Möjligheterna med D365 Customer Engagement tillsammans med D365 Finance and Operation

Jerker Carlström och Kenan Dedukic

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Kontaktinfo

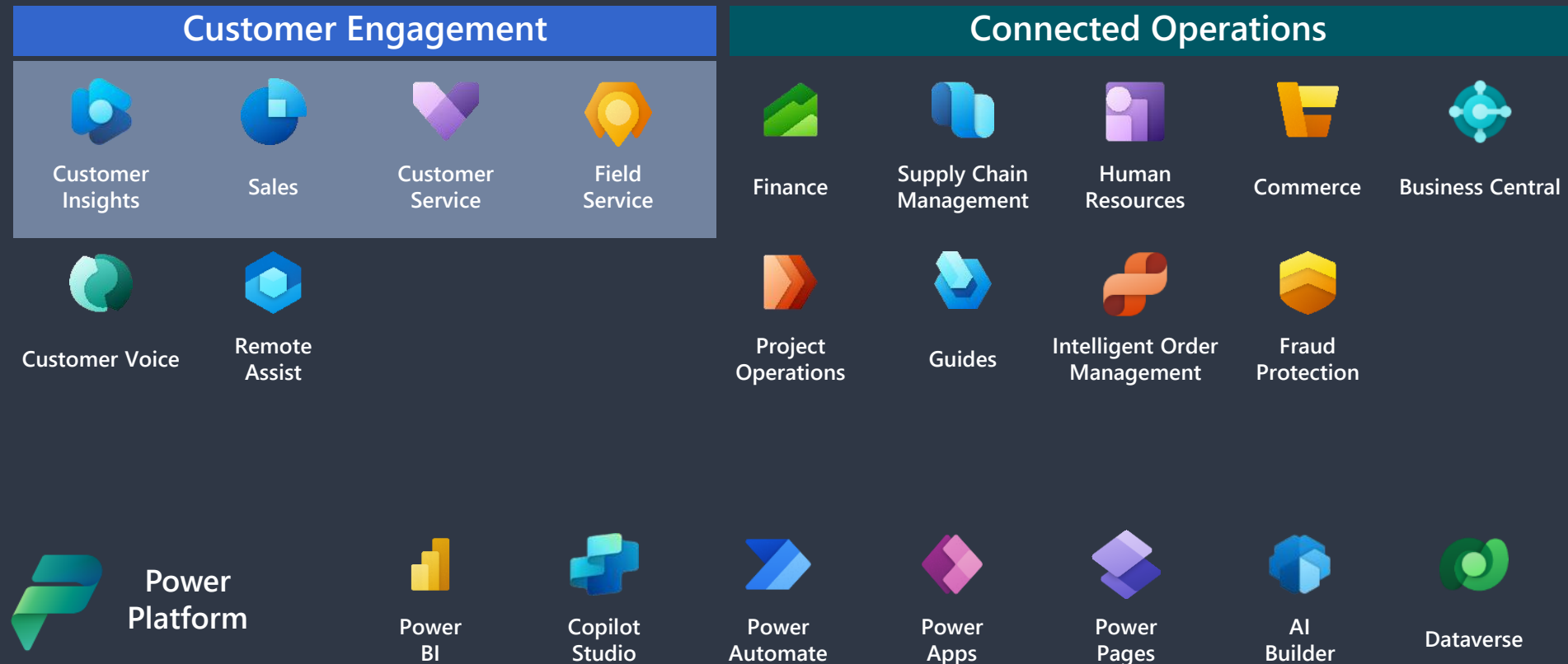**Jerker Carlström**
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The customer lifecycle and Customer Engagement

- **Real-Time Customer Journeys**
- **Unified Customer Profiles**
- **AI-Driven Insights**
- **Advanced Analytics**
- **Seamless Integration**

Customer Insights

Awareness

Consideration

Acquisition

Service

Loyalty

Attract new customers

Get customer attention

- Potential customer enter website

Get customer consent

- Potential customer gives consent

Create lead

- Lead is automatically created

Customer journey

- Customer journey starts
- Interaction leads to score increase

Sales-ready lead

- Lead is automatically marked as sales ready.

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- **Sales Forecasting**
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Lead to Cash

Quality lead
- Sales representative receives a lead
- Sales representative contacts the lead
- Lead is interested

Create opportunity, contact and account
- Sales representative qualifies the lead
- Opportunity created
- Contact created
- Account created

Convert to customer
- Meeting with potential customer
- Requests a quote for a new compressor
- Account is changed to customer
- Customer is synced with Finance

Set up customer for finance
- The customers is prepared by the Accounts Receivable department

Create quote
- Sales representative creates quote
- Sends quote to customer
- Quote is synced with SCM

Follow up
- Customer invoice is available in Sales

Invoice customer
- Customer is invoiced in Finance
- Invoice is synced with Sales

Deliver sales order
- Sales order is delivered from SCM
- Status of the sales order is synced with Sales

