Microsoft

Dynamics 365 for Field Service

Event guide

Please consider the information in this kit a framework, not a fully-packaged standalone event. Please use it to create your own Dynamics 365 event that is tightly aligned with this guidance, a Dynamics 365 event with your unique spin, or another event that is better aligned to serve you and your customers.

Resources

Hosting a Dynamics 365 for Field Service event
- Schedule
- Checklist

Event assets
- Abstract
- Agenda
- Registration page
- Feedback form

Marketing assets
- Invites
- Social
- Banner

Hosting a Dynamics 365 for Field Service event

Hosting a Dynamics 365 for Field Service event

Thank you for your interest in hosting a Microsoft Dynamics 365 for Field Service event. Our objective with this event kit is to provide partners with a framework for hosting a Dynamics 365 for Field Service event of your own.

This event kit will provide guidance on hosting a successful event and resources to help you pull it off, including a workback schedule, a to-do checklist, an event abstract and agenda, and assets to help you market your event.

Making it your own

Please consider the information in this kit a framework. To the extent which it is useful, feel free to use it to create a Dynamics 365 for Field Service event that is tightly aligned with this guidance, a Dynamics 365 for Field Service event with your unique spin, or another event that is better aligned to serve you and your customers.

Topics to consider:

- Redefining field service in the cloud
- Turn your field service center into a profit center
- Steps to success servitization
- How to improve tech effectiveness with connected field service
- Modernize field service with mixed reality

Other resources

Event guide

Documents

- Schedule + Checklist
- Event overview
  - Abstract
  - Agenda

Marketing

- Invite emails
- Social posts
- Banners
  - Emails
  - Social
  - Registration/Feedback

The following are examples to provide guidance as you create your own events.

Schedule + Checklist

Pre-event

-6 weeks
- O Set date for event
- O Secure venue
- O Confirm speakers
- O Set agenda
- O Determine invite list
- O Write event copy
- O Determine demand gen strategy

-5 weeks
- O Launch registration page
- O Send initial invites

-4 weeks
- O Contact catering
- O Order swag
- O Organize security
- O Schedule social posts

-2 weeks
- O Lock slides
- O Provide catering info to venue
- O Send second invites

-3 days
- O Provide guest list to venue
- O Send reminder emails
- O Launch post-event survey

Day of event
- O Provide attendees with WiFi password
- O Create hashtag and encourage attendees to share
- O Take pictures during the event and share them on social

Post-event

+1 day
- O Send follow-up emails with survey request

Checklist

Event logistics
- O Event date and time
- O Event venue
- O Invite list
- O Catering
  - O Consider dietary restrictions
- O Security

Programming
- O Speakers
- O Agenda
- O Slide templates

Marketing
- O Registration page
- O Feedback form
- O Social media posts
  - O Create hashtag
- O Emails
  - O Invite
  - O Second invite
  - O Registration confirmation
  - O Reminder
  - O Thank you
  - O *Optional: Waitlisted, Rejected, Change location or schedule, Cancellation confirmation, Event cancellation, Sorry we missed you*
- O *Swag (Optional)*
  - O *Pens, stickers, power packs, USB sicks*

Experience
- O Name tags
- O Internet connectivity/WiFi
- O Signage (*Optional*)
  - O *Welcome signs, posters*

Event assets

Abstract
Agenda
Registration page
Feedback form

The following are examples to provide guidance as you create your own events.

Abstract + Agenda

Abstract

Deliver a seamless, end-to-end service experience with Dynamics 365 for Field Service. Built-in intelligence helps you resolve service issues before they occur, reduce operational costs, and deliver positive onsite experiences.

Field services are no longer just about mitigating problems; they are an opportunity to add value through service and to build stronger customer relationships. Modern companies are capitalizing on this opportunity through connected field services to unlock new service models, provide insights into product health through remote monitoring, and empower field services to better support customers.

We'd like to invite you and your team to participate in our Dynamics 365 for Field Service Summit, designed to equip you with the knowledge and tools to deliver better outcomes with IoT, optimize your resources, make your technicians more effective, and modernize your field service with mixed reality.

During this event you will learn how to:

- **Inspire:** Get inspired by new ideas and success stories of modern field service teams leveraging technology to drive growth.
- **Discover:** Discover opportunities to improve field service performance, innovate with proactive service, and create better experiences for your customers.
- **Experiment:** Try the latest tools from Dynamics 365 for Field Service.

Agenda

AM Event	PM Event	Schedule
08:00 AM	12:00 PM	Registration & Breakfast/Lunch
09:15 AM	01:15 PM	Welcome
09:30 AM	01:30 PM	**Inspire** session
10:30 AM	02:30 PM	**Discover** session
11:15 AM	03:15 PM	Break
11:30 AM	03:30 PM	**Experiment** session
12:45 PM	04:45 PM	Closing
01:00 PM	05:00 PM	Reception & Networking

Registration page

Partner

Partner logo

Dynamics 365 for Field Service Summit

Register today!

