



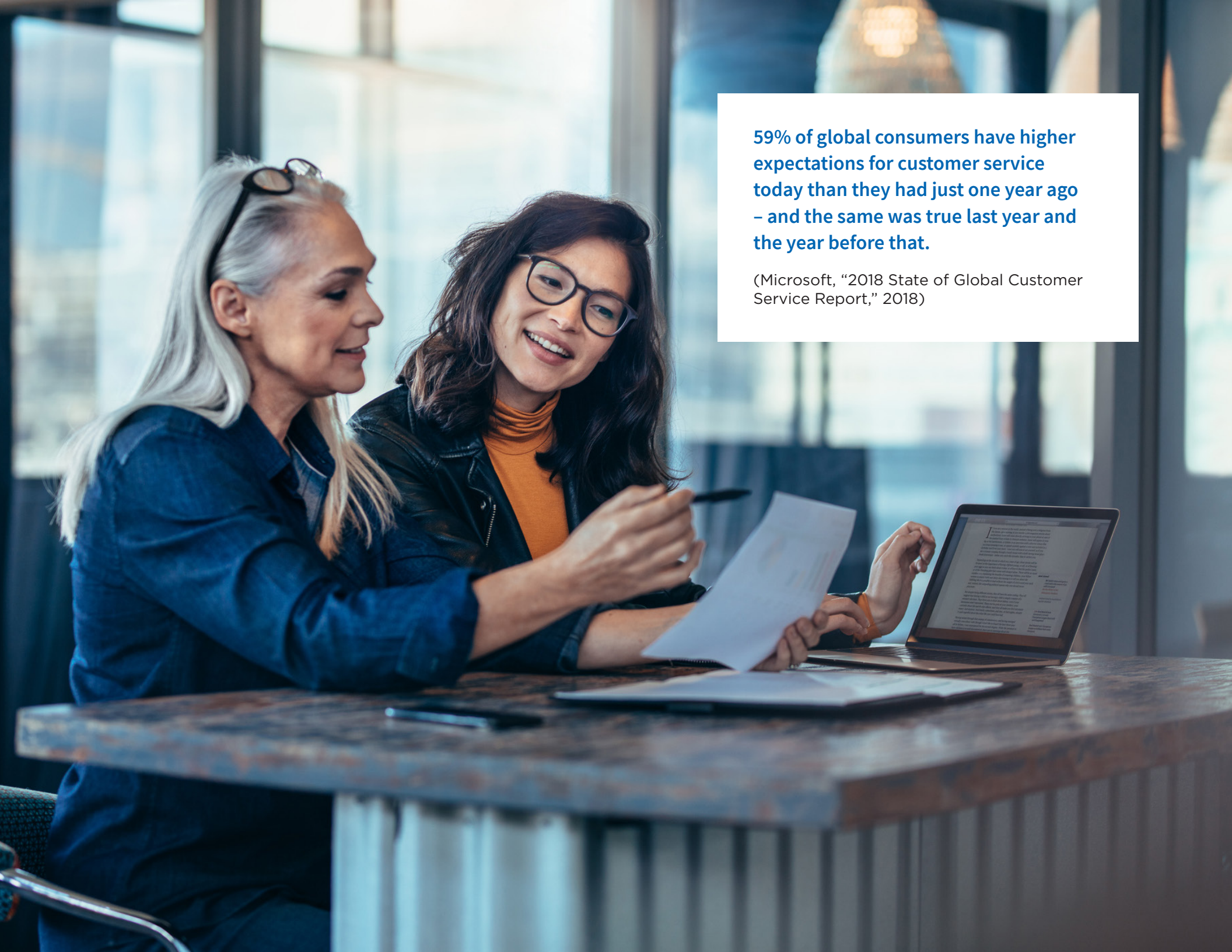
HOW LEADING BRANDS ARE OVERCOMING **FIVE COMMON CUSTOMER SERVICE CHALLENGES**

The advent of ecommerce as an institution brought a slowly-evolving shift in consumer behavior. As more information – and eventually more products and services – became available with only a few simple clicks, customer expectations began to escalate.

