



ORBIS DefenseONE

A white number "01" inside a dark blue circle, which is part of a vertical stack of five circles. The background of the entire slide is a sunset sky with silhouettes of a helicopter, a fixed-wing aircraft, and military vehicles.

01

ORBIS SE SHORT FACTS

02

INTRODUCTION

03

DEEP DIVE

04

SERVICE AND FIELD SERVICE

05

HOW TO START / GET IN TOUCH

OVERVIEW – ORBIS SE



**Founded
1986**



**Technology Partners
Microsoft und SAP**



ORBIS GROUP

Growth from 25mn EUR Revenue in 2010 to 132mn EUR in 2024



AWARDS

Microsoft partner of the year and Member of the INNER CIRCLE



3,000+

Completed Projects



ORBIS Group

1000+ employees



530+

Active Customers



**Microsoft
Solutions Partner**



ORBIS SE 2024

~ 132 m € Turnover
49 % Equity Ratio



**20 Locations on
3 Continents**



ORBIS is your partner for digital transformation. We advise, integrate, optimize and automate processes ... based on the solutions and technologies of our partners Microsoft and SAP as well as our own solutions.



ORBIS MICROSOFT BUSINESS AREA



LOCATIONS

- » 21 locations on 3 continents
- » Europe, USA & China



CUSTOMER ENGAGEMENT with MICROSOFT DYNAMICS 365

DIGITAL TRANSFORMATION

- » for Marketing, Sales & Services
- » CoPilot



INDUSTRY PRIORITIES

- » Discrete manufacturing
- » Automotive supplier
- » Construction supplier & Wholesale
- » Cross industry (Consumer, Retail, Logistics...)



EXPERIENCE

25+ Years of CUSTOMER ENGAGEMENT Experience

Change Management



OUR TEAMS

- » 350+ MS Consultants, Developers & Experts
- » 1500+ Projects
- » Dedicated team with extensive experience in industry processes



TAILORMADE SERVICES

- » Best practice ISV solutions
- » D365 Industry templates
- » Innovative consulting offers



BUSINESS VALUE (Value +)

- » Data-based process transformation
- » KPI-based value realization
- » Organizational impact consulting



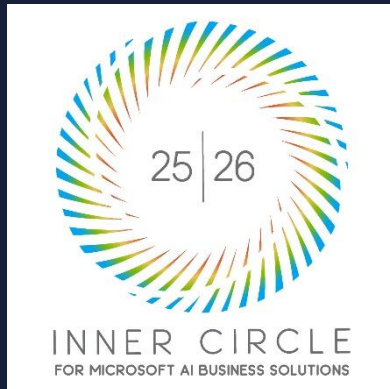
PARTNERSHIP

- Leading PARTNER in Europe for
- » Microsoft Customer Engagement & Power Platform
 - » Microsoft Catalyst
 - » FastTrack Ready Partner



AWARDS

- » Member of the INNER CIRCLE 2025/2026
- » 5 FastTrack Recognized Solution Architects
- » MVP Business Applications



MICROSOFT POWER PLATFORM

- » Professional low-code / pro-code approach for LOB applications
- » Proactive Insights & BI

MODERN COMMUNICATION & COLLABORATION with M365

CLOUD DEVELOPMENT BASED ON AZURE

- » Cloud Native
- » IaaS / PaaS / SaaS
- » Azure AI & Agentic

Automotive, Defense and Aerospace Clients Trust Us

You cannot buy trust – you earn it



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01

ORBIS SE SHORT FACTS

A white number "02" inside a dark blue circle, which is part of a vertical stack of five circles. The background of the entire page is a sunset sky with silhouettes of a helicopter, an airplane, and military vehicles.

02

INTRODUCTION

A white number "03" inside a dark blue circle, which is part of a vertical stack of five circles. The background of the entire page is a sunset sky with silhouettes of a helicopter, an airplane, and military vehicles.

03

DEEP DIVE

A white number "04" inside a dark blue circle, which is part of a vertical stack of five circles. The background of the entire page is a sunset sky with silhouettes of a helicopter, an airplane, and military vehicles.

04

SERVICE AND FIELD SERVICE

A white number "05" inside a dark blue circle, which is part of a vertical stack of five circles. The background of the entire page is a sunset sky with silhouettes of a helicopter, an airplane, and military vehicles.

05

HOW TO START / GET IN TOUCH

TASK FORCE MODE IS THE NEW NORMAL



Geopolitical Conflicts



Trade Wars



Supply Chain Disruptions



Inflation



OEM Crisis



Regulatory Uncertainty



A CHANGE NEVER SEEN BEFORE

Electrification



Connectivity



Autonomous Vehicles



Glocalization



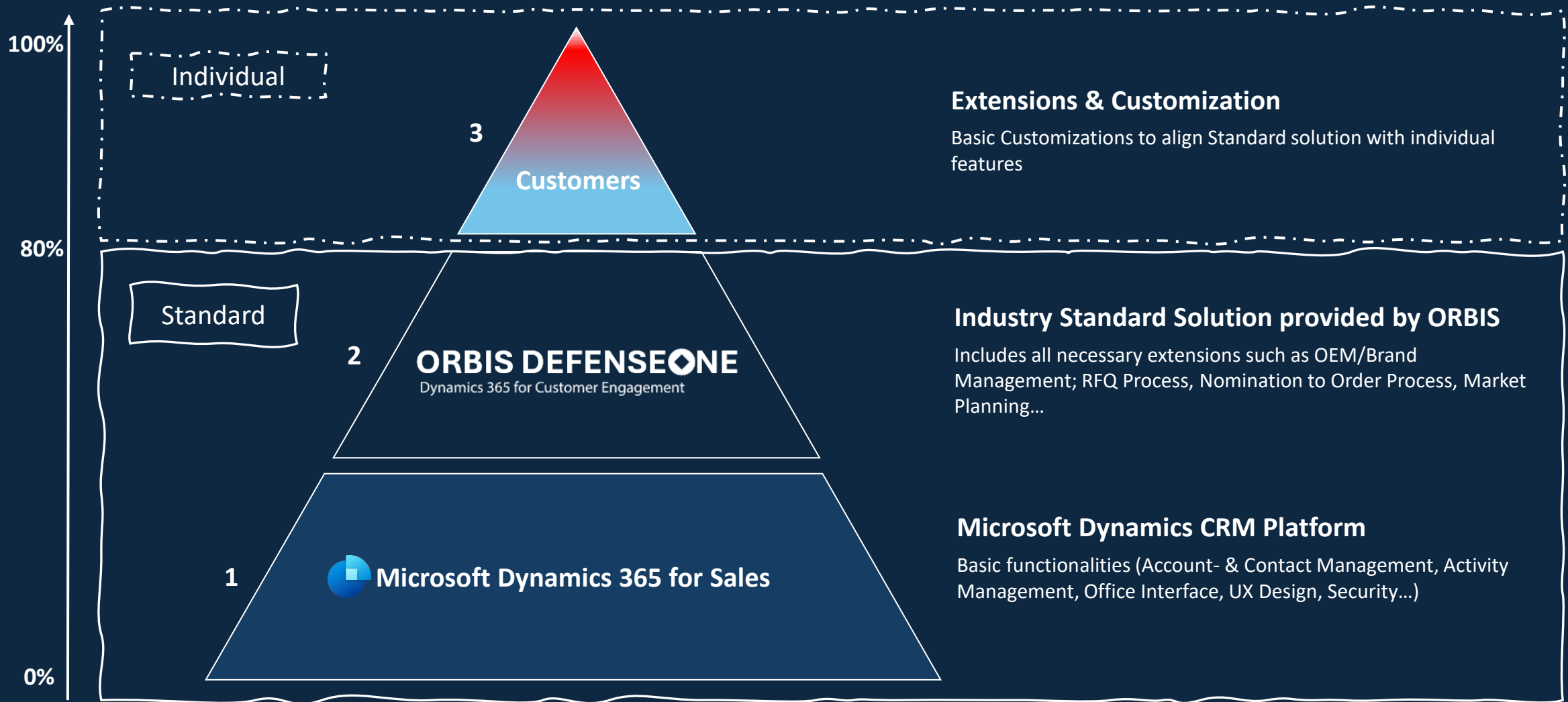
Demographic Change



Sustainability



DefenseONE approach



Process Portfolio



Marketing 	Key Account Management 	Contract Management 	Market Intelligence 	Portfolio Management 	
Opportunity Management & Lifecycle Management					
Customer Service, Field Service & Spare Parts Management					
Milestones 	Planning 	Scenario Management 	Workorder Management 	Quotation Management 	Agreement Management
Change Management 	Reimbursements 	Reference Monitoring 	Pricelists 	Order Management 	Claim Management
Collaboration 	Analytics 	Integration 	AI 	Security & Permission 	

Technology Portfolio



Key Account Management



Master data, non-booked business, booked business at one place



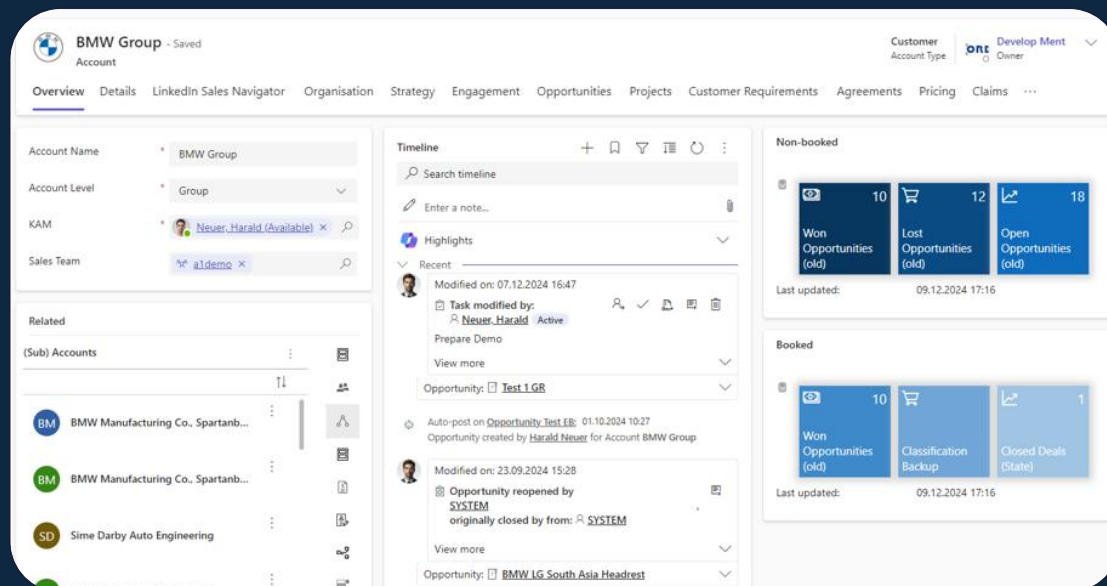
Outlook and LinkedIn integration for communication



Streamlining of strategy with classification, buying center and customer engagement



Teams and SharePoint integration for collaboration



Copilot supporting Sales in customer interaction



Parametrized integration of market forecasts



Best practice reporting and analysis

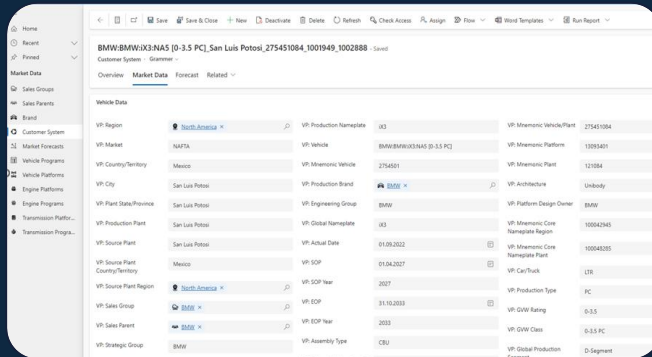


Business proven SAP integration with predefined template processes

Sales Planning



Integration



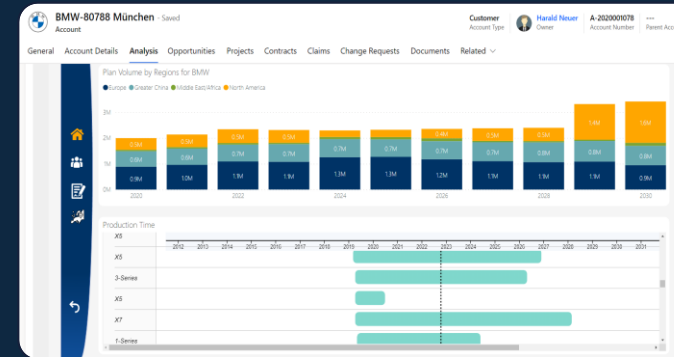
- ✓ Integration of market data via excel upload, integration of internal data base or external interface
- ✓ Flexible combination of LV (vehicle, engine & transmission) and CV data bases

Planning

Position	Year	Vehicle Volume	Parts per Vehicle	Take Rate	Installation Rate	Part Volumes	Base Price	Turnover
POS-123	2023	302.452	2	50%	44%	44.567	32,32 €	1.440.393,16 €
POS-123	2024	345.692	2	50%	44%	69.350	32,32 €	2.047.469,41 €
POS-123	2025	388.812	2	50%	44%	82.133	32,32 €	2.654.545,67 €
POS-123	2026	375.943	2	50%	44%	76.492	32,32 €	2.472.211,91 €
POS-123	2027	352.874	2	50%	44%	70.850	32,32 €	2.288.878,14 €
POS-123	2028	349.905	2	50%	44%	69.209	32,32 €	2.107.544,38 €
POS-124								
POS-125								
POS-126								

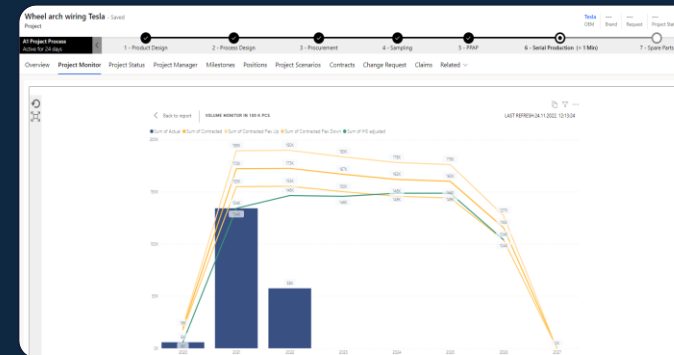
- ✓ Integrate market volumes in your opportunity and projects scenarios
- ✓ Automatically update opportunity and project forecast when updating market data

Visualization



- ✓ Visualization of market forecasts via modern analytic tools
- ✓ Define automatic notifications for new vehicles or volume drop-offs

Analysis

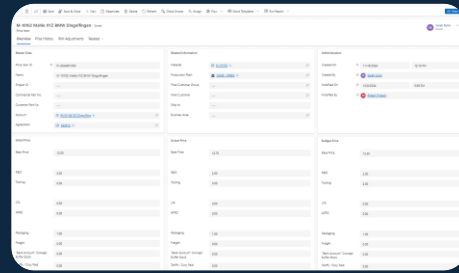


- ✓ Analyze market volumes per customer, project, technology
- ✓ White spot analysis and identification of chances and risks
- ✓ Identify claim potentials before they occur

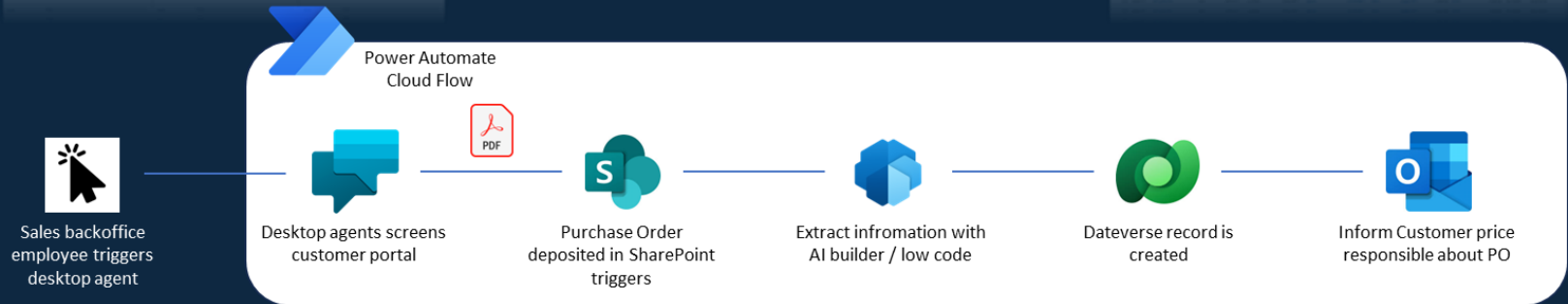
Price Management



Sales Price Calculation including price element breakdown and Reference Databases



AI driven price updates from OEM portal including analysis of POs



Distinct integration between CRM & SAP to close gap between Sales & Plants



Price Item	Agreement Price	Purchase Order Price	SAP Price	Delta
0001	1.00	1.00	1.00	0.00
0002	1.00	1.00	1.00	0.00
0003	1.00	1.00	1.00	0.00
0004	1.00	1.00	1.00	0.00
0005	1.00	1.00	1.00	0.00
0006	1.00	1.00	1.00	0.00
0007	1.00	1.00	1.00	0.00
0008	1.00	1.00	1.00	0.00
0009	1.00	1.00	1.00	0.00
0010	1.00	1.00	1.00	0.00

Opportunity Management



This screenshot shows the CRM interface for an opportunity named 'NK Large Headrests 1st Tranche'. The interface includes a top navigation bar with tabs for 'Overview', 'Details', 'One Pager', 'Strategy', 'Activities', 'Products', 'Scenarios', 'Milestones', 'Concepts', 'Quotations', and 'Documents'. The main content area is divided into several sections: a left sidebar with metadata (Opportunity No., Account, Group Account, Technology, Corporate Region, Likelihood, EOP, Buying Center), a central 'Timeline' section with a search bar and recent activity, and a right sidebar with 'KPIs' (Lifetime Turnover, Lifetime Volume, Average Price) and a 'Completed' checklist.

Business process flow including milestones and review gates

Basic and enhanced Teams integration

This screenshot shows the CRM interface for an opportunity named 'BMW 1er Green Caliper EV 2022'. The interface features a top navigation bar with tabs for 'Overview', 'Details', 'Classification', 'Manager', 'Positions', 'Scenario', 'Workorders', 'Analysis', 'Pricing', 'Quotations', and 'Related'. The main content area includes a 'Completed' checklist with items like 'Opportunity Details defined', 'Opportunity Assessment conducted', and 'Initial Scenario defined'. A 'Set Active' button is visible at the bottom of the checklist.

Standardized opportunity evaluation and classification

Task management including Kanban board and Gantt chart

PowerBI integration for monitoring and reporting directly in CRM



Copilot

Your everyday AI companion

Selected use cases by 

OEM portal screening and document routing by desktop agent

PDF recognition and **automatic sales order creation** in SAP/CRM

Routing of service requests to the right counterpart

Screening of market news and targeted posting into user timelines

Analysis of calculation docs and transfer of **excel into database**

Raw material price crawler updating CRM database based on LME

Contract version comparison to identify changes in T&Cs

Alexa-like **voice controlled search** engine for internal databases

Intranet chatbot for employees' questions to relieve internal support

Technical knowledge base chatbot respecting access right

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DEEP DIVE

A white number "04" inside a dark blue circle, which is part of a vertical stack of five circles.

