

Dynamics 365 AI Insights — a solution for a financial company.

Artificial Intelligent CRM collects customer information

About

WaveAccess is a results focused software development company that provides high quality software outsourcing services to hundreds of emerging and established companies globally. We use our technical expertise to increase business efficiencies, optimize slow or unreliable systems, recover projects that have gone off track and bring ambitious ideas to life.

19

years of delivering
successful outcomes
for customers

350+

talented & passionate
professionals

4

global R&D
centers

20+

industry verticals
from banking
to healthcare

300+

successful projects
delivered and counting

96%

of our customers
are repeat business

Las Vegas

headquarters

USA, UK, Denmark and Eastern Europe

sales offices

Silver
Microsoft
Partner

Microsoft
Partner


2018 Partner of the Year
Artificial Intelligence Award

2017 Partner of the Year
Business Analytics Award



Microsoft
Partner Network

WORLDWIDE
DYNAMICS PARTNER
OF THE YEAR

2009, 2010, 2011 & 2016



Academy Award-winning
Mocha for Imagineer Systems



Locations



USA
sales offices



Denmark
sales offices



Eastern Europe
sales offices



Germany
sales offices

Core Competencies



Implementation of highly loaded and highly scalable systems



Workflow and business process automation



Development of Real Time Monitoring Systems



Implementation of highly loaded and highly scalable systems



Blockchain implementation



Web and Mobile applications development



Building ETL and BI Systems



Project recovery



Building AI and Machine Learning based systems



System Integration and optimization



Data import and migration

Project Overview

| Customer

The client is a large international financial company.

| Business problem

An hour of work as a consultant is very expensive, and their work schedule is tight. Highly qualified specialists had to spend their working time searching the Internet for information about their clients. This search was almost always of the same type - it included looking for the problem points of the counterparty, for example, information on bankruptcy, merger, hacker attacks, or getting new information about the client, its capabilities, new markets or expansion.

Experts complained that the routine search takes a lot of time and disperses the attention before the meeting.

| Contractor selection

The company turned to WaveAccess to develop a solution to automate the process of gathering information - Information insights.

WaveAccess already has several projects involving artificial intelligence solutions and processes automation. We are proud of our CRM expertise confirmed by partnering with Microsoft for Microsoft Dynamic 365 CRM. We have been providing customization, integration and development services for Microsoft CRM add-ons in the Russian and foreign markets for more than 15 years.

Solution

We developed the Dynamics 365 AI Insights service — an analytical tool integrated into Microsoft Dynamics CRM using Artificial Intelligence technology, which made life easier for our customer's employees. The Dynamics 365 AI Insights tool built into CRM as a separate frame right in the client's profile allows the consultant to quickly prepare for the meeting, see the insights without a routine search: data on the client's profitability, the company's presence in certain markets, client transactions, bankruptcy, merger, suspicious transactions - the topic is given by keywords.

These insights are constantly updated, making life easier for the consultant and replacing the repeated or even everyday search with an automatic operation.

Service value

- Simplifies making decisions on transactions conducted in Microsoft Dynamics CRM by providing relevant and filtered information
- Facilitates the work of the manager, providing instant access to insights directly from the workspace CRM
- Reduces transaction processing time by replacing manual search

