

minsoit

An Indra company

Quick Start Pack

Dynamics 365
Customer Service



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01



Minsait, your
technological
Partner

Who we are

Indra is currently the **leading technology in Spain** and one of the **main in Europe and Latin America**

Business Consulting

Technology

Digital Solutions

3.043 M€ sales

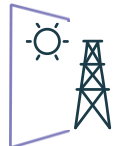
+49.000 Professionals

Projects in +140 countries


Local presence in 46 countries

50% sales abroad

(2020 Data)

16%
Energy and Industry




11%
Telecom and Media




17%
Financial services



18%
AA.PP. and Health



17%
Security and Defense



21%
Transport and Traffic

Business Management Systems

- ERP Solutions
- Payroll and Human Capital
- Consolidation and budgeting

Advanced Technologies

- Business Consulting
- Technology
- Digital Solutions

Outsourcing y BPO

- User Management
- Application Maintenance
- Infrastructure Management

Paradigma

- Agile Projects

Cybersecurity



- Digital Risk
- CyberSec Services & Solutions
- Digital Identity and Signature



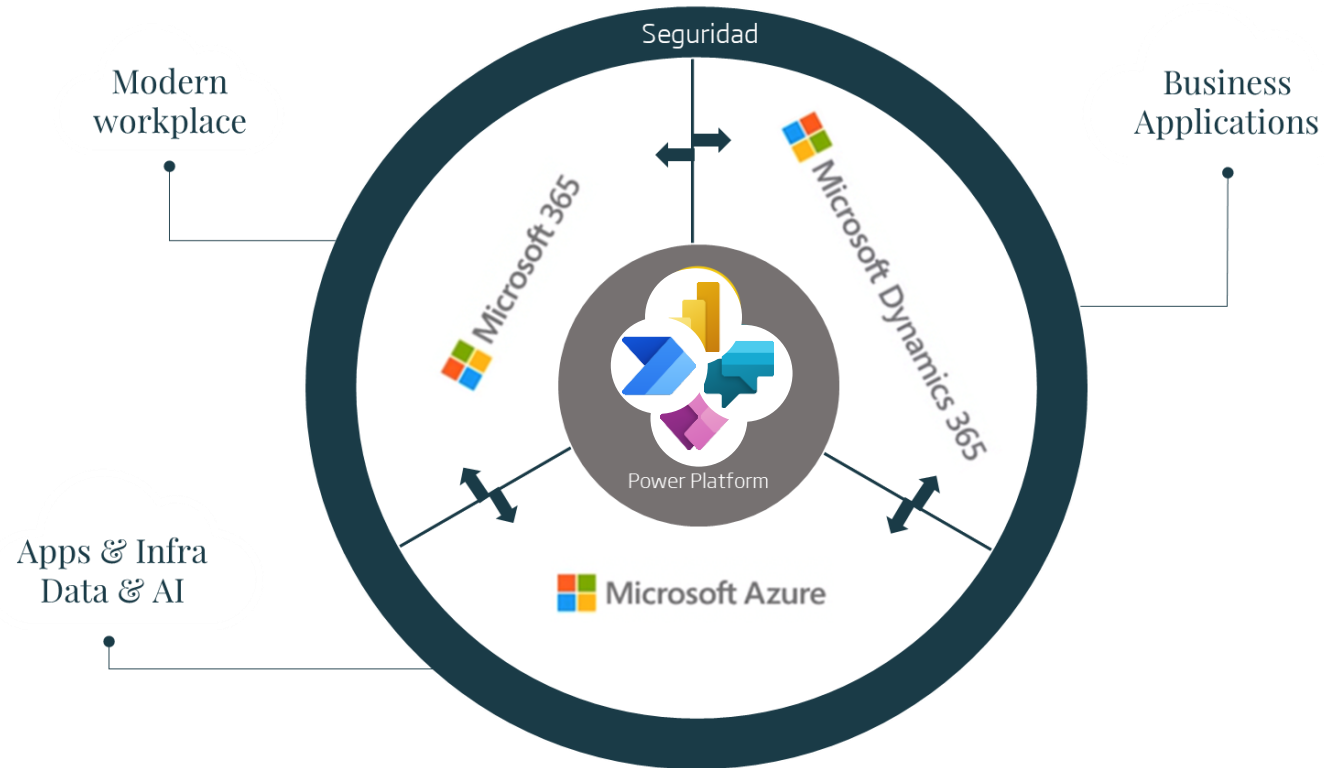
02



Our vision and
capabilities

Our vision and capabilities

Committed to thinking about the world through platforms and ecosystems



We approach our projects with a holistic and integral vision of the Microsoft Platform, with the perspective of Dynamics 365 as a core system but using the entire ecosystem of **Microsoft solutions as a platform to extend its capabilities**



Modern workplace

Productivity
Collaboration
Communication
Culture



Business Applications

Value creation
Efficiency
Profitability
Scalability



Apps & Infra Data & AI

Proactivity
Creativity
Competitiveness
Adaptation

Our capabilities

We ensure the quality of the service thanks to the certifications that accredit us...