04

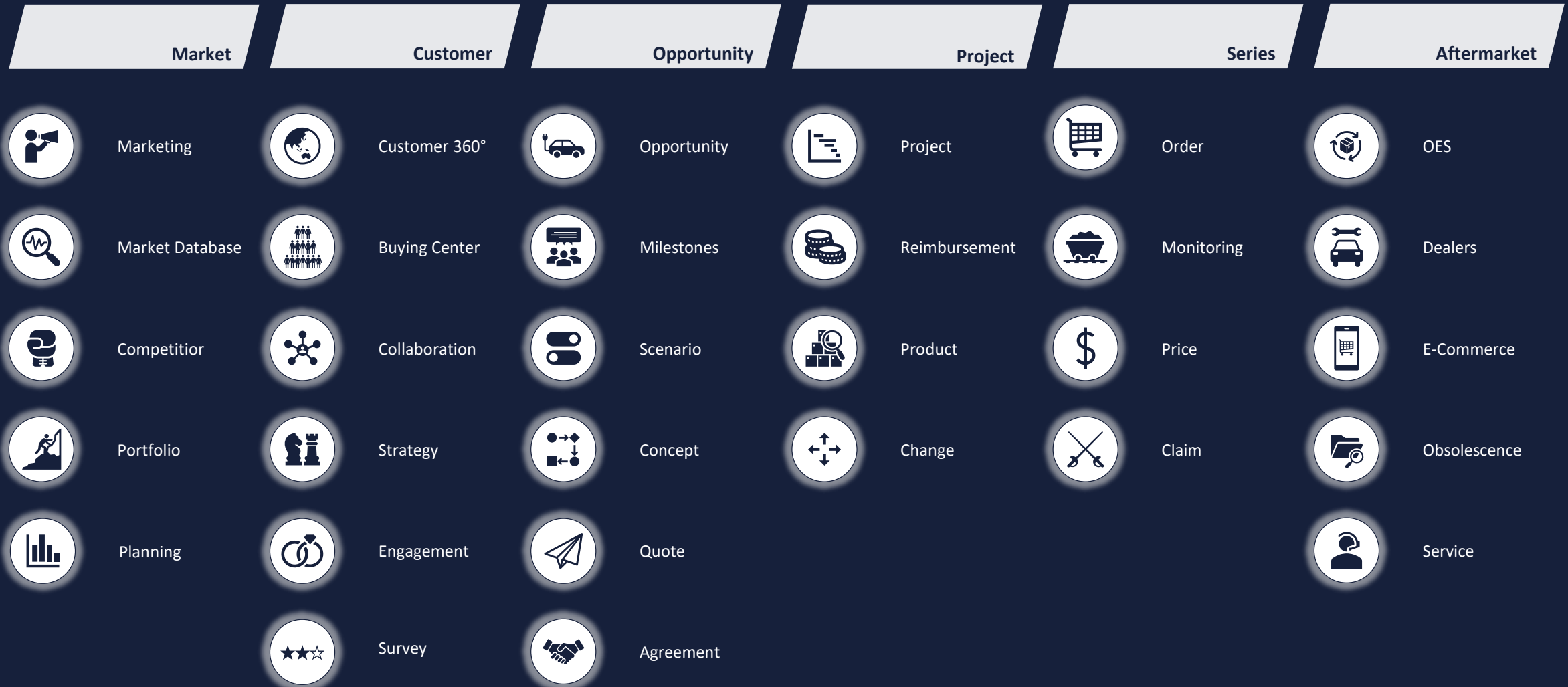
SERVICE AND FIELD SERVICE

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05

HOW TO START / GET IN TOUCH

PROCESS PORTFOLIO & USE CASES



CHALLENGES & SOLUTIONS MARKET



Fragmented and isolated production forecast shared via EXCEL file with operative sales



Central up-to-date market forecast in modern analytic tool accessible in CRM

Disconnect between market data and business data & no incorporation of market data into planning



Integration of market forecasts with business data

Inconsistent program strategies across regions, business units and technologies and no identification of white spots and synergies



White spots analysis and standardized classification of OEMs, markets, platforms

Double counting of tier 2 opportunities

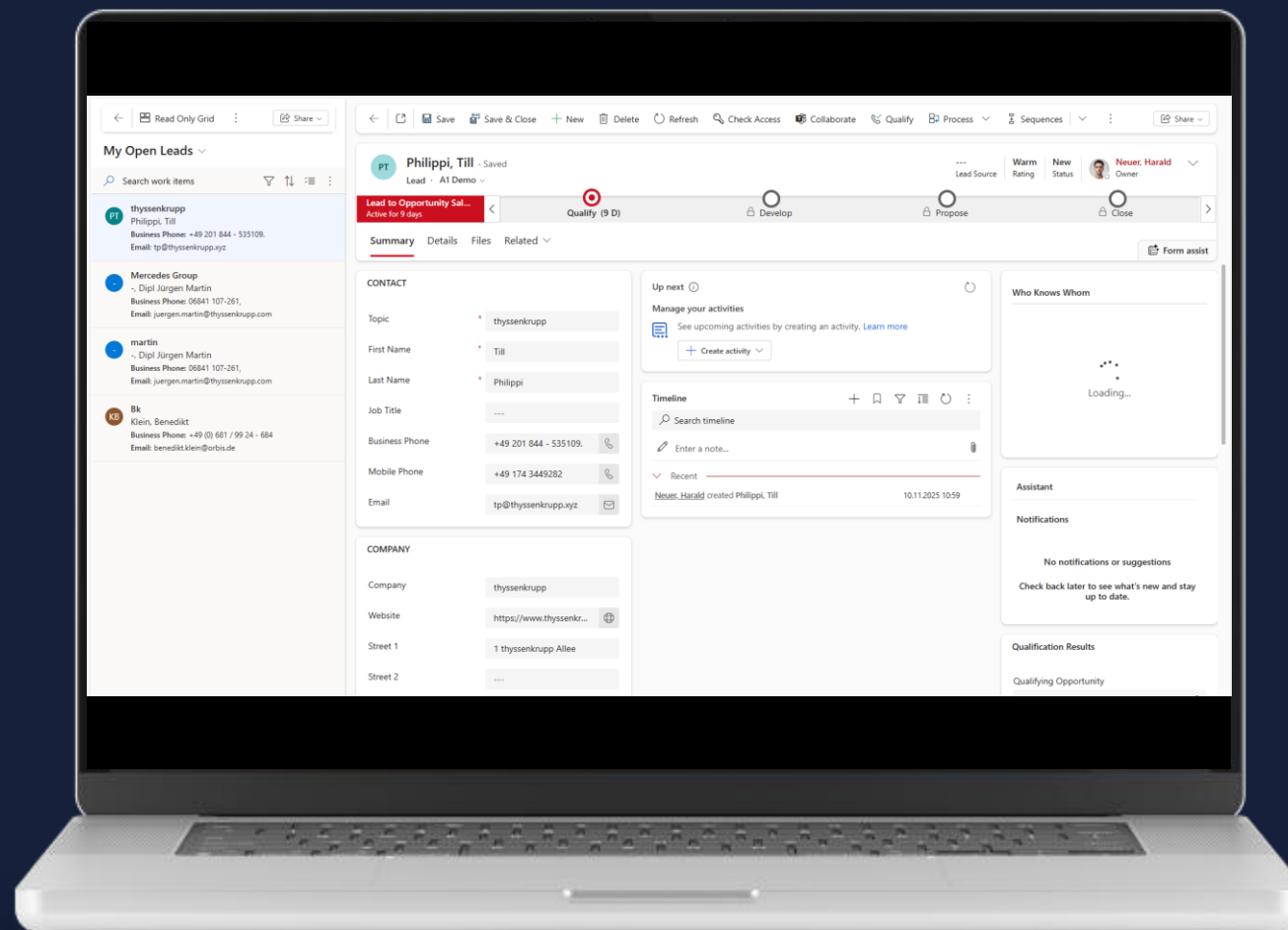


Intelligent detection of duplicates based on customizable parameters



Marketing

- Leads: Efficient capture, qualification, and routing from all channels
- Campaigns: Targeted outreach by program/component with measurable responses
- Events: Smooth event lead capture and automated follow-up from industry shows.





Market Database

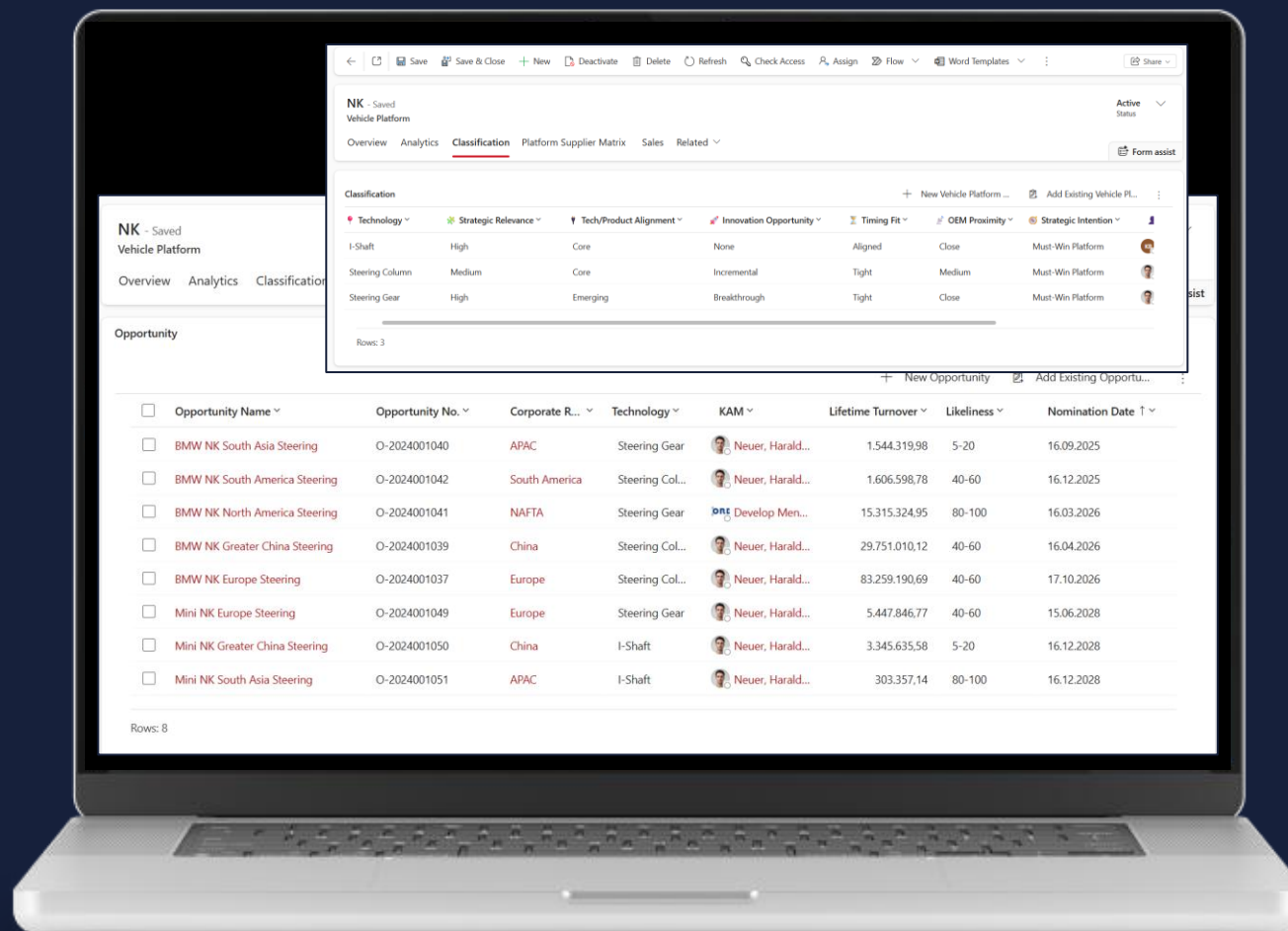
- Full integration of market data – not only forecasts – incl. intelligent search
- Customizable market data model
- Extension of forecast database with news by user or web crawler





Portfolio

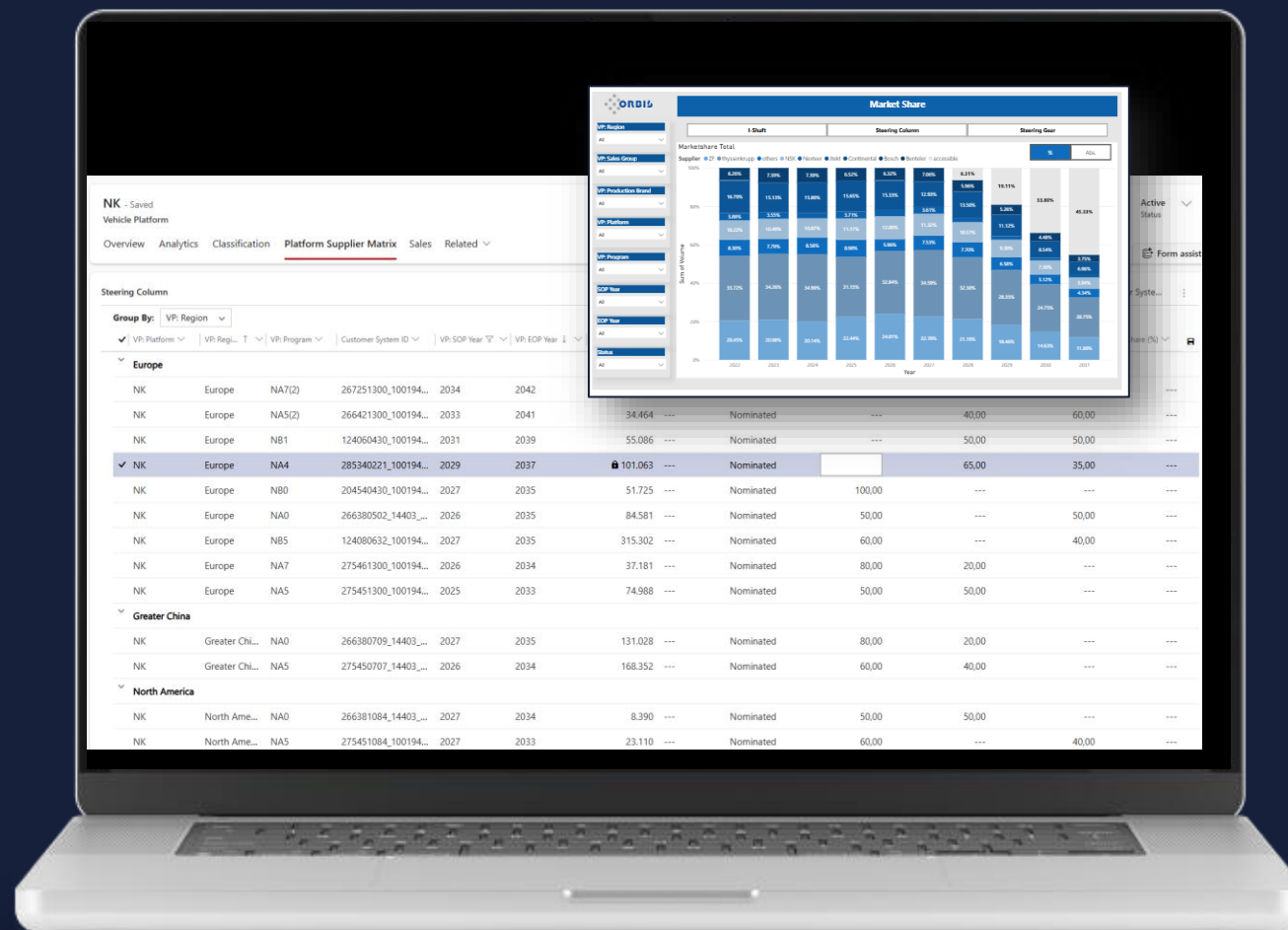
- Technology specific classification of platforms upfront to RFQ
- Targeted approach of OEMs across business units
- Benefit from your internal account network





Planning

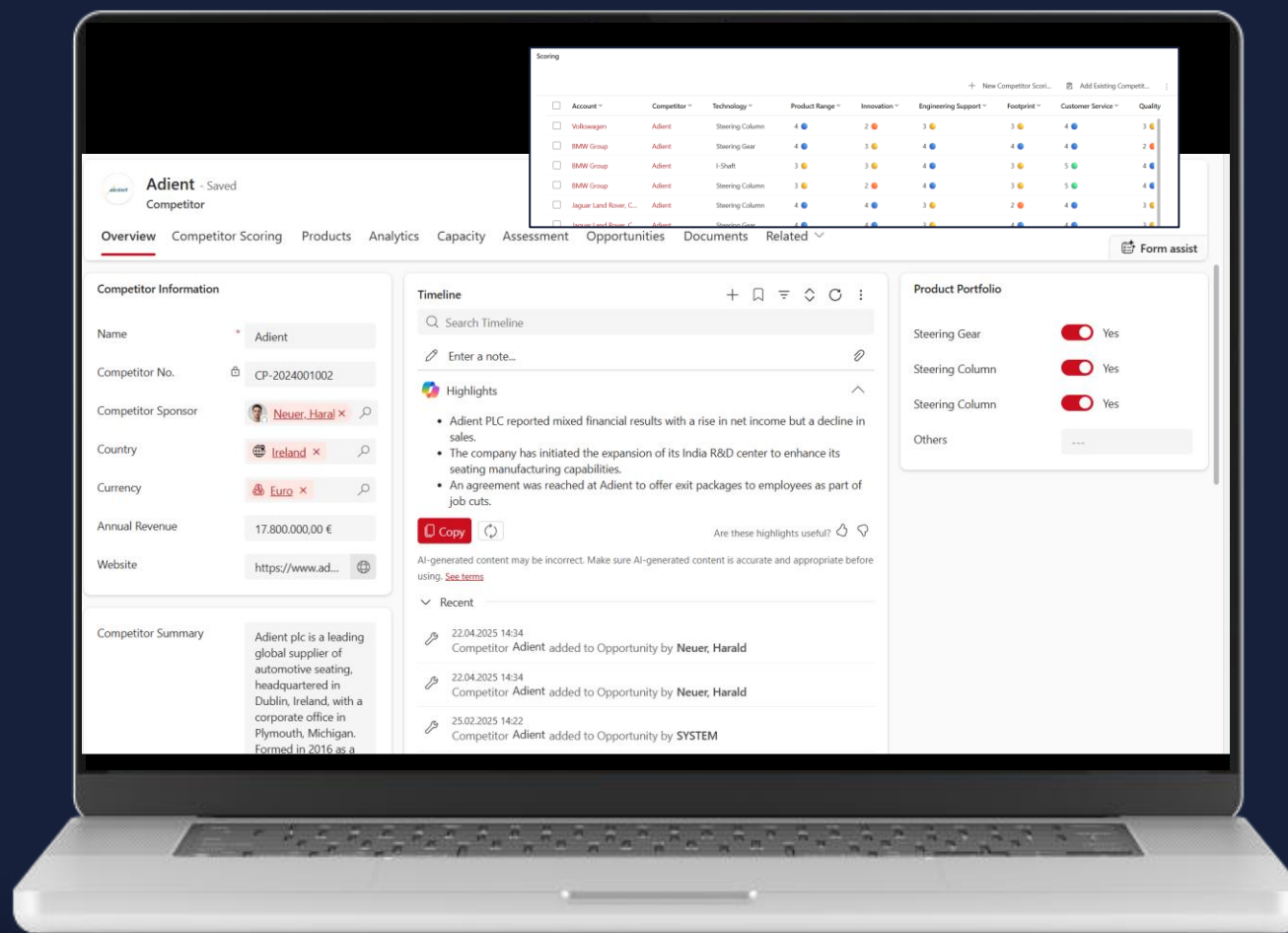
- Ability to build market models with dynamic market forecasts
- Covering multiple dimensions – OEM, technology, region, supplier
- Baseline for any white spot analysis





Competitor

- Combined analysis of competitor-supplier-technology status
- Derive competitor strategy by capacity constraints
- WLO analysis
- Extensibility with technical benchmark information



CHALLENGES & SOLUTIONS

CUSTOMER



Customer information siloed in systems



Single point of truth in CRM

Disconnected sales teams through regions and business units lead to inconsistent customer approach



One communication, collaboration, documentation hub

Informational disadvantage towards the OEM in negotiations and claims



Entire customer history available in CRM

Missing customer engagement outside sales

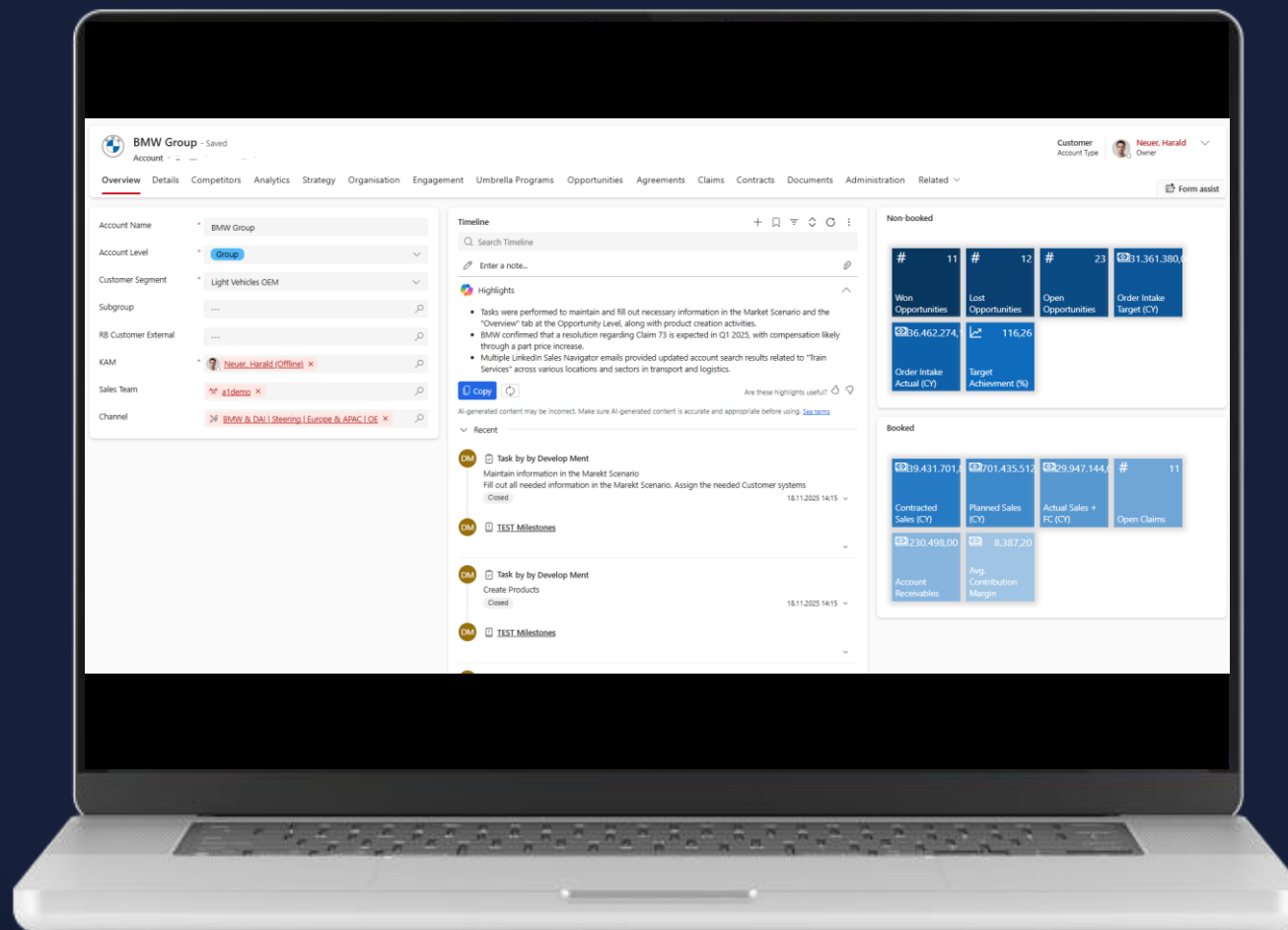


Integration of the entire customer facing organization in CRM



Customer 360°

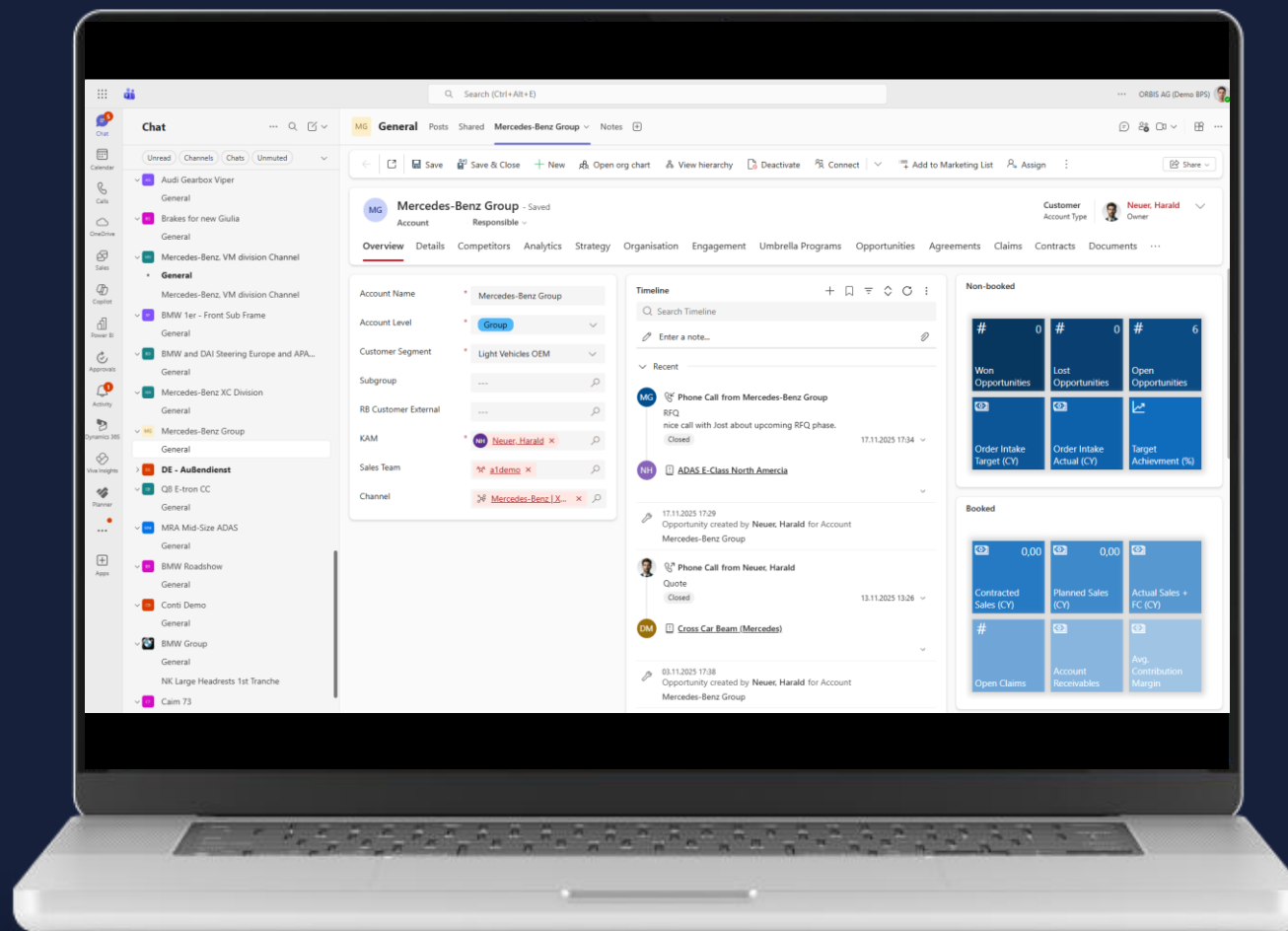
- 360° customer view
- Master data
- Organization
- Communication
- Analytics
- Strategy
- Engagement
- Business objects
- Documentation





