

# Telco 360

A comprehensive Microsoft Dynamics 365 CRM solution for the  
Telecommunications Industry

A comprehensive solution for the telecom industry leverages the capabilities of Microsoft Dynamics 365 CRM. It is verticalized for the communications sector and integrated with various tools and systems to offer comprehensive customer relationship management. Key features include customer case management, contact and account management, interaction management, lead and opportunity management, order management, identity management, and a 360-degree customer view. The solution incorporates modules for sales, order management, customer service, field service, and marketing tailored for telecom services.

## Challenges

- **Contact and Account Management:** Define the complete organization work breakdown structure using product provided out of the box features and custom modules.
- **Customer Case Management:** Cloning the record by defining different business rules.
- **Interaction Management:** Getting interactions from channels that do not use Microsoft Dynamics 365 CRM (e.g., Web, USSD) is a challenge.
- **SFA Lead & Opportunity Management:** Compensation and commissioning management are not available out of the box and customer-specific changes and integrations will be required.
- **Order Management:** Customizations for HAND loyalty, subsidization, and bulk validations are needed.
- **Customer 360° View:** Integrations will be required with BSS and other channel systems to build a 360-degree view.
- **Social Media:** Customer-specific customization is needed for assigning priority for proper response to customer comments on social networks, communities, and forums.
- **Dealer and Partner Management:** Customer-specific dealer and partner management requirements and dealer and CSR hierarchy structures with roles & profiling allocation (login) are needed.

## Offering

- Essential customer hierarchies and language preferences and enabling cross-channel handovers.
- Mature case management with automation of assignments, routing, escalation, workflows, notifications, and SLA management.
- Storing and retrieving all interactions from multiple channels, including comments, attachments, and interaction history reporting.
- Customized compensation and commissioning management using separate Billing System (outside from Microsoft Dynamics 365 CRM). Strong lead and opportunity management, territory management, offline access, Microsoft Outlook integrations, reports, and goal setting.
- Framework for order and asset management, ready integration between Microsoft Dynamics 365 CRM & various Catalog and telecom-specific customizations. Integrates between native Microsoft Dynamics 365 product catalog and a full-fledged CPQ tool (e.g. Apttus, Sigma, Cloudsense, etc.)
- Comprehensive identity management features out of the box
- Personalized views with exhaustive and easy-to-use dashboarding capabilities.
- Author and publish knowledge articles, define groups, subgroups, communities, and provide role-based access and a fully enabled self-service portal.
- Capturing and analyzing comments on social media, deploying & prioritizing knowledge to media pages, and monitoring interactions within media through third party social media connectors like Sprinklr, Twilio, Telesign, etc.
- Hierarchical structures for dealer and partner management, geolocation capabilities, and multi-team support.

## Outcomes

- Enhanced customer engagement and satisfaction through a unified 360-degree customer view.
- Improved efficiency and productivity in handling the E2E Life Cycle management of customer cases.
- Effective management of interactions from multiple channels, including comments, attachments, and interaction history reporting.
- Streamlined sales and order processes with better lead and opportunity management.
- Optimized product selection and cross-sell/up-sell opportunities.
- Reduced operational costs through flexible and scalable product catalogs and automated workflows.
- Strong reporting and dashboarding capabilities with multi-format support and fresh data.
- Configure a sophisticated, scalable, error-free solution.
- Streamline sales cycles by minimizing quotation generation time.
- Accelerate the introduction of new products to the market.
- Enhance user experience with a user-friendly, intuitive interface for guided product selection.
- Facilitate improved cross-sell and up-sell conversions.
- Optimize product selection for diverse user communities.
- Reduce total cost of ownership (TCO) through flexible and scalable product catalogs.

# Telco 360 Visualization

Tech Mahindra's Digital Template for Telco leveraging Microsoft Dynamics 365 CRM

Partner Portal    Customer Portal    Mobile Apps    Partner Portal    Customer Portal    Service Desk



Ecommerce Platform    Mobile App    Portal (Customer, Partner, Employee)    Call Centre Desktop