As brick-and-mortar and face-to-face continue to fall by the wayside, consumer expectations are skyrocketing. In nearly every interaction, customers demand:

- **Greater convenience**, which includes apps, chats, bots, self-help, and more
- **Faster speeds**, which means standard service requests must be satisfied almost instantly
- **Improved accuracy**, which requires collection, storage, and immediate recall of every single piece of customer data
- **Complete familiarity**, meaning that not only is a caller immediately recognized as a customer, but all prior purchases, service requests, and other interactions are accessible in real-time



A photograph of two women sitting at a rustic wooden table in a modern, brightly lit interior space, likely a cafe or office. The woman on the left has long, straight white hair and is wearing a dark blue button-down shirt. She is looking towards the right. The woman on the right has long, wavy dark hair and is wearing glasses, an orange turtleneck, and a black leather jacket. She is smiling and looking at a document she is holding. A laptop is open on the table, displaying a webpage. The background shows large windows and a warm, bokeh light source.

59% of global consumers have higher expectations for customer service today than they had just one year ago – and the same was true last year and the year before that.

(Microsoft, “2018 State of Global Customer Service Report,” 2018)

To remain competitive in such an environment, businesses must have technology infrastructures capable of meeting those customer demands – and one of the most important components of that infrastructure is the customer relationship management (CRM) solution.

Years ago, the primary focus of any CRM tool worth its salt was collecting customer information and delivering operational efficiencies. In those days, organizations were resigned to the fact that customer service centers were, by definition, *cost centers* – and efficiencies *gained* equaled *lower costs*. While those are still relevant aspects of CRM, the focus in today's market has shifted in tandem with those skyrocketing consumer expectations. Indeed, organizations now look to their CRM to help generate revenue by better servicing and supporting customers on their journeys – from acquisition, service, and retention to repeat business, referrals, and advocacy.

Organizations are exploring new, next-generation, omni-channel CRM solutions like Microsoft Dynamics 365 for Customer Engagement to support their innovation and enable them to differentiate for customers where it matters most. The widespread popularity of social media and mobile provides opportunities to engage customers more frequently and more effectively by personalizing and contextualizing the messages they receive. And yes, the evolution of consumer behavior means that call centers are no longer synonymous with cost centers.

CHALLENGES

With that in mind, the CRM of today absolutely must help businesses overcome five challenges that are pretty much universally applicable to customer service organizations:

- Lack of real-time data insight and poor reporting capabilities, leading to ineffective decision making
- Limited case deflection and self-help capabilities, causing an unnecessary reliance on human intervention that diminishes the consumer's brand confidence
- High agent turnover, resulting from inefficient systems that erode employee satisfaction
- High customer churn due to systems and processes that don't deliver the convenience, speed, accuracy, and familiarity consumers demand
- Lack of the cross-sell and upsell capabilities that are instrumental in turning cost centers into profit centers



Can a single CRM tool really address all those challenges? Fortunately, yes, Dynamics 365 was designed, developed, and continually enhanced to do just that. To prove it, we'll shine a light on more than a dozen organizations that implemented Dynamics 365 to successfully overcome those common customer service challenges – and, in the process, discovered that with the right tools in place, consumer expectations *can* be met.

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CHALLENGE #1: LIMITED REPORTING CAPABILITIES

When we ask call center management teams to identify their biggest opportunity for improvement, one of the most common first responses we hear is *reporting and analytics*, which includes a few different important considerations:

- Access to real-time data for key metrics
- Ability to slice and dice data from multiple sources
- Access to a data hub for collaboration

Let's explore each of these.

ACCESS TO REAL-TIME DATA FOR KEY METRICS

Access to real-time data empowers management teams to make midstream adjustments. Deriving key metrics easily and efficiently means being able to make evidence-based, in-the-moment decisions that positively impact organizational results. Just ask the folks at The Christman Company (Christman).