Collaboration

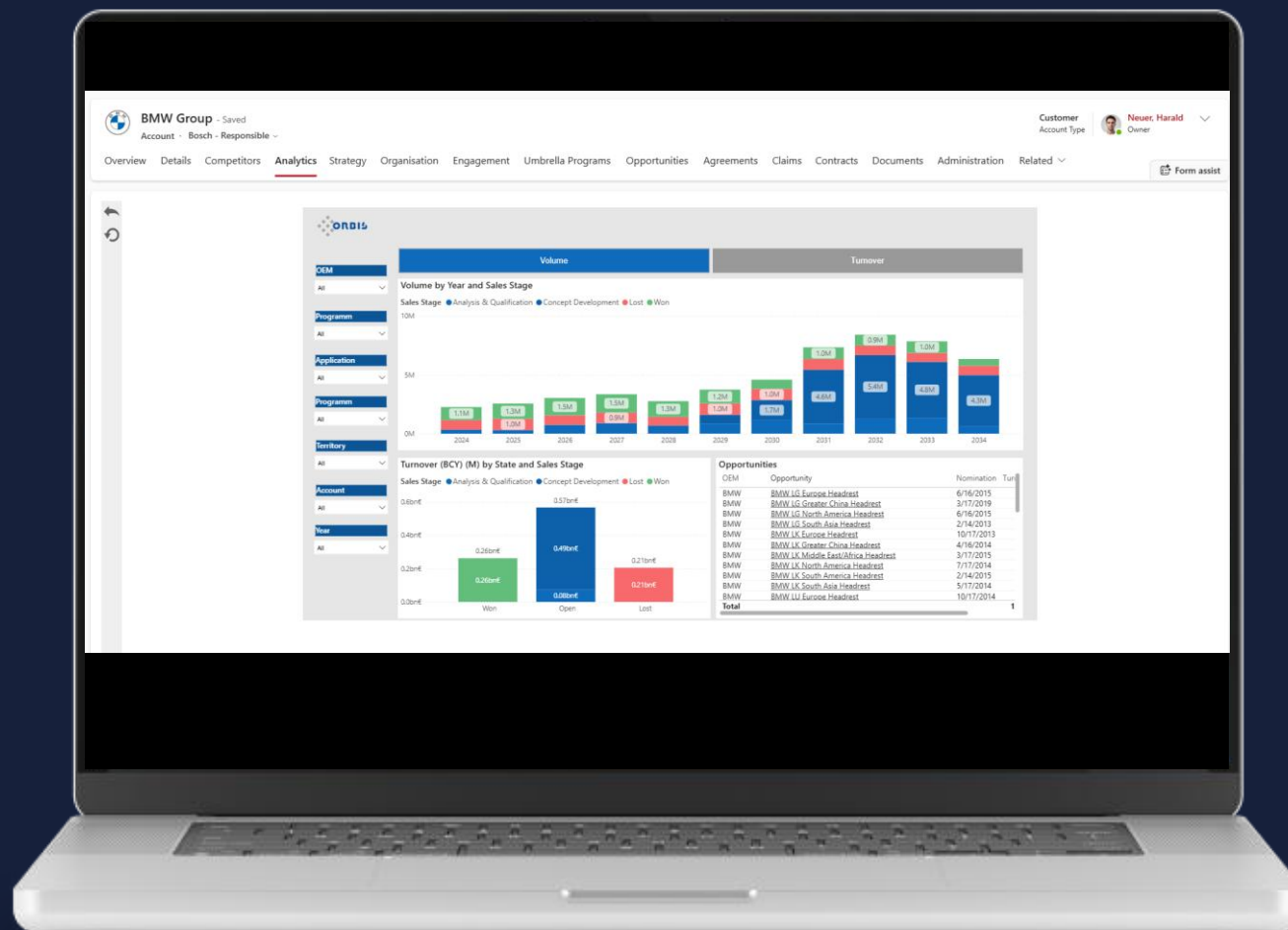
- Streamlined communication and collaboration with external *and* internal stakeholders
- Key enablement for best-in-class Customer Engagement
- Covering all relevant communication channels
 - Emails
 - Appointments
 - Tasks
 - Chat
 - Teams
 - Teams telephony
 - SharePoint
- Analysis of activities and touchpoints via Copilot





Strategy

- Analytics based on CRM data, ERP data and external data
- Standardized methodology for strategy definition
- Strategy execution via action streams and business objects





Buying Center Analysis

- Role mapping: Identifies and visualizes decision-makers and influencers within each OEM or tiered buying center
- Engagement insights: Tracks interactions by role to show who is active, blocked, or needs targeted follow-up
- Influence scoring: Rates stakeholder impact to prioritize outreach

BMW Powertrain - Saved
Buying Center - Bosch

Overview **Members & Action Plan** Related

Buying Center Members

Contact	Role	Coverage	Influence	Opinion	Motivation	Account	Responsible User
Ahjupera, Einhardt	(B) Buyer	(M) Multiple Contact	(1) Weak	(D) Neutral	Commercial	BMW Group	
Anna Fischer	(B) Buyer	(B) Brief Contact	(1) Weak	(C) Competitive	Strategy	BMW Group	
Dinkelhuber, Heinz	(I) Influencer	(B) Brief Contact	(2) Strong	(C) Competitive	Strategy	BMW Group	
Emma Schulz	(E) Evaluator	(M) Multiple Contact	(B) Very Strong	(D) Neutral	Commercial	BMW Group	
Felix Weber	(D) Decider	(N) No Contact	(2) Strong	(S) Supportive	Commercial	BMW Group	

Row: 6

Chances

Risks

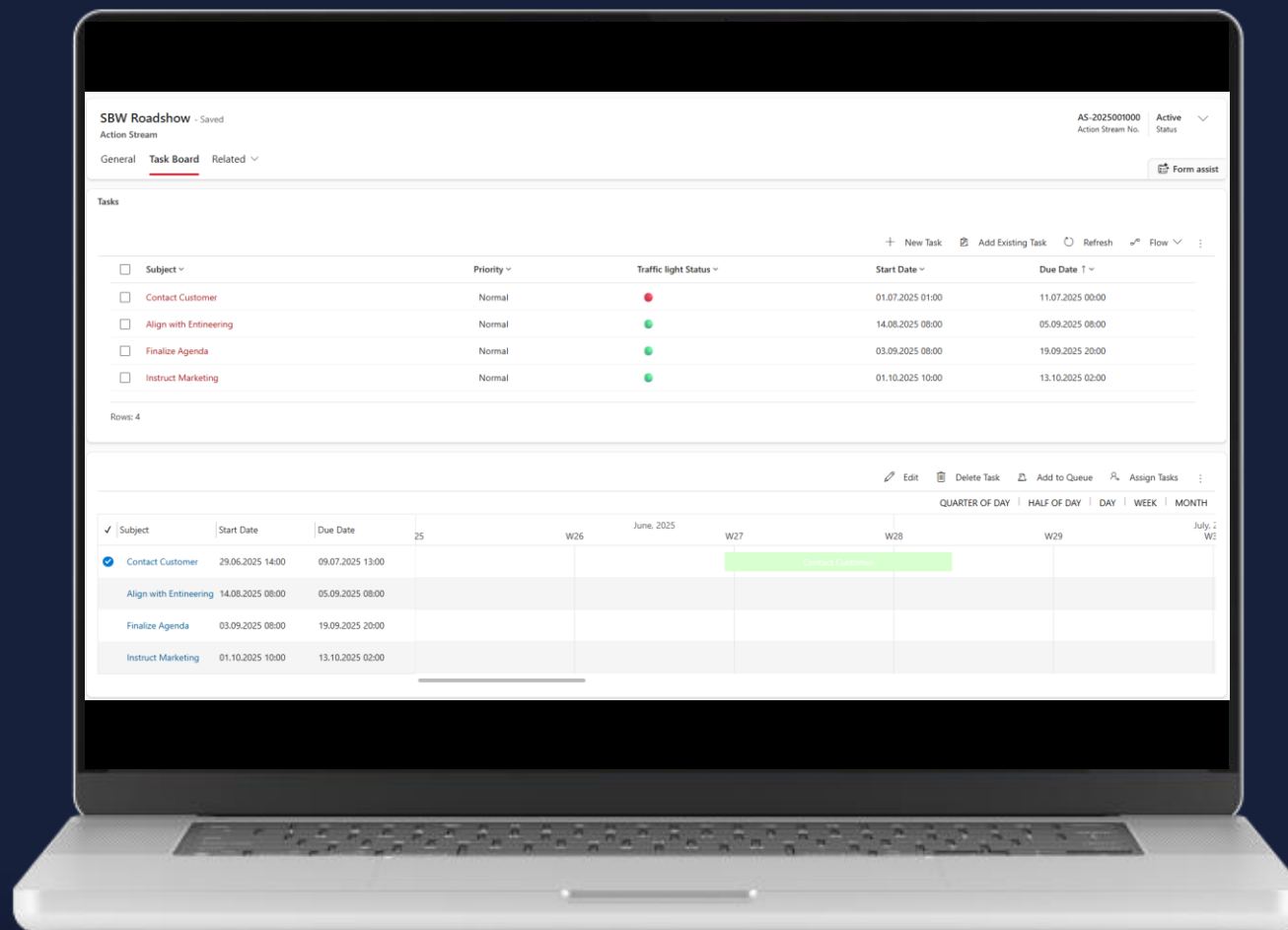
Measures

Subject	Status Reason	Regarding	Contact Rep...	Priority	Due Date	Description	Modified On	Owner
Get contact to QAM departments	Not Started	BMW Powertr...		Normal	21.08.2025 08:...		14.08.2025 19:...	Neuer, Harald (Offline)



Engagement

- Buying center specific customer engagement (across functions)
- Matched pairs for distinct counterparts and responsibilities
- Ability to integrate with surveys / NPS incl. derived action items



SBW Roadshow - Saved
Action Stream

AS-2025001000 Active Status
Action Stream No.

General **Task Board** Related

Form assist

Tasks

+ New Task Add Existing Task Refresh Flow

Subject	Priority	Traffic light Status	Start Date	Due Date
Contact Customer	Normal	Red	01.07.2025 01:00	11.07.2025 00:00
Align with Engineering	Normal	Green	14.08.2025 08:00	05.09.2025 08:00
Finalize Agenda	Normal	Green	03.09.2025 08:00	19.09.2025 20:00
Instruct Marketing	Normal	Green	01.10.2025 10:00	13.10.2025 02:00

Rows: 4

Edit Delete Task Add to Queue Assign Tasks

QUARTER OF DAY HALF OF DAY DAY WEEK MONTH

Subject	Start Date	Due Date	W25	W26	June, 2025	W27	W28	W29	July, 2025
Contact Customer	29.06.2025 14:00	09.07.2025 13:00				Contact Customer			
Align with Engineering	14.08.2025 08:00	05.09.2025 08:00							
Finalize Agenda	03.09.2025 08:00	19.09.2025 20:00							
Instruct Marketing	01.10.2025 10:00	13.10.2025 02:00							

CHALLENGES & SOLUTIONS

OPPORTUNITY



Opportunity management via EXCEL, PowerPoint and email leads to missing process compliancy



Business process flows and milestones ensure process

Missing prioritization of opportunities – each RFQ is managed with full effort



Systematic opportunity classification closes gap between strategy and sales

Multiple stakeholders working in disconnected tools



Tailored views within one database

Fragmentation of planning, reporting, processing, calculation and quoting

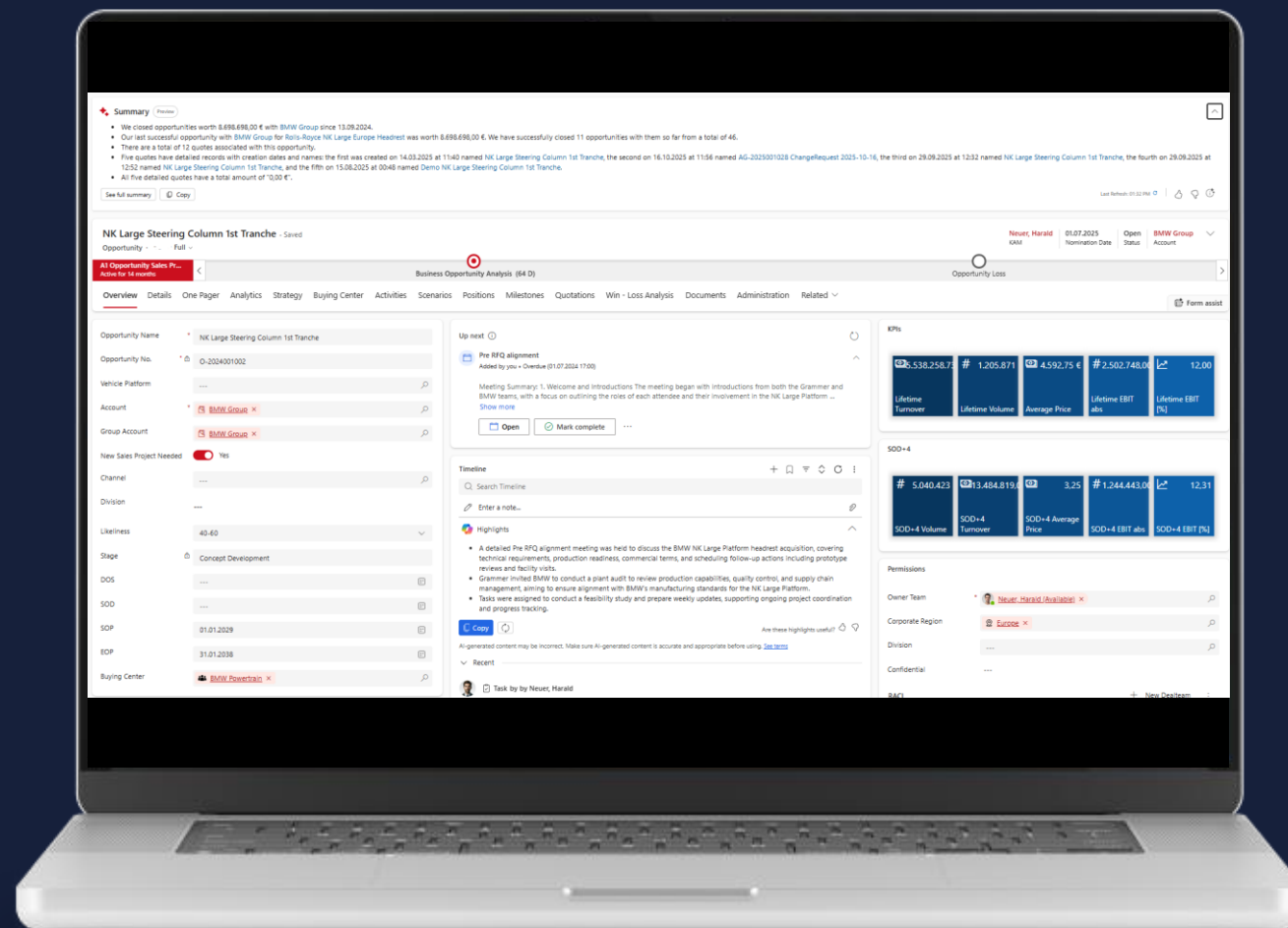


End-to-End opportunity management from identification until project management handover



Opportunity

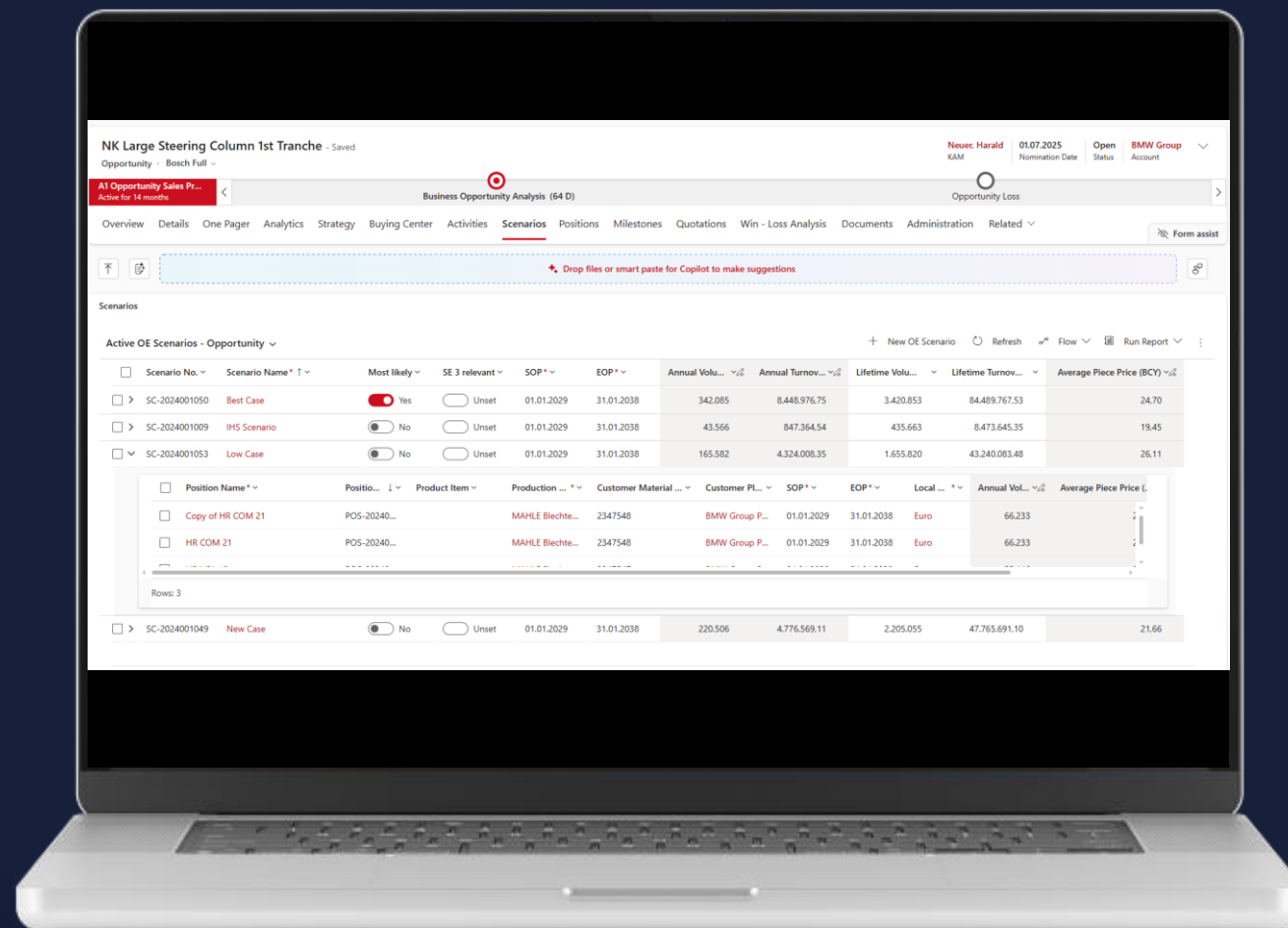
- Best practice supplier data model
- Flexible allocation of information per table
- Minimized maintenance effort by multiple automations, inheritance and copy functions





