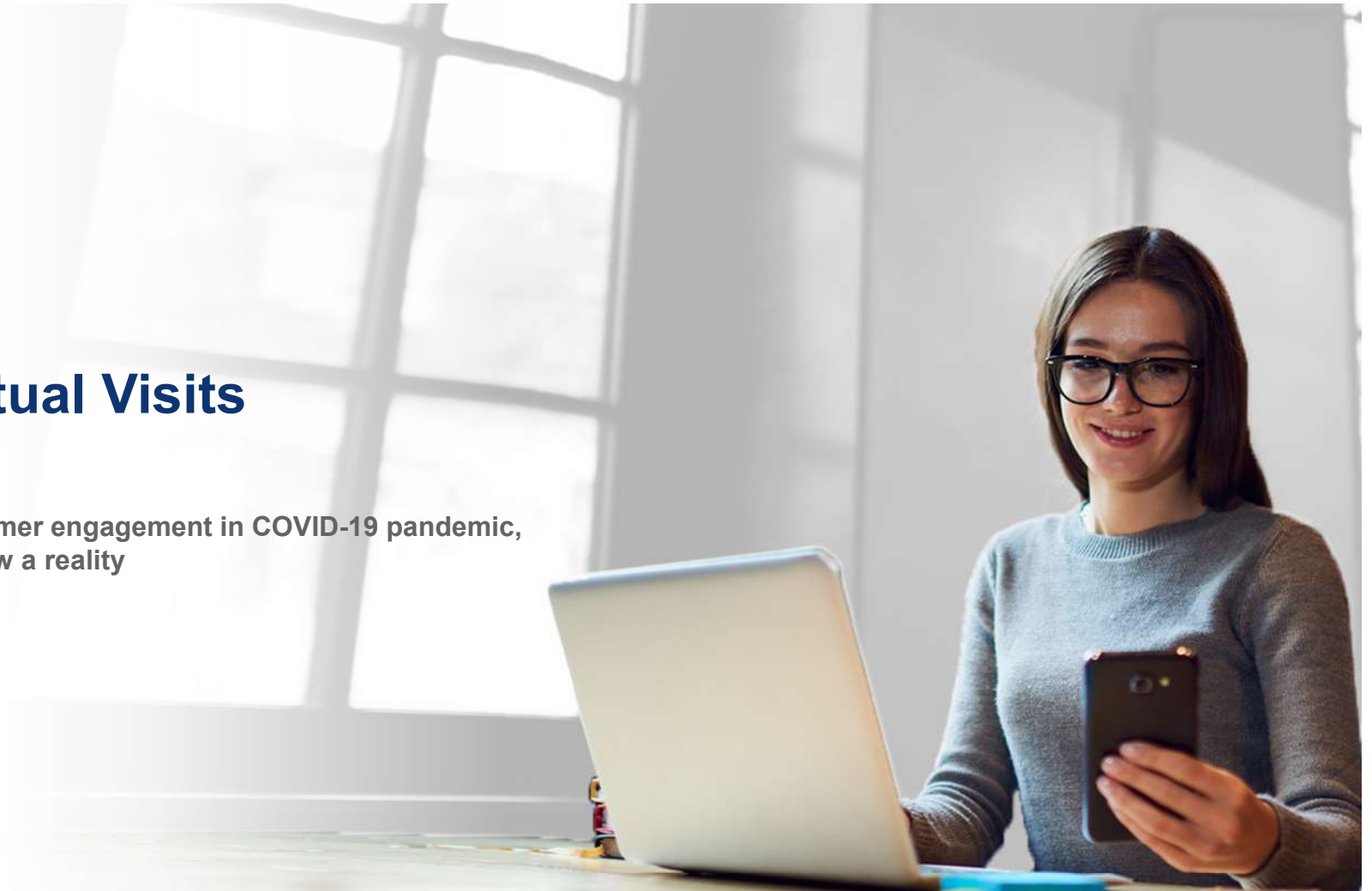