Christman is a commercial and professional construction firm offering construction management, real estate development, and related services. Founded in 1894, the company is now ranked among the largest contractors in the US.

As the company grew, the use of spreadsheets and multiple digital platforms was no longer providing a complete 360-degree view of customers or real-time insight into the sales pipeline, but that's not unusual. Many companies struggle to manage dozens – or even hundreds – of spreadsheets and reports generated from several different systems. For Christman, combining Dynamics 365 with Power BI from Microsoft changed everything.

Dynamics 365 gives senior leadership within Christman the opportunity to review real-time pipeline information at any given time via user-created views and dashboards. In addition, they utilize Microsoft's Power BI to report and analyze opportunities, wins, and losses.

"Reporting on our sales activities and progress used to be a manual process for us and that's where Power BI came in," says Jennifer Lee, Regional Marketing Manager. "Our reports are now automated and much easier to process."

"From the management perspective, it's been really great to have a dashboard of information that our business development leader can bring up for us to review together. We have company-wide management team meetings where we can look at what we call our grow dashboard, which surfaces information about what we have in our sales pipeline and the active milestones for our open opportunities."

Angela Bailey,
Vice President of Brand
Strategy and Communications



ABILITY TO SLICE AND DICE DATA FROM MULTIPLE SOURCES

Pulling data from multiple sources and being able to manipulate it to create otherwise-hidden insights can drive forecasting, long-term planning, and overall strategy. The employees of CLEAResult know this to be true.

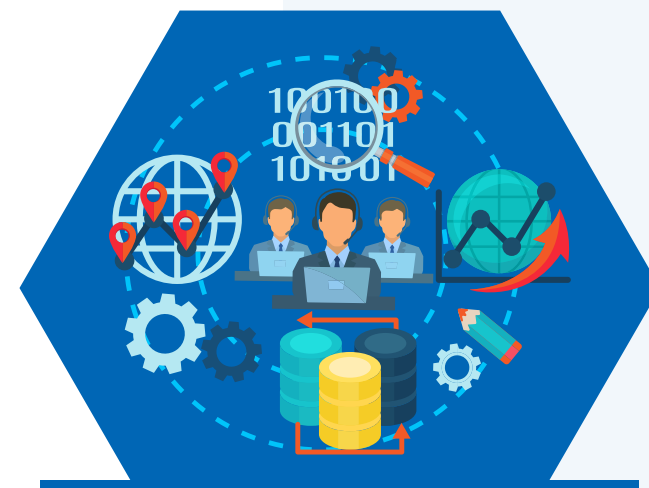
CLEAResult started in Austin, Texas in 2003 with a simple idea: a results-oriented company could have a positive impact by helping people make smart energy decisions. In the years since, they've grown to become the single largest provider of energy solutions in North America. Now, with offices in 60+ cities in the U.S. and Canada, they're able to tailor their efforts to fit each client's specific needs.

Dynamics 365 allows CLEAResult to fully integrate, analyze, present, and use data from their incentive processing center, field audit tools, call center, and program teams. With this level of access to key metrics and the power to slice it and dice it, they're able to help utilities increase project conversion rates and cultivate long-term relationships with customers.

Whereas CLEAResult once relied on homegrown systems and Excel spreadsheets to store data and track projects, the migration to Microsoft Dynamics 365 enables them to create targeted marketing campaigns based on tracked customer data, such as behavior, motivations, and program participation. They can access real-time information on each program's performance through dashboards, data visualization charts, and customizable reports. The data insights provided by Dynamics 365 have helped them truly transform their organization.

ACCESS TO A DATA HUB FOR COLLABORATION

Within any organization, the true power of data and analytical insights lies in the ability of stakeholders and decision-makers to access it, discuss it, and act on it. As Bishop-McCann can confirm, a data hub that allows free access and fosters collaboration can lead to increased productivity and improved organizational communication.



With several offices across the United States, Bishop-McCann (BMC) is one of the industry leaders in producing meetings, incentive programs, and events worldwide. One of the pain-points they were experiencing was a lack of a central hub for collaboration.