Scenario

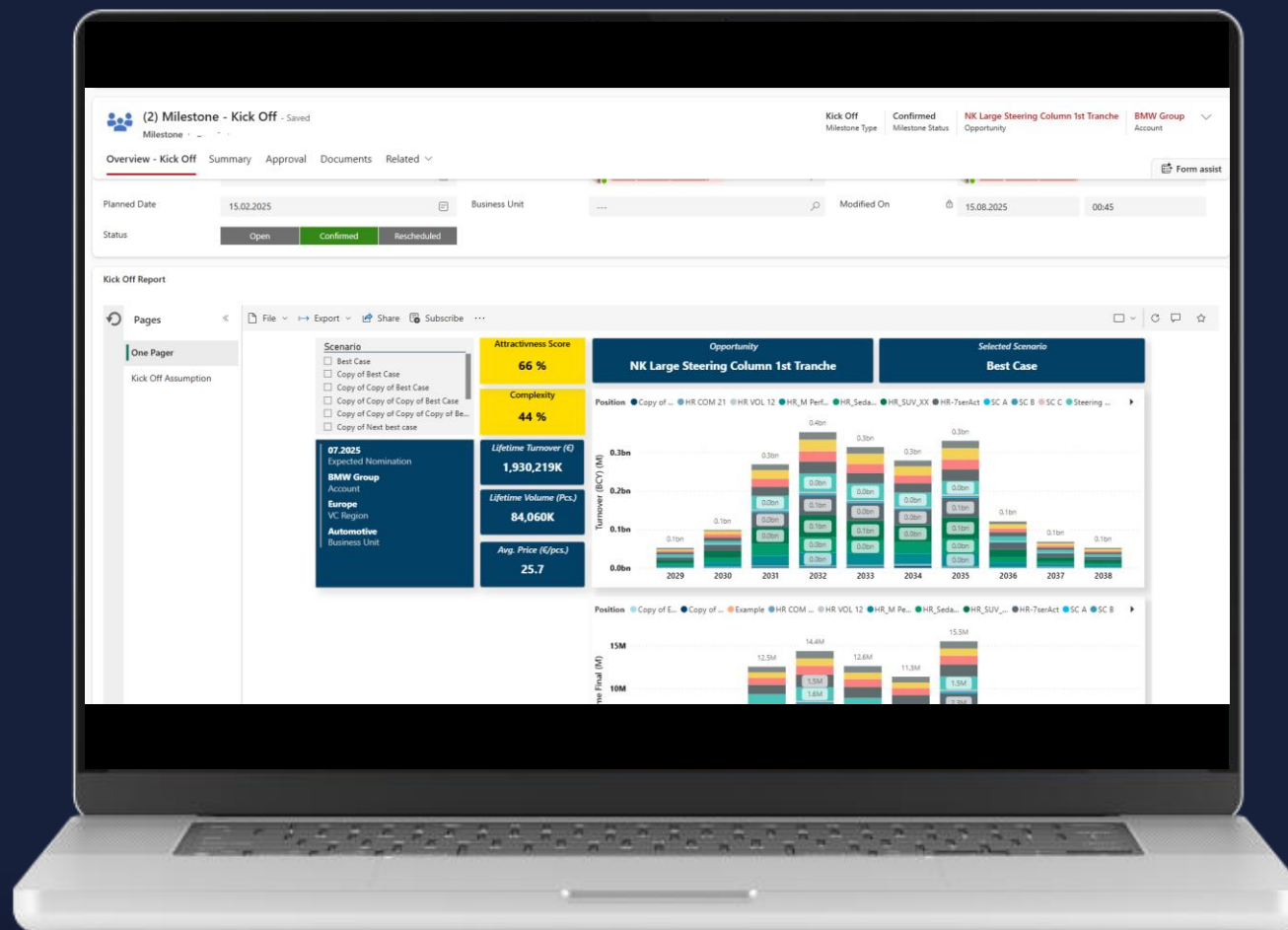
- Challenge customer volumes with market volumes incl. updates from forecast
- Copy scenario and copy position actions to accelerate process





Milestone

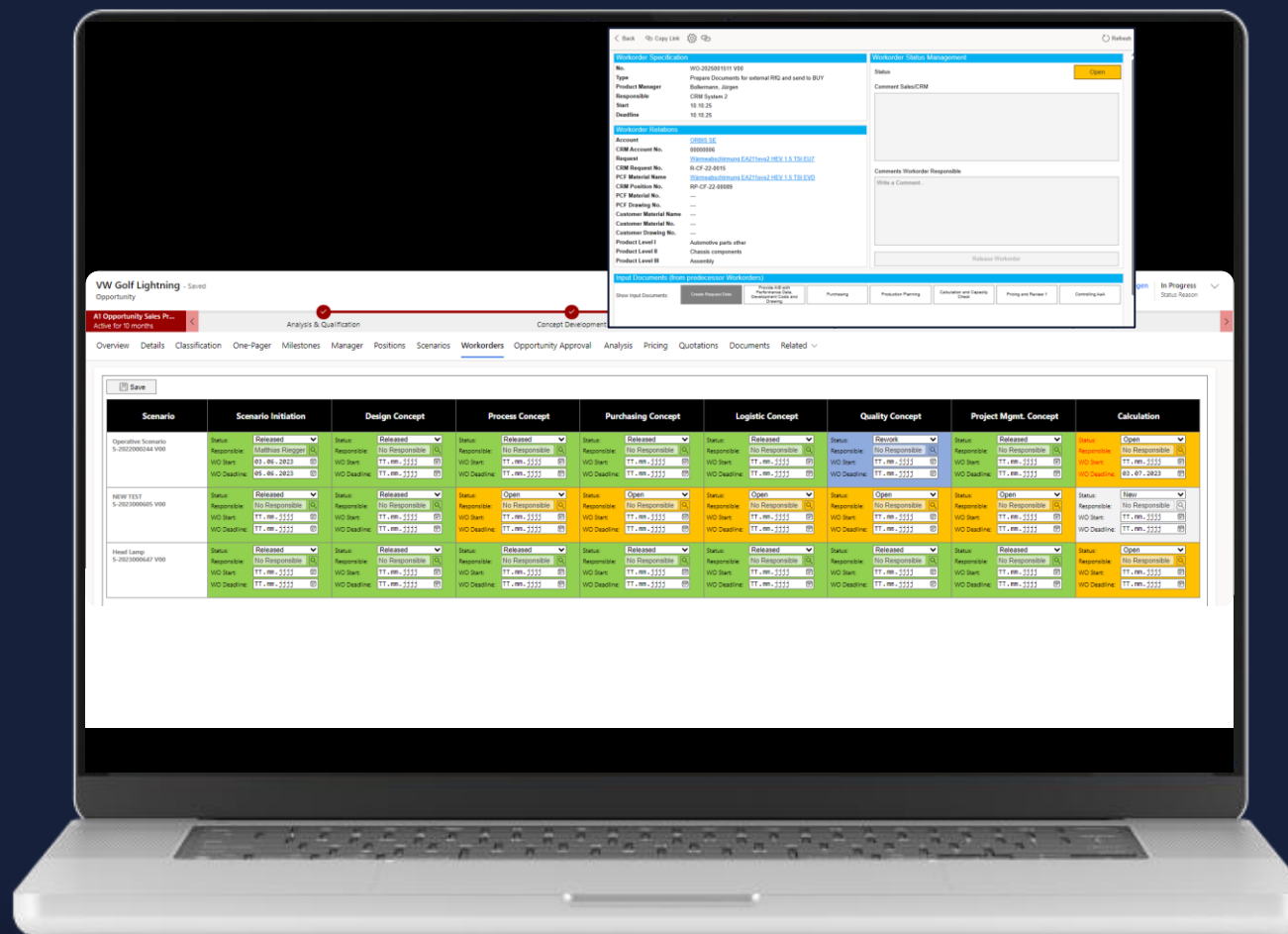
- Custom milestone templates including audit compliant approval and documentation
- Automatic reports via PBI export to PDF and send out via PDF attached to approval





Concept

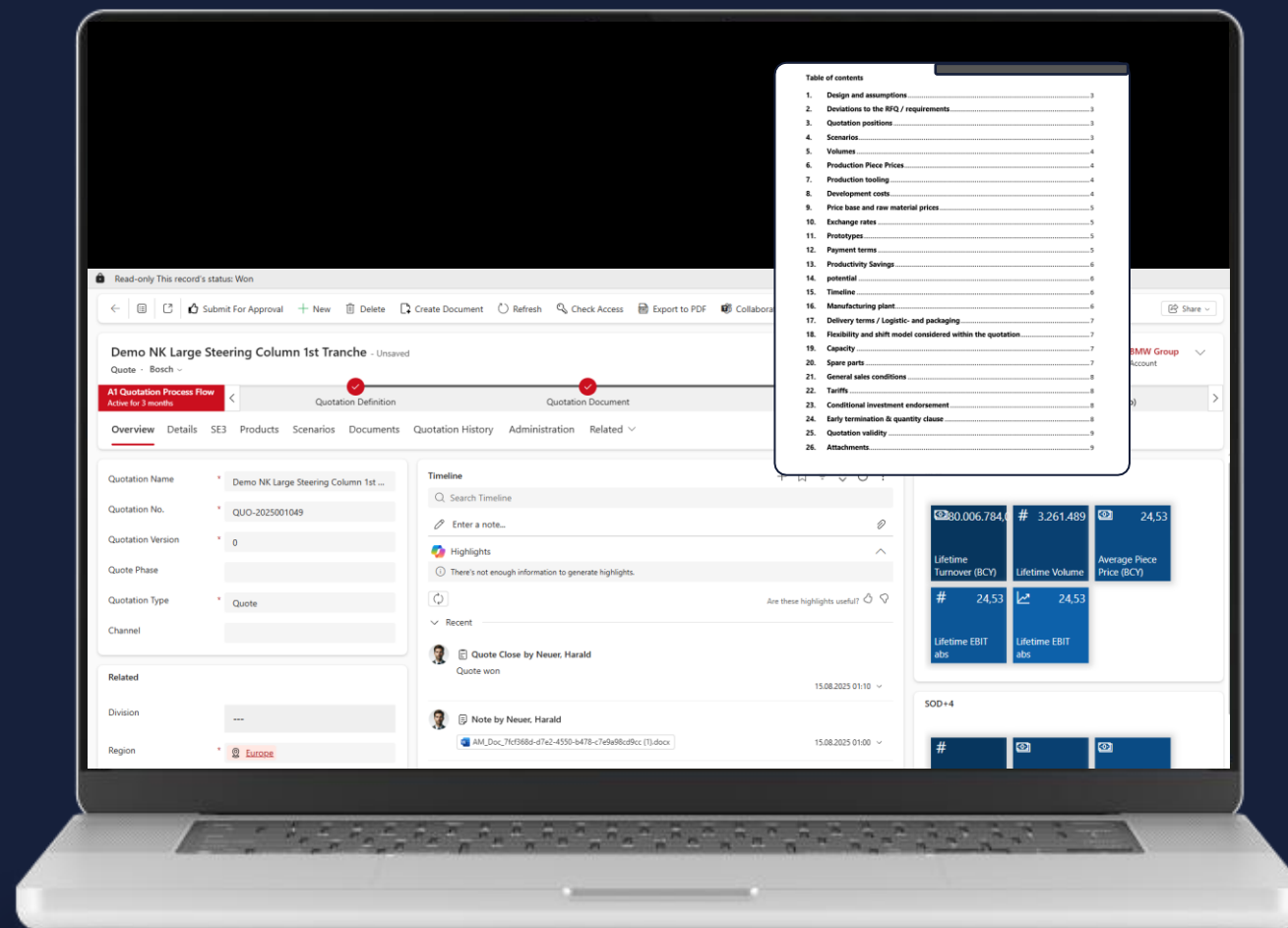
- Autocreation of workorder incl. predecessor / successor and prefill of responsible & timeline
- Configurable parent – scenario/position/mix
- Distinct document folders for inputs and outputs





Quotation

- Full copy of selected scenarios for quote to ensure full traceability w/o manual data entry
- Automatic creation of quotation documents
- Configurable approvals
- Transition of quote to agreement via full copy & full traceability





Agreement

- Agreement contains all information from nominated quotation
- Scenario data directly available on agreement
- Status handling of agreement version via draft / freeze

Test MR DA C-Class - Saved Agreement

Mercedes-Benz AG Account | MRA MID-SIZE Platform | Active Status

Overview | Details | Products | Agreement Analytics | Pricing Analytics | Change Requests | Claim | Scenarios & Positions | Reimbursements | **History** | Documents | ...

+ New Agreement | Add Existing Agreement

<input type="checkbox"/>	Agreement Name	Agreement ...	Agreement V... ↓	Status	Corpora...	Technolo...	Lifetime Turnover (BCY)	Status	Start of Agree...	End of Agree...
<input type="checkbox"/>	Test MR DA C-Class	AG-2025001017	06	Active	Europe		302.984.299,67	●	01.01.2025	31.12.2033
<input type="checkbox"/>	Test MR DA C-Class - Arch...	AG-2025001017	05	Inactive	Europe		303.467.739,67	●	01.01.2025	31.12.2033
<input type="checkbox"/>	Test MR DA C-Class - Arch...	AG-2025001017	04	Inactive	Europe		300.401.819,67	●	01.01.2025	31.12.2033
<input type="checkbox"/>	Test MR DA C-Class - Arch...	AG-2025001017	03	Inactive	Europe		299.918.376,52	●	01.01.2025	31.12.2033
<input type="checkbox"/>	Test MR DA C-Class - Arch...	AG-2025001017	02	Inactive	Europe		300.401.816,52	●	01.01.2025	31.12.2033
<input type="checkbox"/>	Test MR DA C-Class - Arch...	AG-2025001017	01	Inactive	Europe		150.200.908,26	●	01.01.2025	31.12.2033
<input type="checkbox"/>	Test MR DA C-Class - Arch...	AG-2025001017	00	Inactive	Europe		147.876.748,26	●	01.01.2025	31.12.2033

Rows: 7

CHALLENGES & SOLUTIONS

PROJECT



Project framework contract only available as document in contract management systems



Agreement maintained as object in CRM

Current agreement status maintained in EXCEL in isolated part life cycles



Agreement incorporating products, volumes, price, specifications, reimbursements, investments, references

Significant manual maintenance effort for sales to keep agreement up-to-date



Automatic creation of agreement out of nominated quotation and minimum maintenance effort by versioning and auto-population of data

No automatic comparison of agreement to actual, plan, market forecast

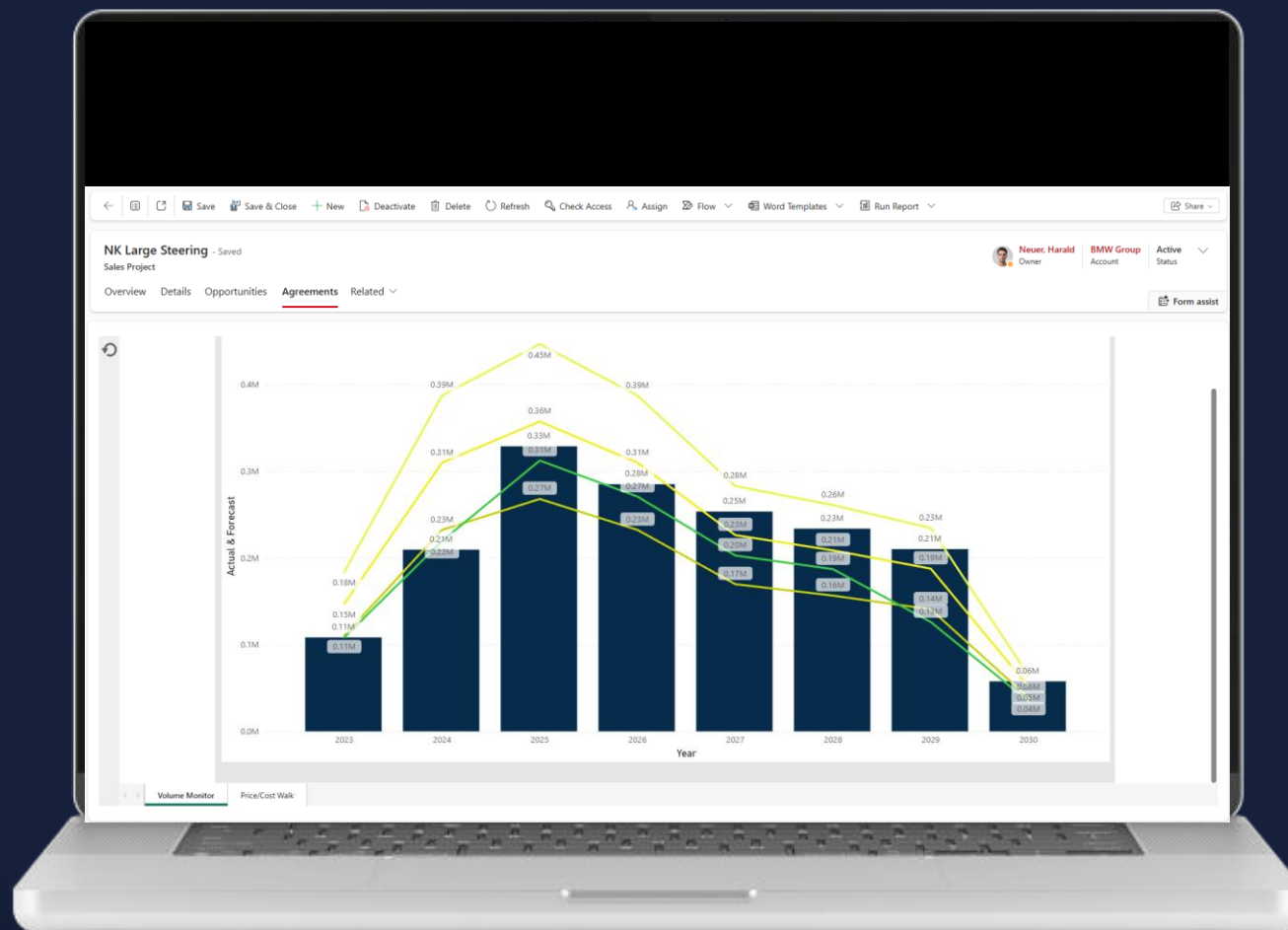


Agreement can be continuously tracked against actuals, plan and market forecast



Project

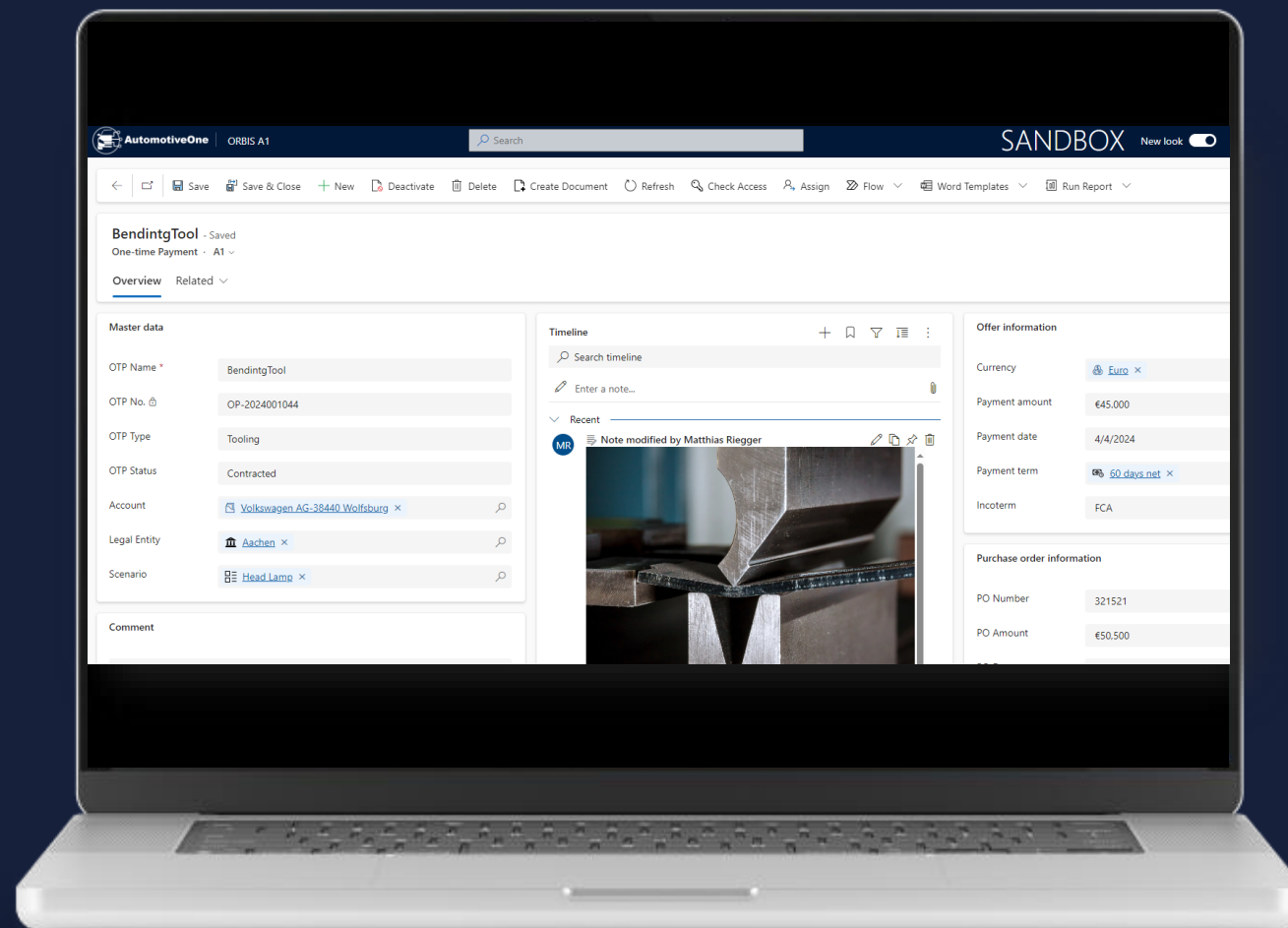
- Umbrella projects to cover staggered nominations with common technological baseline





