



Dynamics 365 Customer Service

Core Customer Service Deployment



Introduction

Dynamics 365 Customer Service is Microsoft's solution for your service area. It is perfect for your call centre; managing queries, operational actions, complaints and case management. Customer Service empowers your teams by streamlining the data from these channels and providing the unified technology needed to deliver seamless, personalised customer experiences.

Core Customer Service Deployment package

Incremental Group offers a packaged Dynamics 365 Customer Service Deployment.

Our deployment approach is designed to get you up and running quickly with a new customer service solution that will deliver for your organisation.

Our Core Customer Service Deployment is a complete delivery approach with no hidden costs, delivering all the core functionality needed to optimise the customer service function.



PACKAGE



What is included?

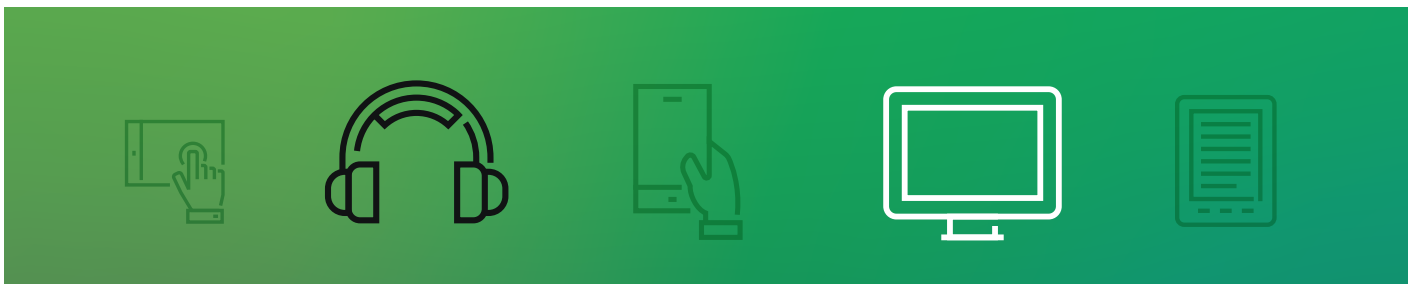
As a Microsoft gold cloud CRM partner, we have used our vast experience to create a package of the most frequently required, core Customer Service functionality.

Our proven delivery approach is designed around your requirements. To ensure the implemented solution works for your organisation, our package allows for appropriate time for requirements gathering workshops and each step of the deployment focuses on collaboration with your team.

Functionality

- » **Case management** – End to end management of enquiries, from queries to complaints, allowing all case activity to be tracked, standard customer service processes to be applied and users provided with the right information at the right time.
- » **Contract management** – Tracking of customer contracts and entitlements, such as specifying the number of cases that can be submitted by customers across the various channels.
- » **Inbound email queues** – Emails can be received directly into Dynamics 365 Customer Service, with automated case creation based upon the email.
- » **Automatic replies** – Automation of case creation and case resolution emails, helping to standardise communication and automate processes.
- » **SLAs** – Full service level agreement (SLA) tracking, helping to drive SLA compliance across customer service teams with clear target dates for key activities and outcomes such as case resolution.
- » **Knowledgebase** – Supporting customer service teams by embedding standard knowledgebase articles within the case management screens. Users can access pre-defined answers to common queries, supporting faster case resolution.
- » **Dashboards** – Interactive dashboards allow customer service agents and customer service managers to understand case volumes and trends, enabling them to focus efforts on the right things at the right time.
- » **Business process flows** – A visual guide, allowing users to move through defined, proven, standardised processes, moving toward a successful case outcome.
- » **Outlook integration** – Dynamics 365 can be embedded within Outlook, supporting users to efficiently track emails into Dynamics 365 and associating them with the correct customer and case.
- » **SharePoint integration** – Enabling document management for customer support cases, whether this be storage of signed customer contracts, or customer provided documents describing an issue in detail.
- » **Dynamics 365 Customer Service Insights** – Advanced, reporting and analytics of your customer service data. Covering everything from KPI performance, to customer satisfaction, through to trending topics.
- » **Customer satisfaction surveys with Microsoft Forms** – Capture customer feedback easily, with feedback forms that are easy to create, complete with inbuilt analytics such as sentiment analysis.

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Consultancy

- » **Requirements gathering** – We start your implementation with product training and workshops with your team. We gather your requirements and develop an understanding of your organisation in order to implement a solution that truly delivers for your customer service function.
- » **Configuration** – We configure the platform with additional data capture fields (as required) on core records such as accounts, contacts and cases. We also configure functionality such as SLA management, inbound email queues and email templates to suit your needs.
- » **Templated data migration** - We provide data migration templates to import core data into the solution.
- » **Training of your users** - User adoption is a critical factor in delivering return on investment. We provide full training as part of our implementation. This covers training on how to complete user acceptance testing, system administrator training and end user training taking a train the trainer approach. Our tailored training approach gets users involved early and ensures knowledge transfer throughout the process. All training is delivered via Microsoft Teams, with sessions recorded so that they can be re-played to additional users.
- » **Set up of users and security roles** - Our consultants will work with the relevant stakeholders in your organisation to define and set up user profiles and security roles to ensure the correct governance is in place when you start to use your new system.
- » **User acceptance testing** – We support a period of testing for your technical and business users to ensure clear acceptance criteria is met and the system is delivering for your organisation.
- » **Go live** – Our consultants will take the finalised system and transition it into a live environment, enabling you to start transforming your customer service experience.



Cost

Our Core Customer Service Deployment package costs £25,000. This includes all the functionality and consultancy items outlined above.

There are a number of options for your user licenses.

Dynamics 365
Customer Service
£37.70
per user per month

Dynamics 365
Customer Service
Professional
£71.60
per user per month

[Contact us](#) to understand more about the differences between the license levels.

Bolt-on packages can be added to your deployment to expand the functionality of the system. These are available at an additional cost. See section below for more detail.



Timeframes

Our Core Customer Service Deployment package is typically delivered within 4 to 6 weeks. If bolt-on packages are purchased these will add to your deployment timeframe.

Key benefits

- » Improved customer service agent productivity
- » Improved data insight supporting proactive customer service
- » Improved customer service through SLAs and greater insight
- » Improved view of the customer
- » Reduced case handling time through process standardisation and automation
- » Greater management insight into workload and agent performance.

Enable KPI improvements in:

- » Average case handling time
- » First call resolution rate
- » Number of customers per Customer Service FTE
- » Customer service staff turnover
- » Customer satisfaction scores.



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Bolt-on packages

We have a number of bolt-on packages available to expand your system. These are available at an additional cost.

Customer self-service portals bolt-on

Benefit from:

- » Embedded knowledgebase
- » Raise support requests
- » View support requests

AI bolt-on

Benefit from:

- » Dynamics 365 Virtual Agent

Onmichannel bolt-on

Benefit from:

Omnichannel Engagement Hub:

- » Work distribution management
- » Agent scripts
- » Quick responses
- » Macros

Channels:

- » Chat
- » SMS
- » Facebook
- » Twitter
- » WeChat





Find out more

As a Microsoft Inner Circle member and gold partner for Cloud Business Applications, we use our strong track record and expertise to deliver a solution that works for your organisation.

With Dynamics 365 Customer Service expertise in manufacturing, public sector, not for profit, professional services and more. Discover just some of our [customer case studies](#) here.

Get in touch today to discuss your package

[Contact us today](#) to discuss deploying this package for your organisation.