BMC also knew that they needed a better system for tracking the effectiveness of their marketing campaigns to ensure they were spending money on the right efforts.

The organization wanted more than just a point solution—they wanted a platform that could function as the central hub for collaboration across departments, and one that could grow as the business grew. They needed technology to help them automate business processes, create more efficiency internally, and help track the customer experience throughout the entire lifecycle.

Utilizing the integration between Microsoft Dynamics 365, Office 365, and Skype, BMC employees can collaborate between departments to a degree that was impossible before the solution was rolled out. Skype allows employees to jump on a call and review documents in real time—a huge time-saver. BMC's CRM also ensures that there is one source of the truth of customer history and interactions, in real time. With the implementation of Dynamics 365, Bishop-McCann has enjoyed:

33% INCREASE IN QUALIFIED PIPELINE

11% INCREMENTAL BUSINESS GROWTH

20% DECREASE IN MARKETING SPEND

“We were doing our business through spreadsheets. It was taking three or four people to run our marketing campaigns, and everyone was doing it their own way. But now, every detail around a particular program or event is documented, creating collaboration that we never had before.”

Rob Adams
CEO at Bishop-McCann





Consumers want quick and easy – and AI delivers. Asked about AI capabilities:

- 85% of consumers think 24/7 availability is useful
- 85% want to connect directly to a virtual assistant vs. navigating a menu of choices
- 79% said that AI solutions provide positive customer experiences when they enable them to interact on the channel of their choice and to speak conversationally – as if talking to a human – instead of forcing them to use “robot speak”

(Interactions, “Artificial Intelligence and the Customer Experience,” 2018)

CHALLENGE #2: LIMITED CASE DEFLECTION

When organizations talk about the need to create more self-help options and implement automation tools involving things like artificial intelligence (AI), bots, and machine learning, what they're actually referring to is the concept of case deflection. A commonality across all industries and every business is the need to provide service to customers, and when that customer service requires human interaction, the service cost grows exponentially. To that end, organizations are always looking to deflect cases away from manual intervention, instead steering them towards self-help. Can a customer relationship management tool help with that? Absolutely. Let's look at a few examples where Dynamics 365 did just that.

AUTOMATING COLLECTION OF CUSTOMER FEEDBACK

The Colchester Borough Council is a local government authority within the County of Essex in the United Kingdom. With 600+ permanent staff across 10+ locations, it is one of the largest district authorities in the country. Colchester provides services to approximately 190,000 residents who benefit from services that include refuse/recycling collection, housing advice, food and safety inspection, planning services, and licensing/permitting.

Customer service agents account for about one-third of Colchester's Dynamics 365 users. For them, the tool provides visibility into each step of a customer service request, from initiation to completion. Colchester also pulls feedback from their website into Dynamics 365 and manages resident updates and complaints in real-time – in other words, no phone calls, which greatly reduces the extent to which human involvement is required. Tracked activities give them the ability to see when and where emails are being sent or where a complaint sits in the queue. Emails from residents also live in Dynamics, providing a complete customer profile to customer service agents.

Residents can interact with Colchester's newly-designed website, which is built entirely using Dynamics 365 self-service portals for things like support requests, scheduling a class or appointment, ordering products, and reporting problems.

With Dynamics 365, employees can identify residents and reduce record duplication from front and back office operations. Using the Microsoft Knowledge Base, Council staff can provide residents with information regarding refuse waste, recycling services available, collection days, what can be collected, how to apply for exemptions, and more. Providing residents self-help access to this information is the logical next step.

"If you're out and about and you want somebody to come and clean up the street because there's graffiti, or there's an abandoned vehicle, you submit a request via our online portal. We now use Dynamics 365 for that. Dynamics on its own is powerful, it's brilliant. But when you start adding in all the rest of the Microsoft Stack like Outlook, Power BI, and Azure, that's when you start seeing the real kind of power the platform truly has."

