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COMPREHENSIVE AUTOMATION FOR CUSTOMER AND FIELD SERVICE

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A package for automating customer request processing and field service: Microsoft Dynamics 365 Customer Service and Field Service, as well as our own developments for automating typical processes (contract management, approval of transitions between process stages, including request processing).

Such automation is needed for service, engineering, and operating companies specializing in on-site customer service, particularly in the following areas:

- Energy sector
- Climate control equipment
- High-tech equipment
- Security systems and facility management
- Retail and banking
- Companies with extensive internal infrastructure that perform their own technical maintenance.

Additionally, companies that want to:

- Move from manual request management to a specialized solution for field service.
- Systematize and formalize processes.
- Quickly implement a powerful dispatching tool to optimize engineer routes, reduce incident response times, and minimize equipment downtime.
- Equip field personnel with a mobile app to access schedules, step-by-step instructions, and record of spare parts used and working hours without the internet.
- Obtain a platform for further scaling.
- Implement the project with a transparent, optimal, and controllable budget, within the projected time frame, and using a proven implementation methodology.

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AUTOMATION PLAN

2 CUSTOMER REQUEST PROCESSING

- Core Dynamics 365 Customer Service capabilities to automate customer request intake and processing.
- Process adaptation services tailored to your requirements, including request classification and categorization, design of the required processing stages, and configuration of additional fields, validations, approvals, and other business rules.
- A set of optional additional capabilities:

WORKING WITH CUSTOMER REQUESTS

Automatic registration of requests received by email with routing to the appropriate queue based on AI analysis of the request text.

Automatic registration of categorized requests submitted through a website form with routing based on category selected on the website.

Automatic registration of uncategorized requests submitted through a website form with AI-based routing based on text analysis.

Automatic registration of requests submitted through a chatbot integrated with a website with routing based on selected category and AI analysis of uncategorized requests.

Request processing workflows configured by request category.

MONITORING REQUEST PROCESSING QUALITY

Definition of SLAs for specific categories.

Monitoring of SLA compliance.

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FIELD SERVICE

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- Core Dynamics 365 Field Service capabilities to automate field service operations.
- Process adaptation services tailored to your requirements, including structuring and importing service catalogs and customer equipment data, configuring the required fields and validations, creating service reports, and integrating the solution into your current processes.
- A general list of functional capabilities, with optional scope selection:

Customer Asset management.

Maintain a register of customer equipment, including its physical location, site hierarchy, key attributes, and service and repair history.

Service task and incident type management (Incident Types).

Create catalogs of services (service tasks) performed by engineers and group them into incident types for quick formation of a set of work orders for scheduled maintenance, diagnostics, or repairs.

Agreement and preventive maintenance management.

Recording contractual obligations for regular (scheduled) equipment maintenance (warranty or post-warranty) with automatic generation of work orders based on a defined schedule.

Scheduling and dispatching (Schedule Board & Schedule Assistant).

Support automated and semi-automated matching of available resources with the appropriate qualifications, as well as Route optimization based on current resource location, GPS data, workload, and request priorities.

Resource and skill management.

Maintaining a database of field engineers, subcontractors, and special equipment. including their skills and certifications, work schedules, service territories, and costs.

Work order management.

Create work orders manually, from customer requests, or automatically based on agreements; assign them to the appropriate resources; and manage all stages of the work order lifecycle.

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Mobile support for field engineers (Field Service Mobile).

Providing field staff with a convenient mobile tool for viewing schedules, following step-by-step instructions, recording time and materials used, capturing customer signatures, and working offline.

IoT integration (Cobbected Field Service) or API-based integration

Connect smart devices for proactive telemetry monitoring and enable the automatic creation of service requests when anomalies are detected, before the customer reports a failure.

Tracking & Analytics.

Monitor work status in real-time, track geolocation on a map, and build analytical dashboards in Power BI to evaluate service performance, including response time and fix rate.

Inventory Management

Monitor spare parts availability in warehouses and in engineers' vehicles used as mobile warehouses and manage purchase orders and returns (RMAs).

