

Dynamics 365 by Minsait



Presentation and value proposal

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01



Minsait
an Indra company

Who we are

Indra is currently the **leading technology in Spain** and one of the **main in Europe and Latin America**

Business Consulting

Technology

Digital Solutions

3.043 M€ sales

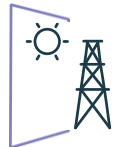
+49.000 Professionals

Projects in +140 countries


Local presence in 46 countries

50% sales abroad

(2020 Data)

16%
Energy and Industry




11%
Telecom and Media




17%
Financial services



18%
AA.PP. and Health



17%
Security and Defense



21%
Transport and Traffic

Sistemas de Gestión Empresarial

- ERP Solutions
- Payroll and Human Capital
- Consolidation and budgeting

Tecnologías Avanzadas

- Business Consulting
- Technology
- Digital Solutions

Outsourcing y BPO

- User Management
- Application Maintenance
- Infrastructure Management

Paradigma

- Agile Projects

Ciberseguridad



- Digital Risk
- CyberSec Services & Solutions
- Digital Identity and Signature



02

Dynamics Teamworkers

Accelerated digitization is forcing companies to look to platforms as the main innovation tools to change the way they engage with their customers, streamline processes and exploit data.



Excellence in customer experience

Take advantage of the hybrid world between the physical and the digital, with the digital impulse to adapt to new needs through the redesign of experiences for a greater approach to customers



Cost reduction

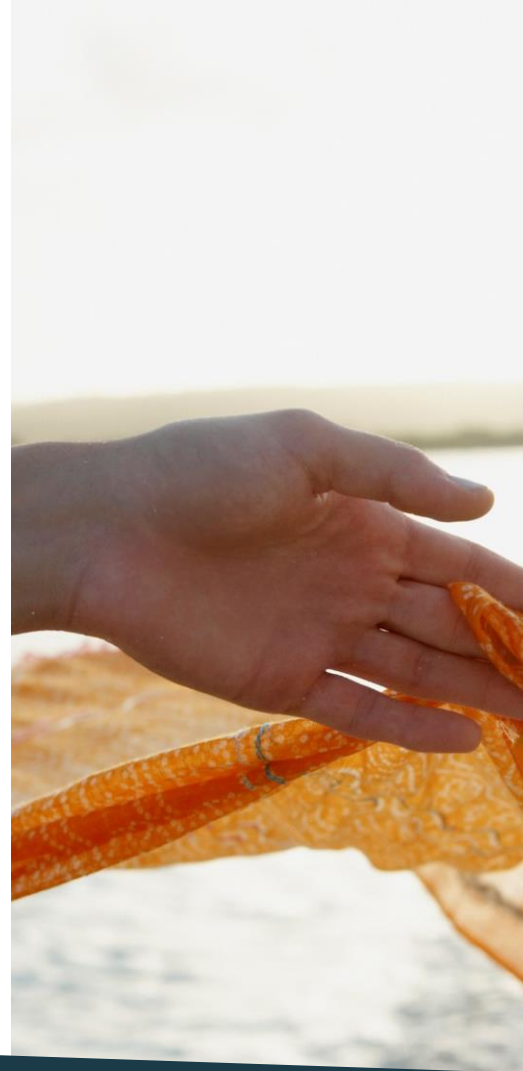
Adoption of the cloud with a company strategy, reducing project deadlines, multiplying scalability and gaining agility in innovation



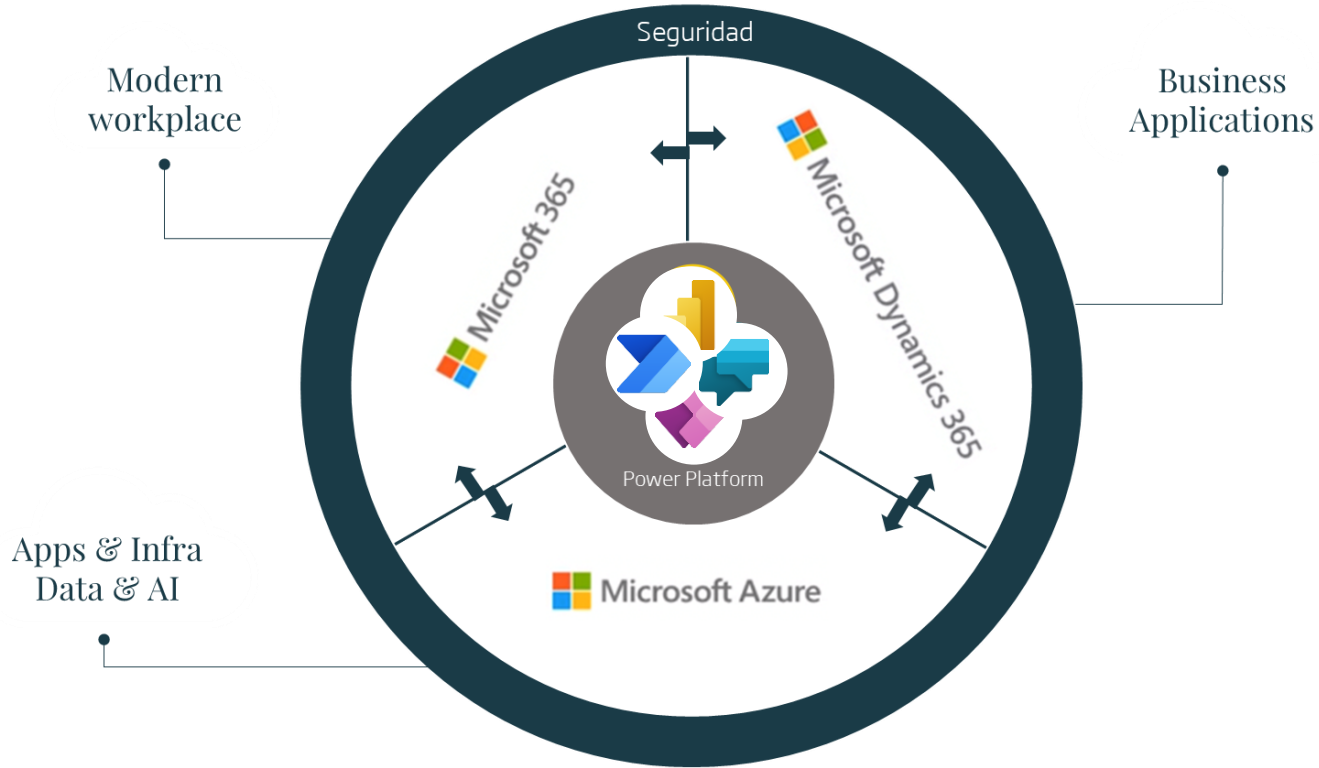
Smart decisions

Exploit data at scale and improve data quality to unlock its value to business with applied intelligence

At Minsait, we combine the best capabilities on Microsoft Dynamics 365 platform for the development of solutions on a global scale that allow our clients to lead the transformation in their industries, focusing on improving customer experience, reducing costs and applying intelligence in decision making.



