IBM Strategy Consulting

IBM Customer & Field Service transformation with Dynamics 365

Build competitive advantage

Market Insights

Customer transformation **unlocks value** and **delivers growth**

27%

Of organizations enhanced their **customer experiences** in 2021, which is 13% higher than previous year.

3X

Organizations that invest in **Digital Experience** report three times higher revenue growth for the last two fiscal years (3.6%) compared to other organizations in our survey (1.2%).

60%

of CEOs leading the most financially successful organizations say that **"delivering better customer experiences"** are among their highest priorities in the next 2 to 3 years*

Forces driving change in the service industry

72% of businesses report **improving customer experience** and **growing revenue** are top post-pandemic priorities[1]

Remote work is becoming common as 71% of service leaders reported that **90% or more of staff are working from home** due to the pandemic[2]

Remote monitoring of connected devices offers [service organizations] a new growth area as well as more efficient and effective maintenance approaches[3]

Executives rank **safety of employees and customers** as their greatest pandemic-related business concern[4]

1. Forrester 2. Pew Research 3. Deloitte 4. Journal of Accountancy

Forces driving change in the service industry

Of the companies who reported an increasing services revenue trend**, 95%** stated that there was a **clearly defined services strategy** in their company, and **62%** of companies **stated that service was** recognized as **a growth engine rather than a department or function**[1]

When it comes to tech initiatives, **54%** of companies worldwide **are prioritizing digital transformation**[2]

By 2025, **50%+ of equipment manufacturers** will offer **outcome-based service contracts** that package product and service and rely on access to digital twin data, up from **less than 15% in 2021**[3]

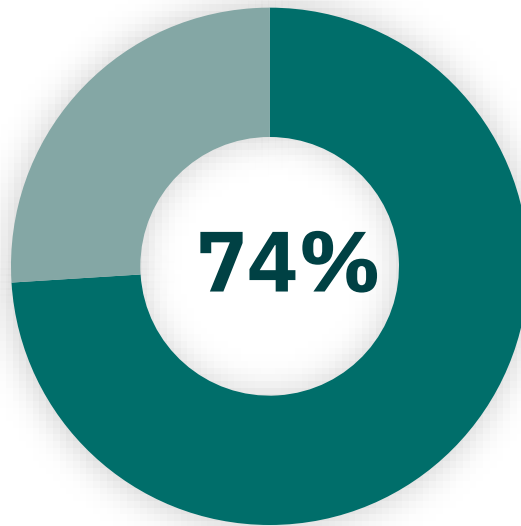**Internet of Things (IoT) spending worldwide** is projected to increase to **$1.1 trillion by 2023** with IoT active connection **installed based** expected to balloon to **30.9 billion by 2025**[4]

1. Noventum 2. Flexera 3. Gartner 4.Statista

Customer needs are evolving
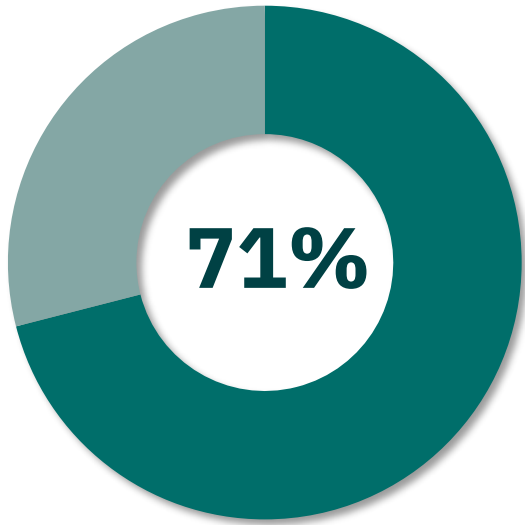
71% Increase in customer contact volume

74% Increase in customer empathy
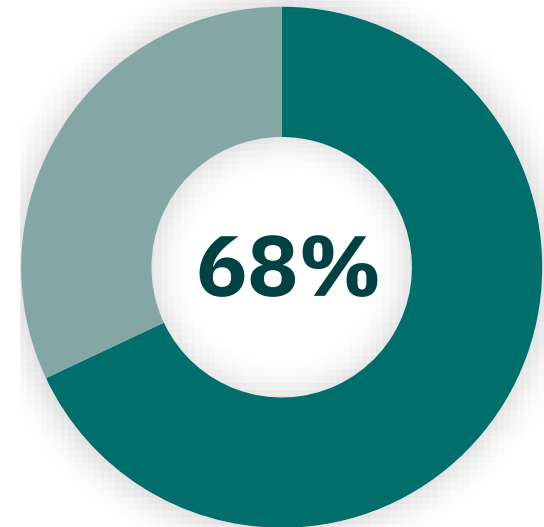
68% Increase in customer expectations

Forbes

Field service delivery is also evolving

75%
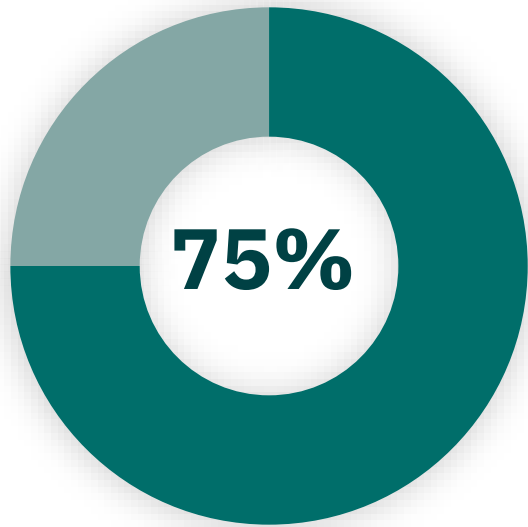
Increased demand for contact-free service[1]

>50%

Increased use of mixed reality by technicians[2]

88%
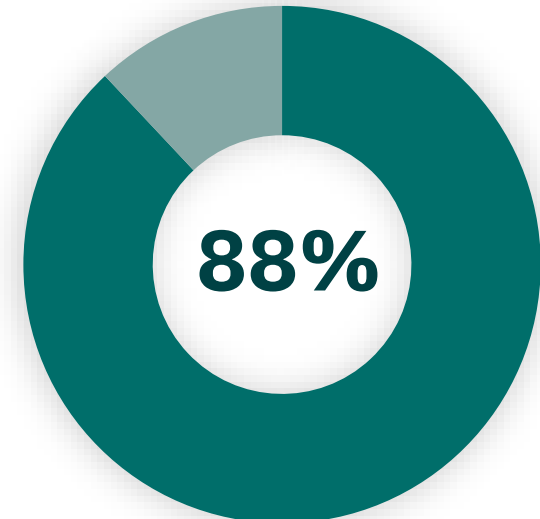
Average first-time fix rate of companies in top 20%[3]

1. Customer Think 2. MSIdaa.com 3. Aberdeen

Common challenges faced by Service Organizations

Digital maturity is driving new consumer behavior and expectations that require organizations to **meet them anywhere and anytime**

Managing **customer interactions** across **multiple support channels**
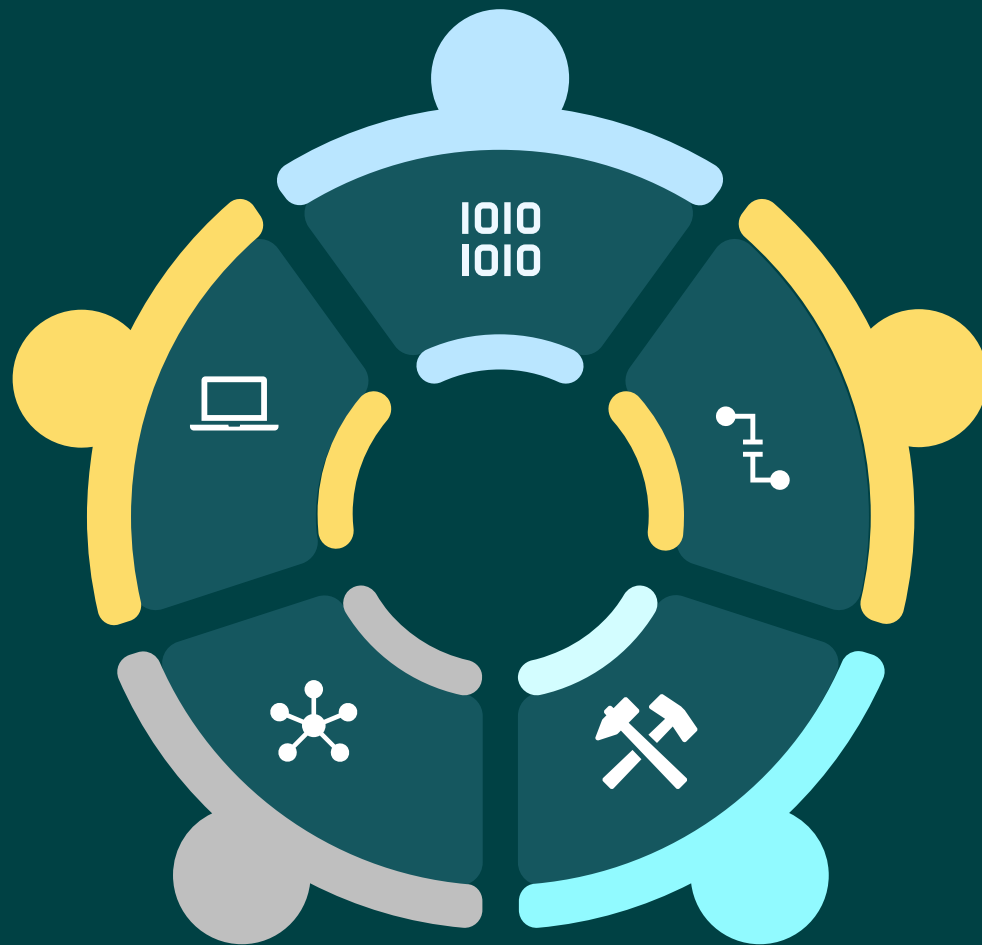
Aging systems with **disparate data** and legacy service features