Deliver a seamless, end-to-end service experience with Dynamics 365 for Field Service. Built-in intelligence helps you resolve service issues before they occur, reduce operational costs, and deliver positive onsite experiences.

Field services are no longer just about mitigating problems; they are an opportunity to add value through service and to build stronger customer relationships. Modern companies are capitalizing on this opportunity through connected field services to unlock new service models, provide insights into product health through remote monitoring, and empower field services to better support customers.

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Agenda

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12:00 PM	Registration & Breakfast/Lunch
01:15 PM	Welcome
01:30 PM	**Inspire** session
02:30 PM	**Discover** session
03:15 PM	Break
03:30 PM	**Experiment** session
04:45 PM	Closing
05:00 PM	Reception & Networking

Register

Name

Company

Title

Email

Submit

Details

When

February 7, 2019 | 12:00 PM - 5:00 PM PST

Where

Microsoft Training Center
700 Bellevue Way NE
Bellevue, WA 98004

Feedback form

Partner

Partner logo

Dynamics 365 for Field Service Summit

Thank you for attending our Dynamics 365 for Field Service Summit. We invite you to complete a brief survey to provide feedback on your experience. As a note, this survey is not anonymous.

How satisfied were you with this event? *
O Very satisfied O Somewhat satisfied O Somewhat dissatisfied O Very dissatisfied

How strongly would you agree that attending the event has motivated you to either recommend, try, purchase, or deploy Microsoft products and/or services? *
O Strongly agree O Somewhat agree O Neutral O Somewhat disagree O Strongly disagree

Did you achieve your objectives for attending this event? *
O Yes O No

Did you find the Dynamics 365 for Field Service Summit and content valuable?
O Highly valuable O Valuable O Low value

Which sections of the Dynamics 365 for Field Service Summit did you find most relevant?
O All of them O Excite O Explore O Experiment O None

Which emerging technologies are you most interested in?

As a result of attending the Dynamics 365 for Field Service Summit, how likely are you to deliver this content to your organization?
O Highly likely O Likely O Not at all

Would you like us to send you the Dynamics 365 for Field Service Toolkit?
O Yes O No

Would you like to share any other comments or feedback about the Dynamics 365 for Field Service Summit?

Submit

Marketing assets

Invites
Social
Banners

The following are examples to provide guidance as you create your own events.

Invites

Emails

Invitations
- Invite
- Second invite

Auto responses
- Registration confirmation
- Waitlisted
- Rejected
- Event reminder

Changes
- Change location or schedule
- Registration has been cancelled
- Event cancelled

Follow-up
- Registered, did not attend
- Thank you for attending

Invitations

Invite

Subject line: Invitation to the Dynamics 365 for Field Service Summit
Dear [NAME],

We'd like to invite you and your team to participate in our Dynamics 365 for Field Service Summit, designed to equip you with the knowledge and tools to deliver better outcomes with IoT, optimize your resources, make your technicians more effective, and modernize your field service with mixed reality. During the summit, we will explore new ideas, share success stories, discover new opportunities for your business to improve field service performance, and demo the latest tools from Dynamics 365 for Field Service.

When
[DATE]
[TIME]

Where
[ADDRESS]

This is an event you don't want to miss! We encourage you to register right away, as space is limited. Event details and registration information is here [LINK]. We hope to see you at the Dynamics 365 for Field Service Summit!

Best Regards,

[NAME]

Unsubscribe | Privacy Statement
[PARTNER NAME]
[PARTNER ADDRESS]

Invites

Invitations

Second invite

Subject line: Registration Closing Soon: Dynamics 365 for Field Service Summit
Dear [NAME],

I hope thinks are going well for you.

We're just a couple weeks away from our Dynamics 365 for Field Service Summit, and I wanted to give you a heads up that registration will be closing soon. If you're planning to attend, please register [LINK] today!

One last thing: A few customers have reached out wondering if there is a fee to attending this event. There is no fee and attendance is absolutely free.

When
[DATE]
[TIME]

Where
[ADDRESS]

Hope to see you at the Summit!

Best Regards,

[NAME]

Unsubscribe | Privacy Statement
[PARTNER NAME]
[PARTNER ADDRESS]

Invites

Auto responses

Registration confirmation

Subject line: Dynamics 365 for Field Service Summit: Registration confirmation
Thank you for registering. This email confirms your registration for the following event:

Dynamics 365 for Field Service Summit
[ADDRESS]

[DATE]
[TIME]

We look forward to seeing you at the event! If plans change and you are unable to attend, please use the link below to cancel your registration.
[Cancel my registration]

Auto responses

Waitlisted

Subject line: Dynamics 365 for Field Service Summit: Registration pending
Thank you for your interest in attending our upcoming Dynamics 365 for Field Service Summit. Due to the popularity of this event, your registration cannot be automatically confirmed. You will be notified by email if there is capacity for you to attend.

