Dynamics Microsoft 365 for

Field Service

Microsoft

KTL SOLUTIONS

Empowers companies to improve customer satisfaction, first time fix rates, and resource productivity.

"When we chose Dynamics, the winning factor was the Field Service and workforce management capabilities."

Alvise Vigilante
CEO
YOUGENIO

Microsoft delivers advanced scheduling, resource optimization and mobile enablement capabilities that set organizations apart by keeping the customer at the center of the business. Field Service, including advanced analytics, machine learning and the Internet of Things' capabilities, allows field service organizations to move from a costly break-fix model to a never-fail service model.

Overview

We provide complete flexibility in how organizations choose to schedule their resources by offering manual, assisted, and automated, optimized scheduling. In each of these workflows, we support schedulers with visual cues to simplify their work. We leverage inventory management capabilities that capture real-time information from deliveries and technicians to ensure that the right parts are always ready to go. On their way to and at the customer location, technicians use a mobile app to stay connected. Each technician updates their status like driving, in-progress work, and completed work.

Key Benefits

CUSTOMER FIRST
Keep the customer informed during every interaction of the service chain to increase brand loyalty and advocacy.

CONNECTED INTERACTIONS
Provide employees and technicians with 360^0 information, from any location to improve resource productivity and customer satisfaction.

EMPOWER ORGANIZATIONS
Improve profitability by optimizing schedules and use remote troubleshooting so a technician is dispatched only when necessary.

91% of consumers are loyal to brands who offer low effort interactions.[1]

Only **4%** of service orgs can solve a service inquiry using a single application.[2]

77% of consumers around the globe have a more favorable view of brands that offer proactive customer service notifications.[3]

1. Shifting the Loyalty Curve" Mitigating Disloyalty by Reducing Customer Effort by the Corporate Executive Board (CEB)
2. Kate Leggett, The Mandate for Intelligent Customer Service, a commissioned study conducted by Forrester Consulting on behalf of Microsoft, December 2015
3. 2016 State of Global Customer Service Report

Key Capabilities

CONTRACT MANAGEMENT

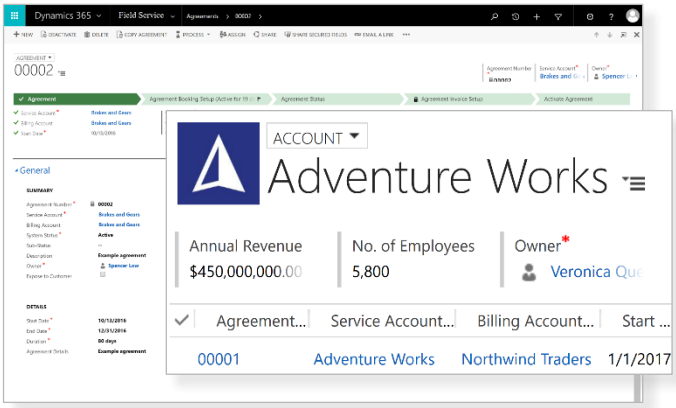
Field Service helps organizations improve customer satisfaction with reliable service through predictable service delivery. Speed, flexibility, and organization are all important factors in winning new business and renewing existing contracts.

Contract Management provides you the ability to engage leads as soon as an opportunity is identified. This could be mean through a field technician noticing a competitive solution that could be displaced or an incoming phone call.

Engaging with these leads and tracking service requirements are imperative to winning business.

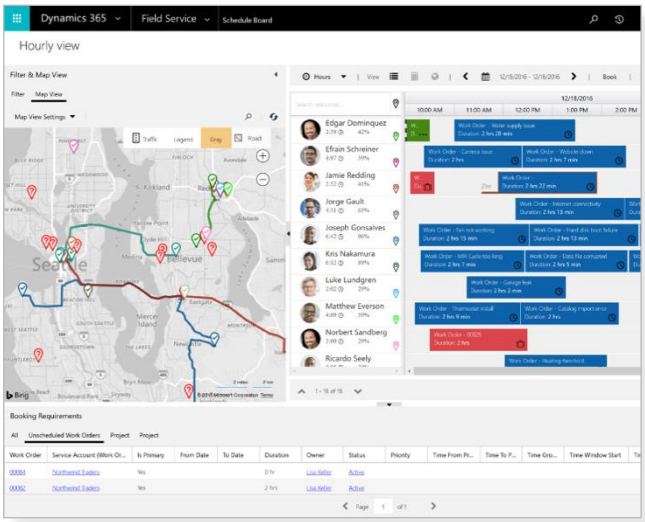
Quoting and contract management is simplified with service templates. Leverage these templates during renewals to easily honor agreed upon pricing. With new customers, quickly and easily create quotes from discounted price lists.