Partner of the year 2021
Data&AI Power Platform

Advanced Low Code
Specialization



+1.000

Professionals with
specialized knowledge



+250

Data & Analytics Experts



+300

CRM & ERP experts



+230

Experts in Infra & Apps



+120

Power Platform
Experts



+15

Professionals accredited
as Microsoft Certified
Trainer



+100

Digital Workplace & M365



+1.000

Projects

+500

Clients

+12

Geographies



+300

Digital transformation projects
in progress

**Microsoft Azure Advanced
Specialization: Windows Server and
SQL Server Migration**

Demonstrate our expertise in migrating and
optimizing Windows Server and SQL Server-
based production workloads to Azure.



+20

Years of experience



03



Quick Start pack
Dynamics 365
Customer Service

3.1. Our approach

Why you might need a Quick Start Pack?

Dynamics 365 Customer Service is a solution with enormous potential and many functionalities. But if your company does not need all the capacity [to start the path of automated and personalized customer service](#), then an approach “[first adopt, then scale](#)” will be your best ally in digital transformation.

We propose a [rapid implementation](#) of the standard functionalities [slightly adapted to your business needs](#) to achieve an agile digitization of the customer service processes ensuring a [scalable solution aligned with product innovation](#)

Quick Start Pack Key Benefits

1

Goals
Oriented

We **consider** your **context** and **changing needs** of your business to take advantage of the transforming power of the business itself, making **common objectives** between the project and business team

2

Keep it simple!

To grant a **rapid deployment** we keep focus on **simplicity** and **efficiency** for all aspects of the project, identifying short-term **quickwins** that will define the roadmap of your solution

3

Embrace
innovation

A **successful implementation** capable of scaling **aligned** with **product innovation roadmap**, guarantees the **quality** of the technical approach and minimizes the impact of changes

Dynamics 365 Customer Service full overview

At Minsait, we drive intelligent interactions that **improve experience**, **customer satisfaction** and foster **loyalty** and **retention**

Business impact

Minimize costs

Automating repetitive agent tasks, achieving maximum operational excellence



Customer retention

Comprehensive omnichannel experience without breakages



Increase satisfaction ratios (CSAT) and recommendation (NPS)

with continuously open lines of communication



Proactive customer support

Empower customers with unattended communication 24/7 via Chatbots, Q&A...



Quality

making the customer history visible in real time so that they can qualify the responses of the agents



Compliance with SLAs

Shorten response times and track key agent performance indicators



Seamless Customer Service
by Minsait



Features

Omnichannel service

Liquid experience with integration of on/off communication channels

Comprehensive incident management

From the creation of a case to its resolution and feedback

Artificial intelligence

to optimize customer service processes

Automation

Of standard processes and tasks

Up-to-date and accessible knowledge base that allows agents to perform queries quickly

Unattended communication

Deploy no-code virtual agents with machine learning and integrated NLP

Self-service

Portals/Websites with Q&A (knowledge bases))