GENERAL APPROACH

- Clear approach and implementation schedule, including preparatory work and work during implementation on the customer's side.
- Workspace for the project team and transparent rules for managing project work and communications; implementation based on SCRUM and Agile.
- Approval functionality — additional functionality that allows you to configure approval processes for transitioning between stages of the sales process or individual approval chains (e.g., contract text).
- Training for key users.
- Acceptance testing and launch support

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GENERAL APPROACH

Support for the initial data loading process.

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Contract management – additional functionality that facilitates the controlled creation, signing, and subsequent management of contracts.

Post-launch Hyper Care support

WHY CHOOSE US

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EXTENSIVE TECHNICAL AND TECHNOLOGICAL EXPERIENCE:

Our team has years of experience with Microsoft Dynamics 365 and Power Platform, but we are not limited to CRM solutions. We build complex systems that include various cases involving telephony, integration with related automation and data storage systems and services, such as Microsoft 365 Planner, SharePoint, Outlook, OneDrive, Azure Blob Storage, Data Lake, database servers,specialized customer systems in the cloud or on the local network, and client portals. Additionally, we are experienced in corporate implementations.

BUSINESS RESULTS:

The solutions we have built using Dynamics 365 Customer Engagement applications (including Dynamics 365 Sales) and Power Platform are already helping our clients in finance, logistics, D2B and B2C sales, inquiry processing, and telephony by automating customer interaction operations and supply management.

PRACTICAL TRAINING:

You get access to a personal test environment with an activated free Power Apps Developer Plan, so each participant can immediately apply their knowledge in practice.

UNIVERSAL YET PERSONALIZED APPROACH TO IMPLEMENTATION:

We offer both basic functionality and automated processes that simplify and accelerate automation, while also analyzing your needs and adapting the functionality to your requirements. The typical cost of this work is already included in the budget, and the implementation plan identifies the usual areas of functionality that require adaptation.

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IMPLEMENTATION ROUTE FOR THE PROJECT

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1 PROJECT SCOPE FORMULATION.

- Discussion of relevant options from the proposal for the pilot implementation, along with a summary of key processes automation within the implementation.
- Creation of the final fixed implementation budget based on the proposal calculator.
- Estimation of the initial data loading task with a separate time & material budget.

2 IMPLEMENTATION PREPARATION.

- Identification of key employees on the client's side who will act as Product Owners and change ambassadors, and planning their presence time in the project.
- Creation of joint work and communication space (MS Teams Team, Planner, associated registers) and communication rules.
- Planning necessary work in the client's IT infrastructure.
- Purchase of the necessary minimum license package for development and client testing.
- Analysis and modeling stage: interviews with key employees, discussion of the automation concept using the real system with basic data adjustments and user interface modifications as an example, agreement on the list of system configurations and modifications, and adaptation of the implementation plan.

3 IMPLEMENTATION.

- Execution of necessary system configurations.
- Execution of necessary modifications.
- Regular demonstration of functionality to key users and gathering feedback.
- Preparation and partial test data loading.

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PURCHASE OF REMAINING LICENSES.

ACCEPTANCE OF WORK BY KEY USERS.

- End-to-end process testing.
- Execution of real-world scenarios.

LAUNCH

- Initial data loading.
- Training of end-users by key users.
- Launch and support: consultations for key users, issue resolution.
- Post-launch support: critical modifications based on usage results, creation of a system development backlog.

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OUR TRAINING PLAN INCLUDES THE FOLLOWING:

WE USE A SIMPLIFIED SCRUM

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- The typical duration of a sprint is 2 weeks.
- Each sprint has goals for both the client and the implementer.
- Each sprint ends with a report to the client (goal achievement, problems, suggestions, risks, forecast, updated priorities, goals for the next sprint).
- The goals are a list of system requirements and tasks that the implementer and the client must complete to meet those requirements.
- The implementer's team conducts a Daily Meeting every day for coordination.
- Discussions on implementation details are carried out in online meetings with the client through the discussion of examples on the system being implemented.
- All agreements and decisions are documented.
- Functionality is demonstrated and handed over to the customer for testing as it is configured.

TYPICAL ROLES IN THE PROJECT ARE:

IMPLEMENTER

- Project Manager
- Architect
- Consultant(s)
- Developer(s)

CLIENT

- Key business users
- Project Manager
- Analyst(s)
- IT (Azure & Local Network administrator))