D365 Virtual Visits solution

Rethinking customer engagement in COVID-19 pandemic, Virtual Visit is now a reality
Impact of COVID-19 on field service and sales

01: Impact on Mobility due to Travel Restrictions
   • Due to lockdown and suspension of travel services, delivering on-site services become incredibly more challenging

02: Surge in Service Incidents of Critical Service & Equipment
   • Due to high uptime in the time of crisis, there is significant increase in Service incidents of Critical Service and equipment. and significant incidents require on-site visit.

03: Restriction on sale of non-essential Goods & Services
   • In many countries, there are restrictions on sale and service of non-essential items

04: Focus on Customer and Employee Safety & Health
   • Due to concern about customer and employee safety and health, many companies have suspended on-site delivery of service and sales visits

05: Budget Cuts & Cash Conservation
   • Due to budget cuts & other cost optimization measures, travel & onsite visits are being moved to virtual medium
D365 Virtual visit solution is one stop solution to enable remote service and remote sales to virtually troubleshoot the problem from their home or virtually size the work involved and showcase their products/services, respectively. This solution is built on Dynamics 365 CRM leveraging Microsoft platform to support end to end journey.
Use case – Remote Service

Remote Service Flow
- Customer will raise case by call, email, chat etc
- Customer Care will create visit request
- Remote Technician will review visit and accept in myvisits app
- Remote Technician will start meeting with help of Collaboration tools to start video call or use remote assist
- After meeting technician will use myVisits app to change status of Visit, order spare parts etc
- Incase issues is not resolved remotely, visit request would be scheduled wrt guidelines
- Surveys would be required to fill by both customer and employee

Convenient Remote Collaboration
- One to one call video call between Technician and Customer for product inspection as per customers convenient timing

Augmented – Reality Annotations
- With help of 3D animation videos and annotation, technician can guide customer to perform primary checks & simple repair activities

Health Surveys and Workflows
- Health surveys to be filled by both Customer and employee to ensure compliance. Guidelines documents/SOPs to be shared before actual visit if needed

Integration with myVisits
- This helps to capture call logs, updating work order and raising spare part request as needed.
Use case: Remote sales

Remote Sales Flow
- Sales Manager leverages Relationship Insights to be prompted to engage priority customers
- Sales team collaborates internally on MS teams for preparing proposal, sales presentations, quotations etc
- Sales team schedules remote meeting with customer via Skype to take work estimations, site measurements etc
- Sales team shares quotation with customer for customer to digitally accept/reject it via portals
- Customer accepts the quote online, and order is created for fulfillment else revised quote is submitted again for consideration
- Finally invoice is emailed to customer with feedback survey on remote engagement experience

Remote Sales Presentation & Meeting
One stop integration with a wide range of popular web meeting and conferencing applications which includes Microsoft Teams, Skype for Business etc

Documents Sharing & Co-Browsing
Easy file sharing with simple drag & drop in conversation. Work on files with colleagues as they can even view, edit, and collaborate on them with available tools.

Visual Conversations & Mixed Reality
Allows salespeople to have real-time visual conversations with your prospect/customer. Invite them to join your online presentations, webinars, or meetings, and replicate the experience of delivering a one-on-one proposal presentation. Use of Mixed Reality if needed.

Integration with Dynamics 365 CX
Integration with Dynamics 365 for Sales helps in smart selling. Business processes could be modified to accommodate process to be followed during crisis for customer engagement.
D365 Virtual visits – Solution benefits

Winning Customer Trust
Ensuring compliance with safety & health guidelines

Cost and Time savings
Virtual connect with experts in remote locations reducing travel time and cost

Remote Collaboration
Open communication channel for exchange of information leading to customer satisfaction and better survey ratings.

Walk the site without being Onsite
Remote expert can see remote location without traveling to actual location

Knowledge Sharing
Enable experts to effectively share their knowledge from anywhere in the world

Visual Communication of Complex Instruction
Use drawings, arrows and 3D Diagram/Video for communication of complex Instruction

Winning Customer Trust
Ensuring compliance with safety & health guidelines