



# RAPID RESULTS

Dynamics 365 for Customer Service





DREAM **BIG**  
START **SMALL**  
DELIVER **FAST**



# RAPID RESULTS

We have developed 'Rapid Results' offering to enable our clients to take advantage of the core 'out of the box' capabilities of Dynamics 365 for Customer Service, to deliver immediate results and to provide a platform upon which additional capabilities can be added in the future. All this can happen within a short timeframe at a fixed cost, and without the risk associated with a lengthy and complex implementation.

Following recognised industry best practice, Rapid Results focuses on delivering the base capability in the first stage of a Customer Engagement project. This approach provides a platform for future improvements, allowing additional capabilities and customisations to be added as needs require.

**6-week duration**

**\$65,000 (ex. GST) fixed cost**



# OBJECTIVE

Empower teams with the right tools & insights to provide real-time, personalised support, optimise resources that scale to meet business needs, and troubleshoot issues anytime, anywhere.

*"Customer Service should not be a Department, it should be the entire company."*

Tony Hseih





# PROVIDE SUPERIOR SERVICE AND BUILD LOYALTY



## Engaging Customer Experience

Deliver engaging and transformative experiences throughout the lifecycle of the customer engagement.



## Case Management

Streamline complex Case Management processes to gain efficiencies and leverage data.



## Knowledgebase

Leverage Knowledgebase to resolve issues the first time, reducing rework.



## Embedded Intelligence

Leverage data insights and AI to provide proactive service and increase the likelihood of a positive referral.