Adam Piercy

Web Development Manager for Colchester Council



Furthermore, the Council's use of the Dynamics 365 mobile app has transformed their recycling and waste services. Approximately 20 Street Wardens access Dynamics 365 on tablets and phones. This mobility allows Street Wardens to connect with residents on reported issues and update note logs, including photos, all on site. Resolution times average about an hour now, as compared to the days it would take for the initial processing and scheduling that would have to occur before a Street Warden could even make it to the reported problem site.

SELF-HELP PORTALS PROVIDE ON-DEMAND INFORMATION

In 2013, UKAR Corporate Services Limited (UKARcs), a subsidiary business of UKAR, became responsible for the administration of the UK Government's *Help to Buy Mortgage Guarantee Scheme* on behalf of HM Treasury. UKARcs needed Dynamics 365 to allow them to handle the demands of the Government scheme at a high level.

Case tracking was a critical business requirement for UKARcs. They wanted to eliminate the need for phone calls and instead focus on a self-service online option for their clients. Dynamics 365 provided a solution that gives users of the program on-demand access to the information they need most.

CUSTOMER PORTALS ELIMINATE STATUS CALLS

A North American healthcare equipment supply company – with more than 5,000 mobile service techs spanning hundreds of counties – knew that it was spending too much time and money in the very automatable service of taking status calls from customers. They were looking to grow, but their existing infrastructure made it impossible because everything – especially status updates – was being done manually. Enter Dynamics 365.

In addition to Dynamics 365, this firm's solution also included mobile access with payment capability, an automated routing engine, and a customer portal. The end result was that they went paperless, which eliminated paper-based errors allowing for faster and more accurate billing and payment. As part of the mobile capabilities, they are now able to quickly scan equipment, which increases inventory accuracy and productivity.

The automated routing engine allowed them to optimize technician routes, reduce travel time and fuel costs, and feed real-time delivery information back to Dynamics 365. And most importantly, because the portal is deployed within Dynamics 365, customers have up-to-the-minute and accurate visibility into delivery status, which means no more status calls. The implementation enabled them to improve efficiency and focus on their growth objectives.

“Self-service is absolutely key to us. Our CRM system was built on a self-serve basis, but the whole point of it was to eliminate paper transactions. With Dynamic 365's self-help portals in place, paper transactions are now almost non-existent.”

Andrew Hamilton
Head of UKARcs



CHALLENGE #3: **AGENT TURNOVER**

An organization still using a collection of archaic and cumbersome legacy CRM systems is going to have a tough time keeping good agents. After all, creating a good agent experience is critical to ensuring the best agents don't leave for a better experience elsewhere. Plus, as every organization knows, it costs far more to hire and train a new agent than to simply retain one.

Agent dissatisfaction can stem from one or any combination of the following:


- Having too many apps or systems to use
- Data between apps not syncing – meaning multiple searches for the same information are required
- No clear view of the customer's information
- Limited access to the tools and information needed to support the customer (any good agent *wants* to support the customer!)

HAPPIER CUSTOMERS LEAD TO HAPPIER AGENTS

It should go without saying that an agent who enjoys his or her job is likely to provide a good customer experience – as the old adage says, you can hear a smile through the phone. But the inverse is true, as well: satisfied and happy customers lead directly to higher agent satisfaction. Combine that with the fact that agent turnover declines as agent satisfaction rises, and it stands to reason that making a significant improvement in the customer's call center experience will reduce agent turnover. Moneris is proof in action.

Canada's largest processor of credit, debit, wireless, and online payment services for merchants in virtually every industry segment, Moneris processes more than three billion transactions annually. They originally identified a need for a CRM solution because of issues they were experiencing with their legacy ticket management system. The platform lacked the ability to scale into a full-fledged CRM, which prevented them from making customer experience improvements and fully maximizing their call center capabilities. Call center agents needed too many screens to view customer information, too many steps were required to access data, and they frequently relied on email to manage customer issues. Something had to change.