The service agreement dictates how work orders and invoices are created. Service agreements provide flexible billing options to your customers to accommodate upfront billing, service appointment based billing, or recurring billing like quarterly, monthly, etc. Understand your billing and work order requirements to forecast revenue and resource demand accurately.



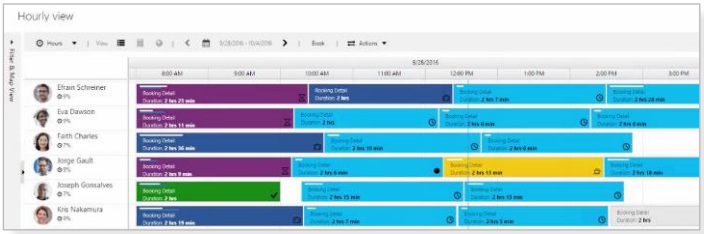
SCHEDULE AND DISPATCH OPTIMIZATION

Field Service provides the ability to manage people and equipment with flexible scheduling options.
A drag-and-drop schedule board allows dispatchers to assign resources and setup schedules for multiple work orders using a Gannt, map or list views, while resource scheduling optimization fully automates scheduling.



Highlights

- Identifies and organizes available resources by categories to balance workloads and resources.
- Matches characteristics of technicians against requirements of work.
- Understands geography, availability, regulatory requirements, customer preference, and service level agreement.
- Easily reallocate resources in response to changes or emergency situations.
- Multiple scheduling options from drag and drop to fully automated and optimized.



Resource scheduling optimization

Automatically create an optimized, prioritized schedule. Typically, to fit in the most appointments per day, an organization optimizes for distance between appointments.

As daily work gets added or removed from a schedule, the schedule gets re-optimized to ensure the field service organization is humming.

Schedulers can lock certain appointments to fulfill a prior service promise made to customers, and ensures that personal time like breaks and lunch example, are not included in the shuffling of the schedule.

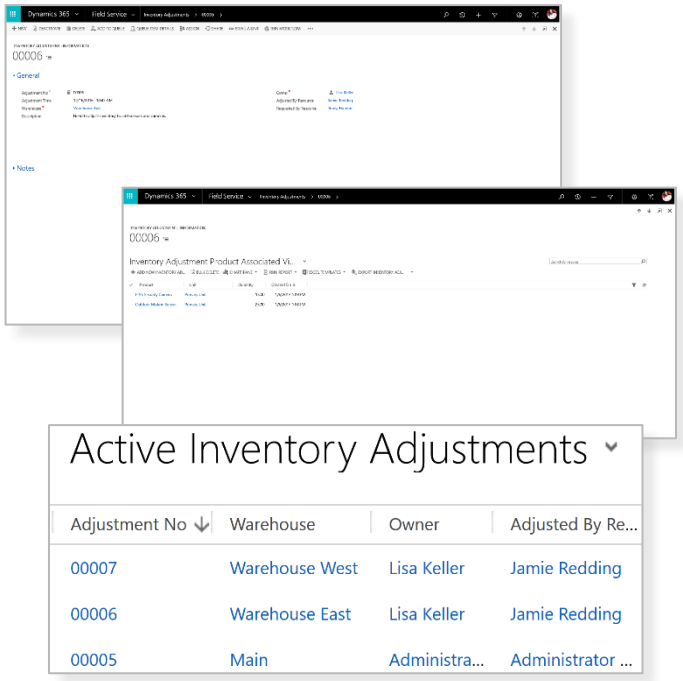
- Fit in more appointments per day.
- Prioritize highest value customers.
- Minimize driving time.
- Send a customer's preferred technician.

INVENTORY MANAGEMENT

Synchronize inventory, set re-order points and track inventory down to the truck level helping drive efficiency and productivity. Manage your inventory across locations, including warehouses, depots, and trucks. Inventory is always accurate, so you can better track your service stock for fewer write-offs, and create better forecasts.