Committed to thinking about the world through platforms and ecosystems



We approach our projects with a holistic and integral vision of the Microsoft Platform, with the perspective of Dynamics 365 as a core system but using the entire ecosystem of **Microsoft solutions as a platform to extend its capabilities**



Modern workplace

Productivity
Collaboration
Communication
Culture



Business Applications

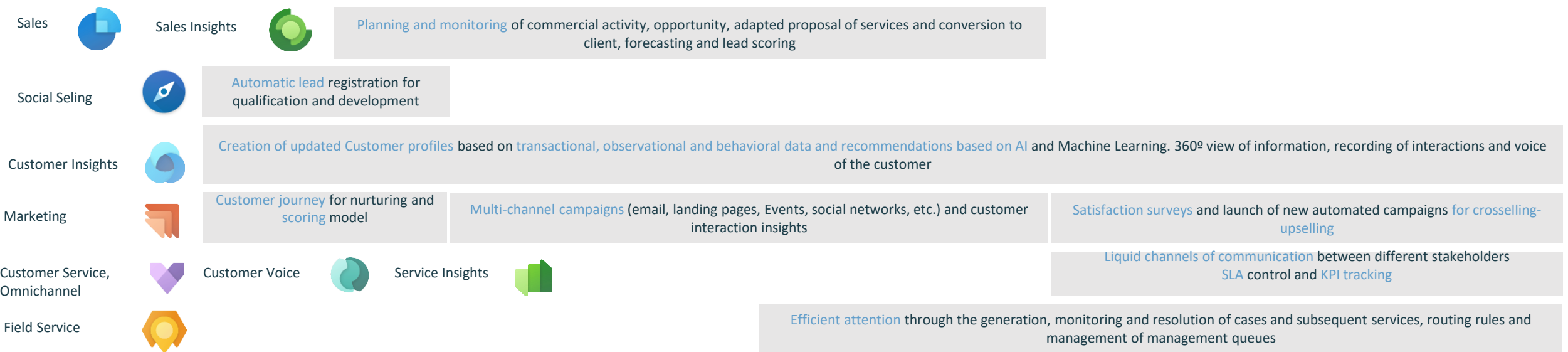
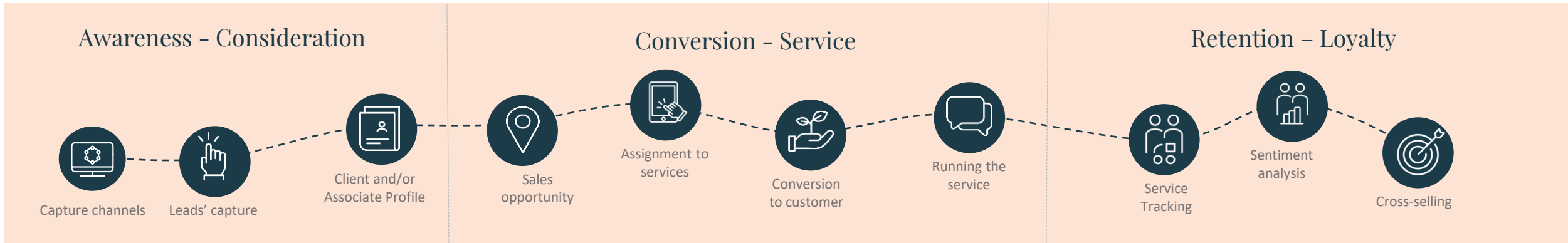
Value creation
Efficiency
Profitability
Scalability



Apps & Infra Data & AI

Proactivity
Creativity
Competitiveness
Adaptation

We provide a unified end-to-end experience of the customer journey as experts in Microsoft Dynamics 365 solutions



+180 Experts

in Dynamics 365 & PowerApps who apply innovative methodologies:

- Microsoft Catalyst Design Thining, Service Design, Process Innovation
- DevOps

guaranteeing the quality of service and delivery time due to our profile's portfolio:



Strategic Consultants (Sales, Customer Servicem, Marketing, Field Service, Power Apps)
Technology Consultants
QA Consultants
Project Managers
Service Managers



Architects
Technicians
DevOps

Helping organizations get more value from technology investments

We address the challenges of our customers with teams specialized in Dynamics 365 solutions with a **Cloud First mentality, adapting our methodology and approach to the level of maturity of the client.**

At Minsait, we have developed 4 exclusive solution practices that allow us to promote and lead the digital transformation of businesses

CX Marketing by Minsait



Success Sales by Minsait



Seamless Customer Service by Minsait



Smart Field Service by Minsait



We combine creativity, innovation and technology to **turn leads into business relationships**

Business impact

Efficiency

Reduce time and margin of error by automating tasks performed in digital marketing strategies



Conversion

Identify each action according to lead scoring of potential customers to optimize lead nurturing tasks and get more conversions

Awareness

Improve the relevance of campaigns and traffic to **Impact more** by generating **qualified leads** of better quality



Upsell clients

Create up-selling, cross-selling scenarios and **increase recurrence**



Engagement

Increase interactions to **expand** sales opportunities and **reduce the cost** of attracting leads



Life-time-value

Increase the net value of the **income** generated by a **customer** with fluid experiences and without breakouts that work for **loyalty** and **recommendation**

Features

Content creation

Templates and A/B testing to control content effectiveness

Comprehensive online/ offline event management

no code needed

Social Media Marketing

Planning and publication of content in RRSS (Facebook, LinkedIn or Twitter)

Social listening

Add relevant tags to the journey, events, and other entities

Customer Journey

Segment and orchestrate personalized experiences

Email Marketing

Automation of sending personalized e-mails and autoresponders according to journey