Prepare sales order for delivery
- Sales order is prepared for delivery in SCM

Create sales order and close quote
- Customer accepts quote
- Sales representative creates a sales order
- Quote is closed
- Sales order is synced with SCM

Demo

Lead to Cash

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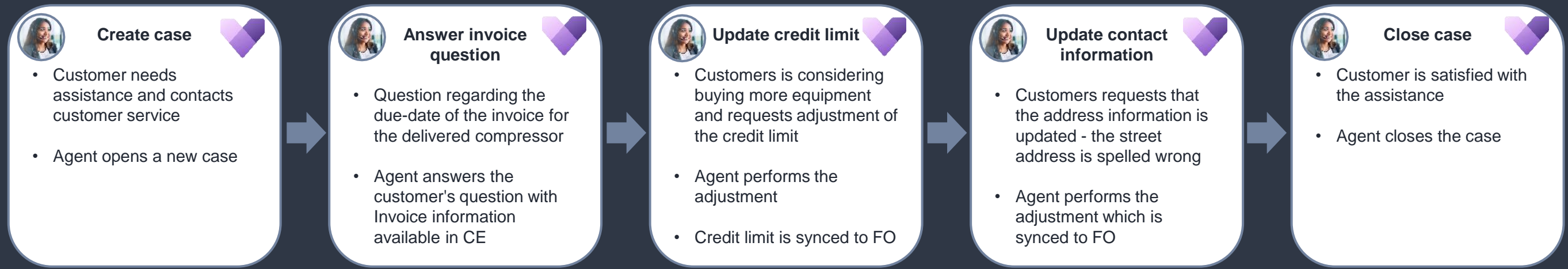- **Advanced Analytics**
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Customer Service

Service customers

Create case
- Customer needs assistance and contacts customer service
- Agent opens a new case

Answer invoice question
- Question regarding the due-date of the invoice for the delivered compressor
- Agent answers the customer's question with Invoice information available in CE

Update credit limit
- Customers is considering buying more equipment and requests adjustment of the credit limit
- Agent performs the adjustment
- Credit limit is synced to FO

Update contact information
- Customers requests that the address information is updated - the street address is spelled wrong
- Agent performs the adjustment which is synced to FO

Close case
- Customer is satisfied with the assistance
- Agent closes the case

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- **Scheduling and Dispatching**
- **Mobile Access**
- **Asset and Inventory Management**
- **Preventive Maintenance**

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Field Service   **Customer Service**

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Service customer assets

Create work order
- Customer contacts the service manager
- Requests service on the compressor
- Service manager creates a work order
- Work order is synced with Finance

Schedule work order
- Service manager finds available field technician and schedules work order

Perform work order
- Field technician performs the requested service on the compressor
- Consumed products and services are reported

Review and close work order
- Service manager reviews the work order and closes it
- Consumed products and services are synced with Finance
- Inventory is consumed in SCM

Invoice customer
- Customer is invoiced from Finance

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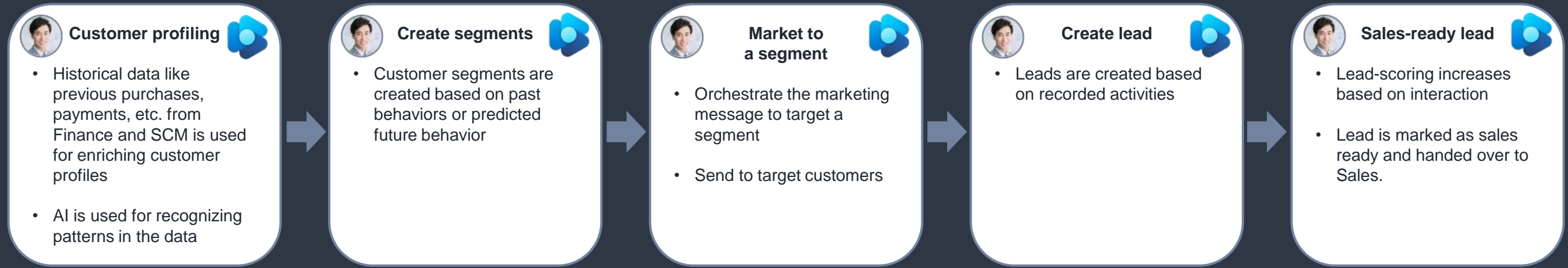- **Mobile Access**
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Maintain customer loyalty - Reduce customer churn

Customer profiling

- Historical data like previous purchases, payments, etc. from Finance and SCM is used for enriching customer profiles

- AI is used for recognizing patterns in the data

Create segments

- Customer segments are created based on past behaviors or predicted future behavior

Market to a segment

- Orchestrate the marketing message to target a segment

- Send to target customers

Create lead

- Leads are created based on recorded activities

Sales-ready lead

- Lead-scoring increases based on interaction

- Lead is marked as sales ready and handed over to Sales.

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Common data

End-2-End processes

Familiar user experiences

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Customer 360

Customer Insights — Sales

Awareness — Consideration

Loyalty — Acquisition — Finance — SCM

Customer Insights

Service

Field Service — Customer Service

Thank you!

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