# DYNAMICS 365 CUSTOMER SERVICE





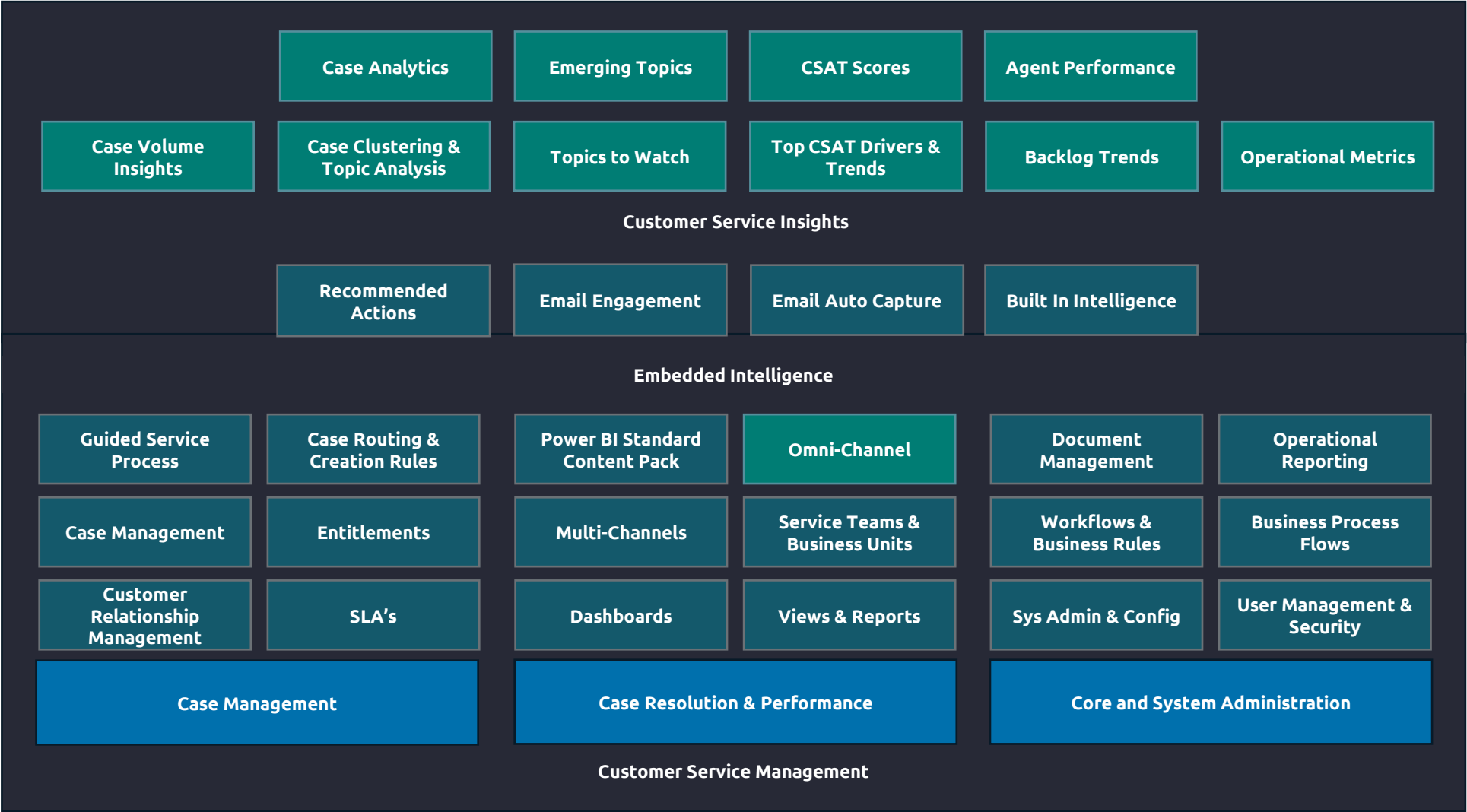
# CUSTOMER SERVICE CAPABILITY



Intelligence and  
Insights



Dynamics 365  
Customer Service  
Model Driven  
Business Application



Included Capability	Future Capability