A young woman with long, wavy brown hair is smiling broadly, looking slightly upwards and to the right. She is wearing a white blazer over a dark top. Her right hand is raised to her chin, and her left hand is holding a white tablet. The background is a blurred outdoor scene with trees and a fence. On the left side of the image, there is a white rectangular box containing blue text.

76% of consumers who contact a service center expect the agent to know a plethora of information about them, including contact information, purchase history, and prior service requests.

(Microsoft, "2018 State of Global Customer Service Report," 2018)

Moneris now uses Dynamics 365 for managing customer alerts, case management, field work order creation, approval management, customer notifications, marketing campaigns, sending surveys, and social listening. Also, by using Dynamics 365, they have knowledge articles suggested contextually at the right place and time in the application. They're also using Unified Service Desk for a third of their user base, mainly in call center roles, with an integration with their telephone system.

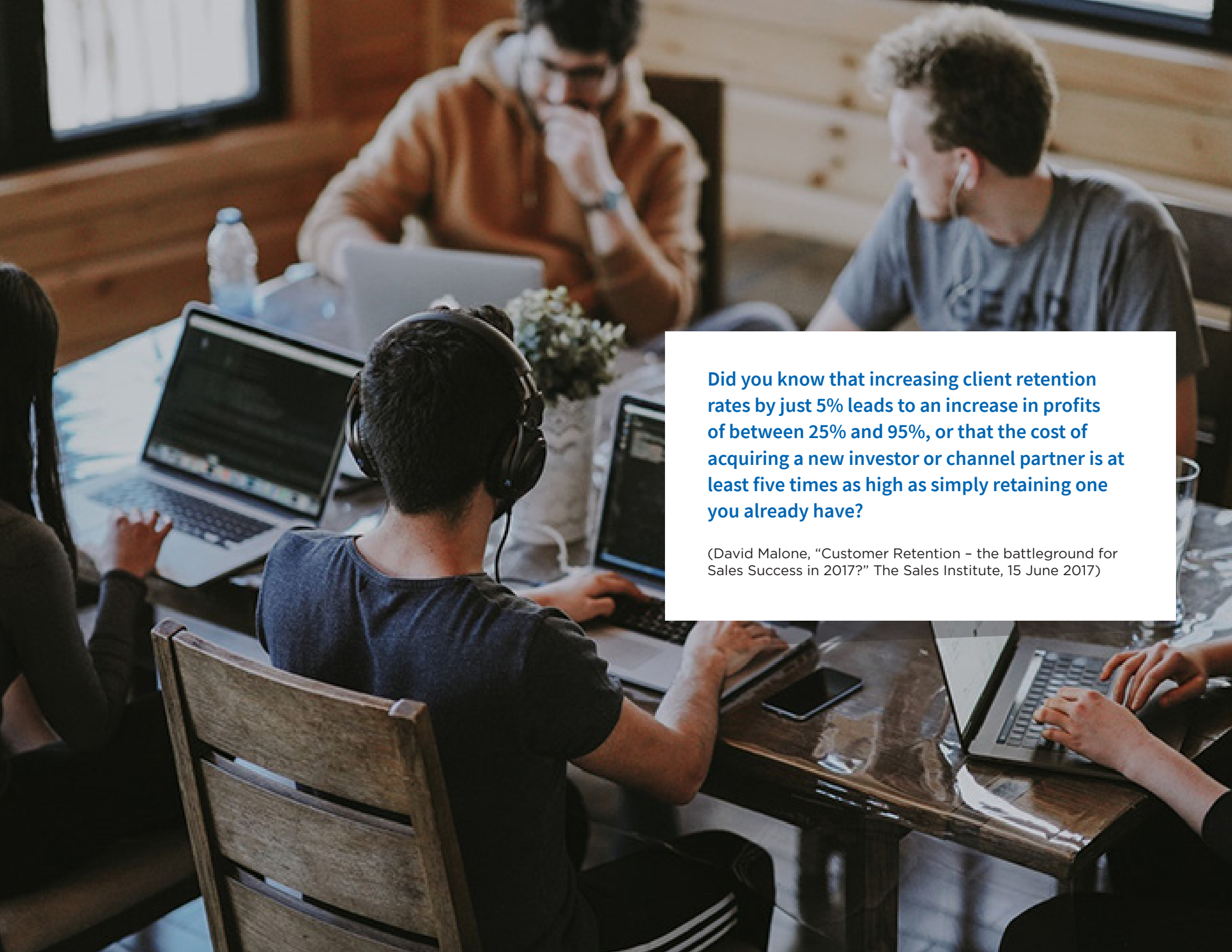
Since deploying Dynamics 365, Moneris has enjoyed a 4% reduction in average handle times (AHT) and a 5% increase in first call resolution. They have also seen improvements in their onboarding processes for new team members – with more standardized processes in place, onboarding time is lower and employee performance is higher.