Reimbursements

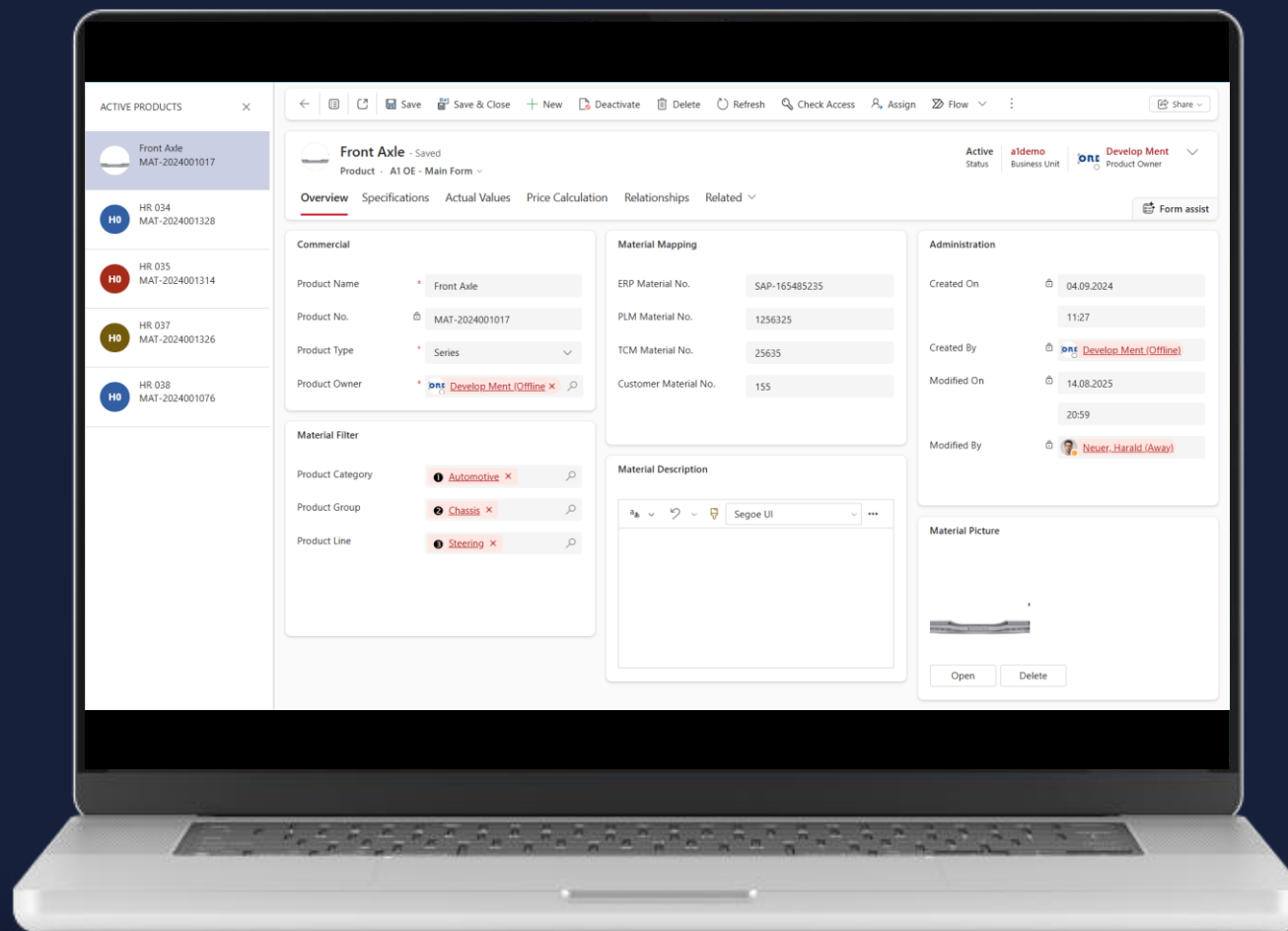
- Integration of reimbursement types from prototypes to royalties, including type specific configuration
- Application of payment types milestone billing, lump-sum & amortization
- Relation to serial product for amortization tracking





Product

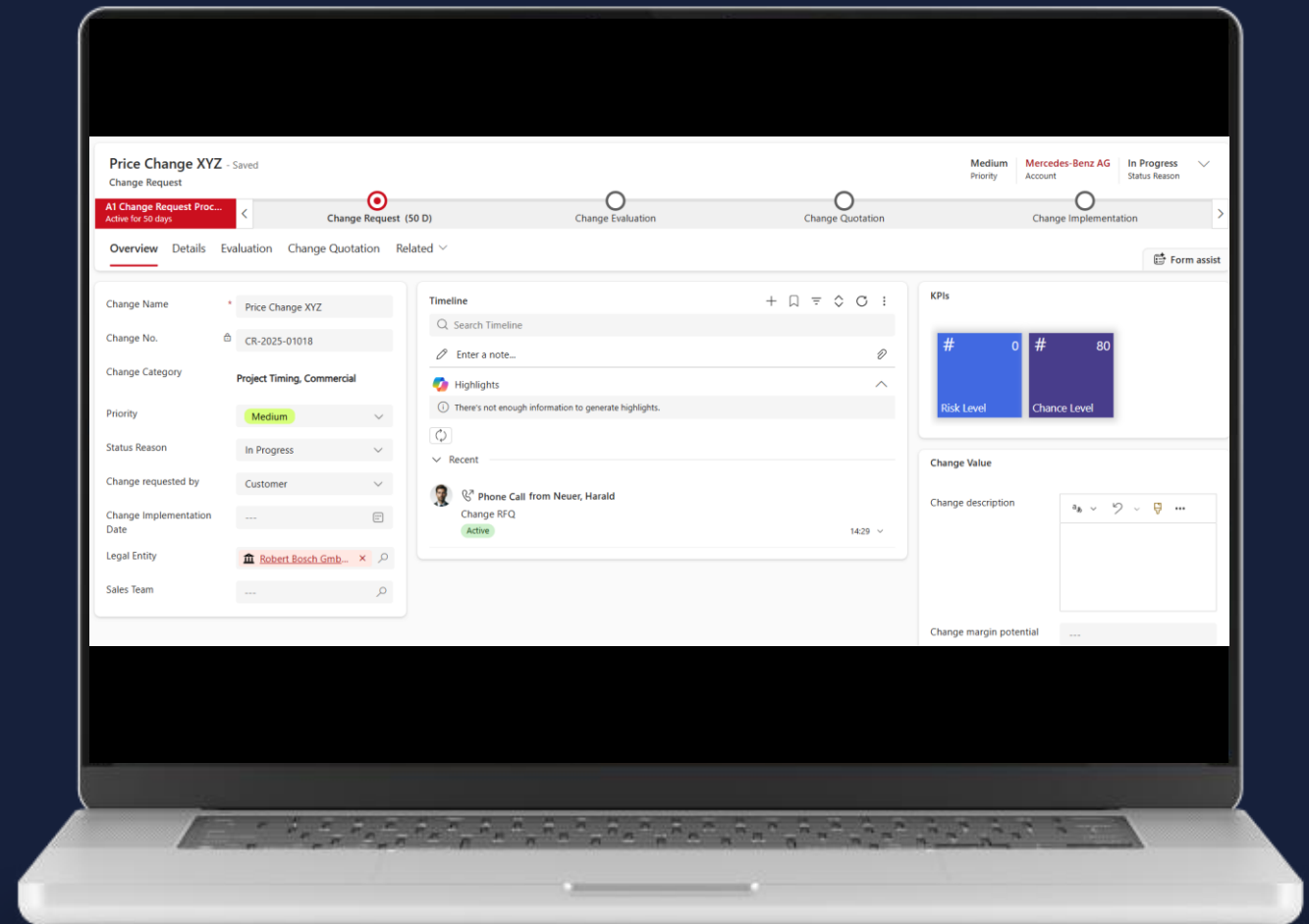
- Product catalogue management across CRM, PLM, SAP
- CRM in leading or consuming role





Change

- Flexible integration of alternative or combined change request types
- Distinct traceability without additional manual data entry
- Historization instead of versioning simplifies overviews for user



CHALLENGES & SOLUTIONS SERIES



No structured approach to identify, evaluate and process claims



Best practice process with phases mirroring degree of implementation

Inaccurate forecasting and inconvenient reporting of claims



Transparent analytics for target, forecast and actual and state of the art reporting portfolio

Missing collaboration for claims



Claim process incorporates other departments – Teams and SharePoint serve as collaboration hub

Missing preparation of negotiation strategy

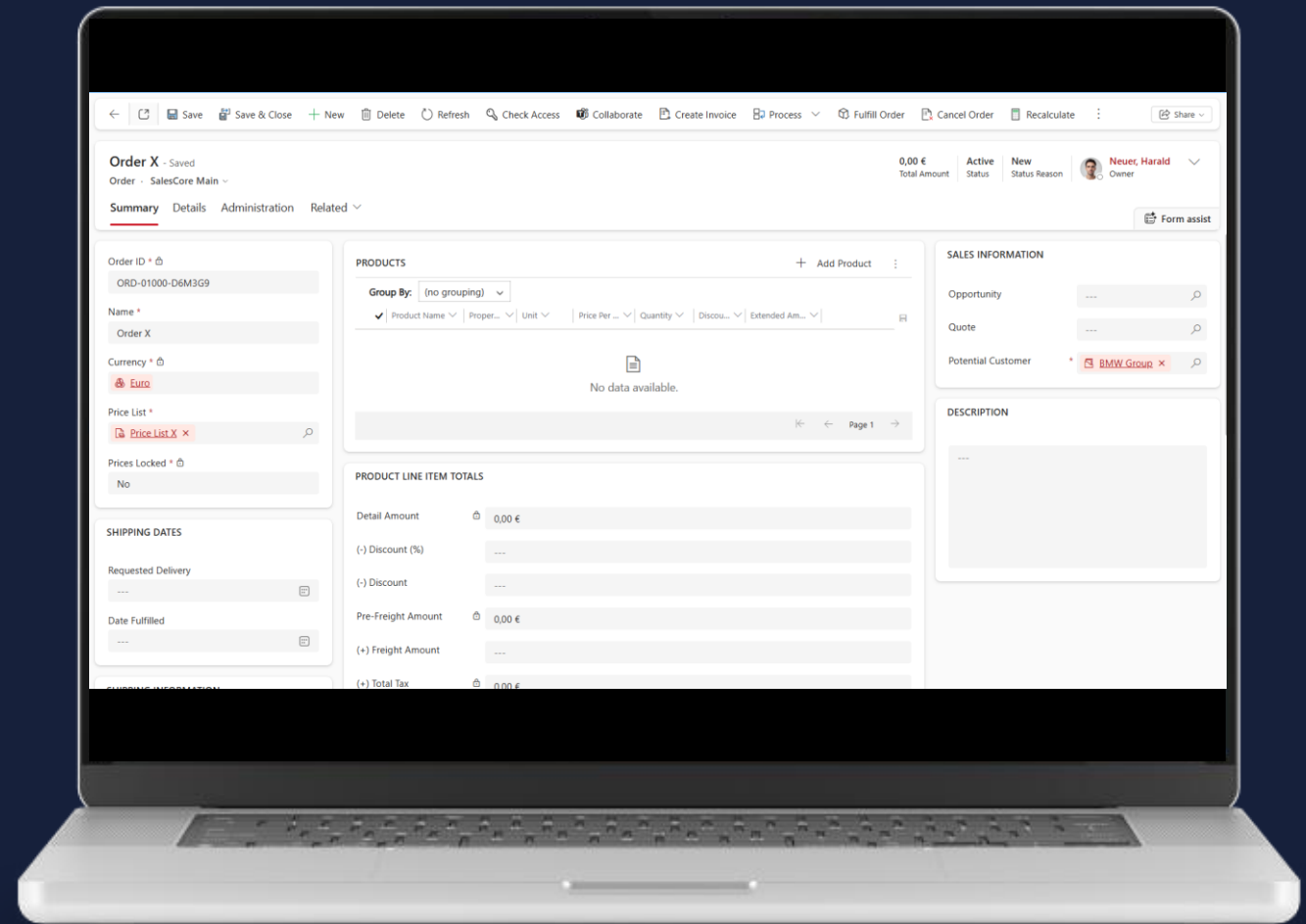


Best practice negotiation strategy board for major claims



Order

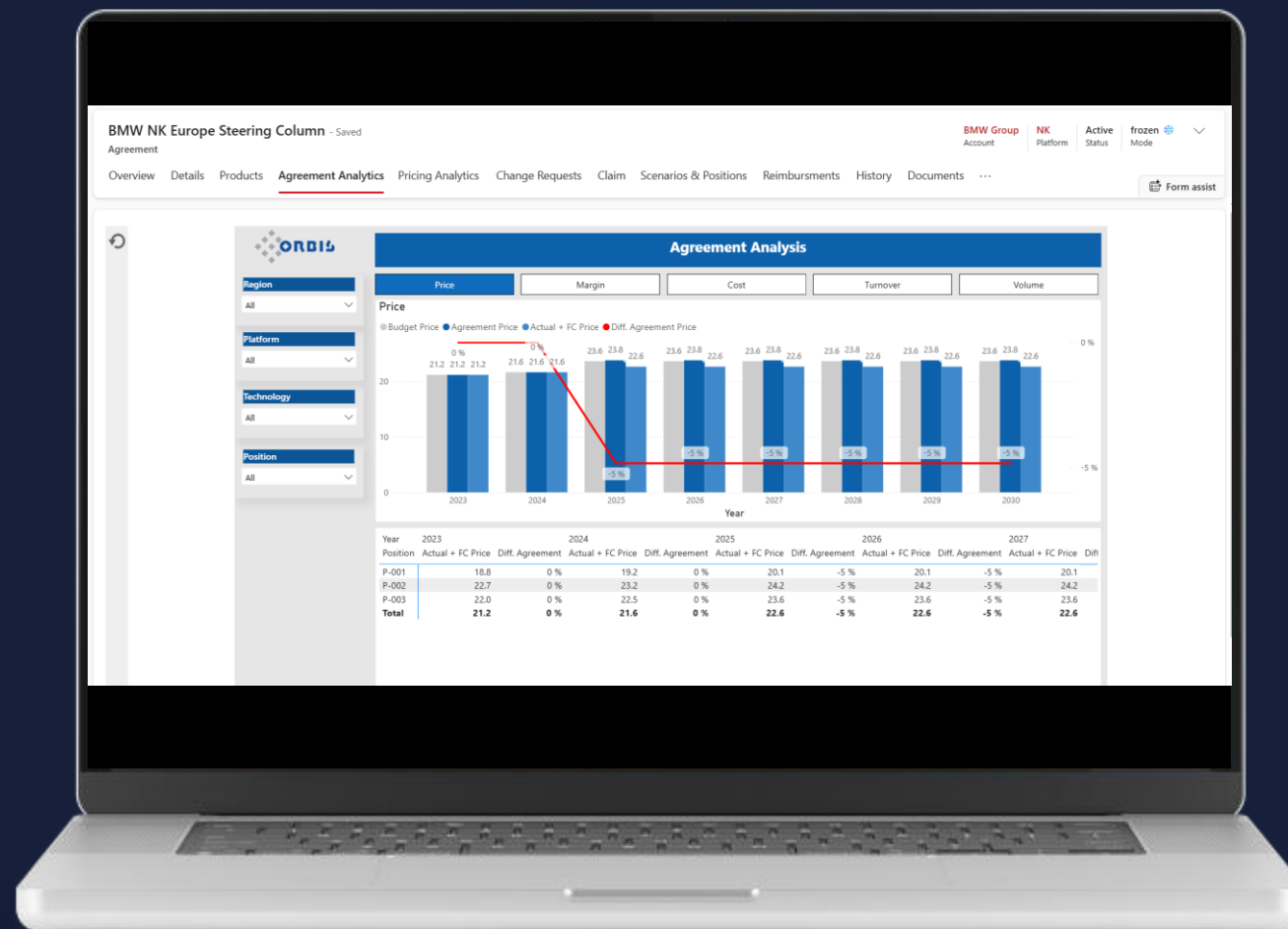
- Order management fully synchronized to SAP
- Enhancement by Purchase order reading via AI





Monitoring

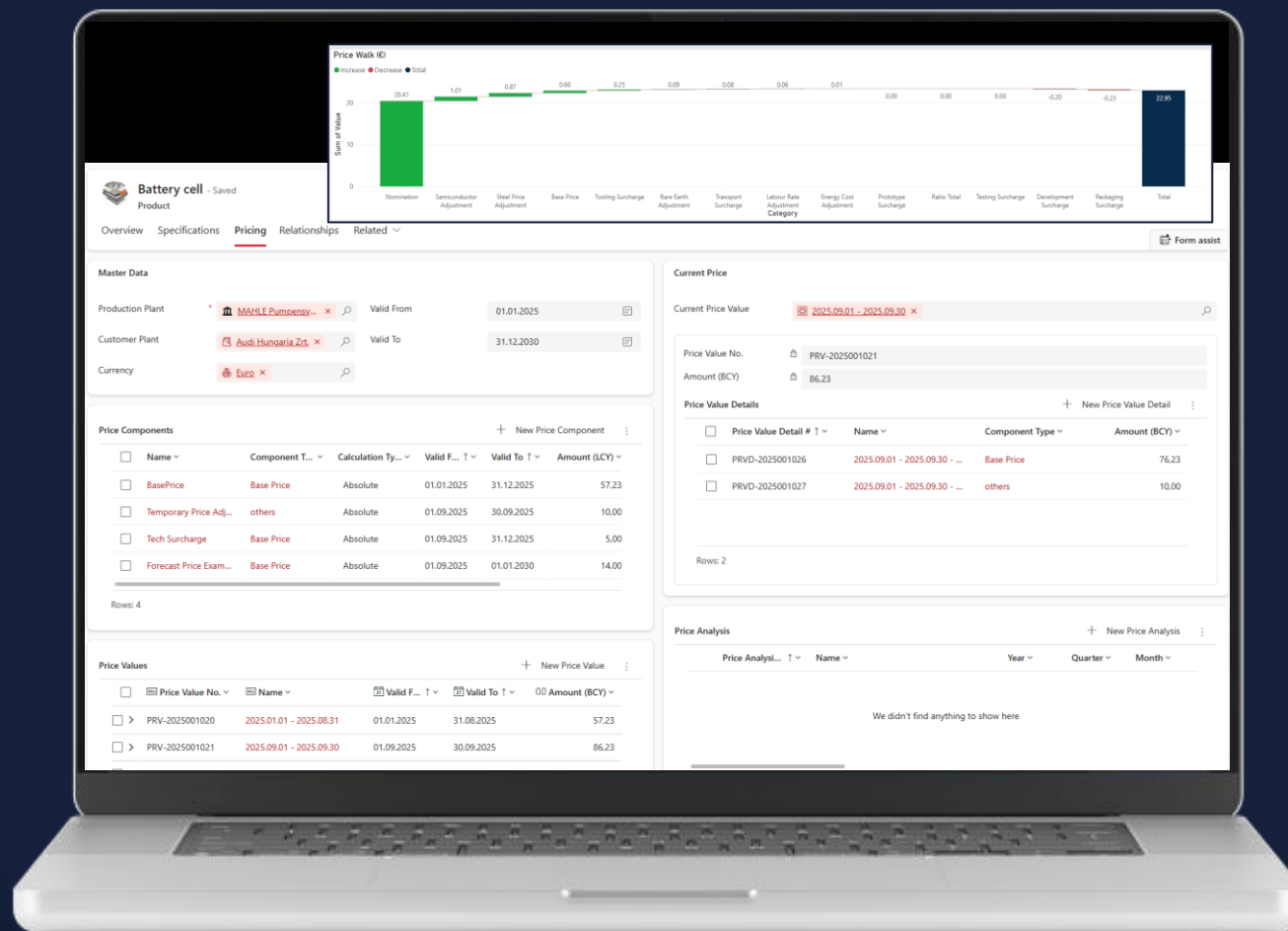
- Comparison of agreement version for all volumes and commercials
- Baseline for claim and provision management
- Minimized effort for reporting and preparation of customer meetings





Price

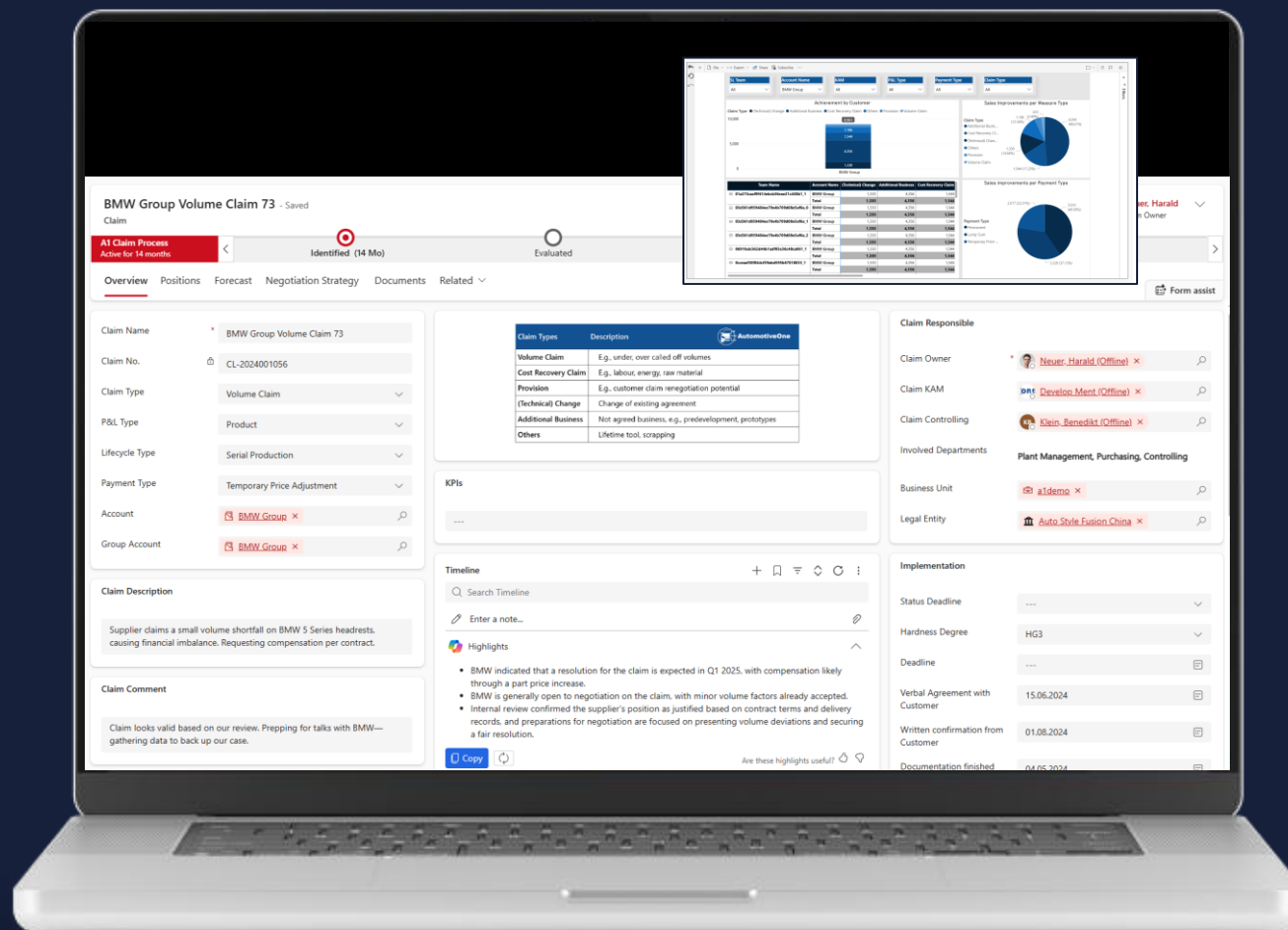
- Full transparency and comparability of prices and early identification of price deltas
- Sales prices secured in centralized database
- Transparency about references utilized in pricing strategy





Claim

- Best practice process with degree of implementation logic
- Claim process incorporates other departments – Teams and SharePoint as collaboration hub
- Transparent analytics for target, forecast and actual and state of the art reporting portfolio



A white number "01" inside a dark blue circle. The background of the entire slide is a sunset sky with silhouettes of a helicopter, two jets, and two tanks.