Data tracking and analysis

to ensure continuous improvement of customer service

Contact Centers/IVR

Native integration and connectors



Customer Service + Omnichannel



Customer Insights



Service Insights

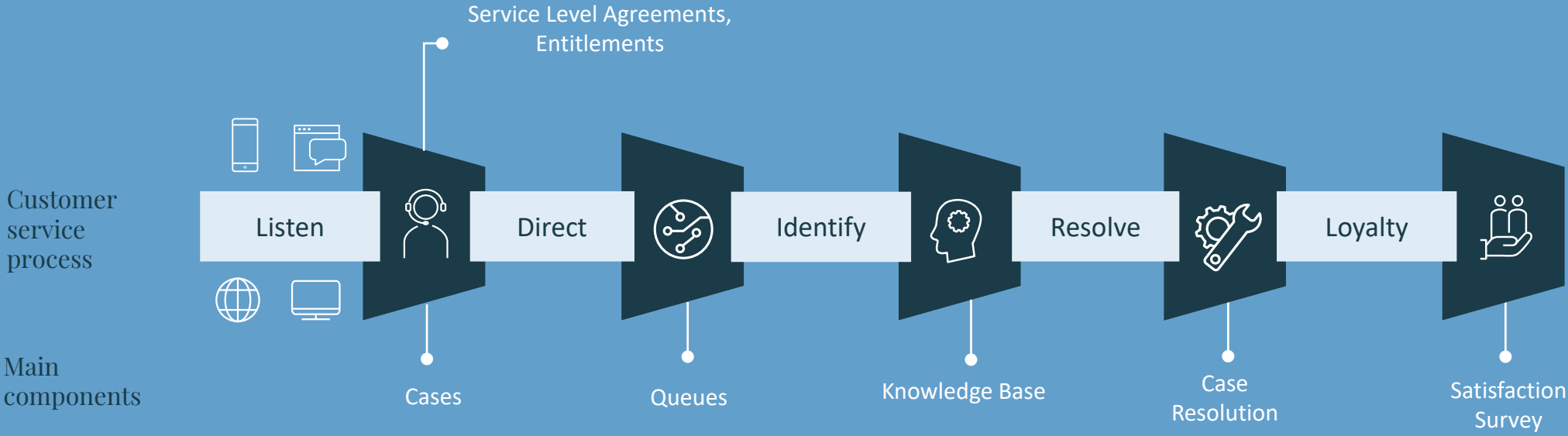


Power Virtual Agents



Customer Voice

The standard end-to-end End-to-end D365 Customer Service Cycle



Leverage the use of technology and digital channels to create more efficient service processes and a better experience with a 360 view of each customer's unique profile

Our approach

What is the scope of a D365 Customer Service Quick Start Pack?



Duration: 8 weeks

Total Amount: 32,000 €

Initial setup



Within the scope of the project, the parameterization of the entity Contact, Account, Case, Case Resolution, Activities, Tree of case topics, Rights and Service Agreements will be carried out; customizing the existing fields, forms and views based on the needs gathered during the analysis phase.

Up to 6 master tables and 5 custom tables will be created and customized.

Initial migration



The initial load of data from the Accounts, Contacts, Case Topic Tree, Master Entities, and custom tables will be performed.

Minsait will provide the .csv files to the data upload and it must be completed in the same format.

The quality of the data is the responsibility of the client.

Dashboards



The following dashboards are included in the scope of the project:

- Platform standard dashboards
- Creation and customization of three basic dashboards that include:
 - Data listings
 - Up to 3 standard charts
 - Up to 3 iframes supported by the standard

Training



There will be 3 training sessions (workshops) of 4 hours with the Key Users, in which the following contents will be addressed:

- General platform navigation
- Work with standard interactive panels for service control
- Use document templates to create standardized documents
- Management of clients, contact persons, communications and knowledge base
- Case Management
- Service Management: Basic Service Scheduling and Resource Management
- Service configuration options
- Searches
- Import and export of records

Processes



4 configurable Business Process Flows will be configured through the standard or 2 Power Automates that extend the no-code application.

Documentation



At the end of the project, the following documents will be delivered:

- Analysis document
- User manual
- Project closing document

Users, roles and applications



Create users in Azure Active Directory.

Creation, configuration and assignment of up to 3 additional user roles to the standard ones.

Creation and configuration of 2 multi-device user applications.

How do we work?

Our methodology raises **4 workstreams** that cover all the necessary activities to ensure the success of the implementation

Line A | Analysis, design and implementation



We propose an implementation strategy supported by workshops to **validate the approach and build an incremental solution**

Line C | Change management



At Minsait we have our own change management methodology under adaptive methodologies

Line B | User validation



The **participation and commitment** of the client is key to ensure an implementation that meets expectations. To comply with these Minsait will generate a **test plan and UATs** that the client must execute to validate the implemented solution.