Disconnected customer journey and slower response times resulting in **higher churn**

Employees digital values create an expectation that employers will provide the **right tools** and for them to work in new ways

Service transformation: Leverage data and intelligence to optimize service operations

With a shift from reactive to a proactive service model: from problem-solving to unlocking insights that deepen and secure customer/agent engagement and satisfaction, Service Organizations are looking to redefine the ways they serve their customers and transform their workforce to future proof operating model

Service transformation

Intelligent call center

Service Strategy

Field Service Automation

Driving Service transformation with Microsoft Dynamics 365

Microsoft Dynamics 365 is a fully integrated solution

Sales

Human Resources

Finance

Operations

Power Platform

Commerce

Customer Service

Marketing

Customer Insights

IBM Strategic Partners / © 2022 IBM Corporation
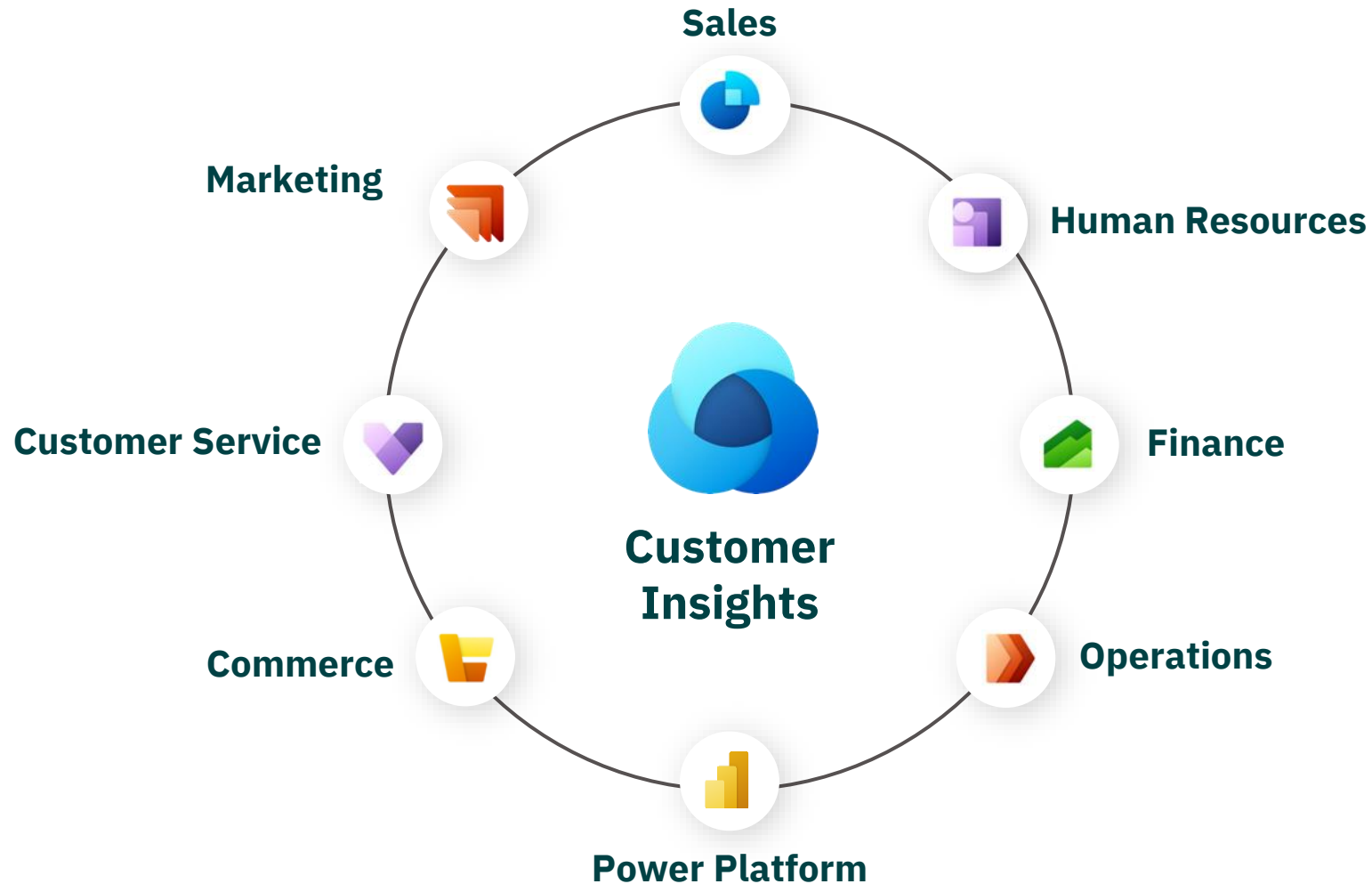
Enable end-to-end customer experiences

Sales

Lead generation

Buyers' journey

Cross-sell/upsell

Omni-channel support

Website and email content

Next best action

Account based marketing

Recommend-ations

Marketing

Service

IBM

Microsoft

Mapping Microsoft technology stack to CX architecture

"No other vendor has a product portfolio that maps as completely to the CX architecture of the future as Microsoft. From Office365 to Dynamics, Teams, Power Platform, Azure, and more, the entire CX stack is covered top to bottom, end to end."
G. Murray - IDC 2022

Service transformation with Dynamics 365 for Customer Service & Field Service

Customer Service

Field Service

Sales

Marketing

Human Resources

Finance

Customer Insights

Operations

Power Platform
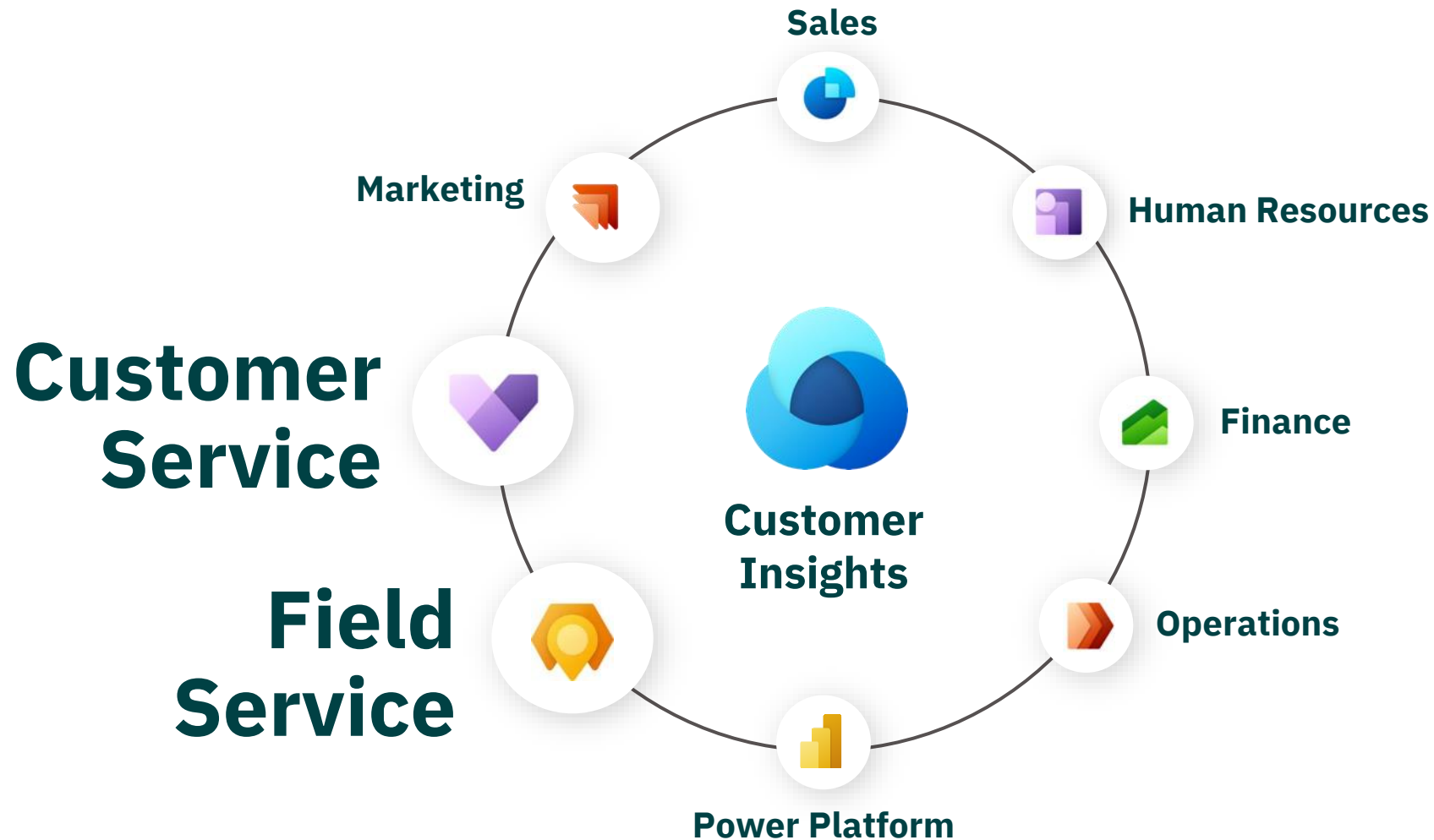
Service transformation powered by Dynamics 365