Highlights

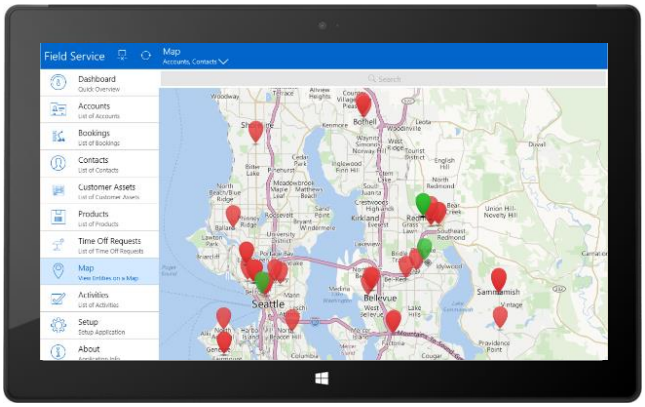
- Improve first-time fix rates with accurate allocation of parts.
- Provide mobile access of inventory and parts information to management resources.
- Manage inventory information for any part transaction: return material authorizations (RMAs), stock adjustment, or stock transfer.
- Track service stock accurately at mobile and fixed locations to reduce write-offs.
- Adjust inventory records automatically based on field use or en route purchasing.
- Effectively forecast materials' requirements.
- Take advantage of bulk and just-in-time ordering.



MOBILE

No matter what device is used, organizations can leverage native mobile applications to provide real time and offline data and gain visibility into customer information to improve field processes and increase technician productivity.

Mobile workers are provided with a calendar of work order details that can be dynamically updated. Work orders are linked to customer and case history, installed product configurations, parts information, pricing, and more.



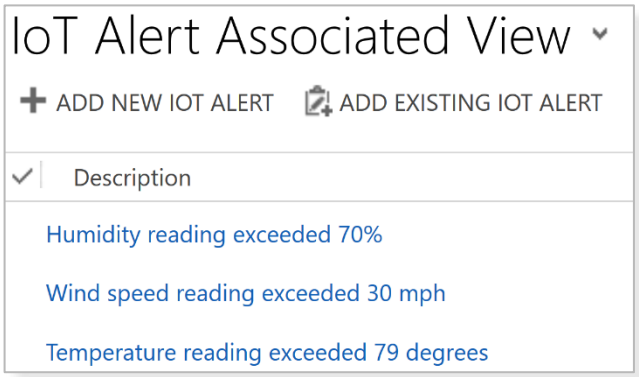
Highlights

- Access all relevant information like case, customer information and history, equipment, and recommended steps for repair.
- Easily update work orders to ensure accurate information.
- Maintain consistency of work performed with step-by-step checklists.
- Launch and complete satisfaction surveys.
- Capture client signatures, generate invoices.
- Take and store photographs of work.
- Route technicians on the best route with turn-by-turn directions.
- Technicians update their status between traveling, working, on break, etc. to ensure visibility for dispatch.

CONNECTED FIELD SERVICE

Connected Field Service allows a field service organization to detect, troubleshoot, and resolve issues remotely so a technician is dispatched only when necessary.

In a traditional field service organization, the customer has a problem and calls to get it fixed. Connected Field Service eliminates the customer concern by attempting to complete self-healing repairs remotely before sending out a technician.



Connected Field Service for Preventative Maintenance

Organizations can benefit from “just-in-time” preventative maintenance instead of scheduled preventative because Connected Field Service can look at the actual consumption of a part and send out alerts when the part needs to be changed or cleaned.

Because Connected Field Service ingests millions of messages from millions of devices, machine learning capabilities allow Field Service to predict when a device needs attention and automate self-healing or maintenance steps before any kind of problem even registers through Azure IoT.

Connected Field Service Incremental path to implementation

- **Basic:** When an anomaly is detected, Field Service automatically creates a work order and dispatches a technician to consider the issue. This level of Connected Field Service takes a proactive approach to improve customer satisfaction by decreasing overall downtime and making repairs before customers become aware of the problem.
- **Advanced:** When an anomaly is detected, Field Service asks the device to try to fix itself with a single, self-healing command. If that command doesn't work, then Field Service automatically creates a work order and schedules a technician. Organizations experience improved customer satisfaction levels and gain greater productivity because fewer technicians are dispatched when devices can self-heal.
- **Expert:** At this level, Field Service initiates a multi-step workflow when an anomaly is detected. This attempts to fix the device in as many ways possible without requiring human intervention. This level maximizes customer satisfaction *and* resource productivity because a technician is only dispatched when all other possibilities are exhausted.