Landing pages

Landing pages and web forms for lead capture

Lead nurturing

Personalized content marketing to potential customers

Marketing Analytics

Assist in measuring impacts in each action

Mobile marketing

SMS y MMS



Marketing

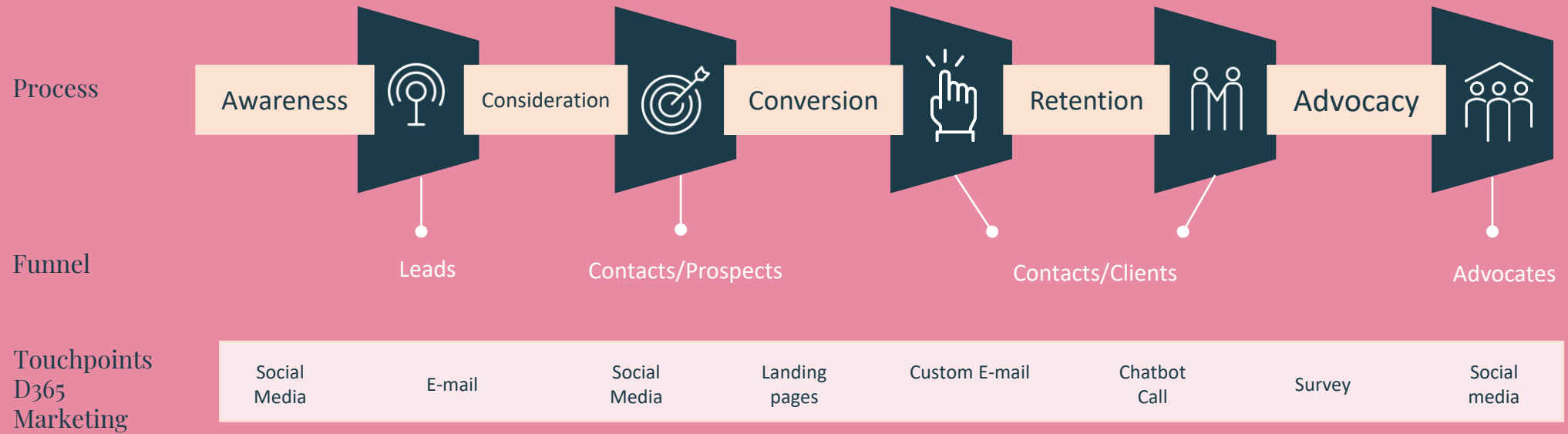


Customer Insights



Customer Voice

Marketing end-to-end Cycle



Automate the actions of marketing strategies with a 360 view of the customer, using data responsibly to create **personalized and connected digital experiences**

Success Sales by Minsait



We help companies build relationships at **scale and make strategic decisions** based on the **value of data**

Business impact

Increased sales

Increase in the number of Leads and **conversion** rates in customers



Productivity

Connect teams through a **single workspace** that **improves collaboration**



ROI

Achieve the **expected return on investment** in sales operations



Planning

Generate **savings and optimization** in the management of agendas, trading activity and forecasting



Time to market

Improve control of the opportunity cycle by **shortening sales cycles**



Loyalty

Creating **lasting relationships** with clients who generate **recurrence** and seek **recommendation**



Features

Business cycle management

Lead, clients, Contacts, Accounts, Opportunities...

Forecasting

Predictive sales forecasts, scoring and next best action

Pipeline Management

Review of sales cycle opportunities and offers

Product Catalog

Product management and price lists

Sales Accelerator

Recommended guidelines and processes

360 Customer Vision

With built-in AI for upselling and crossselling creation

Linkedin

Native integration for lead generation

Teams, Outlook...

Native integration for automatic record creation and collaboration enhancement

Process management

Automation and customization of business flow



Sales

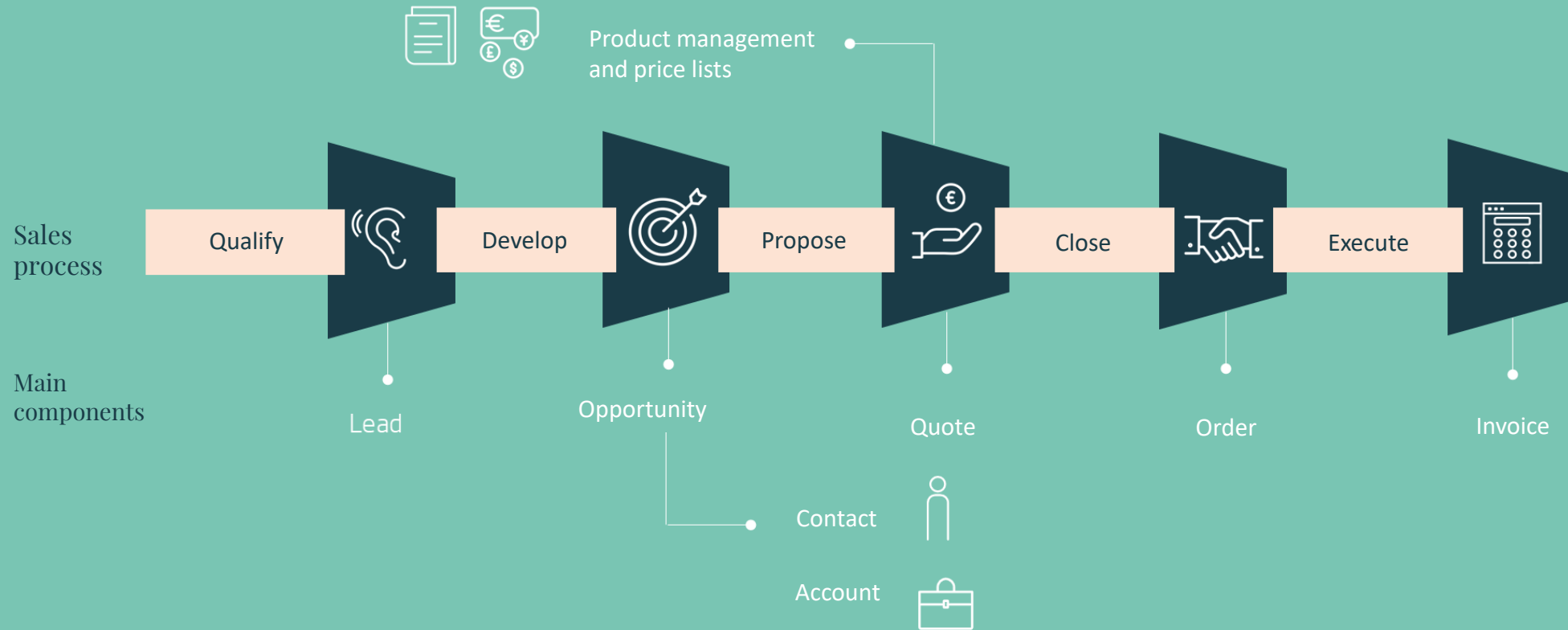


Sales Insights



Social Selling

End-to-end Sales Cycle



Guide and automate the sales process with tools to improve the shopping experience and build lasting relationships with customers

Seamless Customer Service

by Minsait



We drive intelligent interactions that **improve experience, customer satisfaction** and foster **loyalty** and **retention**

Business impact

Minimize costs

Automatizando tareas repetitivas de los agentes, logrando la máxima excelencia operacional



Customer retention

Comprehensive **omnichannel** experience without breakages



Increase satisfaction ratios (CSAT) and recommendation (NPS)

con líneas de **comunicación** abiertas de forma **continúa**



Proactive customer support

Empower customers with **unattended communication 24/7** via Chatbots, Q&A...