Customer Service Transformation

Implement **Dynamics 365 Customer Service** to provide a seamless, end-to-end customer service experience within a single solution built on the Microsoft cloud. Deliver consistent, connected support across channels and support customers anytime, anywhere. Empower your teams with insights into customer satisfaction, using analytics and AI-powered features to spend less time searching and more time engaging.

Field Service Transformation

Implement **Dynamics 365 Field Service** to improve first-time fix rates, customer satisfaction, resource scheduling and ensure technician success every time. Field Service enables organizations to move from a costly break-fix model to a more efficient predictive and proactive service-based model.

Reimagine the way you deliver service with Dynamics 365

Increase resource productivity

Efficient case management and resolution

Modernize omnichannel contact centers

Reduce routing errors

Evolve field service management

Engage customers on their terms

Optimize service operations

Unlock real-time data and customer insights

Elevate employee effectiveness

Tailor customer engagements

Optimize service operations

Customer service

Field service

IBM Strategic Partners / © 2022 IBM Corporation

Key capabilities in Dynamics 365 for Customer Service enabling service transformation

Personalize service across channels

Anticipate needs and avoid issues to build trust and earn customers for life

Provide Omnichannel support including voice, chat, SMS, Facebook Messenger, WhatsApp, WeChat, and LINE—all from the same desktop

Give customers access to knowledge articles and AI-powered virtual agents to quickly resolve issues

Intelligently route conversations

AI models and rules assign incoming service requests to best-suited agents

Eliminates queue supervision and manual work distribution

Get routing performance of each channel to help optimize routing strategy

Empower team to intelligently handle routine requests

AI-driven suggestions leverage context cues to recommend articles or cases agents can reference to quickly resolve customer issues

Help agents easily connect with colleagues, supervisors or subject-matter experts to resolve complex cases more quickly using Microsoft Teams

Deliver omnichannel engagement

Connect via the customer's channel of choice

Customer

Agent

Supervisor

Service Leader

Falling customers satisfaction ----------> ✓ Increase CSAT and loyalty through 24/7 on-demand access to self-serve support

Siloed, disjointed channels ----------> ✓ Omnichannel engagement provides seamless connected experiences

Lack of personalization ----------> ✓ Enhance customer engagement by personalizing the customer experience

Inability to scale agent operations ----------> ✓ Deploy Power Virtual Agents as an IVR or as a chatbot to resolve simple inquiries, freeing agents for more complex issues

IBM   Microsoft

Deliver inquiries to the best-suited agent

Resolve issues faster by leveraging agent experience

Customer

Agent

Lengthening resolution times - - - - - - - - - - - → ✓ Get routing performance of each channel to help optimize routing strategy

Inefficient agent productivity - - - - - - - - - - - → ✓ Classify, route and assign work automatically with skill-based routing

Inconsistent routing of issues - - - - - - - - - - - → ✓ AI and rules assign incoming work items to best-suited agent

Unable to identify pain points, areas in need of improvement - - - - - - - - - - - → ✓ Historical analytics provides actionable insights into opportunities to improve customer satisfaction and agent scores

Empowering team to handle requests intelligently

Investigate, collaborate and resolve the case

Agent

Inability to collaborate with experts on a complex case

------------------>

✓ Easily collaborate with experts using Microsoft Teams right from the agent's desktop; strengthen team participation

No insight into the customer issue, journey, history or previous interactions
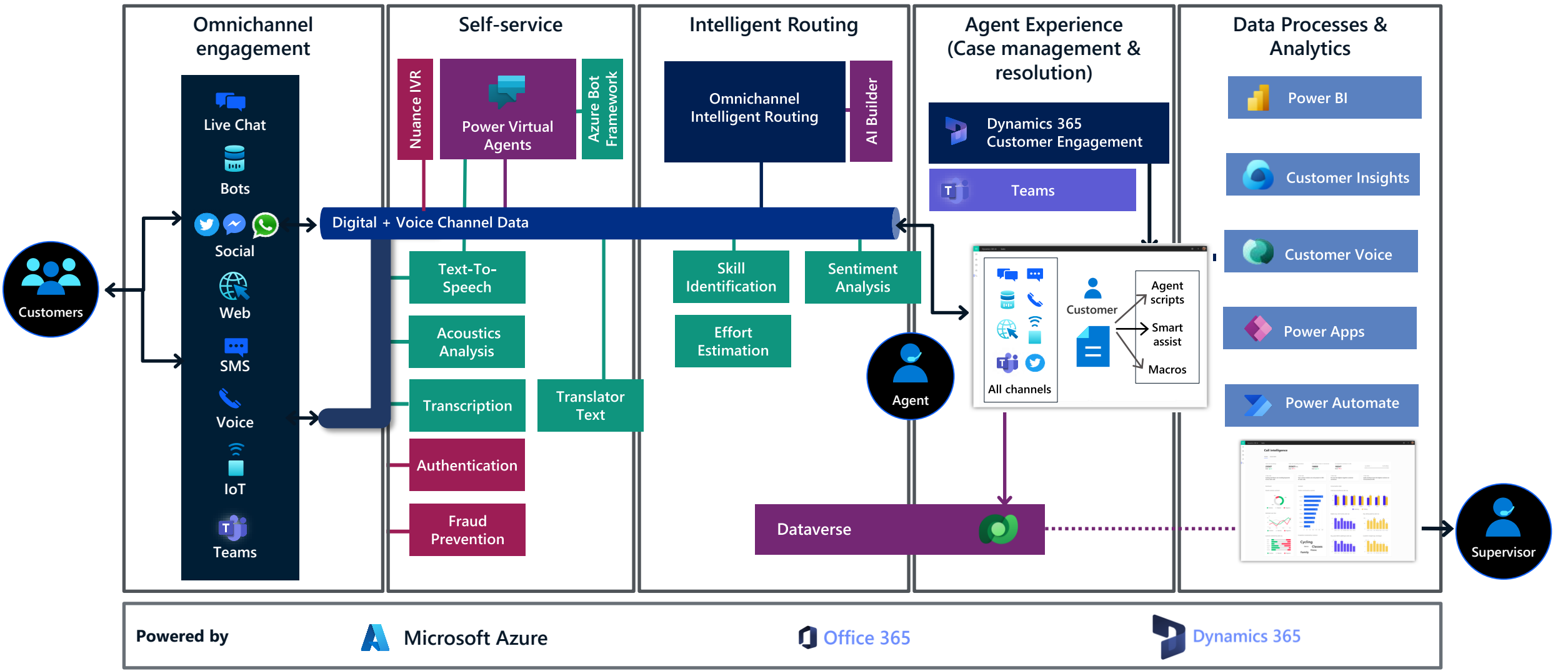
------------------>

✓ Get a 360-degree view of the customer. Enable agents to quickly interact with multiple apps, across multiple channels without losing context

Customer

Inconsistent solutions

------------------>

✓ Easily create and update knowledge base articles that can be shared with customers. AI-driven content available inline, including images and videos.

