



USE CASE

Dynamics 365 service

A digital experience
in after-sales





After-sales services are one of the most important parts of the buying experience.

The trend is for companies to pay increased attention to their customers, **bringing organisations closer to the people they serve.**

After-sales service can be defined by all the interactions with a given customer after they have made a purchase at one of the organisation's points of sale.

Case Study

In this article, using a case study, we will take as an example a company in the retail sector to discuss and detail all the needs and challenges encountered at this stage of the customer journey.

Company Analysis

Consider the situation the world has experienced over recent years. Imagine a company that grew exponentially during the pandemic, but which, amidst the hustle and bustle of that growth, never found the time and dedication to restructure its internal processes to keep up. This is a company that managed its after-sales process using only Excel spreadsheets, email inboxes and the telephone to support customers on their post-purchase journey.

This quickly became unworkable and was reflected in its relationship with its customers. They were not using, for example, SLAs, knowledge bases or even satisfaction metrics.

Challenge: As-is Scenario

Imagine that a customer has just arrived home on a weekend after buying an automatic coffee machine. While unpacking the product they discover that one of the water tank parts is damaged, which causes them some annoyance. The customer immediately goes to the company website and finds out that the telephone service is only available on working days, between 9 am and 5 pm. Discouraged, they continue searching the site and find an email address, which allows for greater flexibility in contacting customer support. The customer then decides to explain the situation by email, including photographs of the damaged part.

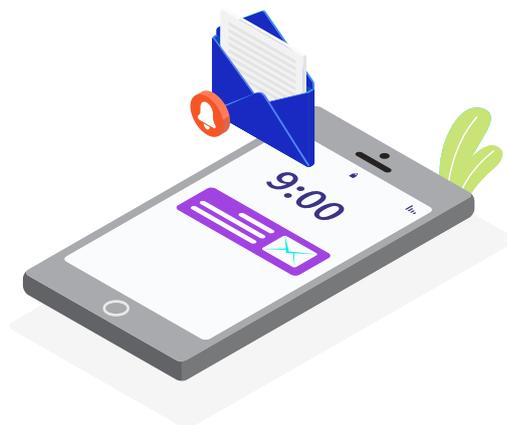
However, the customer service department is overwhelmed with work and is unable to triage the incoming emails.

They are therefore only able to deal with the customer complaint a full week after receiving it, without that customer having been given any information about the process during this time. In turn, and because there was no reply, the customer sent yet more emails, generating duplicates of the complaint.

In its response, the company outlined the steps to be taken for the customer to receive the new part. To do this, the customer was asked to provide billing data, address, product code and attach the purchase invoice – information the company already had in its possession, but which was too scattered to be useful. Upon receiving this email, the customer sends the necessary information the next day, and the part arrives four days later.

With this scenario in mind, there are some fragilities:

- Sense of unavailability
- Lack of feedback
- Long response times
- Customer dissatisfaction
- Generation of duplicate complaints
- Unconnected or searchable information silos
- Lack of mechanisms to measure customer satisfaction
- Disorganisation in internally performed functions
- Management lacks visibility of processes and/or team performance



Solution: To-Be Scenario

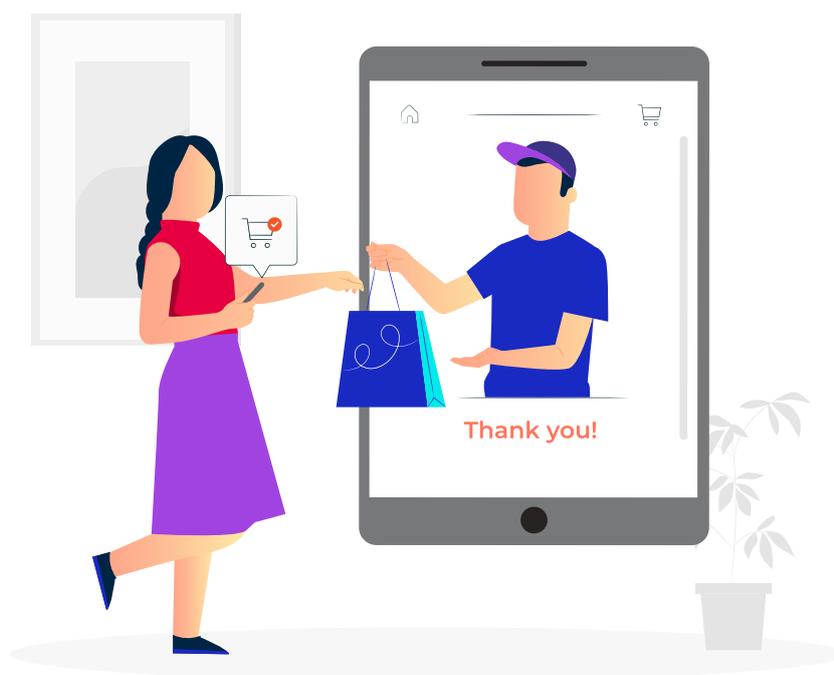
To meet its **customer service** needs, the customer support department decided to opt for the Dynamics **365: Service and Customer Voice solution**, to meet the needs of its customers better.