Interaction

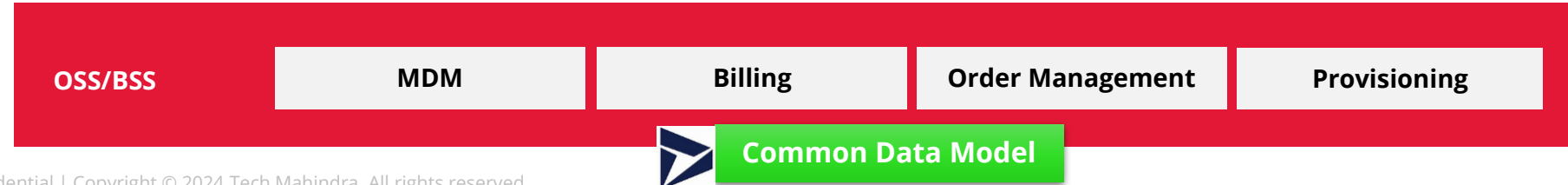
	Single Pane of Glass (Customer 360)			
	Accounts Management	Lead Management	Opportunities	Shopping Cart
	Product Catalogue & CPQ (CRM or CPQ tool)		Order creation	Order Journeys In CRM or a CPQ tool
	CTI & Live Agent	Case Management	Knowledge Base	
	Guided Service	Social Listening	Field Service	Loyalty

Intelligence    Next Best Action (NBA) | Next Best Offer (NBO) | Azure AI    Power BI    Azure Automation Suite

Analytics    Reports & Dashboards    Power BI    Microsoft SQL Server Analytics Services

Integration    Batch Integration | Integration API (REST/SOAP)    SDK    SSIS    Microsoft Power Automate    3rd Party Tools

Omni Channel



OSS/BSS Stack

# Integrated Functions with Microsoft Dynamics 365



## Industry: Telecom

### Services:

- **Mobile :**
  - Voice, Data, SMS, MMS
- **Fixed Line:**
  - DTH, IP TV, Broadband
- **Managed Services:**
  - OTT, M2M, IoT
- **Cloud Services:**
  - Paas, Saas, Iaas, Cloud Management, Security

Marketing	Customer Engagement	Sales Operation	Customer Service and Finance	Customer Service and Field Service	Customer Service, Sales and Finance
Marketing Campaigns	Territory Management	Product Catalog and Price Lists	Service Request Management	Case Management	Customer Self-Service Portal
Lead Forms and Lead Scoring	Lead Management and Lead Assignment Rules	CPQ Integration	Workflow Automation and Approval Processes	Service Health Alerts or Notification Management	Customer Billing
Lead Analysis	Account and Contact Management	Quote Approval Process	Entitlement Management	Field Service Management	Contract Management
Campaign Insights	Account Hierarchy	Entitlement Management	Billing and Subscription Management	Escalation Rules	Partner Relationship Management
Marketing Insights	Partner Relationship Management	Discounting Rules	Service Level Agreements	Case Resolution	Case Resolution
Social Engagement	Opportunity Management	Credit Management		Knowledge Base	
Experience Analytics (Sitecore)	Sales Performance Dashboard and Sales Insights	Order Management		Multi-level SLAs and Escalation Rules	
	Sales Pipeline Analysis and Forecasting	Sales / Demand Forecasting		Suggested Cases	

