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Manage a Case Exceptionally Using Microsoft CRM Case Management

Creditable customer service is fundamental to any business. Having a well-designed CRM in place makes it easier to serve the customers promptly, one such tool that serves this purpose is Case management, from MS Dynamics CRM. In this white paper, we look at how this feature can help your business.

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Introduction: MS Dynamics and Case Management

With the number of brands vying for customer attention, the world of sales is undergoing significant change. Organizations will have to provide the right tools for internal processes to function effectively and help relationships between customers and the company to advance into profitable accounts and strategic partnerships.

Microsoft Dynamics CRM is one such tool that can help sales team to become prepared and insightful, collaborative and connected, quick and mobile, and highly productive.

‘Case Management’ by MS Dynamics is designed to track the process of customer grievances, right from the stage when a customer gets in touch with the customer service center to ***report an incident, to going through the remediation process and finally resolving the case.*** Customer Service Module, one of the most powerful feature of MS Dynamics CRM, allows us to manage and track customer service activities in an organization. The distinct feature about this tool is that, every case or issue received from a customer regarding a product or service until it is resolved, is recorded on a single page.

Case management today is much more complicated than it was earlier. As the cases come via different channels and the concerns are not that simple as before, resolving the issues requires more information and interdepartmental collaboration for agents to bring them to a resolution. Fortunately, new developments in analytics, social media, integration, dynamic case management, and gamification enable today's customer care professionals to get a lot more out of case management than ever before.

When a customer initiates contact with your organization, it is saved as a communication activity, such as an e-mail message, phone call, or letter. These activities are either created automatically, such as an incoming e-mail message, or manually when the case is received in the form of a letter.

MS Dynamics CRM allows to create Case from e-mail. In this scenario, when an e-mail comes, it will check if the sender is already existing in CRM, if not a new contact will be created and the e-mail will be converted to Case. If the Contact is already existing, then the Case will be created associated to that Contact. If the e-mail is related to an already existing Case, then actions will be taken according to the already set business rules or workflows in CRM.

This feature is most commonly used in help desk setups, where the customers approach with an issue. To keep track of all customer requests and issues, support cases are created in Microsoft Dynamics CRM. The advantage of this feature is that when a customer contacts support center with a question or problem, the attending representative can quickly check if there is an existing case. ***If not, he can open a new case and start tracking the issue.*** The activity is then sent to a queue to wait for someone to take ownership of the same. Alternatively, workflows could be developed to automatically acknowledge the customer communication and route the service request to the appropriate individual or department in your organization.

The new owner converts the activity to a case and starts working to resolve the customer's issue. The customer service representative (CSR) can link the case to an existing account or contract and view historical information about the account or contact. If there is a contract, the case can be linked to a specific contract line that allows the allotment to be added to the billable total time.

Later, when the case is resolved, it is removed from the queue automatically. The closed activities, including the case resolution, can be viewed in the history of the account or contact.

These information on customer care dashboards and reports can give management insight into this important department of the company.

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Advantages of Case Management

- When handling multiple cases, customer service representative will not need to open multiple web browsers as everything is visible on a single screen and can be accessed quickly.
- As this CRM has a simple design interface, all the activities regarding an account and cases can all be managed easily.
- Dashboards and forms of the interactive service hub can be customized to fit design criteria for customer service representatives.
- Dashboard allows to view the current status of multiple cases at the same time, cases completed and the new ones on their queue.
- New cases can be created, assigned, or re-assigned to a different customer service officer if required.
- Business process flow is supported to handle cases faster and more efficiently.
- Custom entities can be added to the interactive service hub for further customization.
- Fast, efficient, and easy to use tabs helps to gain better insight of your customer's information.
- It is possible to integrate MS Dynamics CRM with Office 365. All one has to do is to buy Office 365 Enterprise E3 plan and set it up.

How Service Level Agreements [SLA] support case management?

Service Level Agreements (SLA) is a feature that perfects case management as it helps you to stay on schedule, measure performance and quality of your agents, and thus keeps your clients happy. It offers an easy way to track the time taken by service representatives to solve support requests. Service Level Agreement is the first step toward crafting key performance indicators (KPIs) and tracking the performance against those KPIs. It is like a timer on record form, where they record the time when a customer placed a query or complaint until it is resolved.

Service Level Agreement determines the level of service you will provide to your customers. If the customer is entitled to service via an entitlement or if they are high value customers, service hours and the degree of service can vary. Different channels of communications could drive a different level of service i.e. a post on twitter could require a response in under 30 minutes, whereby a response via e-mail requires a response in 4 hours.

It is possible to manually apply a Service Level Agreement (SLA) to a Case by updating the Case record. It allows us to define rules on how SLA should work specifically in each Case. Service Level Agreements allow CRM users to pause the timer depending on the status reason of the support request. For example, if a service representative is waiting on certain information from the customer, the status reason "Waiting on Customer" will pause the timer until the status reason changes. The time on hold is also tracked.

The benefits of SLA:

- Easy and convenient way to manage your customer requests
- Diligently tracks time taken by service representatives to solve requests
- More transparency and credibility to your business
- Efficiently implement case management & lead management in organizations
- Customer satisfaction improves due to less operational hassle

Interactive Service Hub

The new interactive service hub is designed specifically to optimize customer service. It is more like a mini-interactive version of Dynamics CRM. It has forms for each entity that includes contacts, chats, dashboards, queue items, quick create, and activities like e-mail, social activity phone call or tasks if any. Since this feature is more interactive, users find it engaging and easier to use.

The redesigned forms in the interactive service hub include components that help customer service representatives to quickly handle all their important stuff from a single place. The customer card in the forms gives a complete view of customer details and helps us to focus on things that require more attention.

The organizations that are able to make the transformation to MS Dynamics will ultimately position themselves to outsmart and outpac e the competition. They learn to win as a team, to create differentiated customer interactions, manage customer interactions more intelligently, ***and ultimately will be able to close more deals faster.***

Conclusion

It is a must for every business to have an excellent CRM in place, for it is 6 to 7 times more expensive to acquire a new customer than retain an existing one.

Mastering this interactive service hub is particularly helpful if you are a customer service representative working on Microsoft Dynamics CRM, as with this feature, one can deliver outstanding customer service experience.

Once the case is closed, the system provides trending data for the managers to see what led the customers to contact the customer service center, and with this information, they can work towards minimizing future cases around that same issue.

About Suyati

Suyati provides marketing technology and integration services for companies that wish to combine the best of breed solutions and create a unified approach to customer acquisition. This unified digital marketing approach requires system integration between various CMS and CRM platforms, and a slew of e-commerce, Marketing Automation, Social Media Listening, email and social marketing, and customer service systems. Our specialized knowledge in Salesforce, open source and .Net based systems enables us to build effective custom integrated solutions for our clients.

Suyati's custom technology solutions have been deployed in companies in the US, Western Europe and Australia, and have helped many enterprises leverage the web/cloud/mobile technologies to acquire customers through integrated digital marketing. Suyati is based in Chicago with product engineering capability out of the US and India.

To learn more visit: www.suyati.com

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