Dynamics 365 is a Microsoft business system, which has two components: **ERP**, where systems such as invoicing, stock management, resource management, among others, are inserted, and **CRM**, for managing business processes, customer support and marketing, etc.

The Service module aims to meet customer support needs, providing incident management functionality, response agreements and knowledge bases, aiming at improving customer visibility into company processes.

The Customer Voice component allows customer satisfaction surveys to be created and sent, as well as analysing information obtained from them.

To overcome the existing fragilities, the **customer service system** was configured to make it possible to manage incidents, allocate agents and provide service agreements (SLAs) and internal knowledge bases (for team use), and external knowledge bases (for customers to consult).

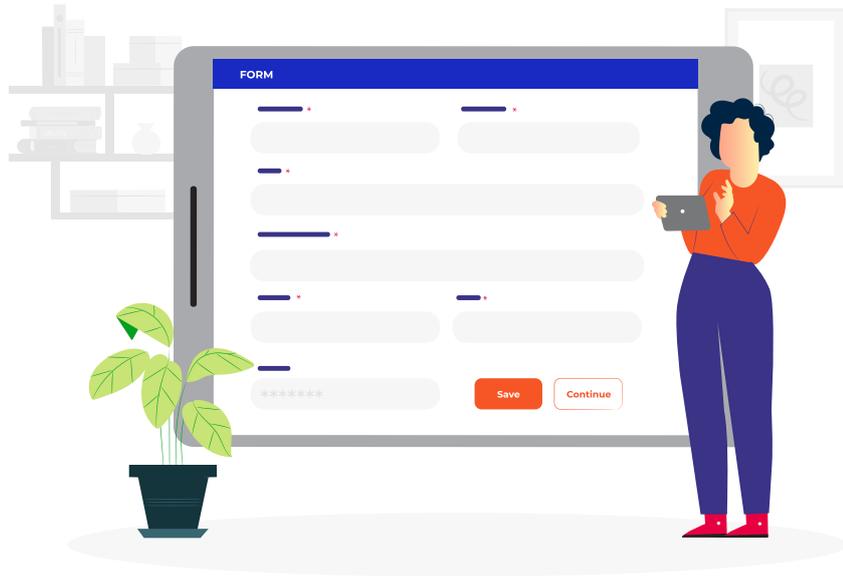


After this rollout, the above scenario would play out as follows:

This time, the customer, on discovering the damaged part, has a FAQ page available, created from a knowledge base, where he/she can search for 'Damaged Part'. The customer quickly found an article giving a specific email address for customers to report problems to, which indicated that the process should be resolved within four working days. The customer sent an email to that address.

In turn, the company's system **automatically** created an incident, which is given to the agent with the lowest number of incidents. This reduces the response time and ensures that the agent knows exactly what to do (because it has obtained this information from one of the knowledge bases). Unnecessary email exchanges with the customer are thus avoided.

As Dynamics 365 is a solution that adapts to the needs of the organisation, templates frequently used by agents for a range of incidents are also configured. In this case, the agent only has to select the damaged part dispatch template, which will be automatically filled in with the customer information in the system.



After sending out the new part, bearing in mind that the company has configured its new system to manage the sending of automatic surveys, a satisfaction form is then delivered to the client, to get information on the resolution of the problem that originated the incident. Finally, since the system is based on a database of excellent quality information, management can finally get data on the performance of their own teams, via intuitive reports and dashboards.

This allows us to improve on the points mentioned above as follows:

- Sense of constant follow-up, with timely exchange of information
- Customers feel supported by the company, knowing that the company is aware of them, avoiding unnecessary exchanges of information
- Reduction in response times, thanks to the distribution of incidents between specialised teams, and better focus on workload
- Team optimisation, as articles and templates are configured so that they can work more quickly and efficiently
- Elimination of duplicates, as the system can identify repetitions
- Better understanding of business operations via the analytics provided by the system
- Visibility over customer satisfaction, through customer surveys

Summary

At the end of this transformation, the company was given an optimised, structured solution, allowing it to scale its business to new heights, and a crucial step towards building a 360° view of its customers.

Excel is still part of the company in a data transaction format, but Dynamics 365 has become the daily work tool.

How Xpand IT can help you:

Our multidisciplinary team can assist with various components, from the definition to the implementation of the solution. We utilise all the experience and know-how we have in different areas to offer the best approach, geared to your business.

If you would like more information, please contact us.

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