Key capabilities in Dynamics 365 for Field Service enabling service transformation

Tailor Customer Engagements

Engage with your customers

Provide post-engagement surveys

Offer self-service scheduling

Elevate Employee Effectiveness

Give technicians access to in-context help

Resolve cases faster with remote collaboration

Streamline tasks through a mobile-optimized experience

Enable technicians in the field

Enhance technician productivity

Optimize Service Operations

Dispatch the right technician

Better manage resource assignments

Automate scheduling

Optimize service and resources

Deliver Proactive Service

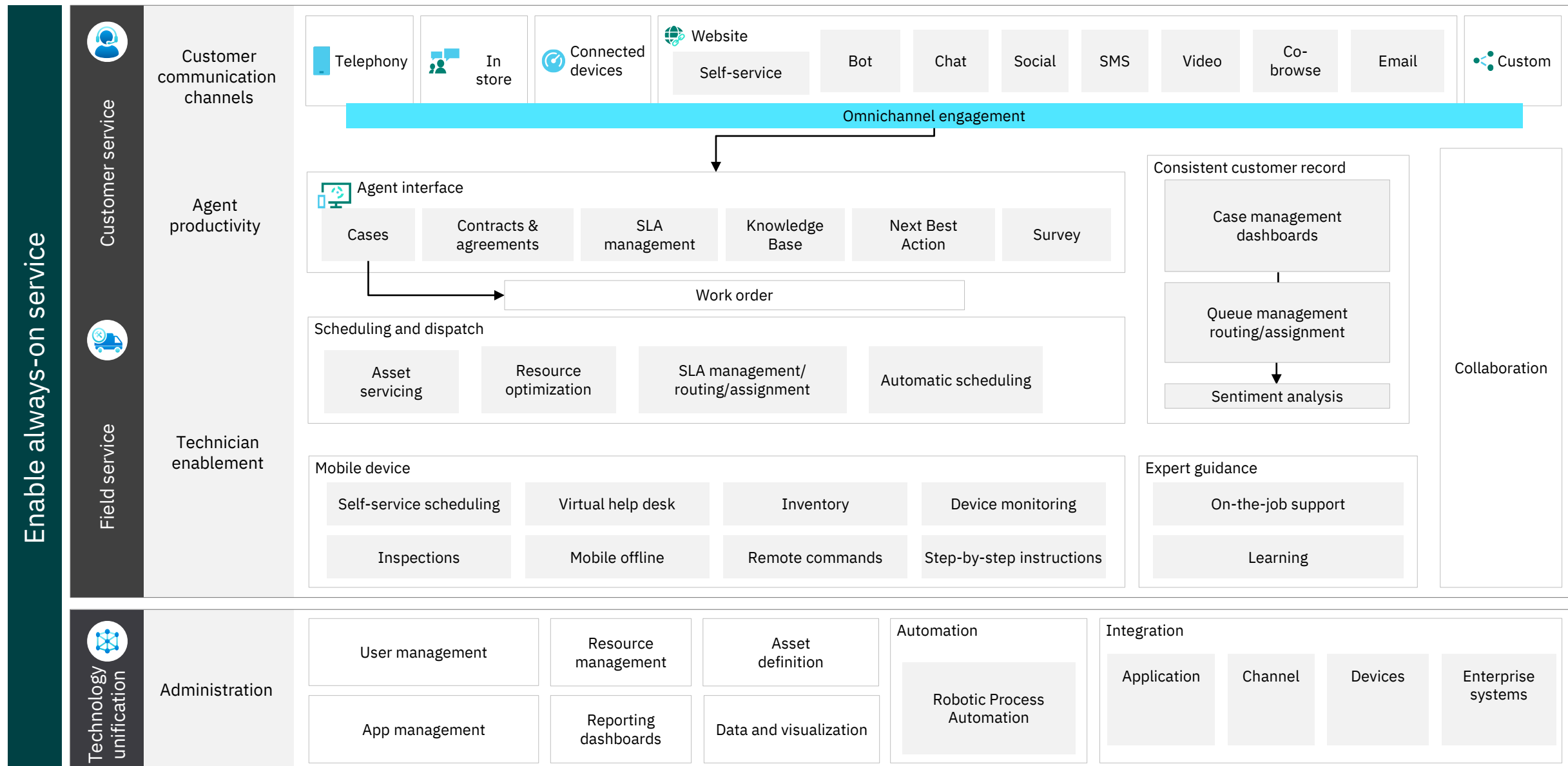**Avoid** service calls with the monitoring of IOT sensors

Transform your business

Get a 360-degree view of customer assets

Effectively manage asset history

Functions enabling always-on service

Enable always-on service

Customer service

Customer communication channels

Telephony	In store	Connected devices	Website Self-service	Bot	Chat	Social	SMS	Video	Co-browse	Email	Custom

Omnichannel engagement

Agent productivity

Agent interface

Cases	Contracts & agreements	SLA management	Knowledge Base	Next Best Action	Survey

Work order

Consistent customer record

- Case management dashboards
- Queue management routing/assignment
- Sentiment analysis

Field service

Technician enablement

Scheduling and dispatch

Asset servicing	Resource optimization	SLA management/ routing/assignment	Automatic scheduling

Mobile device

Self-service scheduling	Virtual help desk	Inventory	Device monitoring
Inspections	Mobile offline	Remote commands	Step-by-step instructions

Expert guidance

On-the-job support
Learning

Collaboration

Technology unification

Administration

User management	Resource management	Asset definition	Automation	Integration
App management	Reporting dashboards	Data and visualization	Robotic Process Automation	Application / Channel / Devices / Enterprise systems

IBM Differentiators driving Service Transformation

We've created **customer transformation experience solutions** which are strategic and drive growth

Driving creation of
products and **services**

Driving
empathy
and **care**

Driving
awareness and
engagement

Intelligent Product

Intelligent Service

Intelligent Marketing

Customer
Experience

Intelligent Commerce

Intelligent Sales

Driving
empowerment
and **conversion**

Driving
demand and
productivity
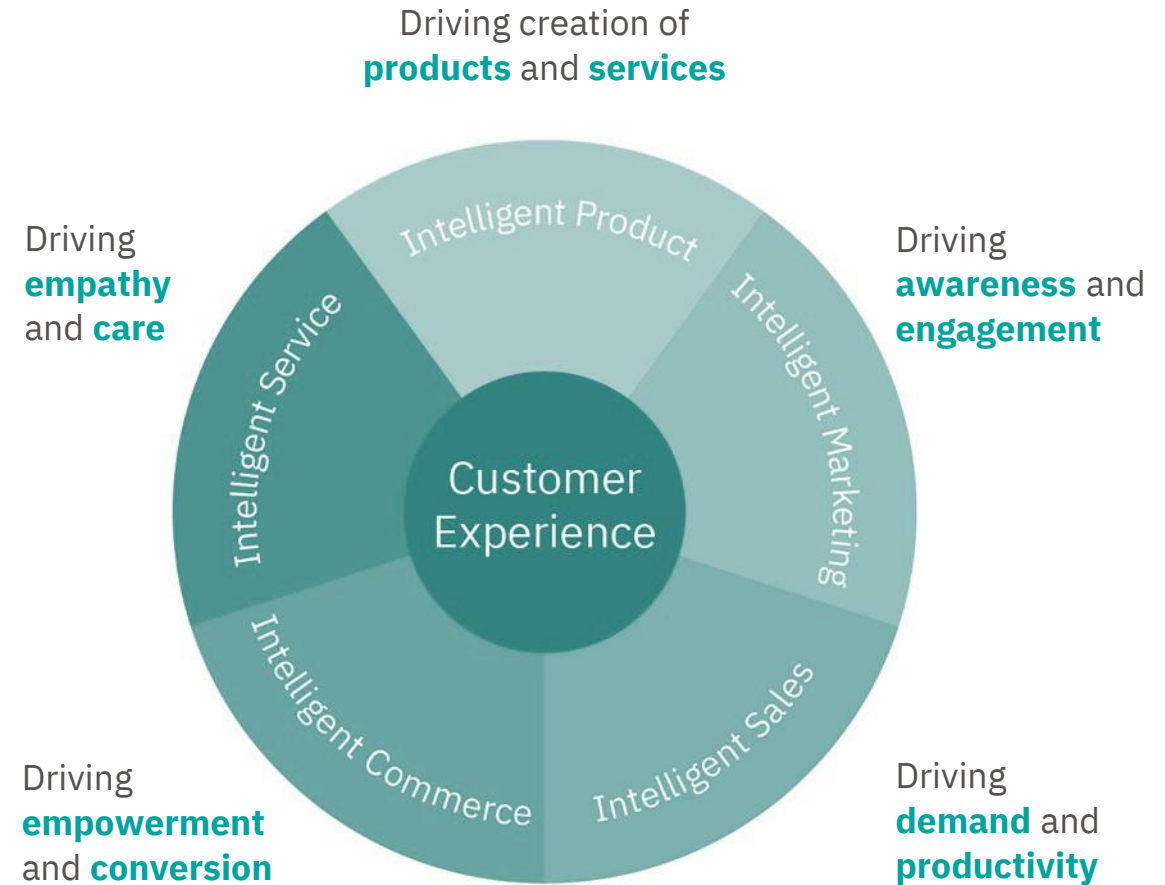
IBM D365 Packaged Solutions & Accelerators for Service transformation

With our unparalleled understanding of Microsoft technologies and deep industry experience and expertise, we have developed **best-in-class industry solutions & accelerators** (based on Dynamics 365) for transforming customer experience. They help enable the organizations to achieve their business goals, **drive operational efficiency**, **revitalize customer experience** and **enhance collaboration** among teams.