01

ORBIS SE SHORT FACTS

A white number "02" inside a dark blue circle.

02

INTRODUCTION

A white number "03" inside a dark blue circle.

03

DEEP DIVE

A white number "04" inside a dark blue circle.

04

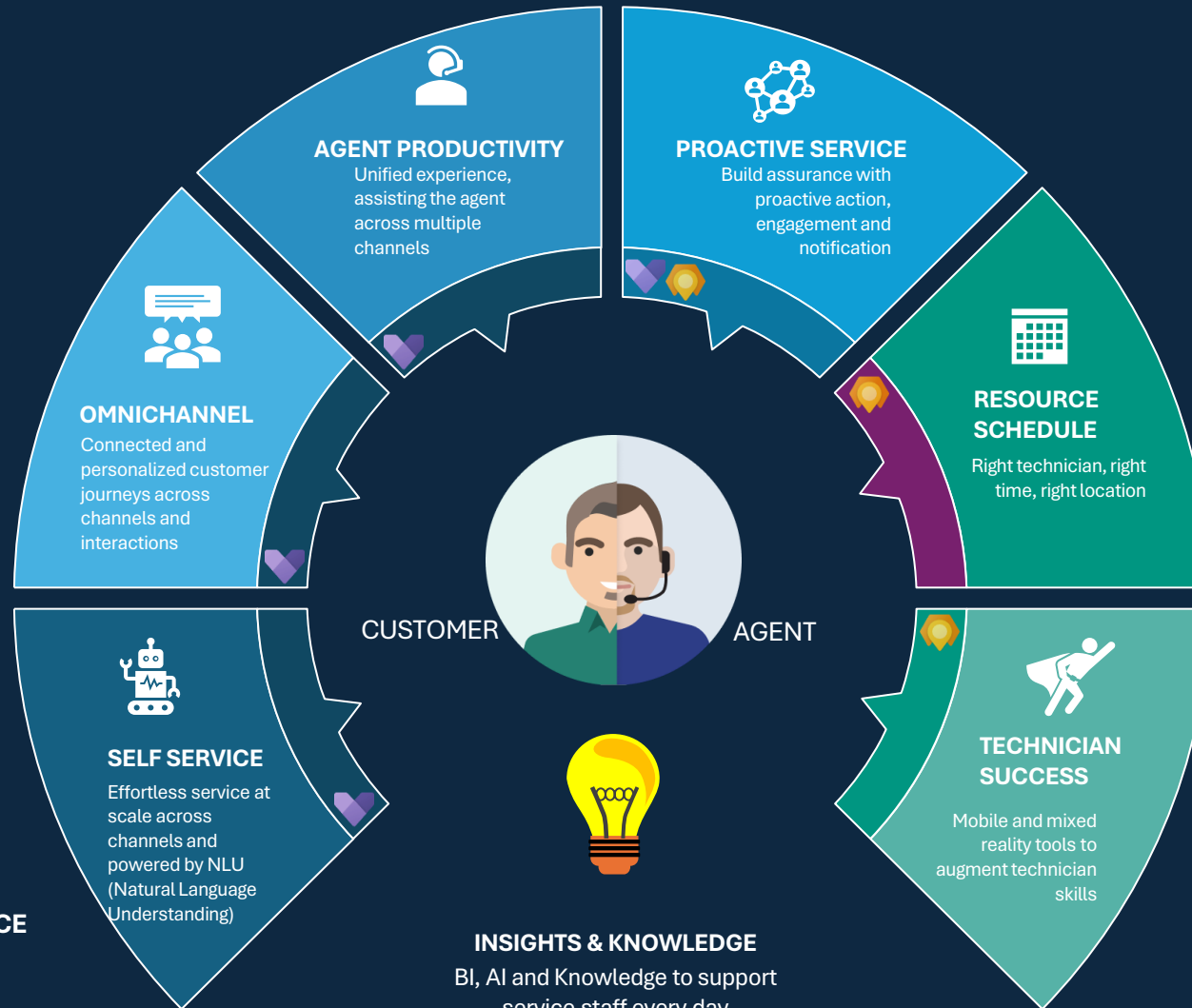
SERVICE AND FIELD SERVICE

A white number "05" inside a dark blue circle.

05

HOW TO START / GET IN TOUCH

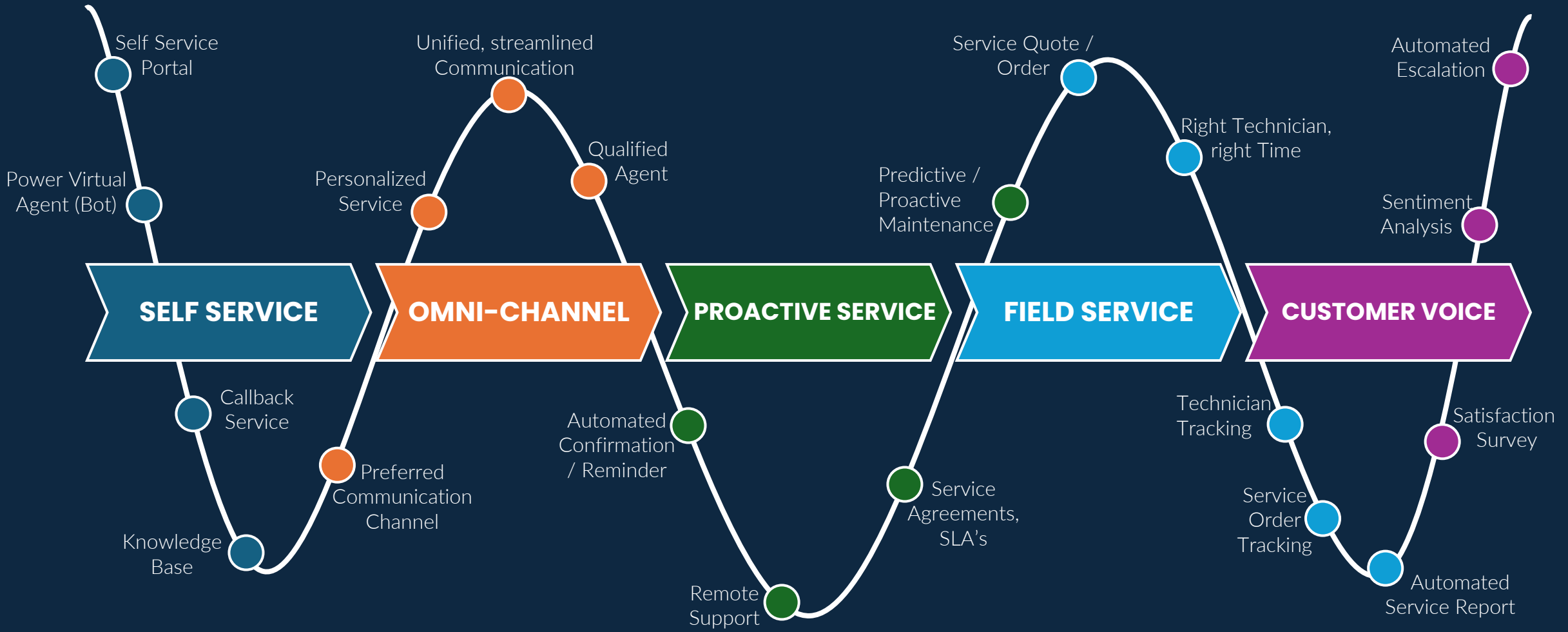
Pilars of World Class Service



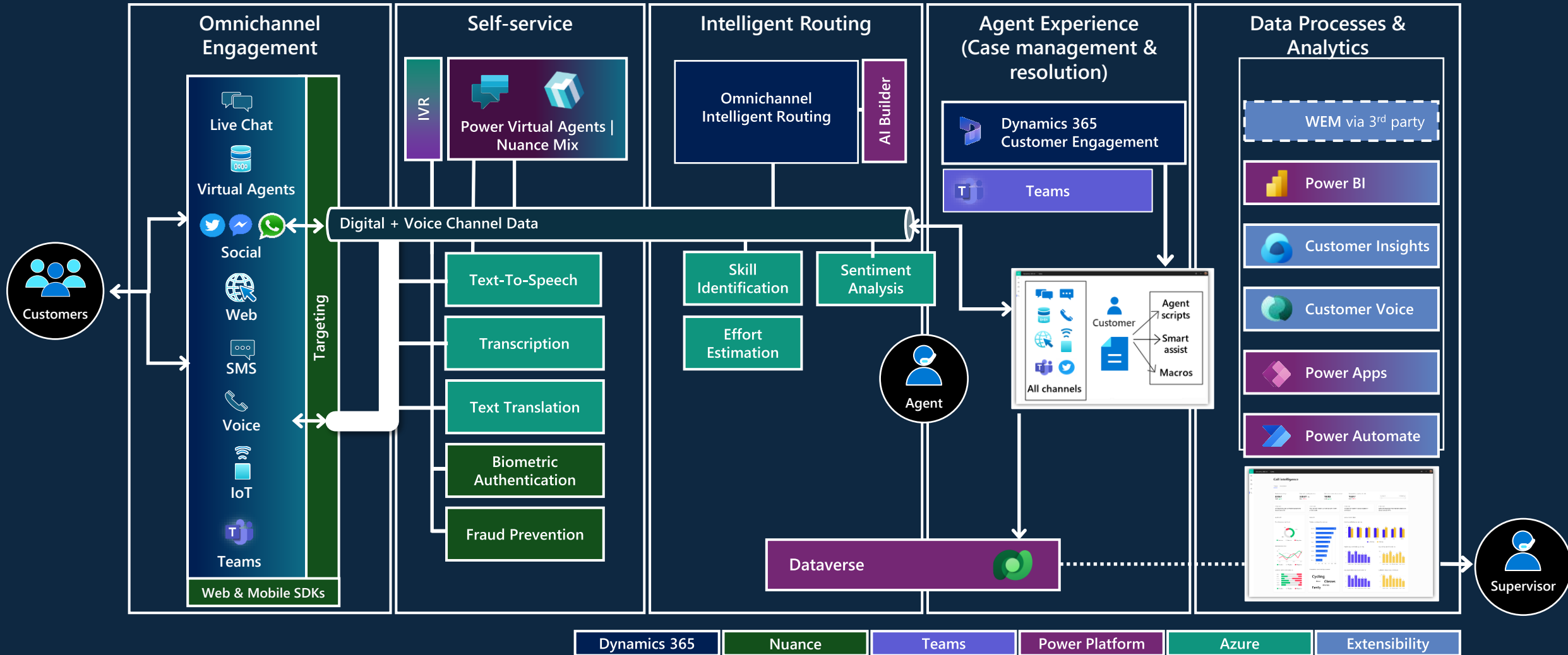
 **DYNAMICS 365 CUSTOMER SERVICE**

 **DYNAMICS 365 FIELD SERVICE**

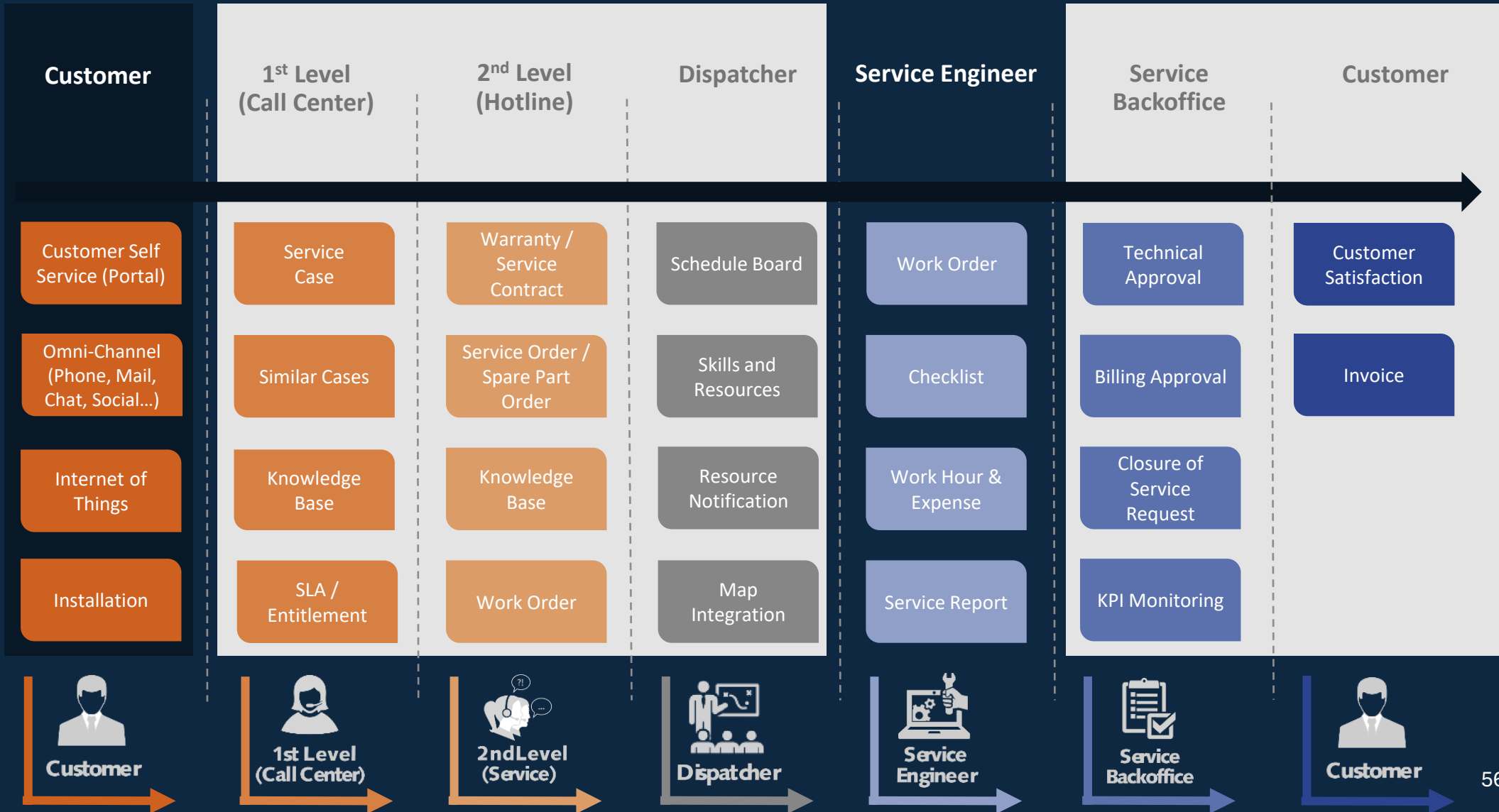
Service Journey Map



Digital Contact Center Platform



SERVICE PROCESS



Roles in Customer Service



Describes the main roles in the process and their individual needs



Albert Porter / CUSTOMER

I would like to have

- » quick access to answers
- » quick access to support documents, like installation or troubleshooting guides
- » support via mobile or pc, platform & device independent
- » quick support when I am not able to find the answer by myself, also for deep dive questions



Sara Support / DISPATCHER

I would like to have

- » quick access to support information to help the customer in a minimum amount of time
- » a clear overview over all requests and open tasks
- » the right tickets assigned to me
- » time saved when I forward a ticket



Sam Expert / SERVICE MANAGER

I would like to have

- » overview over all open tickets at one customer
- » good self service options for customers, so that the support load decreases
- » the ability to see if a Knowledge Base Article is useful and find out where improvements can be done



Juliane Streck / TECHNICIAN

I would like to have

- » quick access to support/installation/repair documents
- » access to my work order data at any place
- » access to internal information
- » the ability to track my working time, expenses, used products on my mobile and on my pc

Customer Service – Use Case

Service Request



Customer has a service request for a configured product

Albert identifies possible contact channels on website

Albert calls Customer Service Center

Identification via phone number & if applicable via voice

Albert is guided by a virtual agent using IVR

Pre-classification of the issue and identification of appropriate Service Agent

Processing the issue and forwarding it to human service agent

Case is logged in the CRM and service agent can view history

Ticket solution is done based on the knowledge base article for the product or forwarded to product expert