Quality

visibilizando el **histórico** de cliente en **tiempo real** para **que cualifiquen** las respuestas de los agentes



Compliance with SLAs

Shorten response times and track key agent **performance indicators**



Features

Omnichannel service

Liquid experience with integration of on/off communication channels

Comprehensive incident management

From the creation of a case to its resolution and feedback

Artificial intelligence

to optimize customer service processes

Automation

Of standard processes and tasks

Up-to-date and accessible knowledge base that allows agents to perform queries quickly

Unattended communication

Deploy no-code virtual agents with machine learning and integrated NLP

Self-service

Portals/Websites with Q&A (knowledge bases))

Data tracking and analysis

to ensure continuous improvement of customer service

Contact Centers/IVR

Native integration and connectors



Customer Service + Omnichannel



Customer Insights



Service Insights

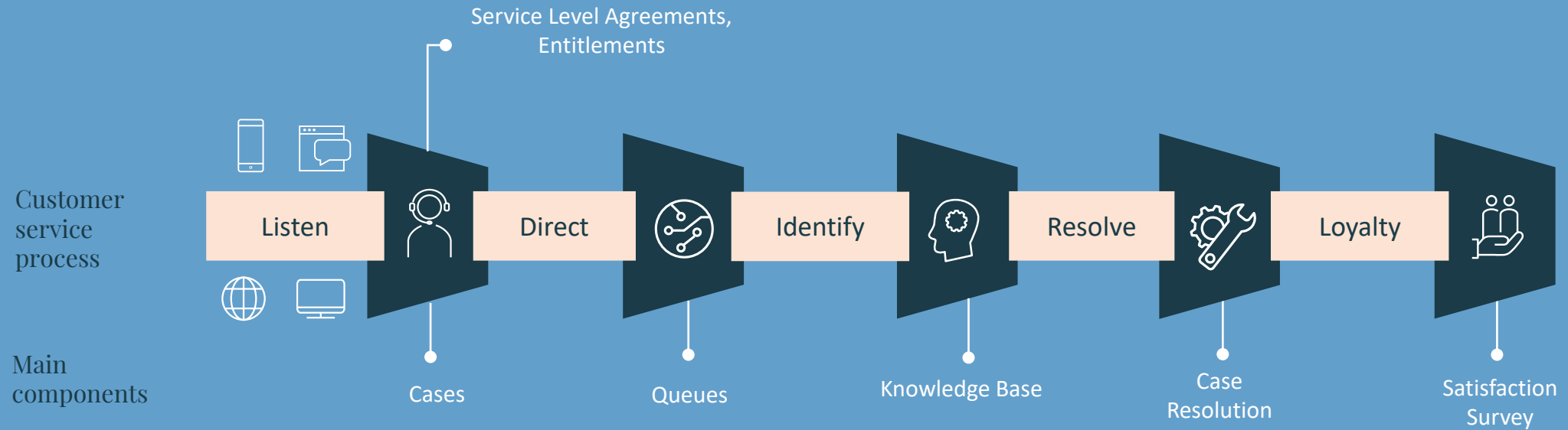


Power Virtual Agents



Customer Voice

End-to-end Customer Support Cycle



Leverage the use of technology and digital channels to create more efficient service processes and a better experience with a 360 view of each customer's unique profile

Smart Field Service

by Minsait



We enable teams to achieve **maximum customer satisfaction in field service** with a solution that enhances efficiency, proactivity, optimization and self-service.

Business impact

Efficiency

with adequate **resource allocation** and service **planning** improvements



Fulfillment of commitments

Control of works with a system that **comprehensively** manages the **services performed**



Savings and profitability

Managing assets and resources efficiently with the and support of asset-centric processes



Agility and deadlines

reducing **execution times** and achieving **greater efficiency** in customer management



Productivity

allocate resources based on their skills, capabilities, and requirements for each service



Time-to-value and customer retention

Improve the field service experience with greater **accuracy and quality**



Features

Mobility applications

Allowing technicians to work anywhere, both offline and online

Effective execution of work orders

Automation and AI

For the planning of resources and equipment, guaranteeing the success of meetings with the client

Predictive maintenance

IoT with real-time data to drive connected experiences

Route optimization

Always guaranteeing the most optimal work during the day

Inventory

With a "zero stock" approach with static and mobile locations

Self-service portals

to provide flexibility to customers, allowing them to program on their own time, directly from their devices