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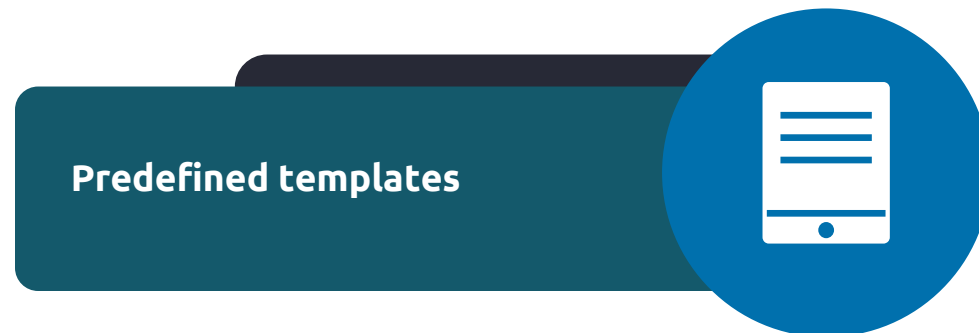
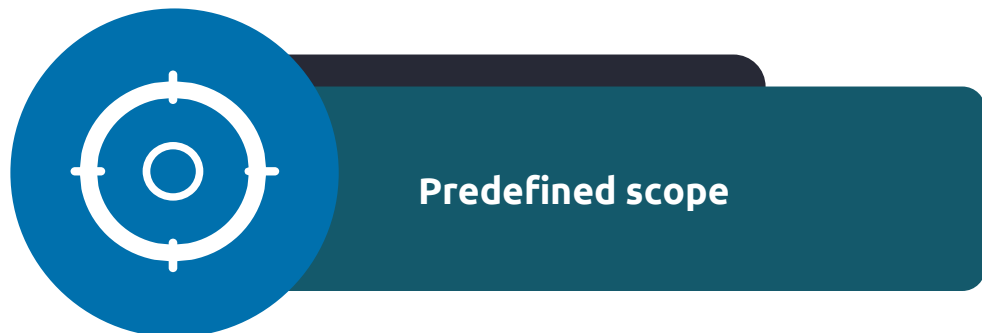
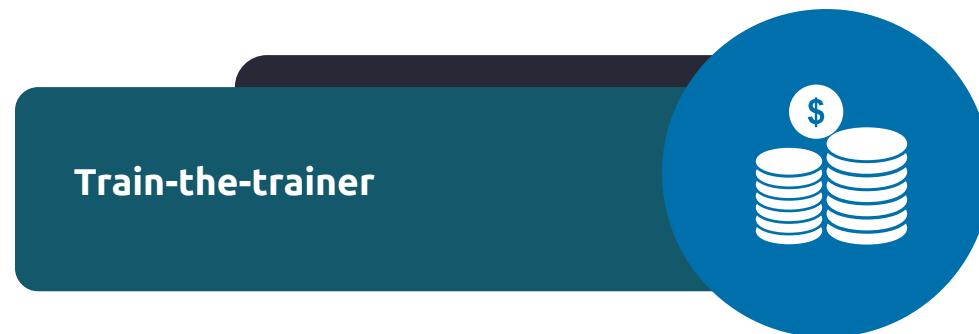
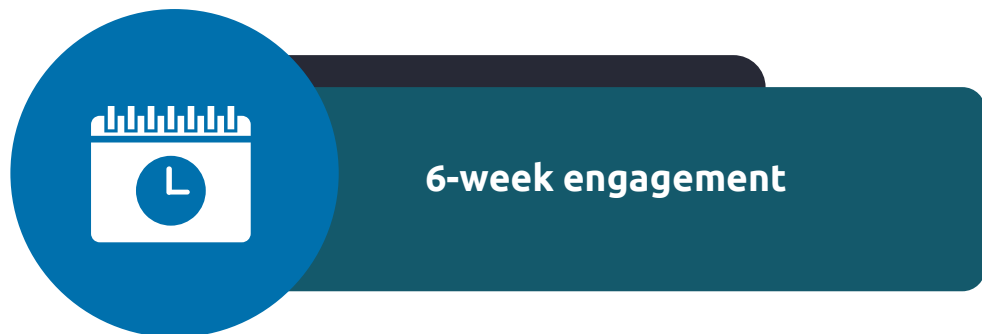
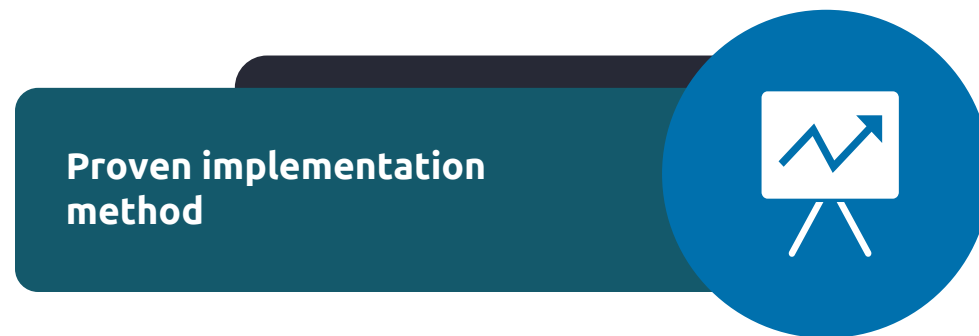