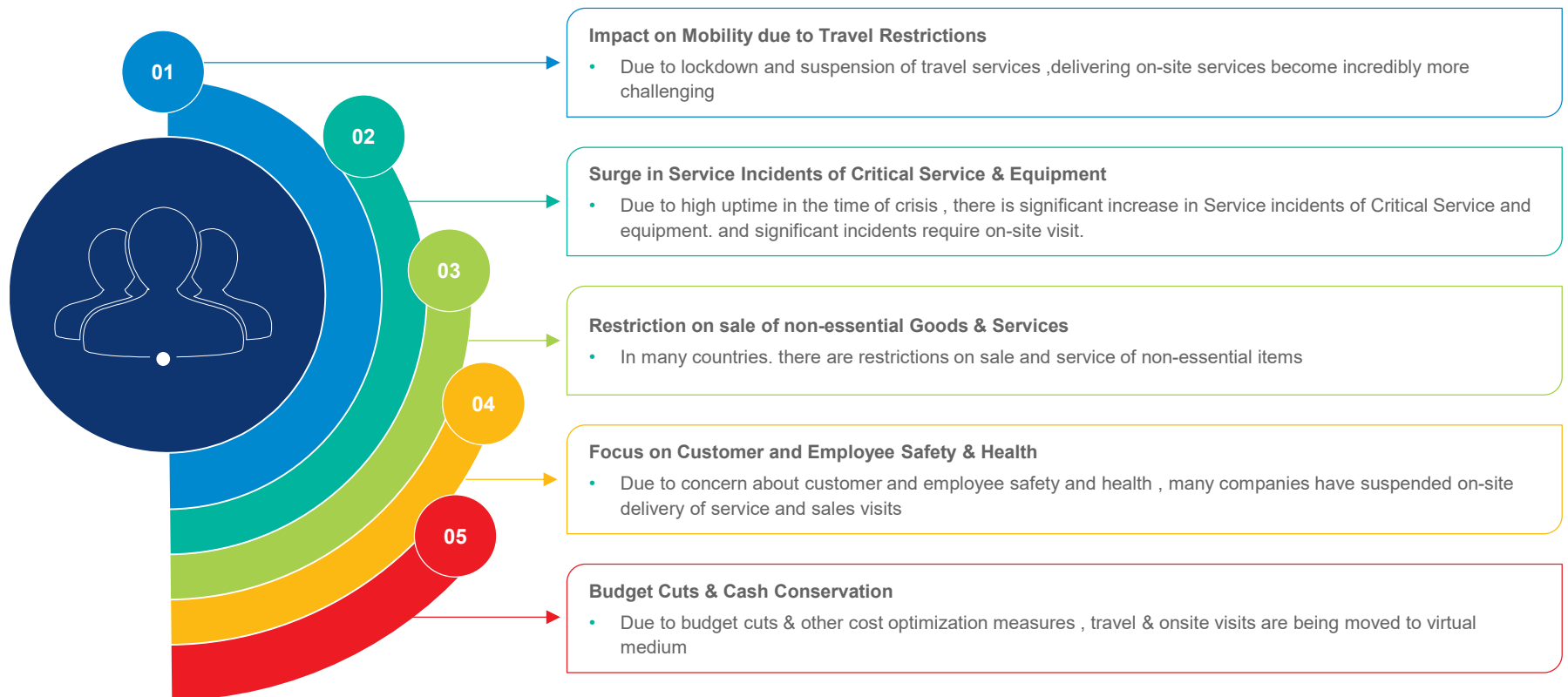