Mixed reality

for the resolution of customer incidents



Field Service



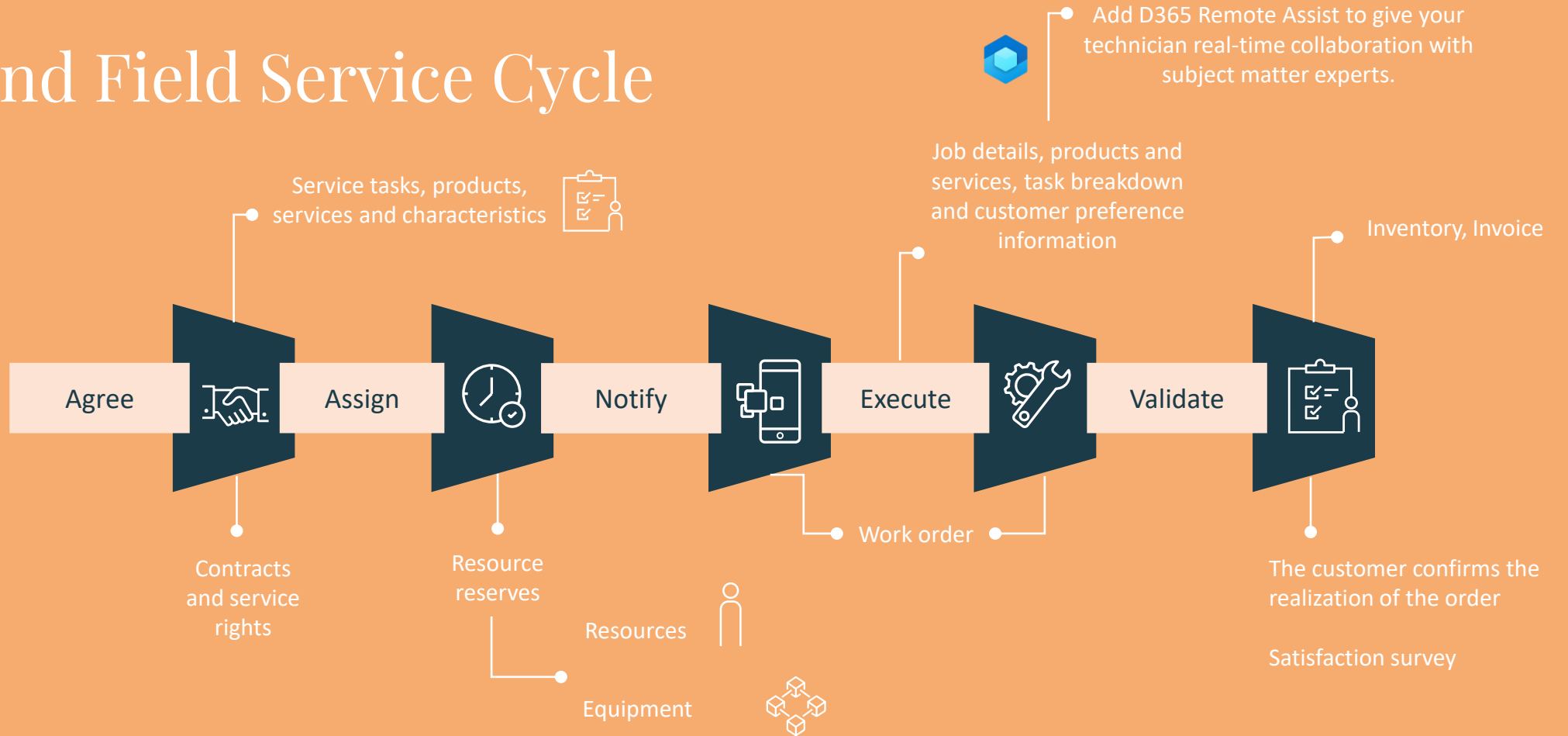
Remote Assist



Customer Voice

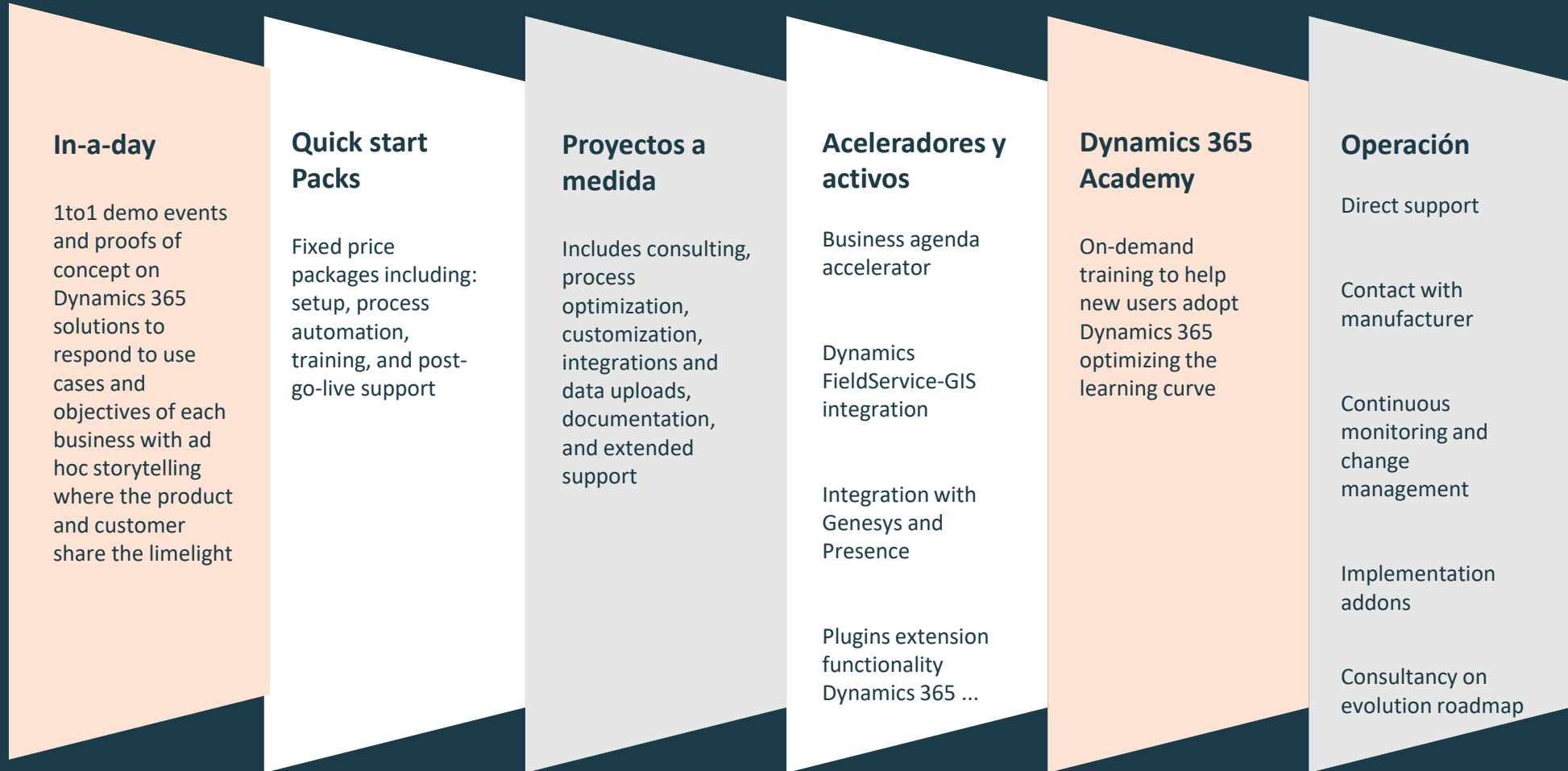
End-to-end Field Service Cycle

Field Service Process



Help customers optimize field service operations with an asset-centric management solution that provides a complete view for equipment and service equipment planning

We use our experience to accelerate digital transformation



Our vision and capabilities

We ensure the quality of the service thanks to the certifications that accredit us...



Partner of the year 2021
Data&AI Power Platform

Advanced Low Code
Specialization



+1.000

Professionals with
specialized knowledge



+250

Data & Analytics Experts



+300

CRM & ERP experts



+230

Experts in Infra & Apps



+120

Power Platform
Experts



+15

Professionals accredited
as Microsoft Certified
Trainer



+100

Digital Workplace & M365



+1.000

Projects

+500

Clients

+12

Geographies



+300

Digital transformation projects
in progress

**Microsoft Azure Advanced
Specialization: Windows Server and
SQL Server Migration**

Demonstrate our expertise in migrating and
optimizing Windows Server and SQL Server-
based production workloads to Azure.



+20

Years of experience



03



Agenda



How do we do it?