Jumpstart to implementation thereby reducing time to market by 4-6 weeks

Reduced risk due to proven data models
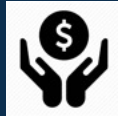
Enhanced employee productivity

Engaging customer experiences

Industry Solutions

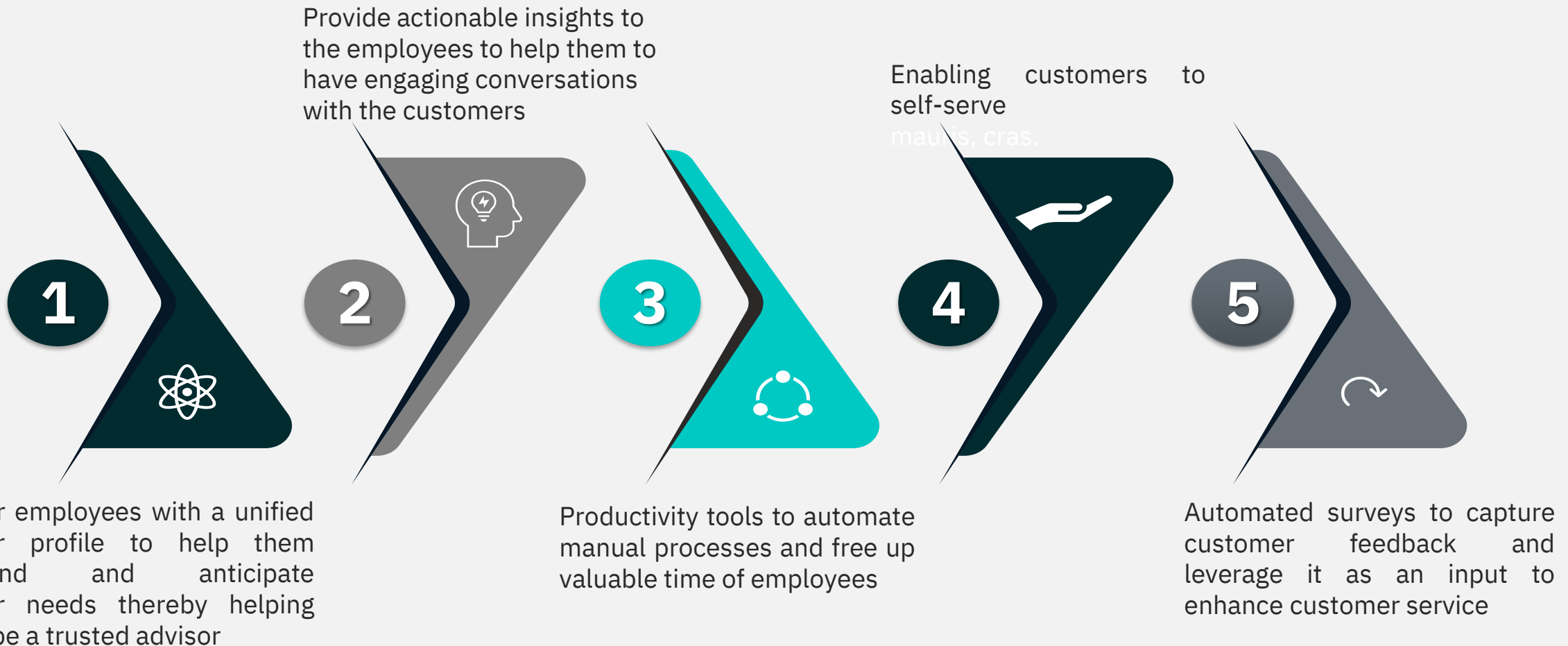| IBM Banking Solution | IBM Insurance Solution | IBM Case Management Solution (Public Sector) | IBM Inspection Management Solution (Public Sector) | IBM License Management Solution (Public Sector) | IBM Automotive Solution | IBM Retail toolkit (Customer Service Assist) |

Dynamics 365 Toolkit for CX (Cross Industry)

Driving Service transformation in Banking with IBM accelerators

IBM Banking Solution provides a powerful platform for digital transformation programme of a Banking Client. It is a tailored solution based on Microsoft Dynamics 365 designed for the banking industry that helps in providing digitally astute banking experience.
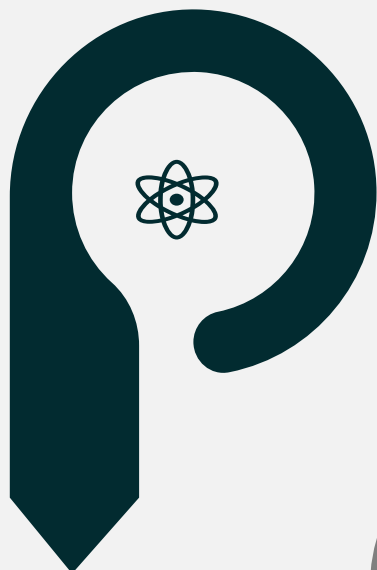
Capabilities driving Service transformation

1

Empower employees with a unified customer profile to help them understand and anticipate customer needs thereby helping them to be a trusted advisor

2

Provide actionable insights to the employees to help them to have engaging conversations with the customers

3

Productivity tools to automate manual processes and free up valuable time of employees

4

Enabling customers to self-serve mauris, cras.

5

Automated surveys to capture customer feedback and leverage it as an input to enhance customer service

Driving Service transformation in Insurance with IBM accelerators

IBM Insurance Solution helps to deliver industry-leading experiences to the insurance policyholders and improve operational efficiency. It provides a robust toolkit designed to shorten the software development lifecycle and provides the capability to the Insurance Carriers to speed up along the path to customer centricity
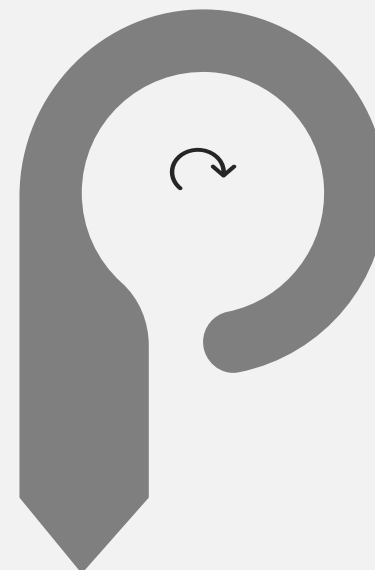
Capabilities driving Service transformation

Enhanced service management framework for a seamless policy servicing experience.

Free up the time of your agents and enable the policyholders to get faster responses to their queries by leveraging bot.

Provides a comprehensive view policyholder and policies to equip the agents with the all the necessary information at a single page.

Insightful notifications for the agents to serve the policyholders effectively to minimize churn.

Automated surveys to capture customer feedback and leverage it as an input to enhance customer service

Driving Service transformation in Public Sector with IBM accelerators

IBM Case Management Solution is an extensible solution which help in streamlining the service management processes thereby resulting in improved customer satisfaction, increase in contact center agent efficiency and improved collaboration. It is a tailored solution that can be rapidly deployed and seamlessly integrated with the client's critical business systems helping reduce configuration and management time

