

# Transforming Customer Service with Microsoft Dynamics 365.



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# Deliver fast, personalised service and support.

**Dynamics 365 Case Management helps teams efficiently handle all types of support requests and service incidents in one place.**

Service quality is sure to improve when issues are handled consistently and agents are guided towards a resolution in line with your organisation's rules and methodology.

Dynamics 365 guided process flows are configured to cover multiple scenarios, prompt users to ask the right questions, and collect relevant data to progress cases in line with your mandatory steps and best practices. Responding to service issues is rarely a linear process so Dynamics 365 includes branching logic that adapts steps to reflect the data entered.

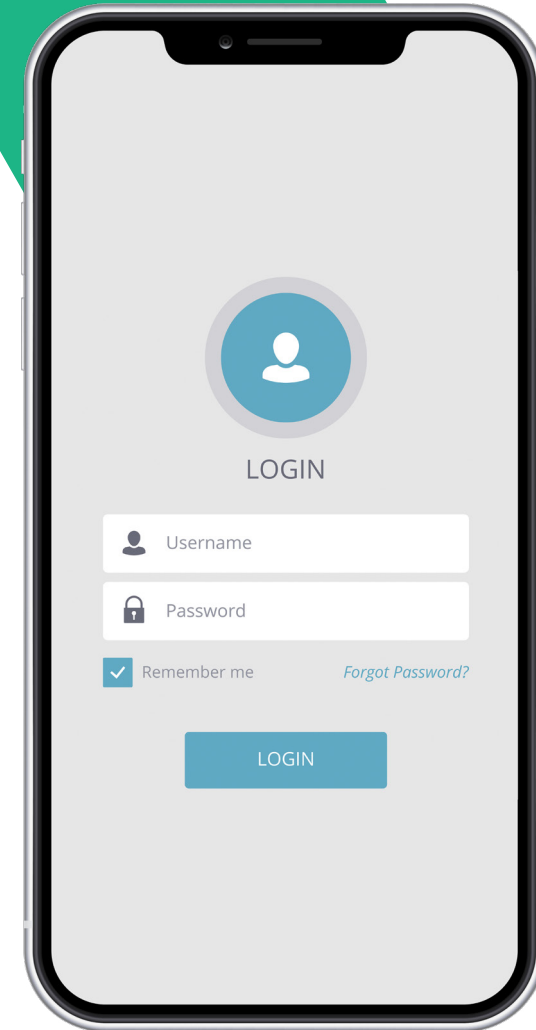
To make sure that support is only provided to authorised customers, the Dynamics 'Entitlements' entity tracks details of each agreement which can include defining which contacts are entitled to use the service.

Varying service levels can be offered to customer groups based on a purchased product or service. SLAs are defined in Dynamics 365 to ensure that each new request is handled in line with these service commitments. Countdown timers enable agents to see at a glance how much time they have to respond. With automated alerts triggered if cases are at risk of breaching a service agreement, corrective action can be taken to preserve service quality.



# Empower customers through self-service portals.

Meet expectations by implementing a self service portal which enables clients to log service issues and check the status on open cases at any time.



**The convenience of a self-service web portal is a proven way to increase engagement, capture ideas and stand out from the crowd. Personalise your portal to share the information that matters most to your external users within a single interface.**

Integrated Dynamics 365 portals empower customers to save time by finding answers online through unified knowledge capabilities. By developing a library of knowledge articles that provide answers to frequently encountered issues, and sharing this online, potential service requests can be deflected.

Web Portals can be configured to share data from any entity and field, or enable portal users to write changes directly back to Dynamics 365.

In addition to contact data, your portal can publish details of active contracts, agreements, appointments, applications and projects to provide customers with a valuable resource that delivers the right answers at the right time.



# Discover insights to drive continual service improvements.

**Real-time reporting across all service metrics means that every aspect of your delivery effort can be measured and reported, to understand and improve performance.**

Dynamics 365 connects with Power BI, to better identify service trends and gain powerful insights into customer behaviour, agent productivity and service experiences. Using embedded interactive dashboards, these analytics and visualisations help managers uncover insights that will help to drive continuous improvements in service quality through informed, data-driven decisions.