People first

Understanding users, their needs and aspirations well

Communicating

Helping all attendees share their vision of problems and solutions

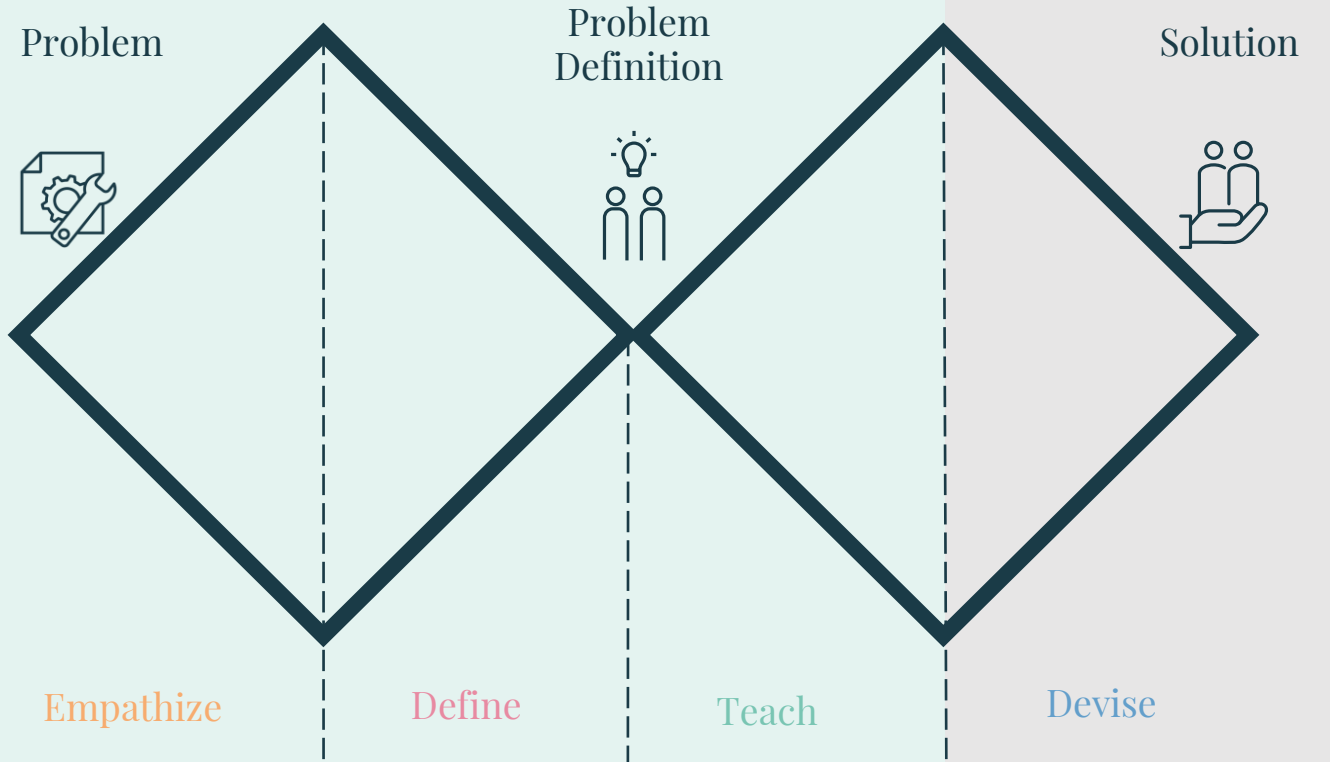
Collaborating

We are looking for a solution with multiple inputs



In scope

Future roadmap



Empathize

Define

Teach

Devise

Session to acquire knowledge about the business, so that we learn about their vision and the direction to follow

Evaluate and prioritize the main problems obtained in the previous phase

Demonstrate Dynamics 365 platform standard capabilities slightly adapted to the business case

Begin the transformation based on the solution proposed

Deliverables

01

Ideation

Business Problems

List of problems collected during the session



02

Design

Capabilities document

Presentation in PDF format of the capabilities of the tool





04



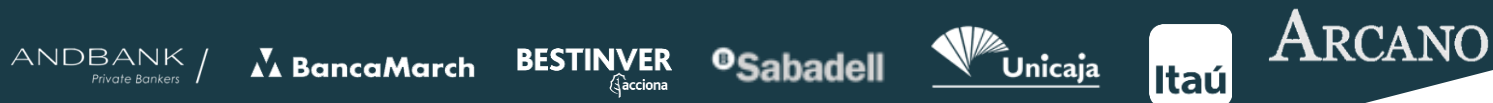
Experiences



Industry



Financial services



Insurance



Telco and Media



Energy



Public sector



+40 customers have trusted

in our strategic expertise and professional support to transform their business

Top Industry & Consumer projects

Digital Selling/Improve Customer Engagement

Ingeteam

We identify potential improvements to achieve **maximum operational efficiency, optimizing the management processes with customers and the commercial process** of the photovoltaic energy area at an international level, centralized in a technological solution that allows its constant evolution.

Dynamics 365 Sales

Digital Selling/Improve Customer Engagement

Enable Always on service

Modix 

Comprehensive implementation of the Microsoft Dynamics 365 solution for commercial management (integrated with NAV and Power BI), providing: Vision 360, management of opportunities, contracts, offers, invoices and product catalog, and support to the B2B Marketplace of vehicle sales

Dynamics 365 Sales, Marketing

Build a resilient supply chain

LEADING COMPANY
IN THE SECTOR

Redesign of the management and planning of Urban Services activities under a new technological platform that serves as a lever to **improve efficiency in the provision of services and processes.**

Dynamics 365 Field Service

Digital Selling/Improve Customer Engagement

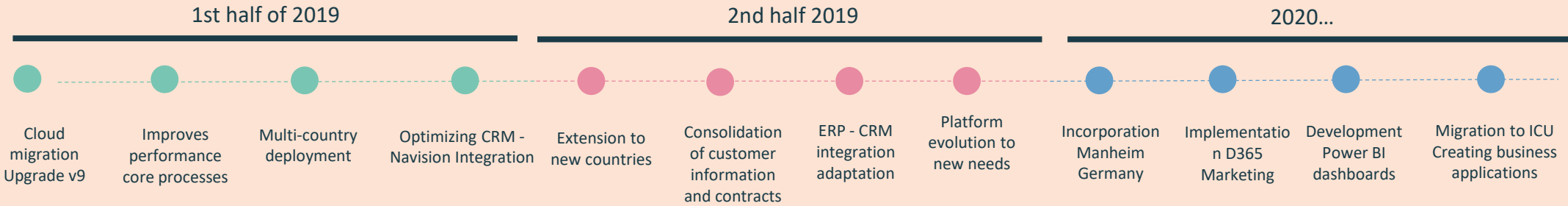
Enable Always on service

ie
Reinventing
Higher Education

We provide **all the necessary services for the management** of the application for access to the institution, admission process, student enrollment and Alumni management.

Dynamics 365 Sales, Marketing & Customer Service

Optimization of the commercial management process



7.369
Client portfolio

+1,6K
Last 12 months orders

▲ 18,5%
Last 6 months qualified leads

60
Active workflows

+13K
Last 12 months Invoices issued

1088
Impacts generated

+1,1
Leads from the last 12 months

21
Generated Power BI Dashboards



D365 Sales



Sharepoint



Microsoft Dynamics NAV



Azure



D365 Marketing

Top projects Financial Services

BancaMarch

Standardization of the commercial system, placing the customer at the center of the commercial process through a 360º vision, which would allow establishing a higher level of engagement, with special focus on the quality of the service, and optimizing the retention and loyalty ratios.

