

# Case Study - Dynamics 365 Customer Service



## MEET THE CLIENT:

A respected and highly esteemed banking institution holds the distinction of being the top choice and trusted financial partner for military personnel and their families.

## CHALLENGE:

Our customer lacked an automated system for monitoring the ongoing status of customer claims. While the organization had well-documented quality control and procedures for resolving claims, outlining the necessary actions, responsible parties, and the way each procedural step should be executed, there was a noticeable absence of means to gauge the effectiveness of the entire workflow or the performance of individual case representatives and agents.

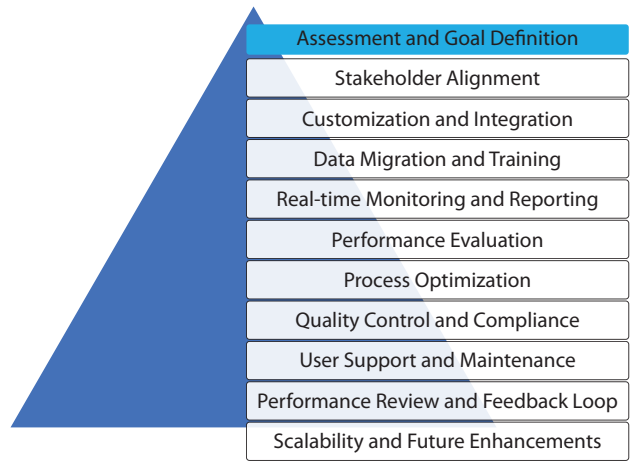
Management & Maintenance Challenges	Technical Challenges
Limited Visibility	Management lacked the ability to monitor the status of multiple claims simultaneously, which made it challenging to identify bottlenecks or issues in a timely manner.
Performance Evaluation	Without automated metrics and data analysis, it was difficult to determine who was excelling in resolving claims and who might require additional training or support.
Lack of Key Performance Indicators (KPIs)	The institution could not easily identify trends, patterns, or areas for improvement.
Quality Control	Without automated checks and balances, maintaining a high level of quality control was difficult.
Timeliness	The institution is struggling to meet deadlines and respond promptly to customer inquiries, potentially leading to dissatisfaction.

## SOLUTION:

Dynamics 365 Customer Service was introduced as the solution to the existing challenge faced by the customer. This robust Microsoft SaaS offering brought in the required automation to monitor the real-time status of customer claims. Through the integration of Dynamics 365 into their operations, the bank effortlessly adhered to their established quality control and claim resolution protocols. Simultaneously, they acquired the capability to evaluate the efficiency of the overall process, gauge the performance of individual case representatives and agents, and optimize processes to maintain a competitive edge in today's rapidly evolving marketplace.

## IDEXCEL APPROACH & METHODOLOGY:

Adhering to Idexcel's approach and methodology, customer effectively deployed the Microsoft SaaS Dynamics 365 Customer Service solution as a robust measure to tackle their management and maintenance challenges. This enabled them to attain real-time monitoring, performance assessment, and process optimization, all while upholding their dedication to quality control and customer satisfaction in today's highly competitive banking environment. Idexcel executed the comprehensive breakdown outlined above to implement the Dynamics 365 Customer Service solution.



## BENEFITS:

Implementing Dynamics 365 Customer Service offers a range of advantages, including real-time claim monitoring, streamlined processes through enhanced automation, improved efficiency by identifying bottlenecks, performance assessment of representatives, transparent operations fostering customer trust, data-driven insights for optimization, a competitive edge, heightened customer satisfaction through timely updates, adaptability in a dynamic market, and streamlined workflows. These benefits synergize to enhance claim resolution, elevate customer focus, and bolster the bank's reputation and prosperity.

Following are the key benefits attained from the new solution:

- Resulted in quicker response times and more efficient case handling.
- Ensured a consistent and compliant approach to customer service, which is vital in the financial sector.
- Data-driven approach facilitated targeted coaching and process refinements, ultimately enhancing employee performance.
- Provided valuable insights into the claims resolution process, empowering management to make informed decisions, pinpoint areas for improvement, and fine-tune internal processes.
- Customer satisfaction and operational efficiency became key factors in attracting and retaining clients, solidifying the institution's position in the evolving marketplace.

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### Contact us

Idexcel, Inc.  
459 Herndon Parkway Suite 10, Herndon, VA 20170  
Tel: 703-230-2600 | Email: [info@idexcel.com](mailto:info@idexcel.com)



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[info@idexcel.com](mailto:info@idexcel.com) | [www.idexcel.com](http://www.idexcel.com)