Line D | Strategy and governance

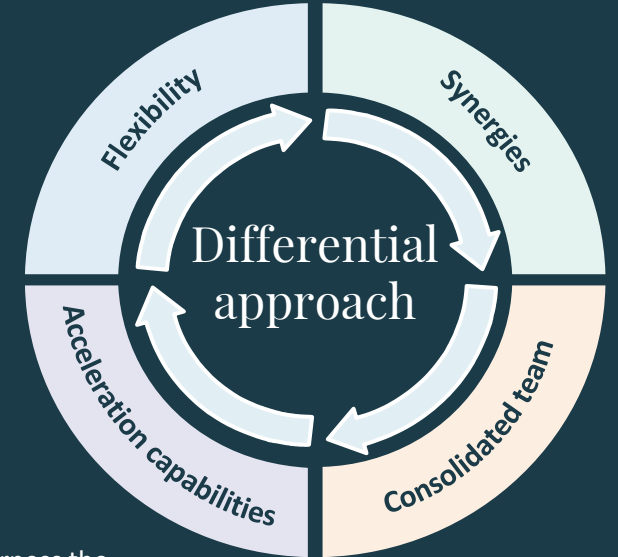


A successful implementation requires a **deep knowledge of the client's needs** and an **evolution strategy**

What sets us apart

The teams and skills involved will be adapted according to the priorities of the moment

We take advantage of working with different technologies and industries

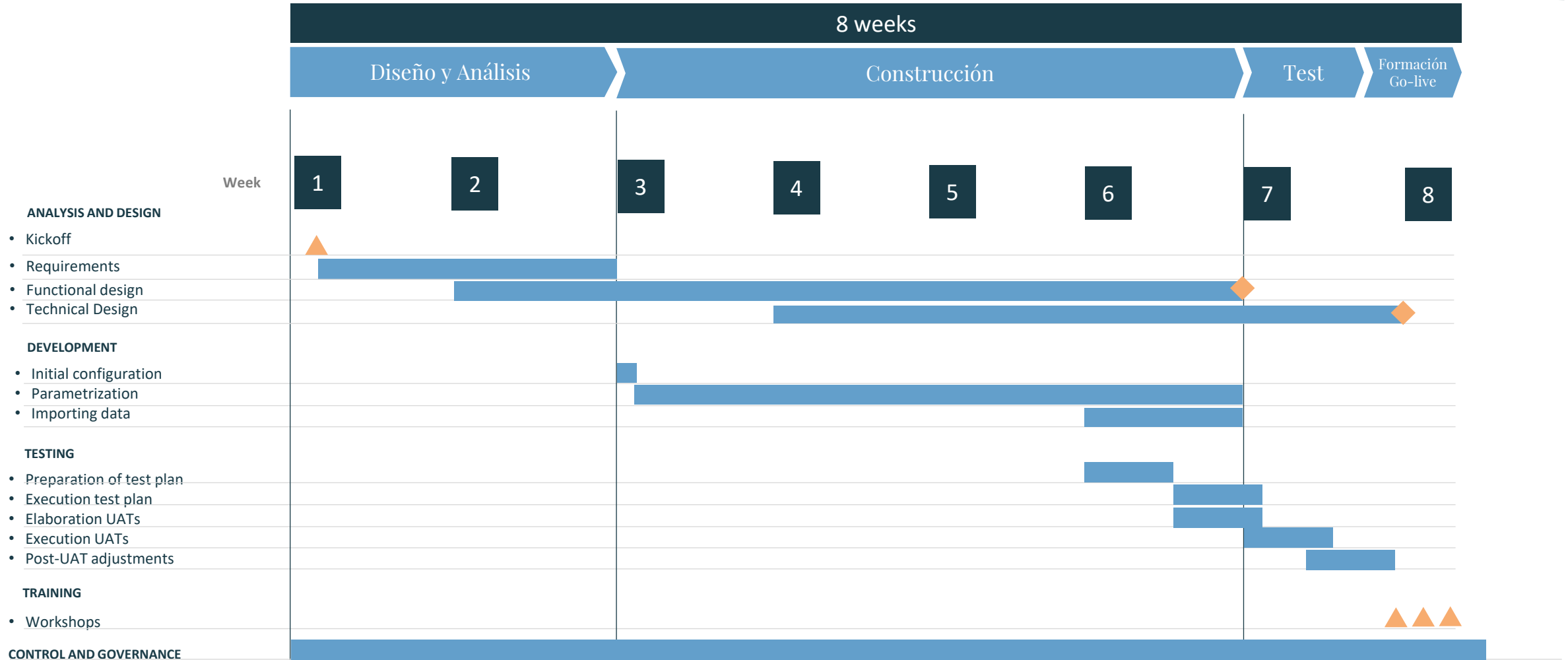


We harness the transformative power of the business itself

Specialized teams that collaborate in a multidisciplinary way

3.2. Planning

The 4 workstreams flow in a coordinated way to ensure the success of the project



Thank you!

minsait

Mark Making the way forward

An Indra company