Dynamics 365 Sales & Marketing

ALANTRA

Global solution to **provide optimize the management of the pre-sale of investments for the area of Asset Management:** Investment management
Attracting new investors
Centralization and sharing of communications carried out with contacts
Management of investment opportunities

Dynamics 365 Sales



Pioneering portal worldwide in the Catholic Church to receive contributions from donors to any parish or diocese in Spain. State-of-the-art tool for data analysis, communications, donor care and bank processing of donations.

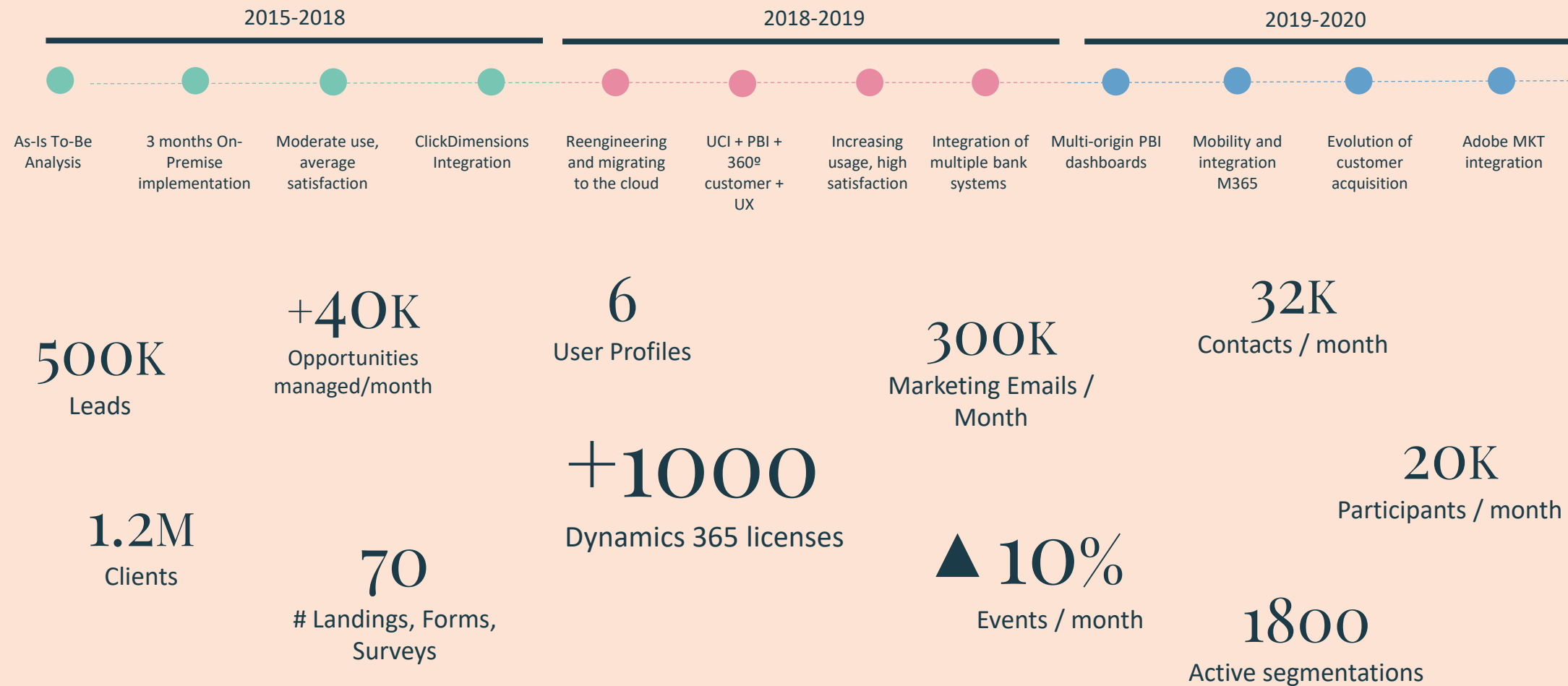
Dynamics 365 Sales & Marketing

ARCANO

Reengineering of the system with a high level of customizations, to achieve an environment that increases performance and performance, responding to the needs of each of the business areas.

Dynamics 365 Sales

Estandarización de la sistemática comercial



D365 Sales



Azure



Power BI



Office 365



Top Energy Projects



Accelerate the **sales cycle of complex engineering** and maintenance projects with high budget management, basing the optimization of management and commercial operations, both nationally and internationally, on the prioritization of opportunities, definition of times and goals of each phase and analysis of KPIs.

Dynamics 365 Sales



Solution that **facilitates** end to end the process of **managing collections of supply points**, integrating with Microsoft Office (Word and Excel) and Lotus Notes, to understand the following functionalities, management of invoices and deadlines, management of direct debit collections, generation of remittances and returns ... among others.

Dynamics 365 Sales & Customer Service



Implementation of Microsoft D365 as a **vertical and integral solution to provide the Expansion and Commercial Development Department** with the best possible tools to optimize its commercial work by improving the assignment and monitoring of commercial opportunities in both the B2B and B2C field with the aim of increasing customer acquisition.

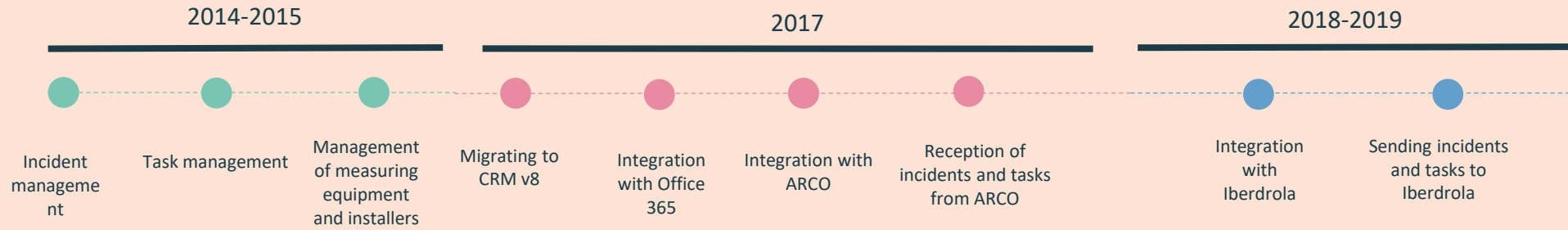
Dynamics 365 Sales & Marketing



Implementation of a **case and task management system** to cover requests for breakdowns and maintenance of energy, gas and heating equipment. Automation of the sending of requests through integration with Iberdrola services and other external applications.