Capabilities driving Service transformation

Proactive insights related to similar cases reported in vicinity

Enhanced notification framework to keep all the necessary parties informed about any outage.
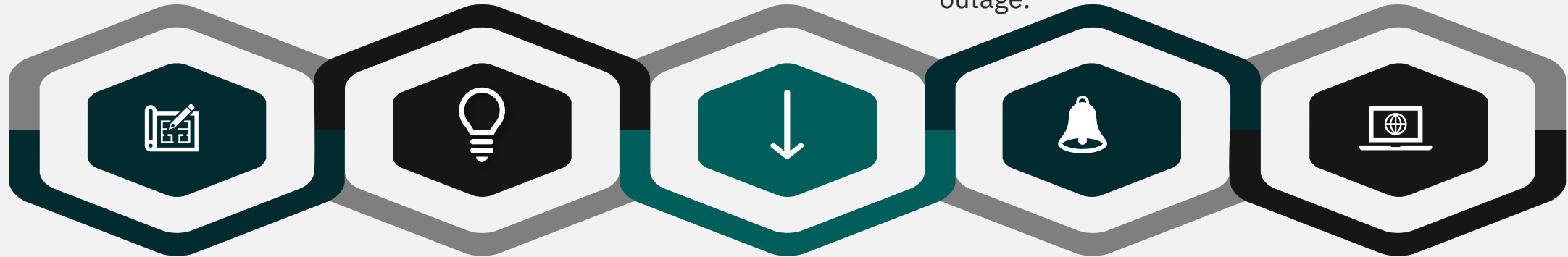
Provides an extensible and scalable framework to configure and manage different types of service processes
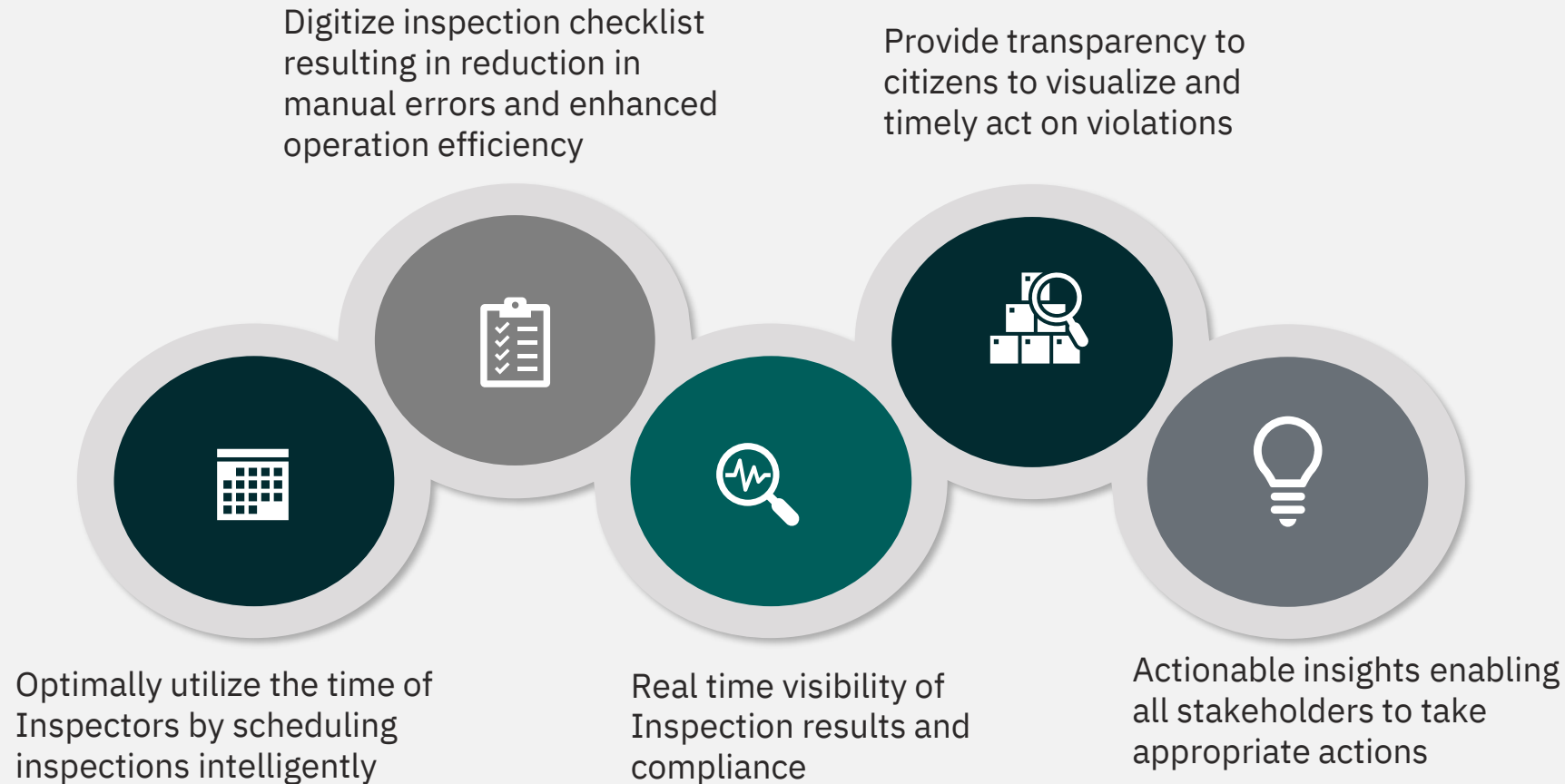
Tools to minimize duplicate case creation

Enable customers to report and track cases via preconfigured portal

Driving Service transformation in Inspections with IBM accelerators

IBM Inspection Management Solution provides a digital platform to streamline the end-to-end inspections processes ranging from scheduling inspection, performing assessments, submitting assessments, raise violations, tracking corrective actions to closure of violations. It can act as a vital asset for generating value for all stakeholders.

Capabilities driving Service transformation

Digitize inspection checklist resulting in reduction in manual errors and enhanced operation efficiency

Provide transparency to citizens to visualize and timely act on violations

Optimally utilize the time of Inspectors by scheduling inspections intelligently

Real time visibility of Inspection results and compliance

Actionable insights enabling all stakeholders to take appropriate actions

Driving Service transformation in Licensing with IBM accelerators

IBM License Management Solution enables the applicants to perform a License Assessment , fill and submit applications and track application status using a single digital hub. It further helps the government employees to serve citizens faster by removing approval bottlenecks with interdepartmental collaboration tools while giving them a complete view of application pipeline.

Capabilities driving Service transformation

| Enable the citizens to track the status of license applications and get faster responses to their queries | Optimally utilize the time of Inspectors by scheduling inspections intelligently | Real time visibility of Inspection results to the compliance team enabling to define the next actions quickly | Provide transparency to citizens to visualize violations and take corrective actions for further processing of application | Actionable insights enabling all stakeholders to take appropriate actions |

Driving Service transformation in Automotive with IBM accelerators

IBM Dynamics 365 template for Automotive provides a platform to connect the dealer process with the OEM through a connected lead, sales and customer service processes served by customer and vehicle master data. It enables a consistent customer journey and an improved level of customer service.

Capabilities driving Service transformation
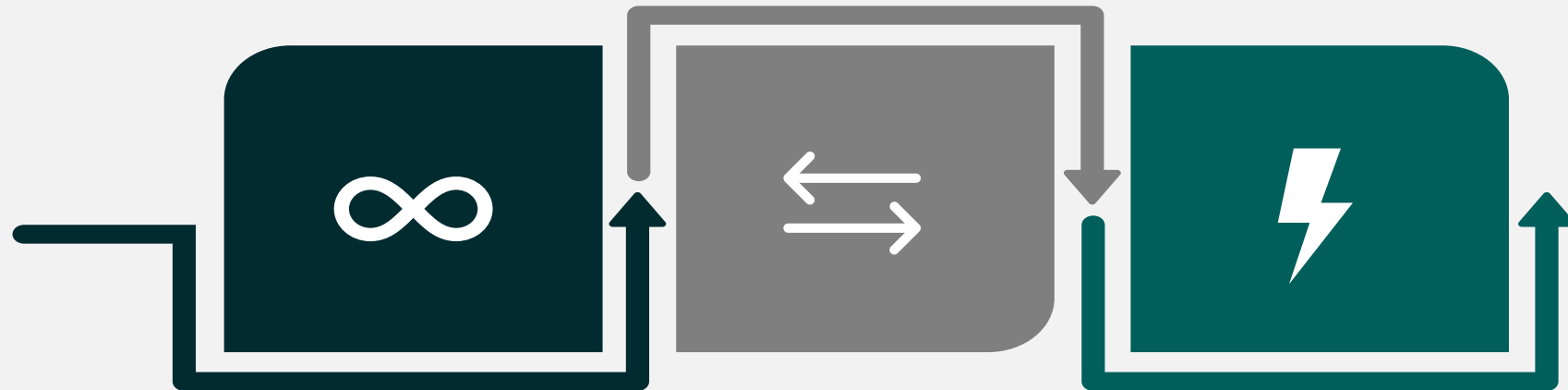
Provides a streamlined mechanism to create and manage cases effectively

Inbuilt capability to synchronize case data across multiple environments to enable CSRs across geographies to collaborate effectively

Real time translation of case data in user preferred language

Driving Service transformation in Retail with IBM accelerators

IBM Retail Toolkit – Customer Service Assist provides a powerful platform to the retailers to instantly connect and engage with customers digitally. It helps enable customers to self-serve and resolve issues quickly thereby improving customer satisfaction.