Dynamics 365 for Field Service Summit
[ADDRESS]

[DATE]
[TIME]

Thank you again for your interest.

Invites

Auto responses

Rejected

Subject line: Dynamics 365 for Field Service Summit
Thank you for your interest in attending the Dynamics 365 for Field Service Summit. Unfortunately, due to the popularity of this event we are unable to accommodate your request to attend.

Dynamics 365 for Field Service Summit
[ADDRESS]

[DATE]
[TIME]

We apologize for any inconvenience this may have caused and look forward to seeing you at future events. Please visit our website if you are interested in learning more about other events and webcasts.

Auto responses

Event reminder

Subject line: Dynamics 365 for Field Service Summit: Reminder
Thank you for your interest in our Dynamics 365 for Field Service Summit. We would like to remind you that you are registered for the following event:

Dynamics 365 for Field Service Summit
[ADDRESS]

[DATE]
[TIME]

We look forward to seeing you at the event! If plans change and you are unable to attend, please use the link below to cancel your registration.
[Cancel my registration]

Invites

Changes

Change location or schedule

Subject line: Dynamics 365 for Field Service Summit: New location/New schedule
The Dynamics 365 for Field Service for which you are registered has changed location and/or schedule. Please see the new event details below:

Dynamics 365 for Field Service Summit
[ADDRESS]

[DATE]
[TIME]

We apologize for any inconvenience to you and your schedule. If you are unable to attend, please use the link below to cancel your registration.
[Cancel my registration]

Changes

Registration has been cancelled

Subject line: Dynamics 365 for Field Service Summit: Cancellation confirmation
This confirms your registration has been cancelled for the following event:

Dynamics 365 for Field Service Summit
[ADDRESS]

[DATE]
[TIME]

We look forward to seeing you at an event in the future! Please visit our [website] if you are interested in learning more about other events and webcasts.

Invites

Changes

Event cancelled

Subject line: Dynamics 365 for Field Service Summit cancelled
We regret to inform you that our Dynamics 365 for Field Service Summit has been cancelled.

Dynamics 365 for Field Service Summit
[ADDRESS]

[DATE]
[TIME]

We apologize for any inconvenience. We will be sure to notify you if this event is re-scheduled for a later date. Please visit our [website] if you are interested in learning more about other events and webcasts.

Follow-up

Registered, did not attend

Subject line: Dynamics 365 for Field Service Summit: Sorry we missed you
Our records indicate that you were registered for the following event but did not attend:

Dynamics 365 for Field Service Summit
[ADDRESS]

[DATE]
[TIME]

Please visit our [website] if you are interested in learning more about other events and webcasts. We look forward to seeing you at one of our future events!

Invites

Follow-up

Thank you for attending

Subject line: Dynamics 365 for Field Service Summit: Thank you for attending!
Thank you for attending the following event:

Dynamics 365 for Field Service Summit
[ADDRESS]

[DATE]
[TIME]

If you did not get a chance to provide feedback the day of the event, please let us know what you thought of everything via our [survey].

We hope that you found this event valuable and informative. Please visit our [website] if you are interested in learning more about other events and webcasts.

We look forward to seeing you again in the future!

Social + Banners

Twitter

Did you know that connected field service increases technician productivity by 25%? Learn how to add value through service and to build stronger customer relationships with connected field services at our Dynamics 365 for Field Service Summit on [DATE]. Register today!

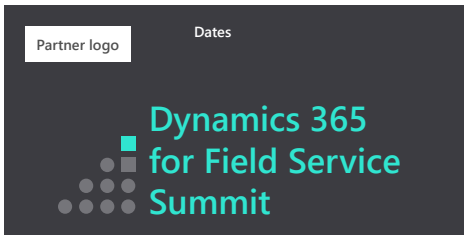
Register for our Dynamics 365 for Field Service Summit, designed to equip you with the knowledge and tools to deliver better outcomes with IoT, optimize your resources, make your technicians more effective, and modernize your field service with mixed reality.

Get inspired and discover new opportunities to improve field service performance at our Dynamics 365 for Field Service Summit on [DATE]. Space is limited.

Did you know that by 2020, 10% of emergency field service work will be both triaged and scheduled by AI? Explore the latest sales tools from Microsoft and learn how to redefine service through connected field service at our Dynamics 365 for Field Service Summit on [DATE]. Register [here].

Deliver a seamless, end-to-end service experience with Dynamics 365 for Field Service. Register for our Dynamics 365 for Field Service Summit and learn how to transform your field service.

Banner



Facebook + LinkedIn

Title: Deliver a seamless, end-to-end service experience with Dynamics 365 for Field Service. Built-in intelligence helps you resolve service issues before they occur, reduce operational costs, and deliver positive onsite experiences.

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- Discover: Discover opportunities to improve field service performance, innovate with proactive service, and create better experiences for your customers.
- Experiment: Try the latest tools from Dynamics 365 for Field Service.

Learn more and register at the link below.

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