Albert receives solution via e-mail, can view changes in the customer portal

Solution is provided by callback, e-mail or portal



Albert Customer

1

2



Customer sends Chat note with his request and product name



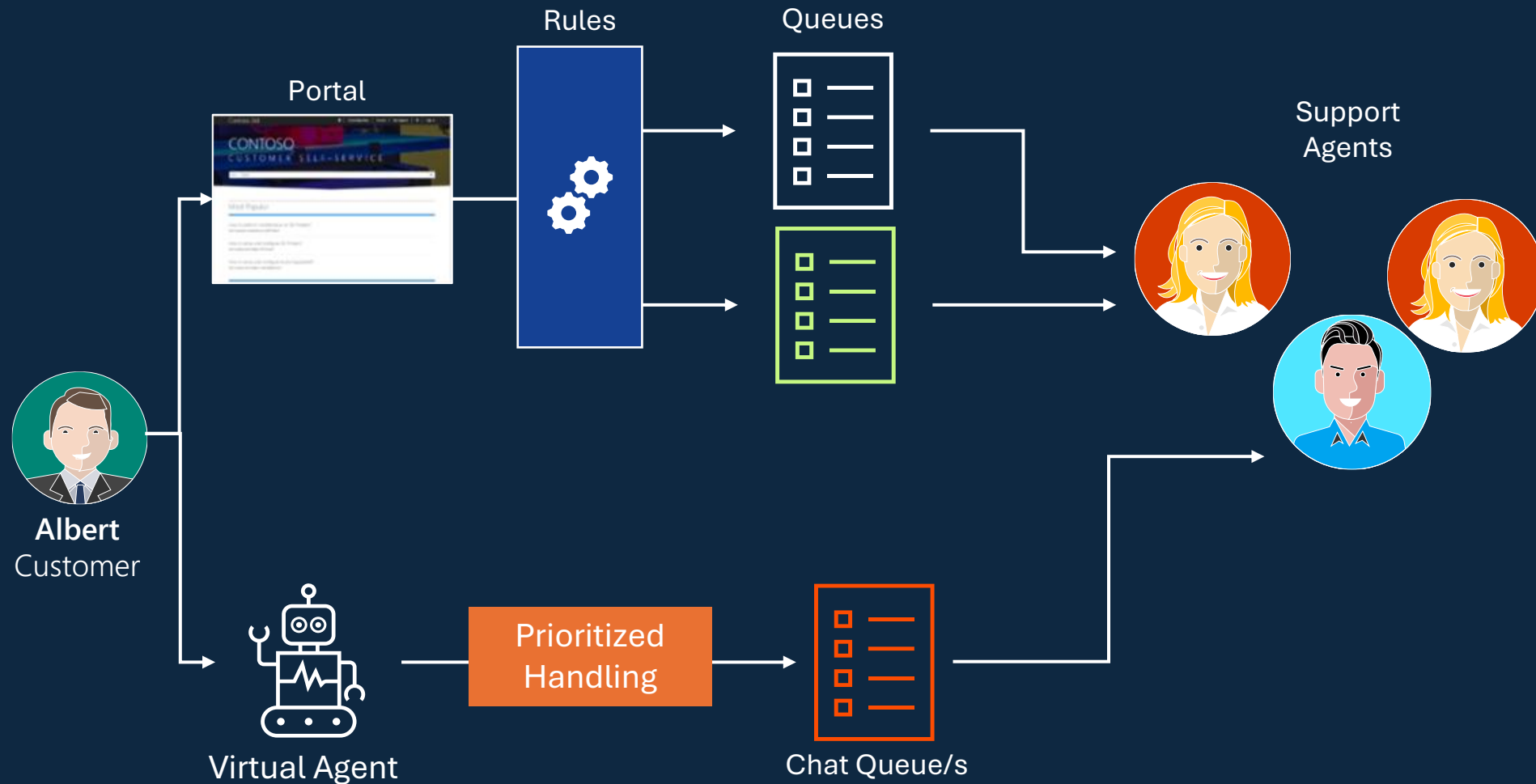
Sara Support



Albert Customer

Efficient - Transparent - Connected

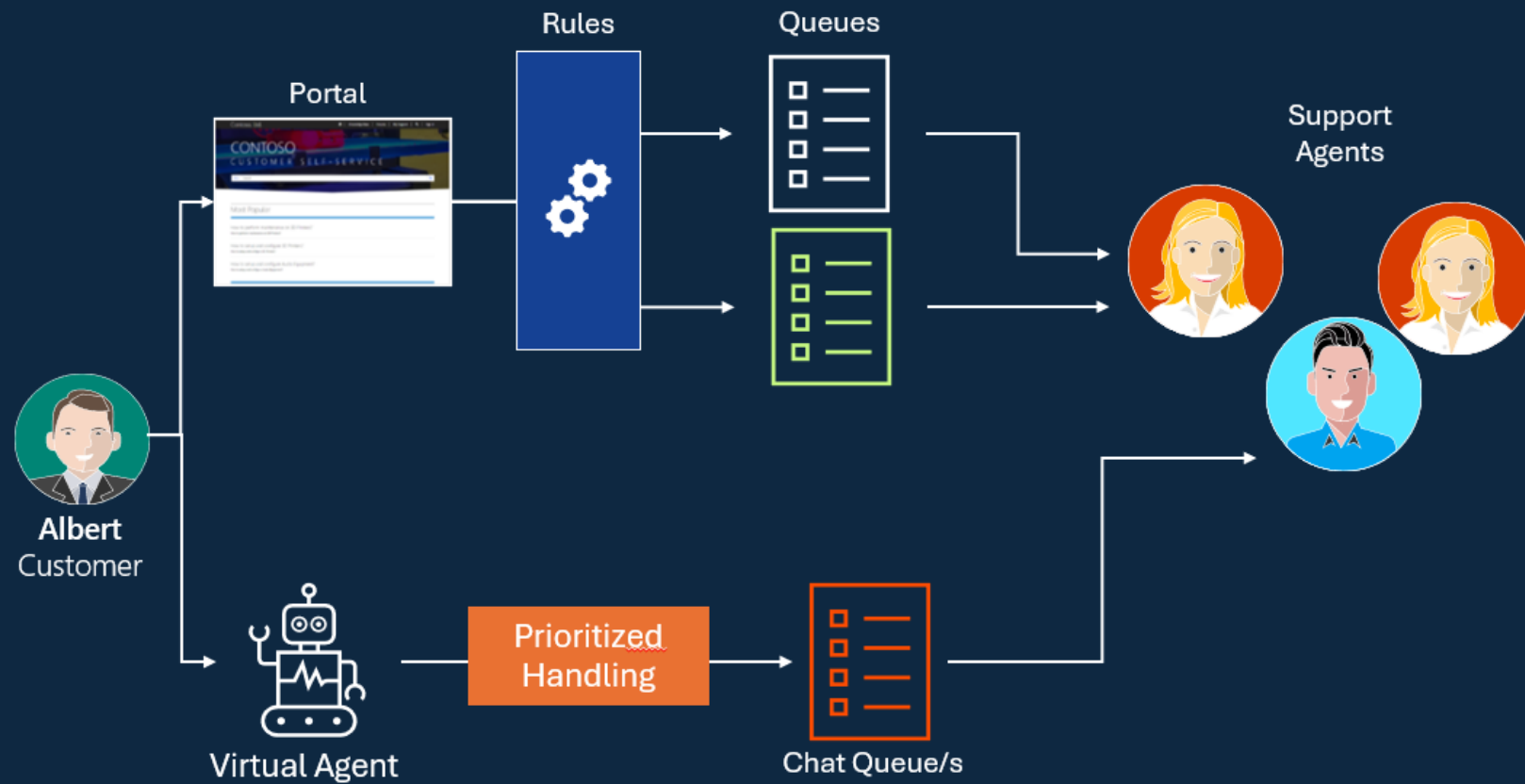
Queues & Rules in Dynamics 365



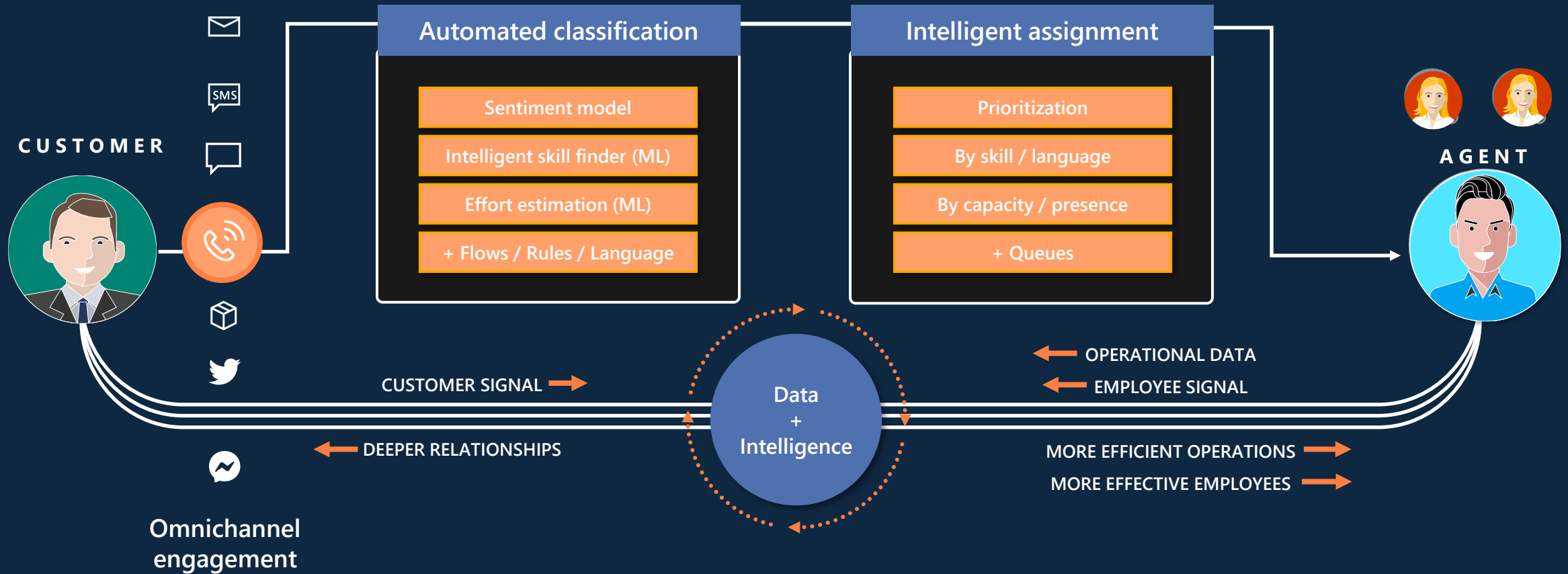
Queues & Rules in Dynamics 365



- » Routing rules control requests to the desired queue, for example:
 - » “Prio” = “High”
 - » “request type” = “problem”
 - » “Customer category” = “A”
- » Routing rules can be “and” or “or” condition



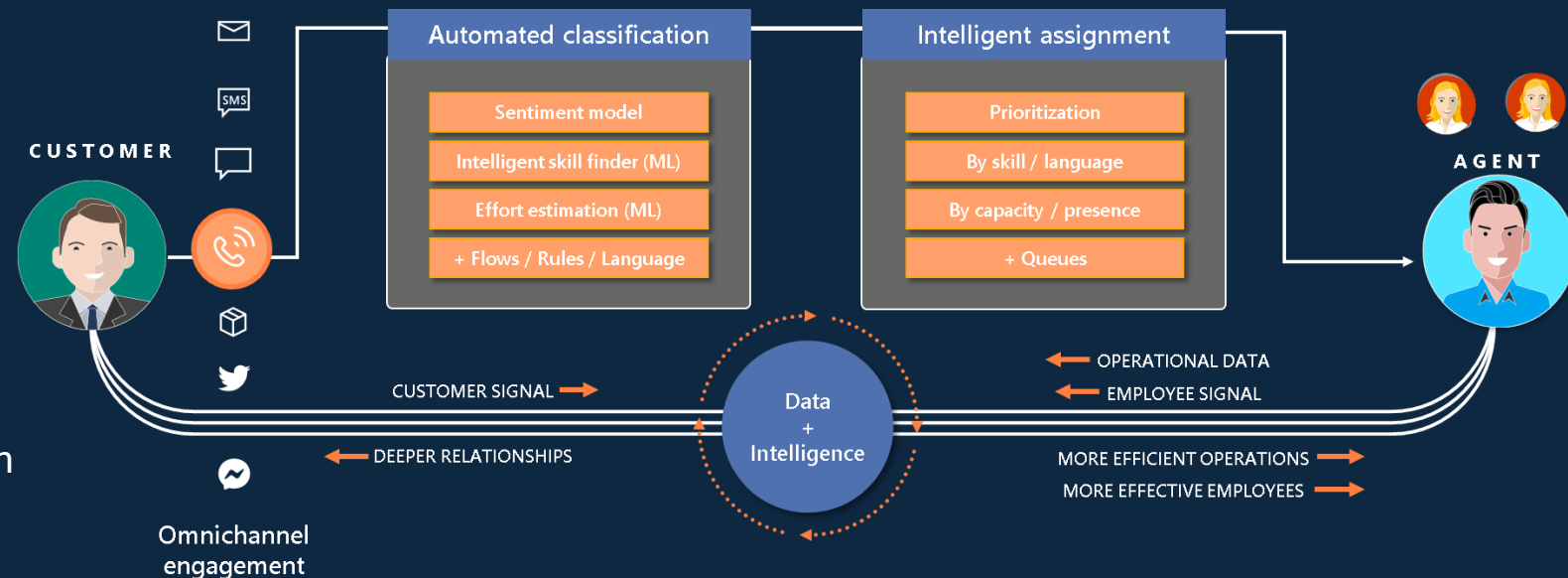
Intelligent Unified Routing



Unified Routing in Dynamics 365



- » Connecting end-customers with the best-suited agent to provide the right outcome upon first contact.
- » Using skills-based routing to automatically assign incoming work, matching to the best agent and decreasing resolution time.
- » Adding more context to the incoming work item using conditions on work item attributes and related entity.
- » Using machine learning models to predict skills and assigning incoming work items to the best agent.
- » Prioritizing work items within a queue using work item attributes, added context, or related entity attributes to ensure the business is able to use the agent's time on the most important work items first as per the business need.



Knowledge Management

Benefits of knowledge management

- » Primary service providers, such as agents, can look up information in a knowledge base to resolve customer queries right away, thereby increasing their productivity.
- » With access to rich, high-quality knowledge resources across consistent and contextual Omnichannel experiences, agents can resolve issues faster, reducing their average call handling time.
- » Customers can use knowledge management search capabilities across channels to solve issues themselves, reducing support tickets and driving customer satisfaction.

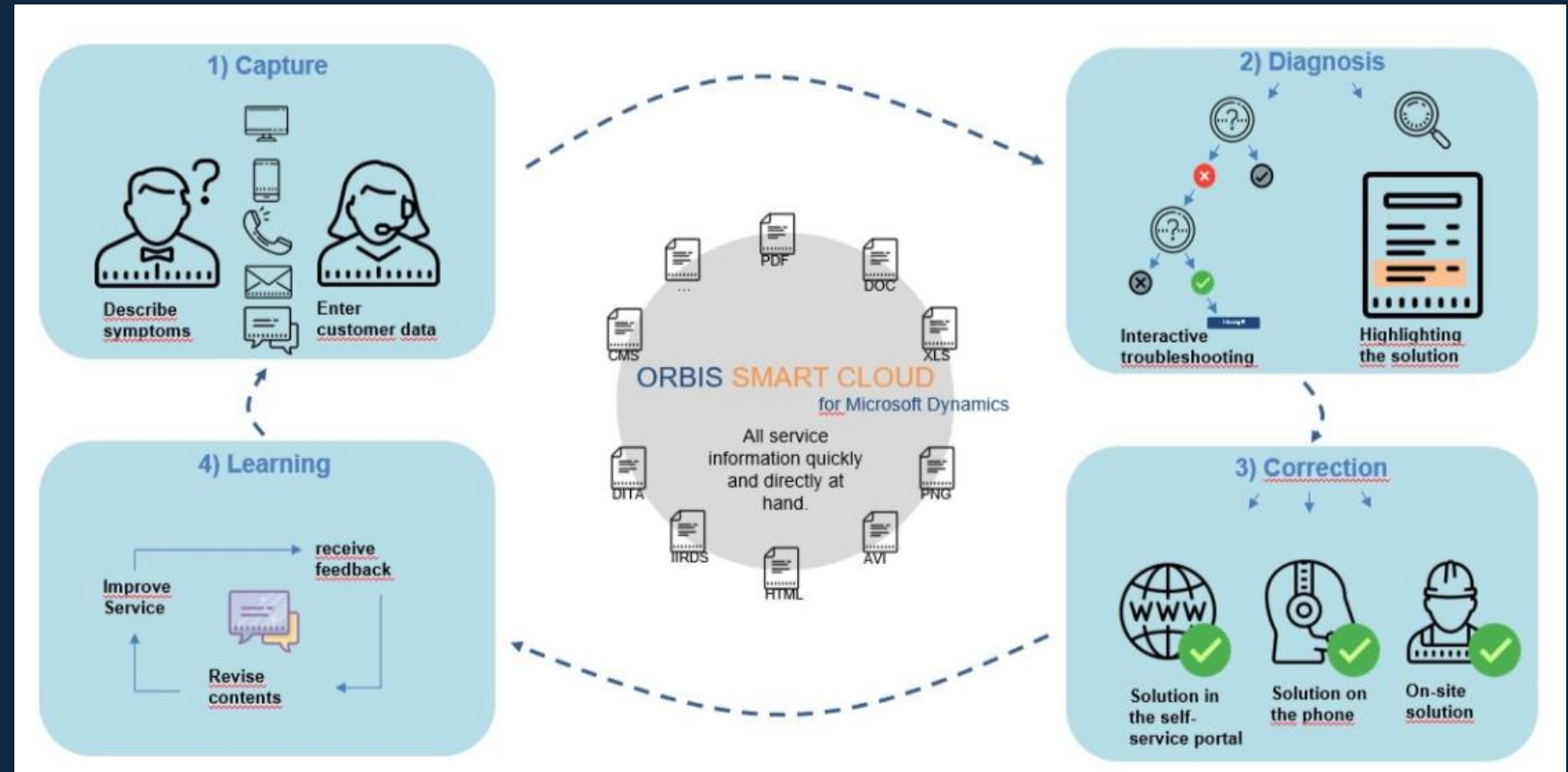


OSKC – Orbis Smart Knowledge Cloud



Benefits

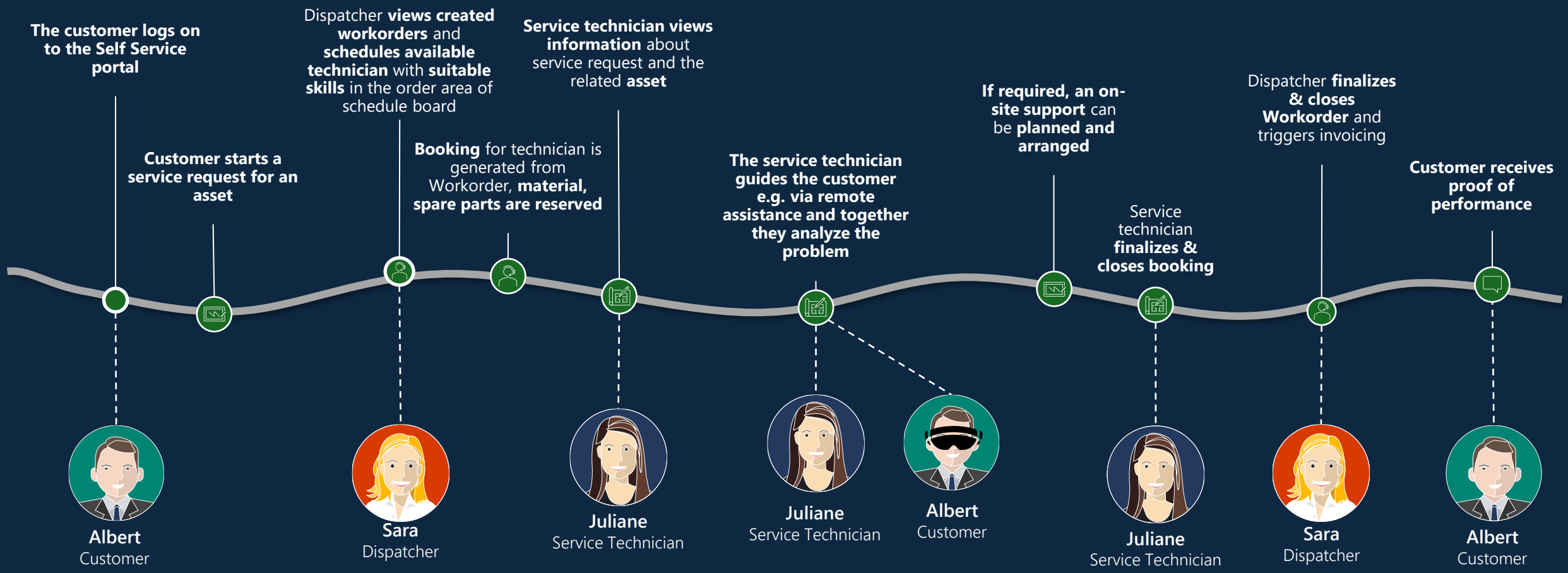
- » Guided conversation of agent & customer through decision tree structure
- » Articles, pictures, videos can be integrated in decision tree results
- » Jumping forward & back in the answers given during the conversation in case of need
- » Time savings for agents & customers
- » Fast availability of right knowledge 24/7
- » Quick start possibilities for new employees



Customer Service & Field Service



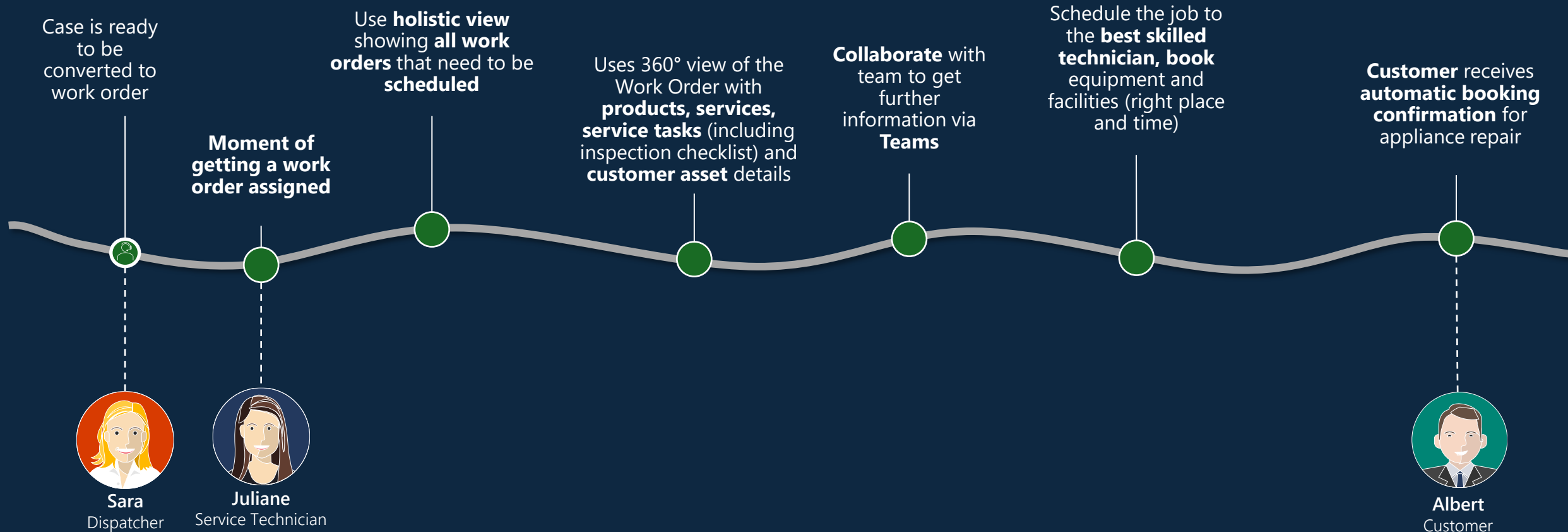
Technician Assistance Needed



Efficient - Transparent - Connected

Field Service – Use Case

Schedule WorkOrder

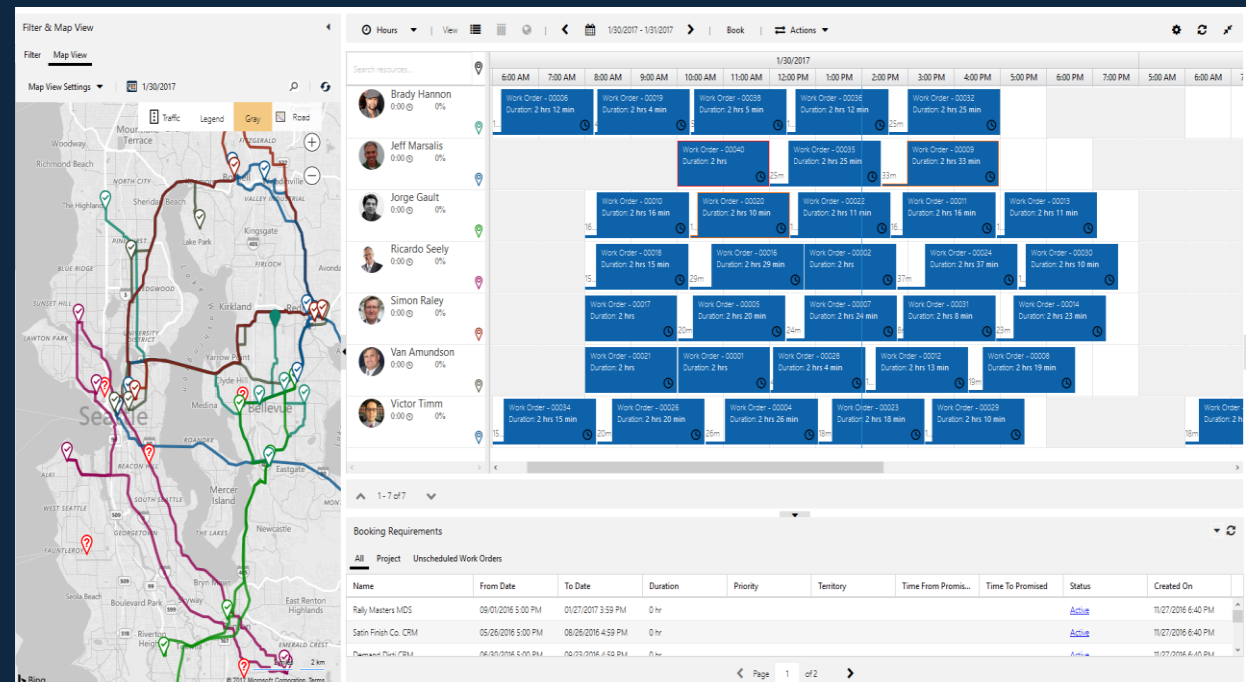
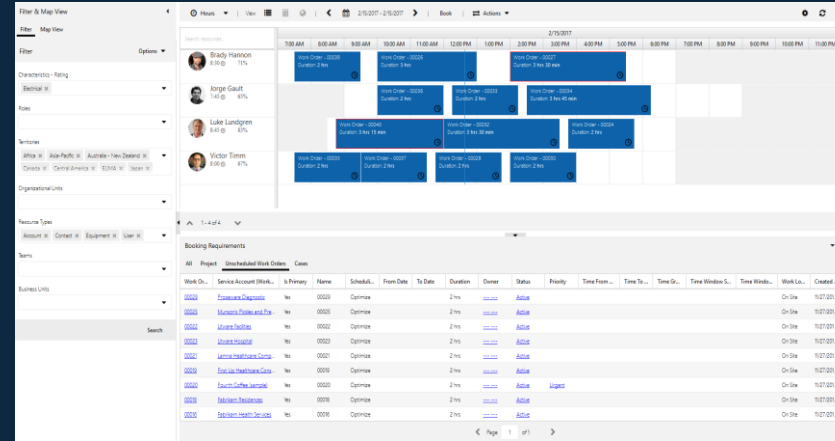