Capabilities driving Service transformation
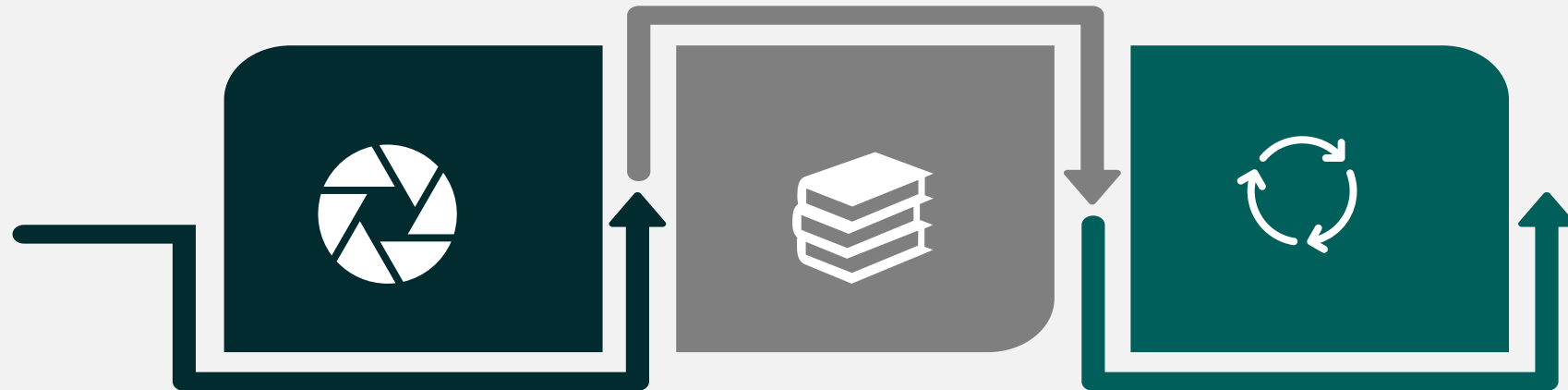
Enhanced framework to capture order replacement and cancellation

Preconfigured process library for Customer Service process for retail enabling customers to self-serve via bot

Automate creation of case from bot conversations without human intervention

Service transformation enable tailored customer experiences to drive revenue growth

We enable the clients serve their customers in new and innovative ways. We enhance digital touchpoints and seamlessly support the partnership between humans and technology to amplify service intelligence.

- Enable **human-centered intelligent workflows** to augment timely customer engagement

- Deliver incredible and **frictionless human experiences**

- Smoothens the **exchange between back office and customer facing teams**, supported by engagement platforms that connect data to enable a '**channel- less experience**'

- **Transforms customer, agent and service data** into new business models, allowing innovative ways to differentiate, increase efficiency, and enable **repeatable value for customers**

95%
first contact resolution

15%
increased employee satisfaction
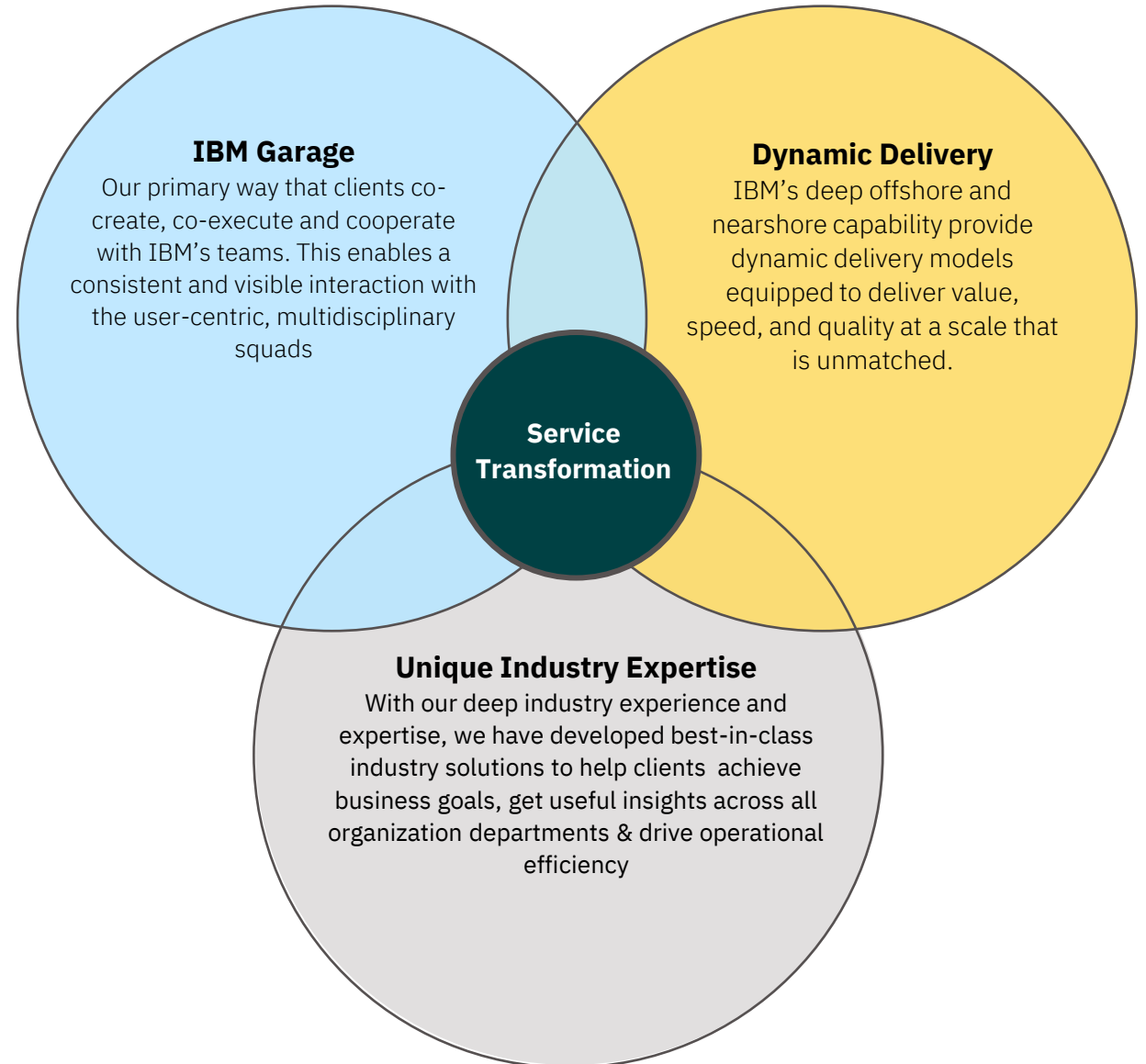
15%
productivity savings

50%
reduction in resolution time

Next Steps...

Our accelerated approach enables rapid Service transformation

We combine the pervasive end-to-end nature of our delivery methods with the ability to scale in all places; people, skills, research, platforms, solutions, all while imparting culture on clients that lasts beyond the individual engagement.

IBM Garage
Our primary way that clients co-create, co-execute and cooperate with IBM's teams. This enables a consistent and visible interaction with the user-centric, multidisciplinary squads

Dynamic Delivery
IBM's deep offshore and nearshore capability provide dynamic delivery models equipped to deliver value, speed, and quality at a scale that is unmatched.

Service Transformation

Unique Industry Expertise
With our deep industry experience and expertise, we have developed best-in-class industry solutions to help clients achieve business goals, get useful insights across all organization departments & drive operational efficiency

The co-creation journey to **Service Transformation** can begin anywhere...

Strategize

Envision the future

Solve

Test and measure to get it right

Scale

Activate finance and operations transformation

...let's identify the best entry-point together

IBM Garage is a bold, comprehensive approach to innovation and transformation that **quickly creates and scales new ideas that dramatically impact your business**

+ De-risk innovation by starting with strong business outcomes and ruthless prioritization

+ Focus on what is essential to realize impactful benefits

+ Fully integrated solutions created by experts; yours and ours

IBM Garage accelerates time to value

Maximize **financial return** while gaining **operational agility, intelligence, and resiliency** with a process-led, technology-enabled digital transformation