THE IMPORTANCE OF AGENT SATISFACTION

Let's take a quick look at a few organizations that used Dynamics 365 to improve agent effectiveness and reduce turnover:

- A global health sciences firm with more than 1,400 customer service agents used Dynamics 365 to integrate an Oracle-based customer order system, an ADFS infrastructure, five unique systems of record, an internal/external portal, and several Microsoft productivity tools. This company realized a 25% reduction in agent onboarding time – meaning that new hires are more efficiently trained and quicker to leave the training room and begin doing what they were hired to do: help customers.
- A global software innovation company with locations in 200+ countries and more than 30,000 CRM users used Dynamics 365 to integrate 170 global and local applications. In addition to realizing a staggering 75% reduction in total cost of ownership, they enjoyed a significant uptick in agent satisfaction due to a CRM experience tailored to the operational workflows and data.
- A healthcare business with 200 call center agents serving 550,000 members and taking 5,000 calls/day used Dynamics 365 to create a single agent desktop that bridged dozens of data islands, including 24 custom applications and 16 mainframe screens. Agent productivity was improved due to a single desktop portal and the true benefit realized was the extent to which it streamlined the patient experience and enabled the agents to provide a superior level of service.
- An international distribution firm with 300 inbound service agents, 500 outbound service agents, and more than 1,000 sales agents serving 80,000+ customers used Dynamics 365 to create a state-of-the-art agent desktop. As a result, they improved interactions with customers, vendors, and project stakeholders, eliminated slow, tedious searching and keying to find relevant data, and integrated with Cisco CTI to streamline multiple entity search and screen pop.





Did you know that increasing client retention rates by just 5% leads to an increase in profits of between 25% and 95%, or that the cost of acquiring a new investor or channel partner is at least five times as high as simply retaining one you already have?

(David Malone, "Customer Retention – the battleground for Sales Success in 2017?" The Sales Institute, 15 June 2017)

CHALLENGE #4: CUSTOMER CHURN

Customers can decide to leave for dozens of different reasons, but the number one cause of customer churn is dissatisfaction, which can happen from a bad customer-service interaction. In these instances, reasons for dissatisfaction may include things like case resolution taking too long or requiring too many touchpoints and lack of transparency in terms of progress towards resolution – meaning the customer has no insight into the status of their issue/request. As described earlier, the best way to avoid these scenarios is to deliver a customer experience that provides:

- Greater convenience
- Faster speeds
- Improved accuracy
- Complete familiarity

IMPROVING SYSTEM EFFICIENCIES = HIGHER CUSTOMER SATISFACTION

The various systems being used at an international home and auto insurance company made it difficult for the customer service agents to identify callers' contact information and insurance policy details. The result, of course, was painfully slow customer and agent interactions.

The 2,500+ agents were using an internal legacy database with an outdated user interface, causing call inefficiency, high agent turnover due to job dissatisfaction, and the customer churn that inevitably follows agent turnover. Something had to change – and quickly.

The implementation of Dynamics 365 included custom “caller validation” screens designed to take incoming calls and identify the caller by comparing caller-provided info to data within CRM. Validating the caller is now a one-click operation that transfers the session to an internal policy handling system.