Efficient - Transparent - Connected

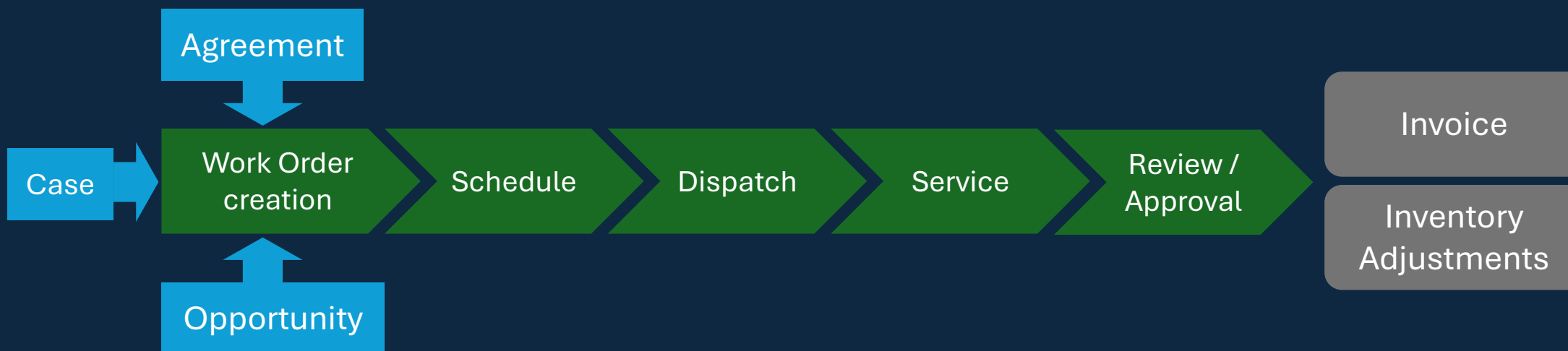
Field Service – Schedule Board



- » Manual Scheduling - Planning with Click & Drag
- » Scheduling Assistant Planning with Suggestions based on resources, skills, possible periods, travel time, etc.
- » Resource scheduling optimization
- » Resource planning based on goals and restrictions:
 - » Automatic Planning, Dispatchers can intervene manually



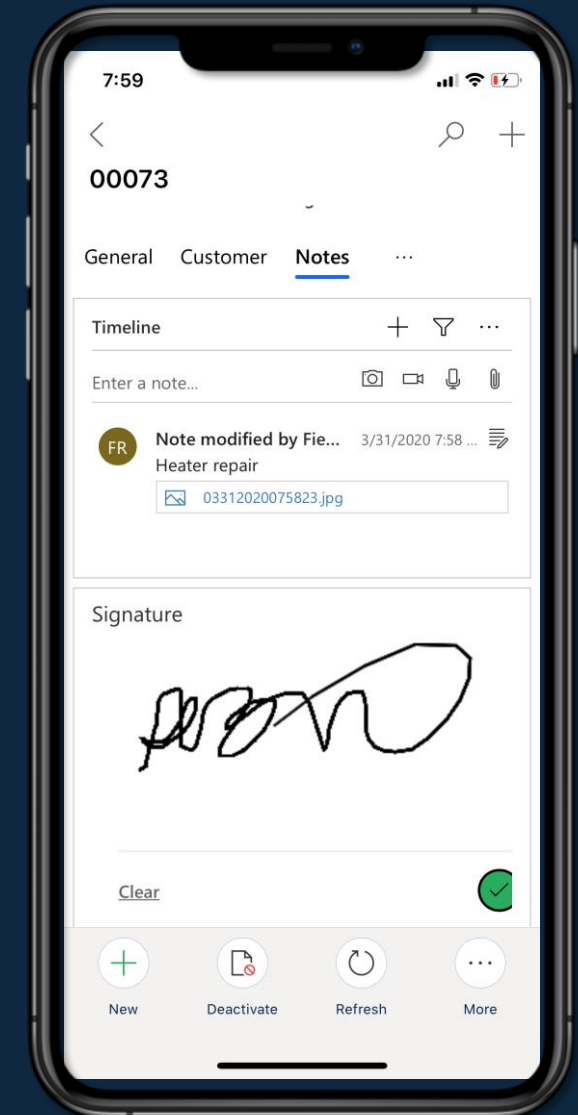
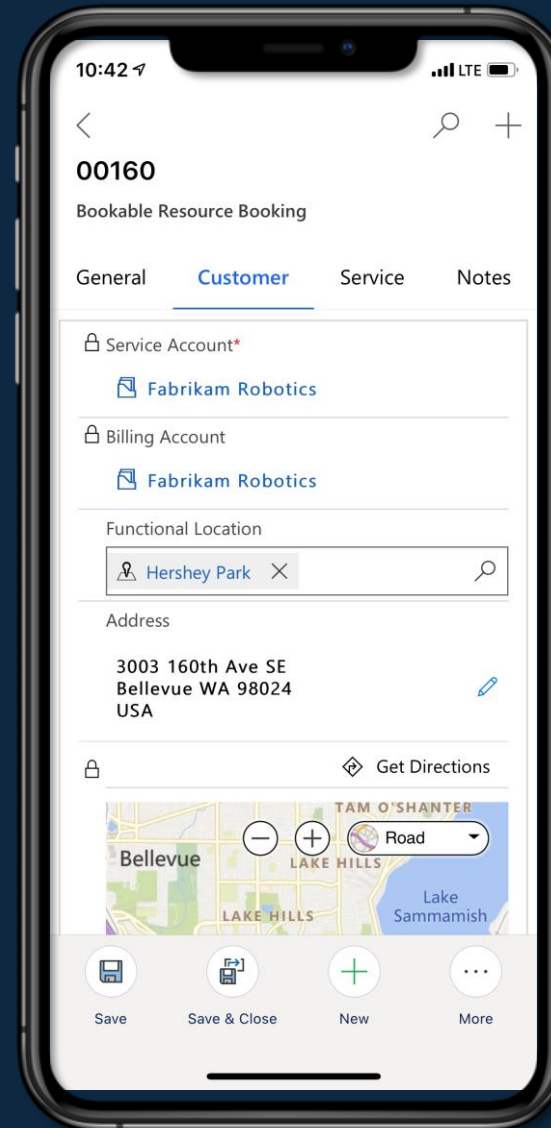
Dynamics 365 Field Service

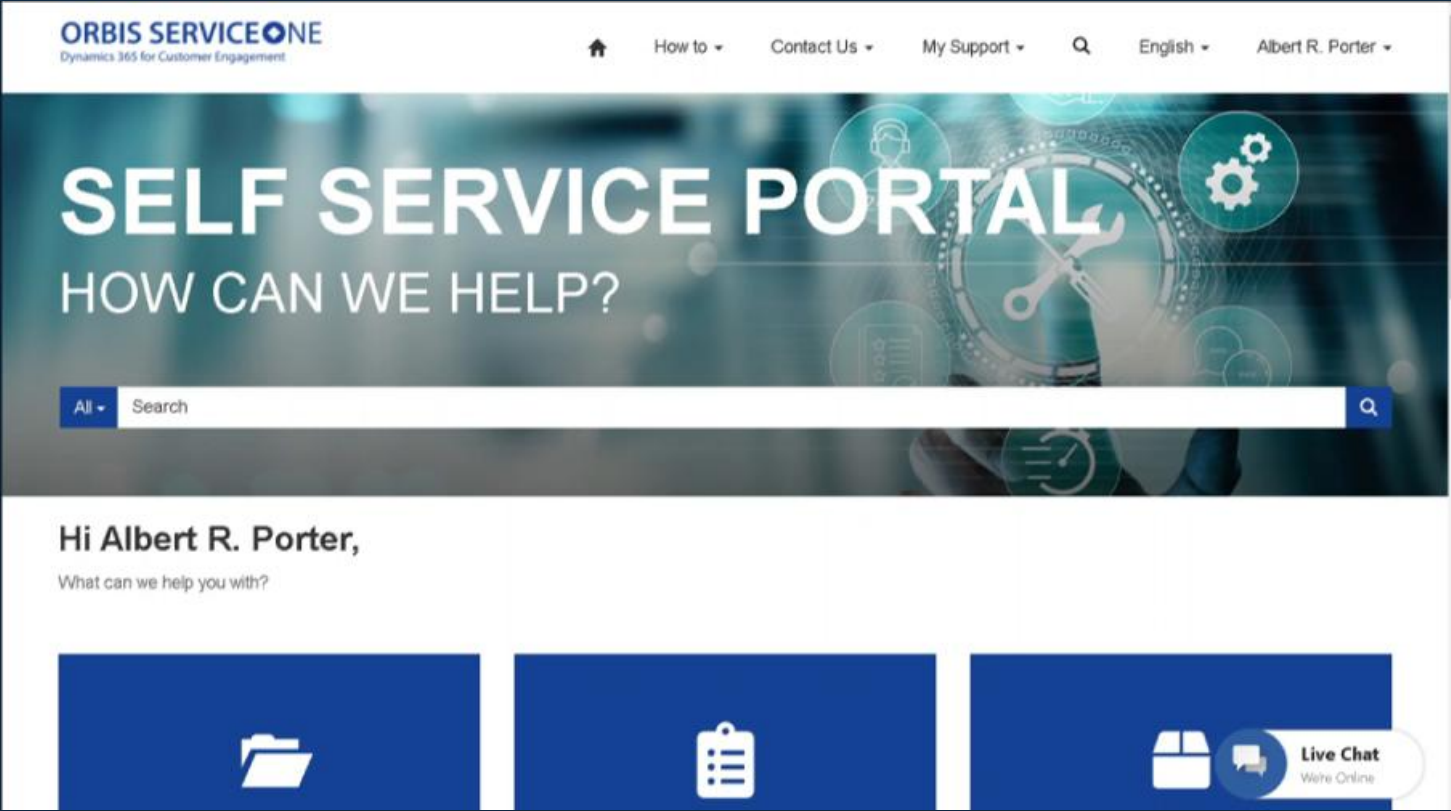


Field Service – Mobile App



- » Active remote support of field service technicians including offline capabilities
- » Enables technicians to view and update work orders, customer assets, accounts, and more on the go
- » Customizable to your business needs (built on Microsoft Power Platform as a model-driven app)
- » Included in your Field Service license



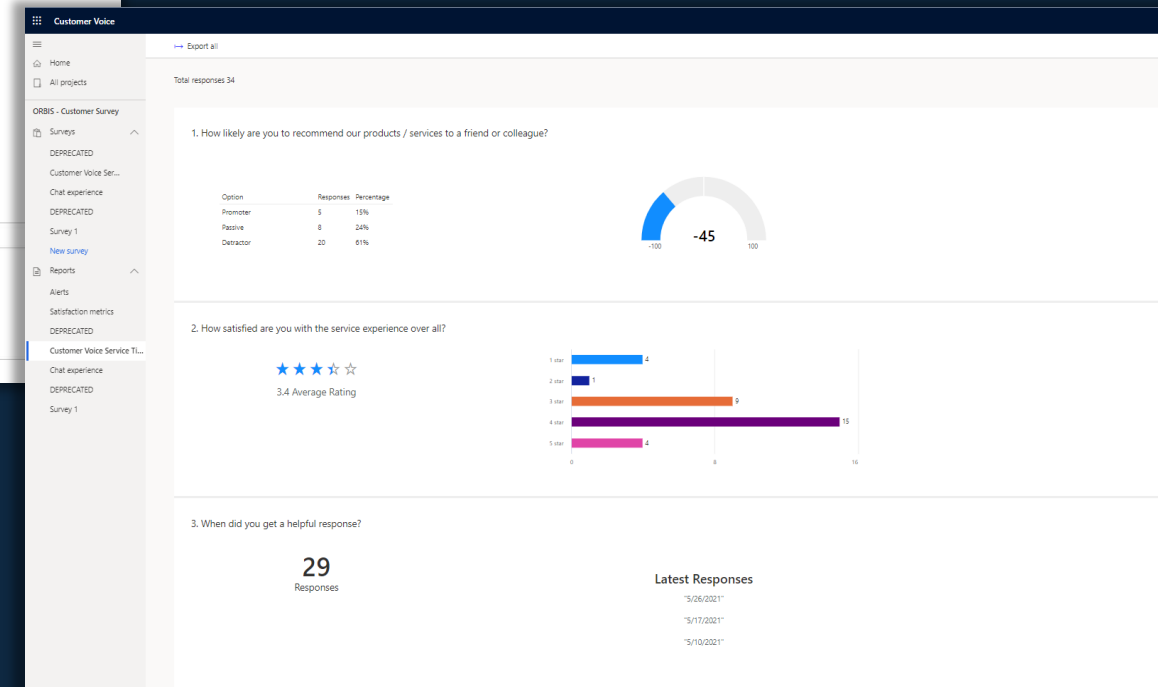
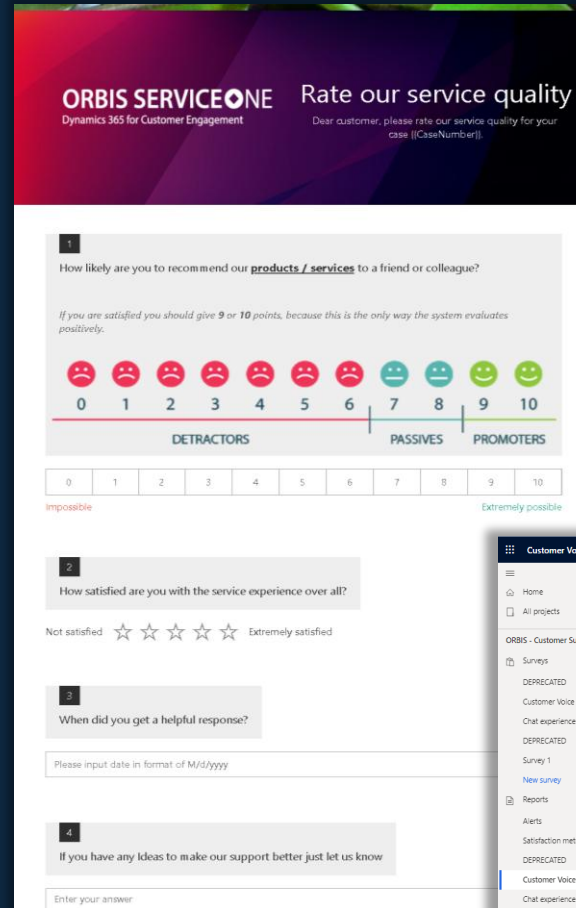


The screenshot shows the ORBIS SERVICE ONE self-service portal. At the top left is the logo "ORBIS SERVICE ONE" with the tagline "Dynamics 365 for Customer Engagement". The top navigation bar includes a home icon, "How to", "Contact Us", "My Support", a search icon, "English", and the user name "Albert R. Porter". The main banner features the text "SELF SERVICE PORTAL" and "HOW CAN WE HELP?" over a background of technical icons. Below the banner is a search bar with a dropdown menu set to "All" and a search icon. The user is greeted with "Hi Albert R. Porter," and "What can we help you with?". At the bottom, there are three blue buttons: a folder icon, a clipboard icon, and a "Live Chat" button with a speech bubble icon and the text "We're Online".

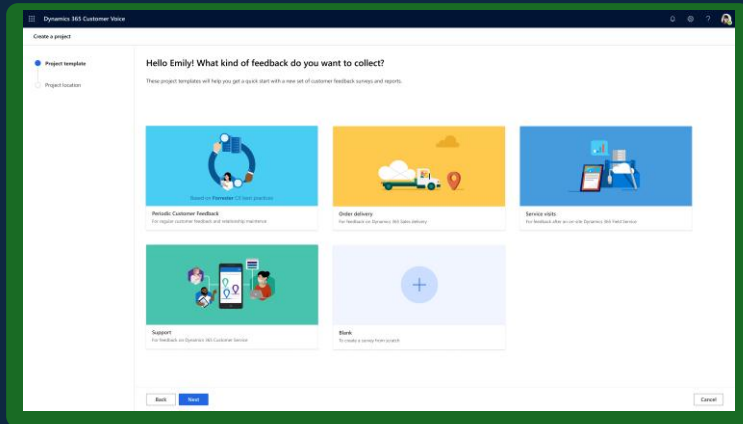
Customer Voice



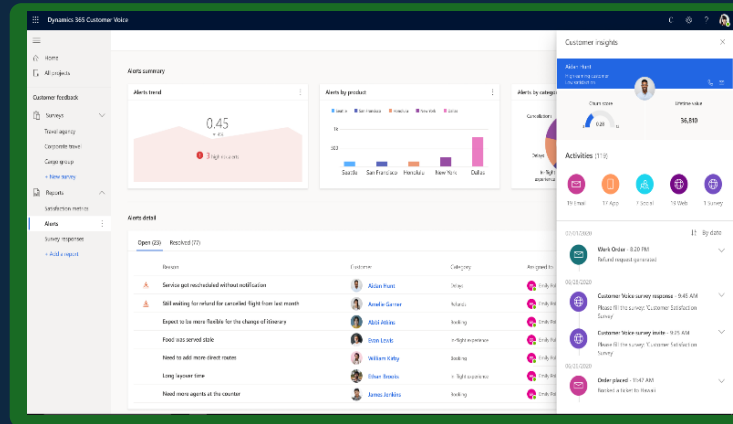
- » Create surveys with a built-in email composer, personalized customer information, and branching rules
- » Modify survey structure and layout across teams with shareable links
- » Utilize AI to better understand respondent sentiments and associations
- » Compare surveys and business transaction data through built-in integrations
- » View and analyze survey results in the Reports section



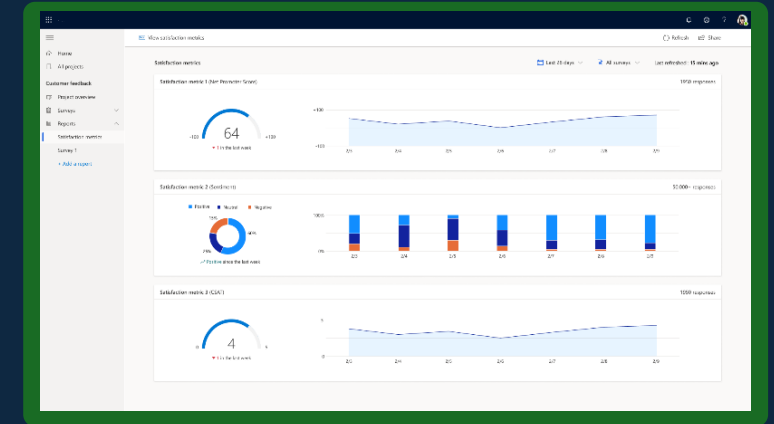
Dynamics 365 – Customer Voice



Feedback in real time



Analysis



Actions in real time



Dynamics 365



Power BI



Power Automate



Power Apps



Customer Voice



ORBIS Service and Field Service

What is in it for YOU?



SUCCESS

- Long-term customer focus and relationship
 - Our Customer's success is our success
- Holistic consulting to increase efficiency and performance

Knowledge

- Structured knowledge delivery
- ORBIS is delivering professional services
 - IT and Process consulting
- Continuous training of our consultants for best-in-class consulting

Partnership & Cooperation

- Clear understanding of roles and responsibilities
 - ORBIS as a trusted partner
 - Full Service Provider
 - One Partner for the whole Microsoft Platform and Microsoft Dynamics CE stack

Transparency

- Full transparency when it comes to interaction (quality, knowledge, communication)
 - Consultant skills and responsibility
 - Early customer involvement



A white number "01" inside a dark blue circle, which is part of a vertical stack of five circles. The background of the entire slide is a sunset sky with silhouettes of military aircraft and vehicles.

01

ORBIS SE SHORT FACTS

A white number "02" inside a dark blue circle, which is part of a vertical stack of five circles.

02

INTRODUCTION

A white number "03" inside a dark blue circle, which is part of a vertical stack of five circles.

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DEEP DIVE

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04

SERVICE AND FIELD SERVICE

A white number "05" inside a dark blue circle, which is part of a vertical stack of five circles.

05

HOW TO START / GET IN TOUCH

GET IN TOUCH

» You can contact Patric Schuh directly to discuss your options

Patric Schuh

Business Center Manager

Phone: +49 (152) 545 389 91
Email: Patric.Schuh@orbis.de



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Board of Management: Stefan Mailänder (Board spokesman),
Damien Schirrer, Frank Schmelzer
Chairman of the Supervisory Board: Ulrich Holzer