D365 Virtual Visits solution

Rethinking customer engagement in COVID-19 pandemic,
Virtual Visit is now a reality

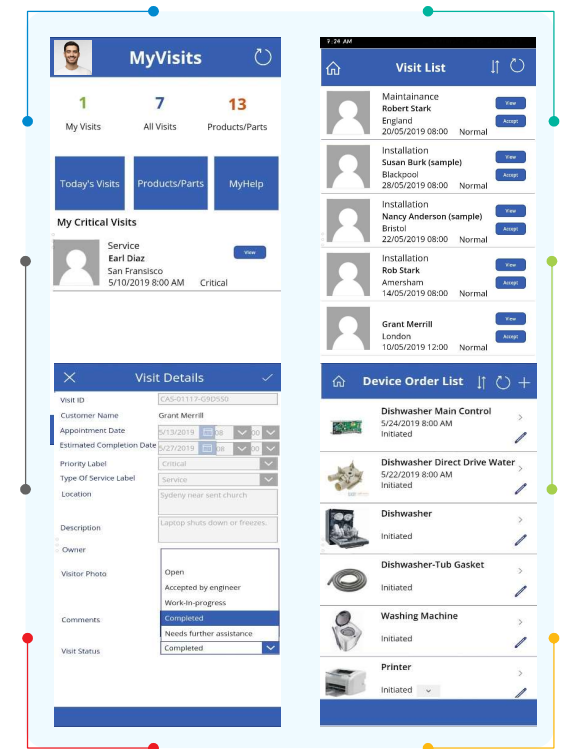
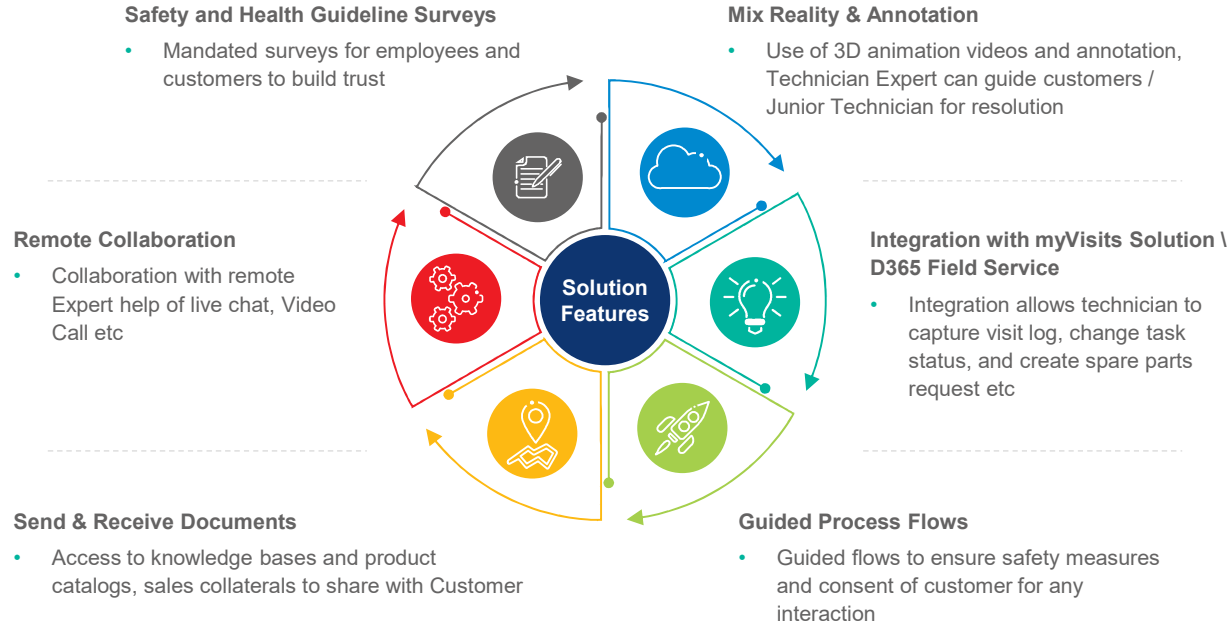


Impact of COVID-19 on field service and sales



D365 Virtual visit solution

D365 Virtual Visits 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 leverages 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 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

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

D365 Virtual visits – Solution benefits

Winning Customer Trust

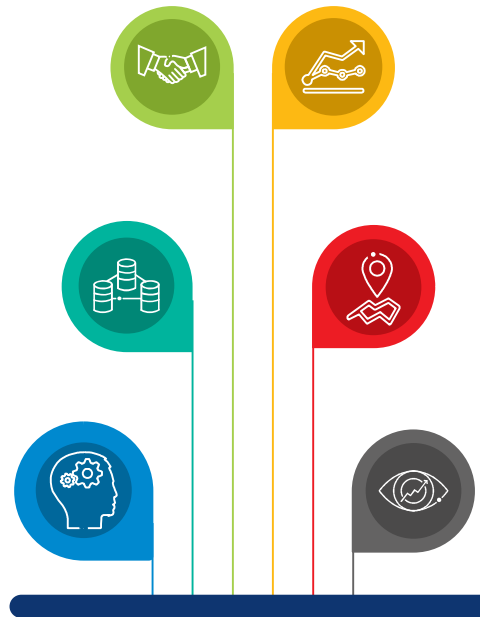
Ensuring compliance with safety & health guidelines

Remote Collaboration

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

Knowledge Sharing

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



Cost and Time savings

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

Walk the site without being Onsite

Remote expert can see remote location without traveling to actual location

Visual Communication of Complex Instruction

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