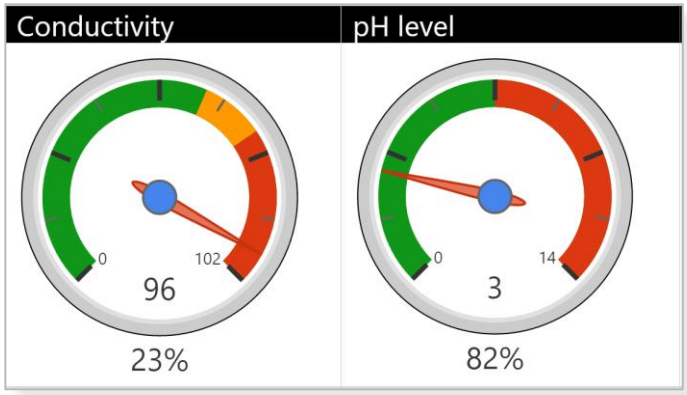
Simple Design

Field Service combines the power of Field Service with Internet of Things connected devices. This means that devices report anomalies that can then be resolved before customers know there is a problem.

Connected Field Service provides a simple to configure experience so either newly installed or existing customer assets can be connected from within Field Service. Behind the scenes, it leverages a preconfigured Azure IoT Remote Monitoring solution, Azure Logic Apps and API Connector.

Highlights

- Decrease the number of repair appointments by sending fewer technicians onsite.
- Identify and fix problems before customers are aware with sensors sending alerts.
- Solve issues before failure with automatically initiated, multi-layered troubleshooting.
- Identify underperforming products by looking at aggregate device data.
- Perform "just-in-time" preventative maintenance by understanding actual consumption.

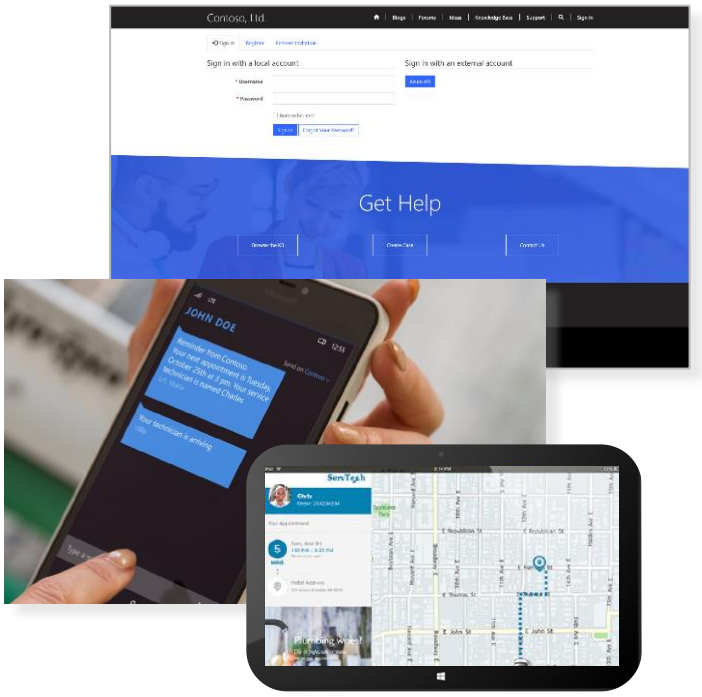


CUSTOMER CENTRIC EXPERIENCE

Field Service puts customers at the center of all interactions by keeping them informed, making communication easy, and ensuring they have positive interactions at every step.

Highlights:

- Customers can see upcoming service appointments and view completed and open cases through a portal.
- Integration with Glympse keeps customers informed of actual arrival times of the technician in real time and provides the technician's photo and vehicle information.
- Customers can automatically receive text messages and phone calls via Twillio API to keep them informed at every stage of service.



Dynamics 365

With intelligent business applications across CRM and ERP, Microsoft Dynamics 365 gives you choice. Start with just what you need and then add apps as your needs change.

Built on an extensible platform with shared data and digital intelligence, Dynamics 365 helps your team make the most of every minute.

Better Together

- **Sales:** Technicians can identify and create opportunities in the field for sales teams.
- **Project Service Automation:** Use the same resource pool for short or long term projects.
- **Customer Service:** Accept customer concern calls through phone, email, social, or chat.
- **Operations:** Automate warehouse processes.
- **Marketing:** Technicians can update customer. information to deliver more personalized content.

© 2017 Microsoft Corporation. All rights reserved.
This document is for informational purposes only. MICROSOFT MAKES NO WARRANTIES, EXPRESS, IMPLIED, OR STATUTORY, AS TO THE INFORMATION IN THIS DOCUMENT. Some examples are for illustration only and are fictitious. No real association is intended or inferred.