**For example, service dashboards reveal trends including spikes and dips in service calls and measure the handling of these issues against key performance indicators including:**

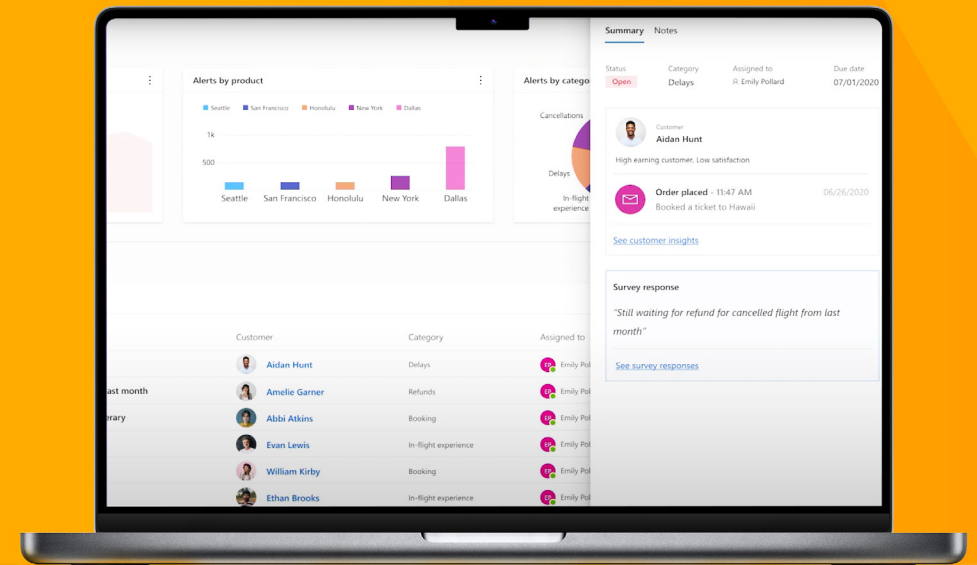
- ✓ Customer satisfaction rates.
- ✓ Case resolution times and average days open.
- ✓ Open and overdue activities by owner, team, type, priority, account.
- ✓ Service activities created in the current month vs last month,
- ✓ Performance vs Service Level Agreement benchmark.

# Capture and analyse feedback to improve customer engagement.

**Better handle your feedback management processes using Dynamics 365 Customer Voice. Collect opinions, ratings and comments that will enrich data and highlight any performance gaps.**

Select from a range of templates or create a survey from scratch, and save them within projects to group together surveys that link to simplify management.

Send out survey invitations manually, or integrate with Power Automate to trigger invitations within the context of defined processes, for example when a case is closed.



Use Customer Voice to set alerts for when high ratings are received and to follow up with autoresponder messages, but also react to low ratings by notifying account managers. View dashboard visualisations displaying response rates, satisfaction metrics and feedback trends, to see a holistic perspective.

Customer Voice usage is included with Dynamics 365 Customer Service Enterprise licences, supporting up to 2000 survey responses per tenant / month by default. Additional response capacity can be purchased as an add-on.



# Innovate with AI-driven insights.

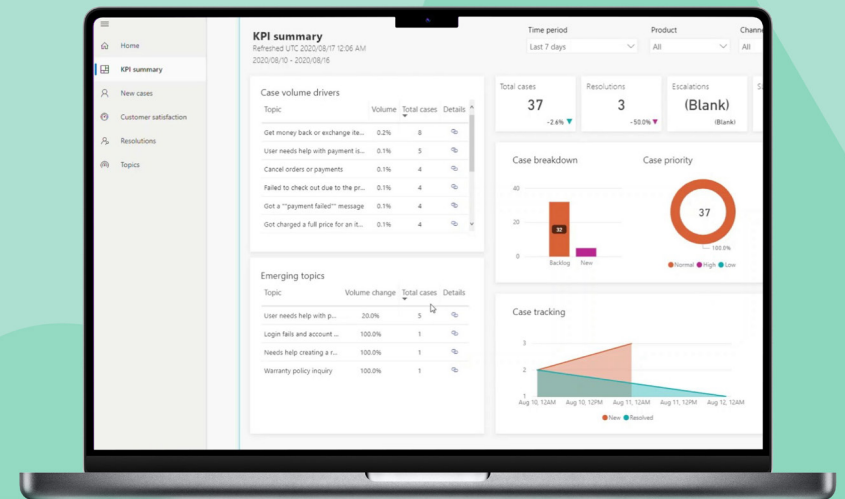
**Dynamics 365 Customer Service Insights uses artificial intelligence to highlight clusters of common cases and emerging trends.**

Using these insights, Service Managers are better able to follow trends so growing issues can be quickly understood before they reach critical levels. In-built reporting reveals which topics are most persistent and which have the biggest impact in terms of time consumed.