How the service works

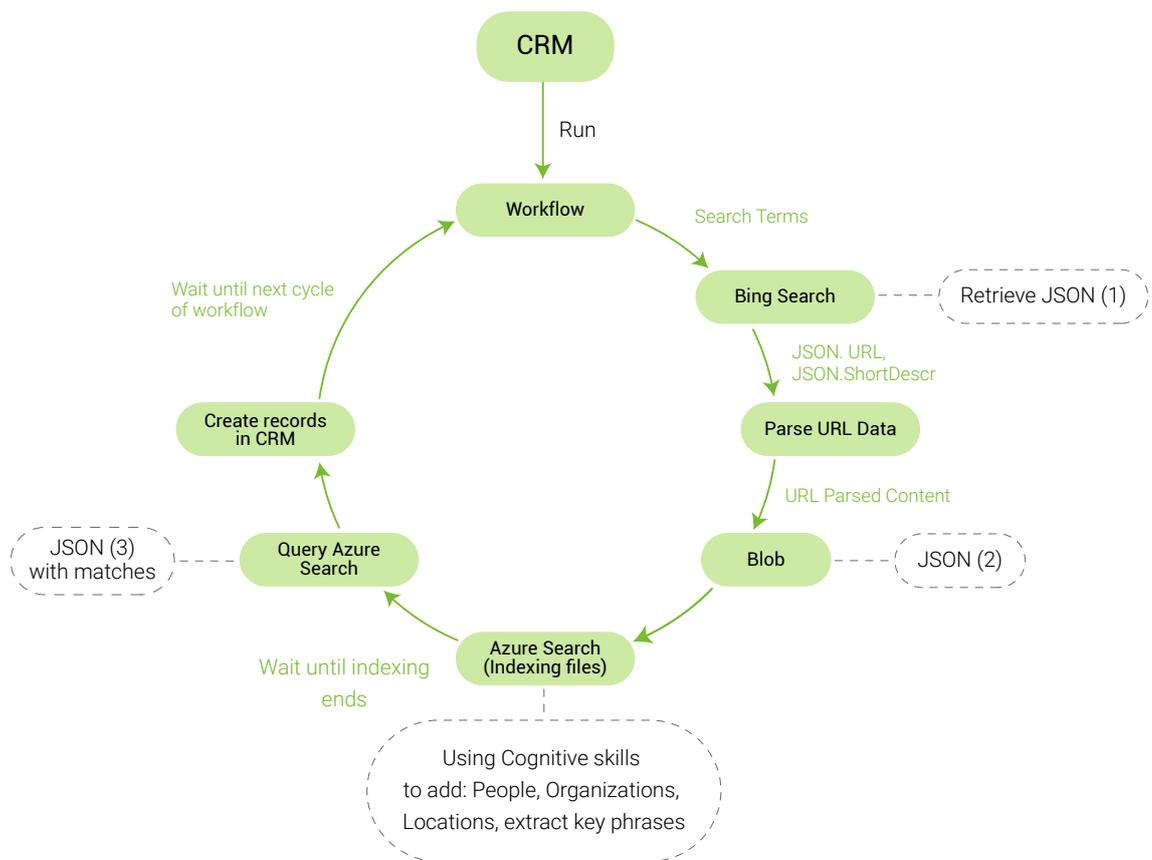
- The service uses keywords defined by the user in CRM. It searches the Internet for information using the built-in search engine Azure Bing. Keywords can be set for every client or for all clients in bulk

Examples of keywords: <company name> + bankruptcy, merger, profit, hacking system, <country name>, entered new market, the owner changed, financial report

- The built-in synchronization tool repeats the Internet search every minute / every night according to its predefined schedule
 - if there are any new CRM accounts, they will be added to the processed pool
 - if there are any new articles on the Internet for existing accounts, they begin to appear in the results

Thus, the information is always relevant for all accounts.

- A service that uses the Azure Cognitive Skills AI toolkit parses articles and produces relevant keyword results, highlighting related places, people, organizations, and the result as key phrases that convey the essence of the articles
- This information is displayed in the CRM interface on the account page as a grid with links to articles and search results.



Technology

- Azure AI
- .Net
- Dynamics CRM

| **The result**

The AI-empowered CRM system replaced manual labor with automatic processes. In business, this led to the following results:

- Reduced deal time
- Less routine work, more awareness
- Improved work quality
- Reduced the risk of making wrong decisions
- Increased transaction security

| **The service can be also useful for**

- Law firms
- Banks and financial institutions
- Credit organizations that need to make quick credit decisions
- B2B companies where sales managers do a lot of business
- B2G companies, leading government contracts and following the announcement of tenders
- Tax services and anti-corruption agencies monitoring the transactions of their counterparties



If you have a project for us,
please get in touch

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