Dynamics 365 Customer Service

Implementation of an incident management system



+450K
Clients

+21K
Cases created in the last month

+15K
Calls managed last year

88
Users

+440K
Tasks created last year

+1,7M
Cases

40K
Tasks created last month

579
Technical contacts

+67K
Emails managed last year



D365
Customer Service



Office
365

Top Telco & Media projects



Standardization of the commercial system, placing the customer at the center of the commercial process through a 360° vision, which would allow establishing a higher level of engagement, with special focus on the quality of the service, and optimizing the retention and loyalty ratios.

Dynamics 365 Sales



Design and implementation of a comprehensive solution for multi-country commercial management. It integrates the Billing system with a complete view of the client, improving the agility and efficiency of business processes. Improved understanding of the sales team on purchasing needs and preferences, pipeline management and KPI tracking.

Dynamics 365 Sales



Global technological solution to **optimize the management of the processes of the B2B business line throughout the customer commercial cycle of the different brands of the group**, combining the potential of Marketing in a transversal way to the sales and customer portfolio management teams. Automation of customer journeys for the conversion of new sales opportunities automatically and independently through integration with the company's own order systems. Implementation of the events module for E2E management and enhance the brand image of the Prisa Media group

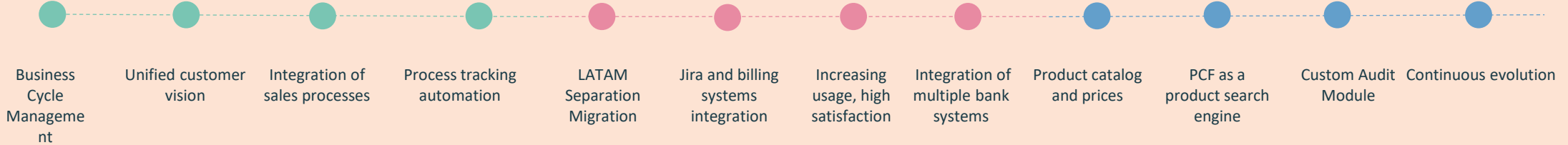
Dynamics 365 Sales & Marketing

Implementation of a multi-country commercial management system

2015-2017

2018-2019

2019-2020..



2.395
Managed framework contracts

+34K
Offers/year

+24K
Clients

97
Active Workflows

3
Azure functions

+30K
contracted services/year

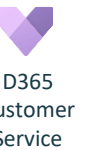
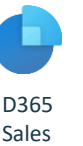
▲ 25%
ORS managed last 6 months

+300
Licencias Dynamics 365

+11K
Projects/year

5.208
Tickets open last month

97%
Tickets closed last month



Top projects Health & Public Administrations



Verticalized commercial efficiency solution for health insurers, which allows to **improve the commercial efficiency of the business channel**, improving market share and increasing turnover. Direct impact on the reduction of operating costs and on the company's results.

Dynamics 365 Sales & Customer Service

LEADING COMPANY IN THE SECTOR

Solution that **enables the recruitment of potential patients through automated marketing**, providing the commercial team with the ability to follow up end to end the opportunity. It also offers a 360 view of the client, with a file enriched with care data, centralizing patient care management and improving its processes, allowing the collaboration of the teams involved in them. In addition, the integration with your call center is carried out, offering a much more personalized service.

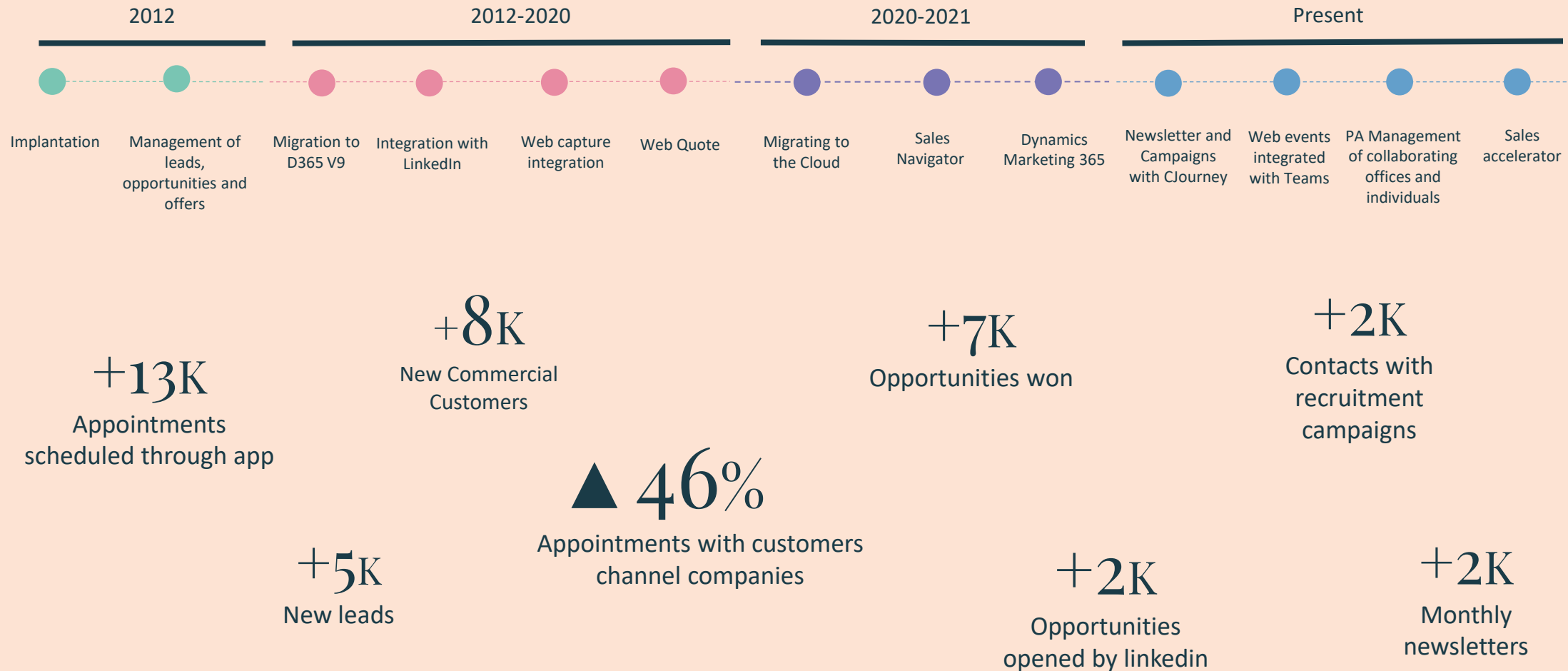
Dynamics 365 Sales & MKT & Customer Insights



Solution to **optimize the management of the service** by providing their team with a centralized, omnichannel, integrated, agile and adaptive tool for the day to day of the service agents.

Dynamics 365 Sales

Standardization of commercial systematics



D365 Sales



LinkedIn



Relationship Sales



Power Apps



D365 Marketing



Sales



Thank you!

minsait

Mark Making the way forward

An Indra company