### Legend

- Core functions
- Integrated functions
- Static functions

*All the processes can be customized based on the business process*

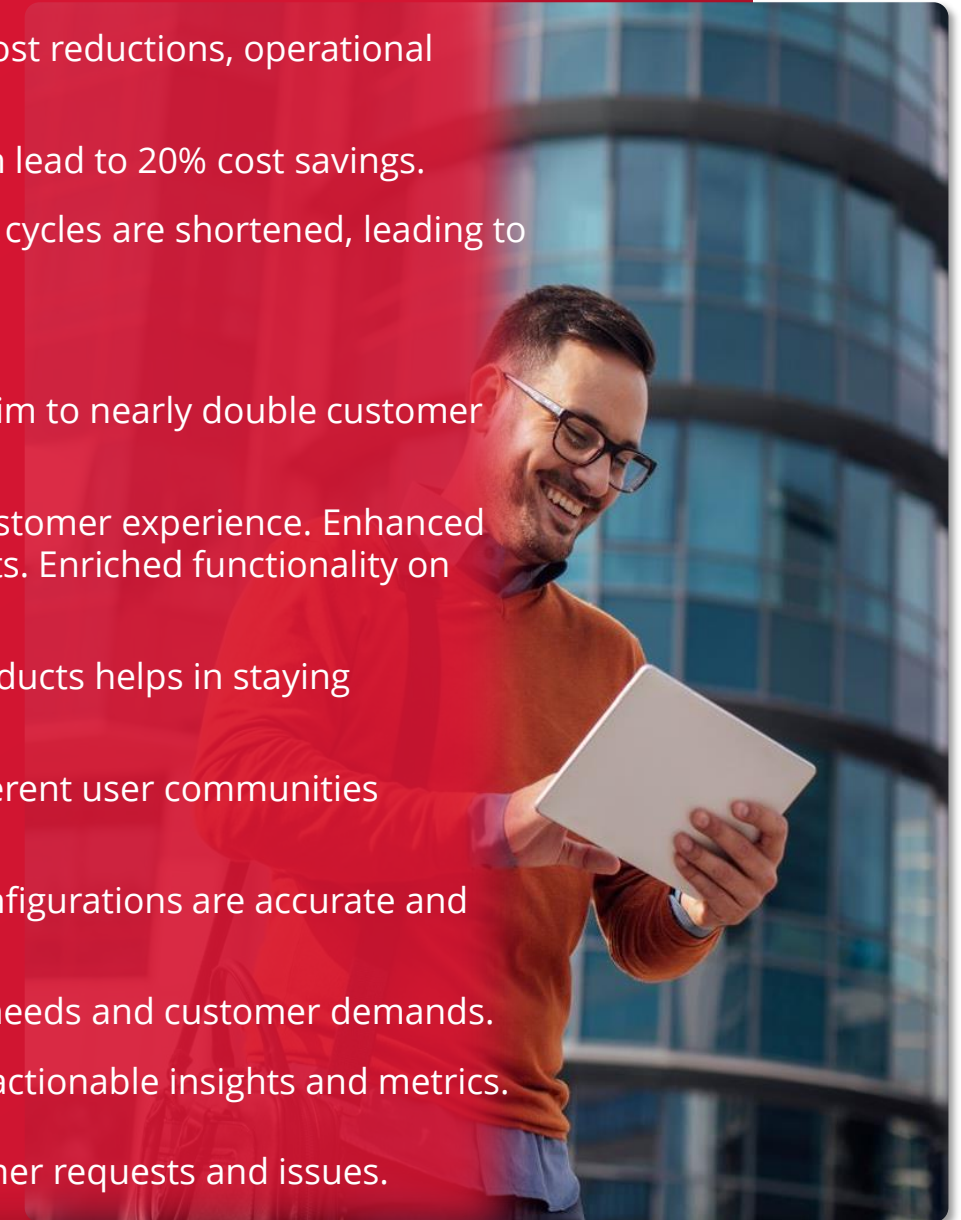
# Add-ons on top of Microsoft Dynamics 365

Modules	Tech Mahindra's Enhancement
<b>Contact &amp; Account Management</b>	Cross-channel integration for non-Microsoft Dynamics 365 CRM systems. Advanced Hierarchical Structures. Advanced data governance rules for multi-level approval processes. Custom views or portals for different hierarchical roles.
<b>Customer Case Management</b>	Custom rules for cloned cases, specialized workflows for unique case types. Integration with Azure AI tools for sentiment analysis during case resolution. Enhanced case prioritization based on customer tiers.
<b>Interaction Management</b>	Integration for interaction data from custom web applications, USSD, or other platforms. Real-time analytics dashboards for multi-channel interaction insights. Custom interaction tagging for better search and retrieval.
<b>SFA – Lead &amp; Opportunity Management</b>	Implement custom workflows and rules for sales incentives. Tailored reports for lead-conversion ratios and performance. Integration with third-party commission calculators. Custom dashboards for forecasting and pipeline management.
<b>Order Management</b>	Implement specific processes and data models for telecom businesses. Custom modules for credit risk and fraud prevention. Integration with external fraud detection tools. Custom order workflows for different product categories.
<b>Identity Management</b>	Implemented custom Multi-Factor Authentication. Configure custom user roles and access rights based on criteria.
<b>Customer 360° View</b>	Integrations with BSS and external systems. Integration with customer feedback and survey tools. Advanced data visualization with Microsoft Power BI.
<b>Knowledge Management</b>	Custom templates for industry-specific knowledge articles. AI-based knowledge recommendations.
<b>Social Media</b>	Custom logic for prioritizing and responding to social comments. Custom workflows for handling negative sentiment escalations. Integration with influencer tracking tools.
<b>Reporting</b>	Custom setup for scheduled or automated reports. Real-time performance dashboards. Predictive analytics using machine learning.
<b>Dealer &amp; Partner Management</b>	Advanced Dealer Structures including Custom role definitions and partner profiling. Partner performance analytics. Custom portals for dealer collaboration.