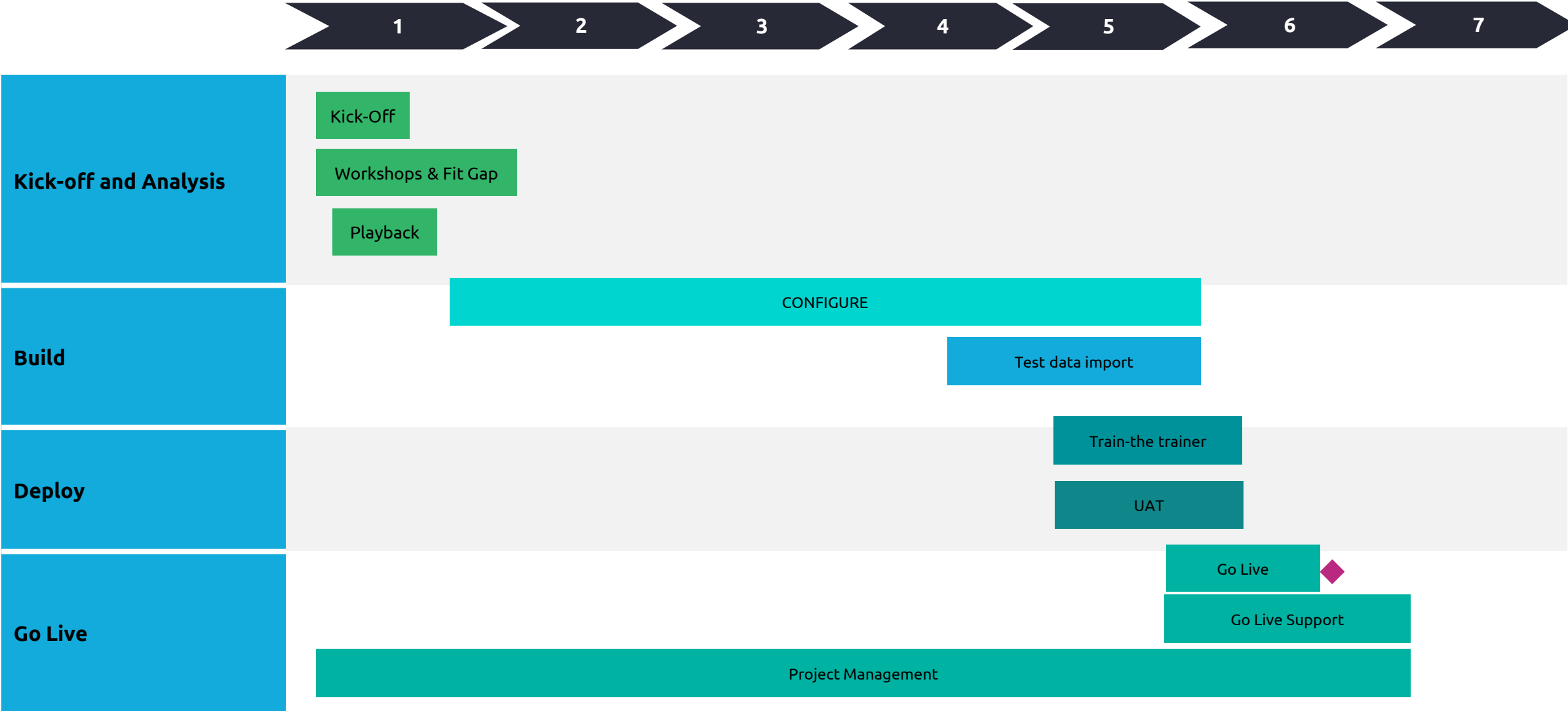
# PROJECT CONSTRUCT



# OUR APPROACH



# PROJECT TIMELINE







# PROJECT SCOPE

## Rapid Results deployment of Dynamics 365 for Customer Service

- High-Level workshop to understand your base Customer Service and Case Management requirements.
- Setup of Out of the Box (OOB) functional areas related to Cases, SLA's, custom queues, case conversion rules.
- Configuration of up to 4 case business process flows with up to 8 stages and 6 steps.
- Implementation of up to 30 field configurations.
- Configuration of 4 automated workflows (up to 8 steps each) across the functional areas.
- Setup of Customer Service Insights
- Data import using Standard import templates for accounts, contacts and open cases.
- Project management and prioritisation with your team on the configurations required to the base system.



# INCLUSIONS

## ■ Base configuration

- Auditing rules and requirements (up to 5 entities), duplicate detection rules (up to 10 simple rules)
- Theme, look and feel (OOB themes)
- Security Roles & Business Units

## ■ Customer Service Configurations

- Initial Customer Service setup
- Basic business process flow and workflows (up to 8)
- Customer Service Forms
- Views & Entities based on workshop output
- Custom queues and case conversion rules, including configuration of service mailbox queues (up to 4)
- Custom email, word template and notification (up to 1 each)
- Custom Charts and views
- Mobile Forms configuration

## ■ Dashboard & Reporting Configuration:

- Power BI connector pack (OOB)
- D365 Customer Service dashboard (OOB, up to 2 simple dashboards)

## ■ Data Migration

- Importing of Accounts and Contacts, and Open Cases supplied by your team in a templated format defined by us.

## ■ Train-the-trainer

- Training of key users will be done via a train the trainer style approach with standard training materials and with the objective of having super users trained up to deliver training to the rest of the business

## ■ Deployment & Go-Live

- User Acceptance Testing support (8 hours timeboxed)
- Deployment to Production
- Go-Live Support (4 hours timeboxed)
- Post implementation review and planning of future enhancements and opportunities

## ■ Assumptions

- Capgemini to be nominated as Claimed Partner of Record (CPoR) for Dynamics 365 and Power Platform.
- Capgemini to be nominated as Digital Partner of Record (DPoR) for Microsoft subscriptions.
- Project deliverable will only include a Production ready solution.
- Only 2 instances (Sandbox & Production) will be configured.





# EXCLUSIONS

- Deployment (including training and configuration) of other functional areas that are not specifically mentioned in the inclusions section above e.g. Sales, Marketing, Field Service or other Business Application components.
- Integration to external systems (This will be viewed as a potential Future Phase).
- Installation and configuration of third party products.
- Development of reports and web resources.
- Setup and configuration of SharePoint, except for enabling the standard Out of the Box Server-Side Integration and Document Management.
- Setup and configuration of Exchange Online or Office 365, except for the enabling of Out of the Box Server-Side Integration with either Exchange On-Premise or Exchange Online.
- Customisations including custom development, custom scripts, plugin and Azure development are excluded from the scope of this project.
- The following aspects of data migration and import:
  - Data cleansing (this is the your responsibility).
  - Extracting data from existing systems (this is your responsibility).
  - Populating Templates with extracted data.
  - Any modification to the standard upload templates.
  - Resolving Data Issues found upon import.



**GET THE  
FUTURE  
YOU WANT**





## About Capgemini

Capgemini is a global leader in partnering with companies to transform and manage their business by harnessing the power of technology. The Group is guided everyday by its purpose of unleashing human energy through technology for an inclusive and sustainable future. It is a responsible and diverse organization of over 325,000 team members more than 50 countries. With its strong 55-year heritage and deep industry expertise, Capgemini is trusted by its clients to address the entire breadth of their business needs, from strategy and design to operations, fueled by the fast evolving and innovative world of cloud, data, AI, connectivity, software, digital engineering and platforms. The Group reported in 2021 global revenues of €18 billion.

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