Customer Service Insights helps agents resolve issues faster using AI, built into self-service solutions such as conversational Interactive Voice Responses and real-time productivity tools including call transcription, sentiment analysis, and knowledge article recommendations.

Another solution to reduce the resourcing impact of recurring requests is to answer these questions through an automated chat bot. Dynamics 365 Virtual Agent is an AI-based solution that enables bots to be quickly created using a guided, no-code graphical UI and embedded within a website.

Through Virtual Agent, customer service teams are able to take the lead in building bots that enable natural online conversations across numerous topics. This can include configuring bots to take action through connectors to look up any detail, trigger a workflow or sending an email that will help to resolve each issue during these chat sessions.



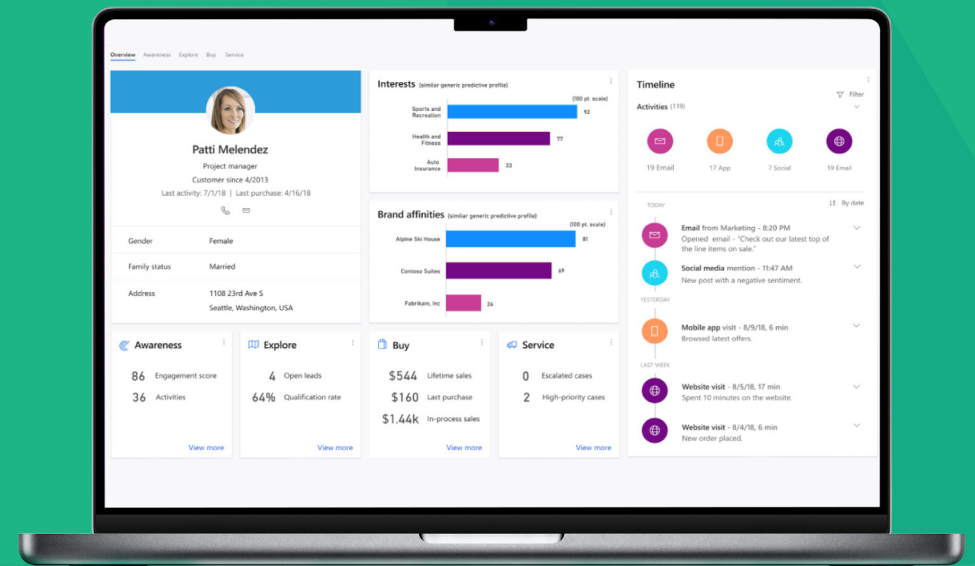


# Unify data to create single customer views and optimise service processes.

Across connected apps, Dynamics 365 gives users visibility of all customer interactions within a single interface.

With a clear picture of each relationship, including recent cases, orders and leads, teams are able to make informed decisions and as a result, customers should experience consistently high levels of service.

Through a Common Data Model, the potential of Dynamics 365 and Office 365 is unlocked. This enables connectivity with hundreds of data sources and apps to automate workflows, manage approvals and handle service processes that will digitally transform the efficiency of your service delivery.



Using Dynamics 365 Customer Insights, demographic, transactional, observational and behaviour data is brought together using prebuilt connectors. This unifies data into comprehensive customer profiles by mapping records into the Common Data Model, with AI applied to match and merge data.

The result is contextual customer insights and tailored customer profile cards which are infused into business applications that help service teams drive personalised engagements across channels.



**Learn more about how to transform service  
and earn customer trust with Microsoft  
Dynamics 365.**



# Get in touch.

## Telephone

0800 458 4545

## Web

[www.ans.co.uk](http://www.ans.co.uk)

## Email

[hello@ans.co.uk](mailto:hello@ans.co.uk)

## Address

ANS Group  
Birley Fields  
Manchester  
M15 5QJ



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