Call times were significantly shortened, agent satisfaction skyrocketed, and the customer churn associated with a poor service experience practically disappeared. Incredibly, searches that used to take minutes are now done in Dynamics 365 and consistently meet a 3-second Service Level Agreement to provide the agent with all detailed information on all policies tied to the validated caller.



DELIVERING EXCELLENT SERVICE = REFERRALS + CUSTOMER RETENTION

A full-service real estate company, Red Door Company offers a comprehensive set of services and high-value options for buyers, sellers, landlords, and tenants alike. Innovation, technology, and state-of-the-art processes are at the heart of their company culture and service standards.

Red Door was looking for a product to help them manage their customer relationships. The organization was using Outlook to help communicate and manage customer relationships. As their business grew, the team struggled with managing the volume of emails they had coming in – meaning requests weren’t getting answered in a timely fashion. Leads were sometimes falling through the cracks because they didn’t have an effective way to track who was following with each one. Luckily, they found Dynamics 365.

Implementing Dynamics 365 has helped the organization continue their vision of providing great customer service and to continue to improve by adopting technology. Red Door now has a centralized database for all their customer information, mobile capabilities for field work, effective lead management, automated marketing, a streamlined customer feedback process, and the ability to provide efficient service to their tenants.

“Technology like Dynamics 365 is the backbone of Red Door Company, because it allows us to be more responsive. It allows us to operate in real time, which means excellent service. It allows us to do business untethered and it allows us to do business in a completely green way. We are 100% in the Cloud. Red Door is indeed earning customers for life.”

Todd Crenshaw
President, Red Door



CHALLENGE #5:

LACK OF CROSS-SELL/UPSELL CAPABILITIES

Another theme that always seems to surface in service organizations is the lack of visibility across systems, teams, and processes that is necessary for effective cross/upselling opportunities.

Let's take a quick look at a couple of organizations that have had success using Dynamics 365 to create better opportunities:

- A large North American service organization with 350 mobile service technicians and more than 1,000 contractors discovered that their once-reliable legacy system had reached its limit and was impacting all aspects of the business. Silos of information, manual forms, and lack of a reliable customer portal caused customer service, productivity, and profitability to suffer. But the biggest problem was that their complete lack of visibility into acquired business divisions and customer equipment inventory meant zero opportunity to cross-sell and upsell services.

After moving to a single platform enabled by Dynamics 365, cross-selling among the other businesses is now standard process. Furthermore, the visibility into customer equipment has eliminated leakage and provided a streamlined process for upselling of services.

- Kelly Roofing, a Florida-based roofing company, needed to improve communication between the company's office workers, field crews, and customers. Clients and office staff alike wanted better visibility into where roofing crews were at any given time, and field service workers wanted better visibility into their daily jobs and timelines. In fact, the systems they were using before implementing Dynamics 365 were so frustrating to the team that field staff was actually disincentivized to do any on-site upselling of things like gutters. Why? The process for creating the work order, obtaining the materials, and invoicing the customer was just too arduous.

But with Dynamics 365 and additional mobile capabilities, everything has changed. Now, when a crew leader upsells additional features – such as gutter replacement or additional tiles – while doing a walkthrough with a customer, they immediately enter that information in an app and the entire process is streamlined and real-time. In fact, they even automatically get a kickback in their paycheck! As a result, workers are now incentivized to add this information into Dynamics 365, which is a win for crew members and the company as a whole.

SUMMARY

The bottom line is that upping your customer service game is possible for any organization with the right tools in place.

And as we said, Dynamics 365 was designed, developed, and continually enhanced to help organizations overcome those (and many other!) challenges. To prove it, we featured 15 different organizations that successfully implemented Dynamics 365 and overcame common customer service organization challenges – and, in the process, discovered that with the right tools in place, the seemingly impossible expectations the customers of today bring to any business relationship and interaction actually *can* be met.

It's now more important than ever to provide excellent service to increase customer loyalty and retention. With Dynamics 365 for Customer Service from PowerObjects, your organization leverages built-in intelligence that consistently delivers faster, more personalized service to your customers.



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