Redefine how work gets done with an iterative framework that guides you from ideation, to build, to scale.
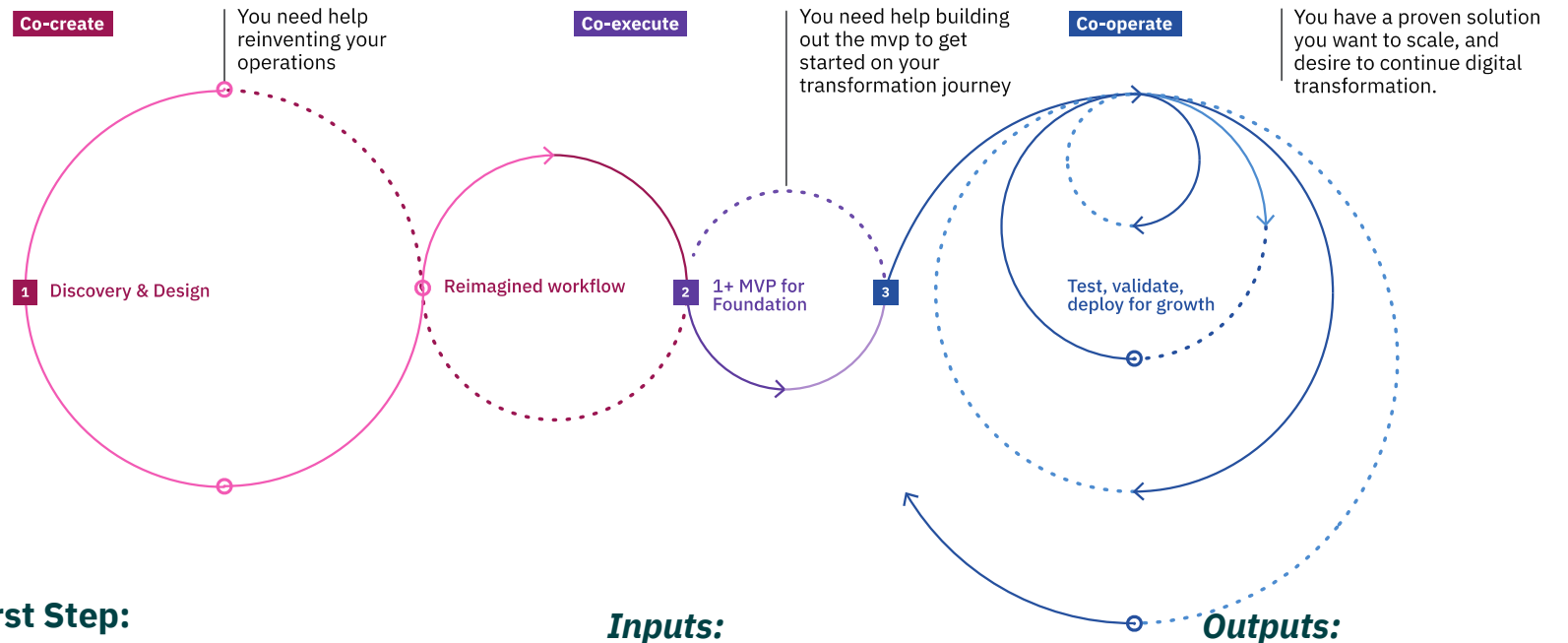
Co-create across stakeholders to define vision.

Co-execute using a fast, scalable, iterative approach

Co-operate scales your solution & team's capabilities.

Co-create

You need help reinventing your operations

1 Discovery & Design

Reimagined workflow

Co-execute

You need help building out the mvp to get started on your transformation journey

2 1+ MVP for Foundation

3

Co-operate

You have a proven solution you want to scale, and desire to continue digital transformation.

Test, validate, deploy for growth

First Step:
IBM Garage Jumpstart

One-day Garage workshop bringing together your key stakeholders to begin envisioning your desired future state (North Star), identify current challenges against that North Star, and determine key enablers – Technology, Data, People, Process

Inputs:

Best in Class Intelligent Workflow Designs

Design & Enabler Accelerators

Industry Leading POVs

Outputs:

- North Star vision and recommendations
- High-level prioritized view of areas with highest business value
- Benchmark assessment
- Business case inputs

Getting started with IBM Garage Jumpstart

One-day workshop bringing together your key stakeholders to begin envisioning your desired **future state** (North Star), identify **current challenges** against that North Star, and determine **key enablers** – Technology, Data, People, Process

What is it?

A half-day or full-day fast-paced session with IBM experts (Industry, Domain, Dynamics 365, and Facilitators) to quickly, efficiently, and collaboratively identify challenges and limitations at the persona and workflow levels to converge on future state.

How can it help?

– Opportunity to **bring together stakeholders** from across the business to begin a transformation with the **end state experience in mind**

– Early input and analysis around key challenges and limitations from the lens of functional personas to– **better inform requirements**

– Exploration on the **'Art of the Possible'**

– **Faster alignment** on transformation objectives and plan

What elements are included?

– Dynamics 365, Domain, and Garage expertise
– Enterprise Design Thinking with Agile
– Transformation Framework
– Persona Development
– Starter Threads
– Technology Enablers

1 PERSONAS

Relevant to your organization and most representative of your user population

– Persona based challenges and pain points
– Alignment on future-state aspiration

2 STARTER THREADS

Conveying the North Star workflows that help to envision a future state, brainstorm, and prioritize
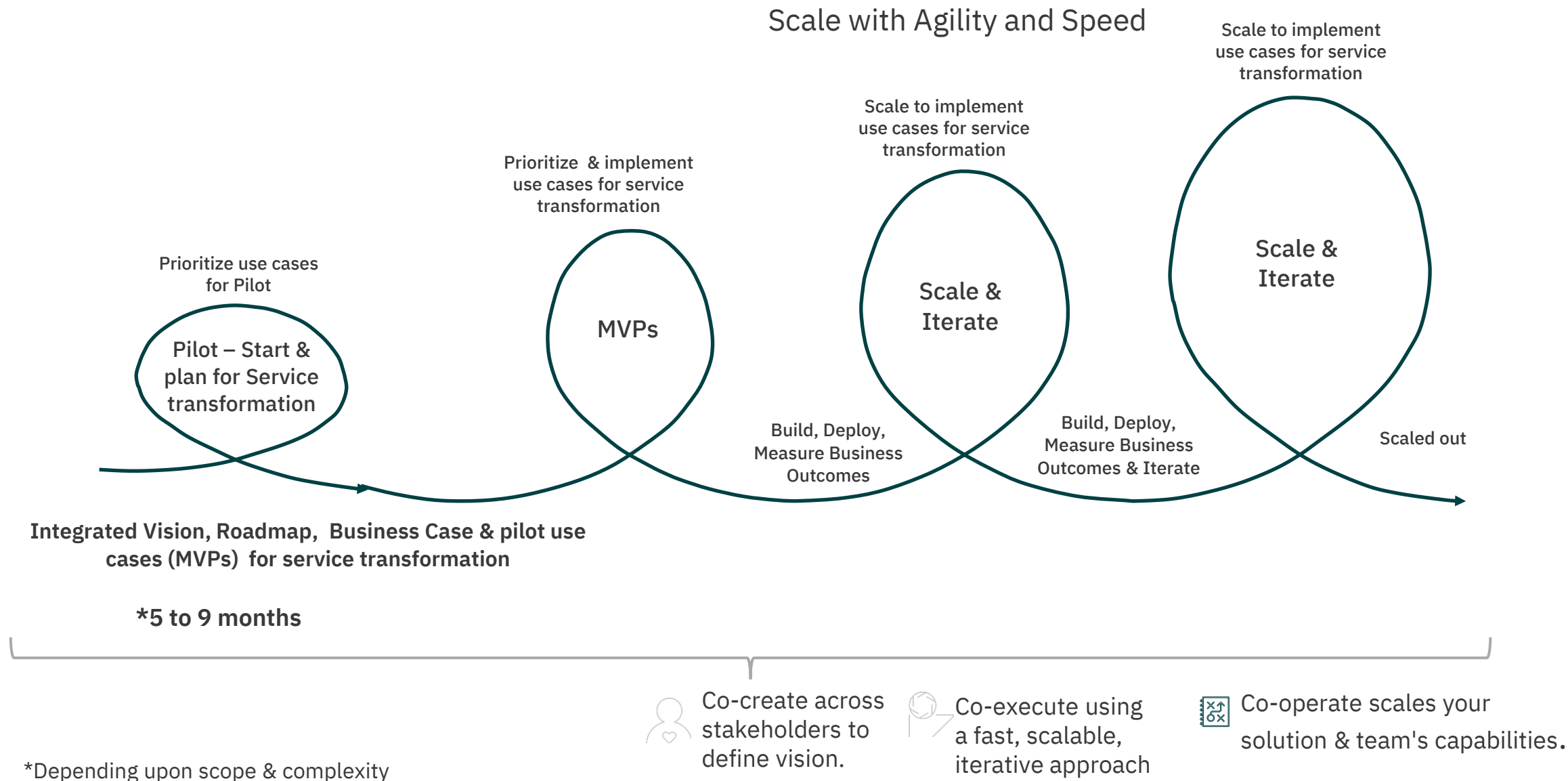
3 QUESTIONS

Answered to kick-start your Application Modernization Business Transformation

– **Why** do we need a strategic enterprise plan?
– **What** will the Future look like?
– **How** will Technology help get us there?

Engagement Model: Garage Method

Scale with Agility and Speed

Scale to implement
use cases for service
transformation

Scale to implement
use cases for service
transformation

Prioritize & implement
use cases for service
transformation

Prioritize use cases
for Pilot

**Scale &
Iterate**

**Scale &
Iterate**

MVPs

**Pilot – Start &
plan for Service
transformation**

Build, Deploy,
Measure Business
Outcomes

Build, Deploy,
Measure Business
Outcomes & Iterate

Scaled out

**Integrated Vision, Roadmap, Business Case & pilot use
cases (MVPs) for service transformation**

*5 to 9 months

*Depending upon scope & complexity

Co-create across
stakeholders to
define vision.

Co-execute using
a fast, scalable,
iterative approach

Co-operate scales your
solution & team's capabilities.

IBM Strategic Partners / © 2022 IBM Corporation