Fully deploy a solution for optimizing and automating financial customer services with Idea Entity's Implementation Services.

Idea Entity provides consulting services to accelerate organizational change through functional empathy that creates people first experiences with productive business outcomes. Our "Change Management" and "Work from Anywhere" services maximize Microsoft technologies to connect people and processes with innovation.

As a Microsoft Gold partner with proficiency in Azure and Microsoft 365, we deliver Modern Work, Business Application solutions that optimize and accelerate the digital transformation journey for enterprise and government organizations worldwide.

Automating customer services workflows to deploy a financial customer services platform will allow you to expand the end user customer experience, deliver higher customer services response times, improve finance operations, gain greater visibility to monitor and analyze performance, increase efficiencies, and lower costs.
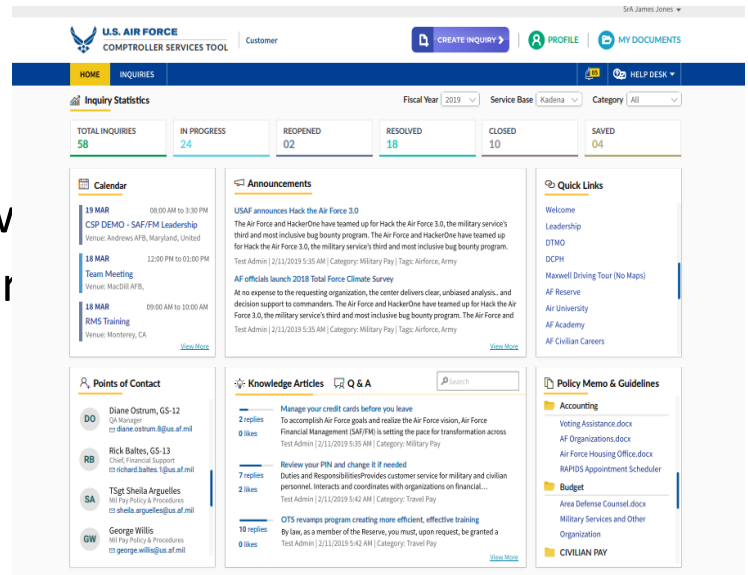
The solution will modernize financial customer services through automating workflow processes, deliver an online, 24/7 customer experience, provide knowledge base access for support inquires, and quickly gain financial insights through digital dashboards.   The Implementation Services deliver real-life application of the financial customer services workflow automation idea.
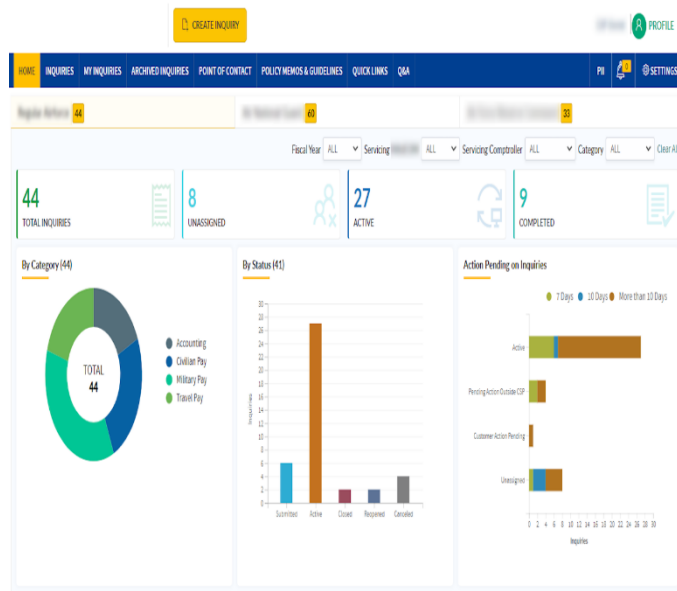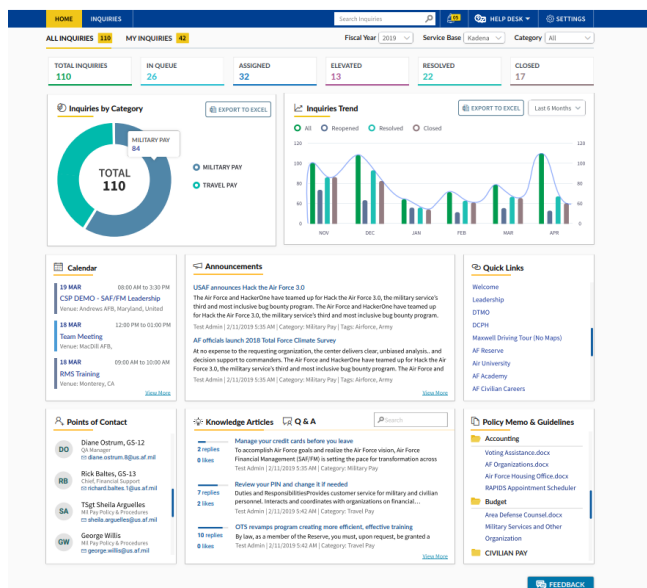
Implementation Services Includes:

- Asses, pilot, and implement automated financial customer services solution
- Leverage a proven methodology to migrate all identified minimal viable products (MVP) and move to exceptional viable product (EVP) status after completing rapid testing to ensure they meet the requirements
- Conduct end user and business decision makers feedback session and include recommendations into solution
- Establishment of end-to end knowledge graphs for workflows and processes
- Design and implement digitized dashboards based on leadership KPI's and requirements
- Training and Support

Business Benefits of Implementation Services

- Modernized, secure and scalable solution providing fully automated processes for managing finance customer services
- Improved employee productivity resulting in costs savings, quicker inquiry response times, and increased reporting accuracy
- Enhanced customer services will reduce overhead and increases revenues and profits
- Access to customized digital dashboards to accelerate real time business insights
- Documented governance and compliance policies
- Support and Maintenance