# Benefits of Solution

The solution delivers substantial financial benefits through a combination of warranty cost reductions, operational efficiency, regulatory compliance and others:

- **Reduced operational costs:** The use of flexible and scalable product catalogues can lead to 20% cost savings.
- **Reduced sales cycles:** By decreasing the time needed to generate quotations, sales cycles are shortened, leading to 30% faster deal closures.
- **Increased revenue:** Higher close rates contribute to increased revenue by 25%.
- **Targeted Segmentation and Sales:** Improved Sales efficiency & conversion rates. Aim to nearly double customer bases YoY.
- **Enhanced customer experience:** Guided product selection improves the overall customer experience. Enhanced user experience with intuitive UI and seamless integration across various touchpoints. Enriched functionality on Mobility.
- **Quickly bringing new products to market:** The ability to swiftly introduce new products helps in staying competitive.
- **Improved cross-sell and up-sell conversions:** Optimized product selection for different user communities enhances cross-sell and up-sell opportunities.
- **Configuration of complex, error-free product solutions:** Ensures that product configurations are accurate and meet customer needs
- **Scalability:** Flexible and scalable solution capable of adapting to evolving business needs and customer demands.
- **Comprehensive Reporting:** Strong reporting and dashboard capabilities providing actionable insights and metrics.
- **Enhance agility in Customer Management** to achieve quicker resolution of customer requests and issues.



# Microsoft Value and Success with the Solution

Tech Mahindra derives significant value and success using Microsoft Technology in delivering this solution, leveraging its comprehensive technology stack, including Microsoft Dynamics 365, Microsoft Power Platform and the Microsoft Azure, to deliver a range of capabilities that enhance the solution for the telecom industry.

- Microsoft Dynamics 365 provides robust functionalities for contact and account management, customer case, and interaction management. This includes automation of case assignments, routing, escalation, and SLA management, which streamline customer service processes.
- The platform supports strong lead and opportunity management, territory management, and offline access. It also integrates seamlessly with various Catalog for order and asset management, which is crucial for telecom-specific data models and processes. Integrated with e-CPQ and Blue Marble as well.
- Microsoft Dynamics 365 enables business users to create personalized views and dashboards, providing a comprehensive 360-degree view of the customer. This requires integration with BSS and other channel systems to build a complete picture.
- The system allows for the authoring and publishing of knowledge articles, role-based access, and social media integration. This helps in capturing and analyzing social media comments, tracking brand feedback, and performing sentiment analysis.
- Microsoft Power BI in a combination with Microsoft Dynamics 365 CRM offers strong reporting and dashboard capabilities, supporting multiple formats and providing fresh data. This is essential for making informed business decisions.
- The platform supports the creation of hierarchical structures for dealer and partner management, including geolocation capabilities and multi-team support. This helps in managing complex dealer and CSR hierarchy structures.
- The technology stack supports omni-channel solutions, enabling seamless customer interactions across multiple channels. This includes live assistance, co-browsing, and integrated field service management.
- Leveraging Azure AI, Microsoft Dynamics 365 provides actionable insights for shift-left approaches, reducing the number of incidents at helpdesk centers and increasing customer satisfaction through more automated and guided solutions.



# Customer Success



## The Client

B2C Sales Management for Largest Broadband Service Provider in Nordics, focusing on creating the best platform for live, interactive, and multimedia events. Also known for providing exceptional client service and facilitating important conversations through phone, streaming video, and social media, utilizing patented technology. Their products help clients engage with their audiences and are trusted by various public and private authorities.



## The Challenge

The client needs for a comprehensive 360-degree view of customers to improve customer interactions and satisfaction. Integration of various channels and systems to provide a seamless customer experience. Customization requirements to meet specific business processes and industry standards. Revamping Sales operations by maintaining Market Leadership position.



## The Solution

Tech Mahindra implemented a comprehensive solution using Microsoft Dynamics 365 CRM. Made customize solution to meet the specific needs of the telecommunications industry, including order management, lead and opportunity management, and case management. Integrated various channels and systems to ensure seamless customer interactions across different touchpoint. Provide a holistic view of customer interactions and data.



## The Impact

The solution led to significant cost reductions in operation. Increase revenue and customer satisfaction through a comprehensive view of customer interactions and data. Enhanced efficiency and productivity by automating and streamlining various business processes. Better decision-making capabilities through advanced reporting and analytics.



## Why Tech Mahindra

Customer selected us due to its proven track record, extensive expertise in the Telecom sector, and proficiency in implementing Microsoft Dynamics 365. Our alignment with customer's organizational culture and its ability to deliver customized technological solutions focused on achieving strategic objectives were key factors in the decision. Additionally, our skilled team and successful implementation of Microsoft Dynamics 365 in Europe and America region, demonstrated their capability to address challenges and facilitate a successful digital transformation.



# Contact Us

For more information, contact the Microsoft Apps, Digital Enterprise Applications



[MSApps.Presales@TechMahindra.com](mailto:MSApps.Presales@TechMahindra.com)



[www.techmahindra.com](http://www.techmahindra.com)



[Microsoft \(techmahindra.com\)](#)

TECH  
mahindra