll know that the buzz volume is really high compared to the average.

Something must be going on with your account – better find out before you call.

It's easy to do so! Choose one of the widgets to access the same data in Social Engagement. There, you can use powerful filters, read posts, and engage with others.

Social Engagement visuals

This section gives you an example of each Social Engagement visual, and some ideas about how to use each one.





get a summary of posts



Analytics summary

Get details about how many posts are showing up, and how the search topic or category you're interested in is trending.

You'll also see the sentiment that is being associated with your topic, the languages used to discuss your topic and the countries/regions found most often in this topic or category.

compare social sources



Sources summary

Compare where the posts are coming from. Quickly check sources like blogs, Facebook, Twitter, News, and videos.

Choose an area on the visual to see more details in Social Engagement.

check the daily buzz



Buzz report

Check the buzz on your search topic or category. See the total number of posts and the average number of posts per week. (You can also choose a different time frame.)

The Buzz report helps you keep track of the volume of posts overall on all active sources for your search topics.

see how the buzz is trending



Trend report

See how the number of posts is trending over time.

The Trend change compares the past five time frames (days, weeks, or months) to the most current time frame.

see the post volume among sources



Sources history

See which sources the posts are coming from. Find out quickly if a specific source is creating significantly more buzz than others and requires in-depth investigation.

compare where posts are coming from

Sources



Sources Share of Voice

See a visual that compares where the posts are coming from, and shows you which sources are the most active.

In this example, most of the posts are from Twitter, a significant number are from Blogs, while News, Videos, and Facebook posts are rarely found.

compare the number of positive, negative, or neutral posts



See a visual that compares the positive, negative, or neutral posts in your search topics.

In this example, all posts are either positive or neutral, which results in a sentiment index of 10. This is an increase of +10 since last week.

see the top 5 languages with the most posts



- en English
- de German
- fr French
- sp Spanish
- it Italian

Languages

See the top 5 languages with the most posts about your search topic or category.

At a glance, see which languages were used the most for posts about your search topics.

see peaks and valleys in volume over time



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see when changes in sentiment occurred



Sentiment history

Correlate sentiment about the search topic with dates and events.

The black line indicates the sentiment index. The green line indicates the average sentiment index in your time frame.



see how sentiment varies among sources

Sentiment summary by sources



Microsoft Social Engagement

Sentiment summary by sources

See how the sentiment varies among sources. Are posts on Facebook trending positive while Twitter is neutral?

In this example, most of the posts in the past week are on Twitter, and they're mostly positive.

compare the number of positive and negative posts



Sentiment volume

See a bar graph comparing the number of positive and negative posts.

This example shows the data by day, but you can also see weekly or monthly comparisons.

Choose the Filter button \bigcirc at the top of the visual to select a different time frame.

read public posts

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23:39	05/27/2015	EN	
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Recent posts

See an excerpt of the 5 most recent posts. Drill in to Social Engagement to take action and respond to these posts.

see key influencers



Key influencers

See which people are mentioning your search topics the most. You'll find details about the number of posts, the author's share of voice, and the trend change.

More resources

To find more information, visit: Social Engagement Help Center

Quick links to more training resources:

- <u>Connect Dynamics CRM with Social</u> <u>Enagement</u>
- <u>eBook: Introducing Microsoft Social</u> <u>Engagement</u>
- <u>eBook: Set Up a Social Engagement</u> <u>Search for Your Product</u>
- <u>Video: Get started with Social</u> <u>Engagement (3:36)</u>
- <u>Video: Microsoft Social Engagement</u>
 <u>Overview (3:55)</u>
- <u>Video: Microsoft Social Engagement</u> <u>Analytics (7:23)</u>

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Version 3.1

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