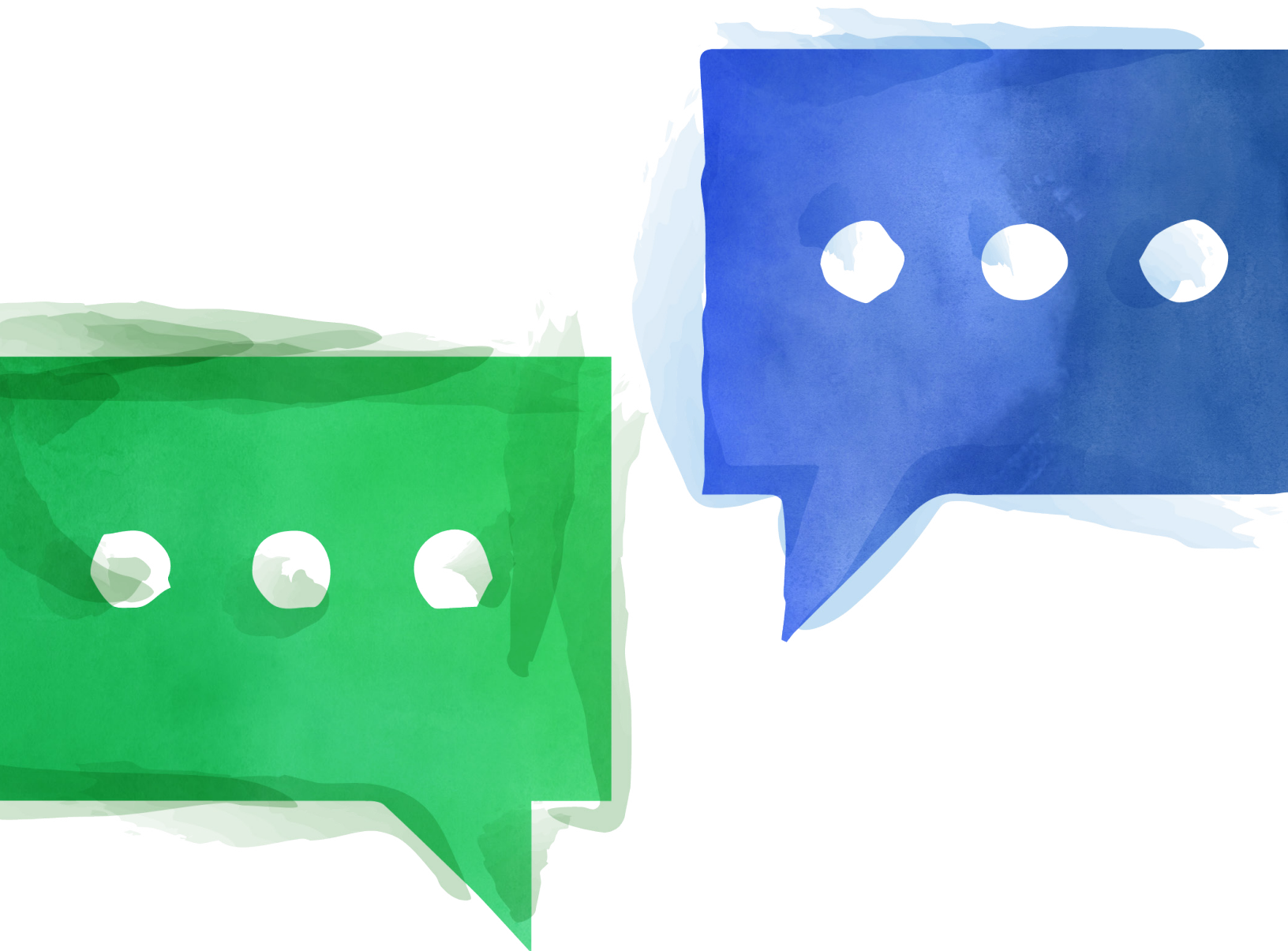


Sales and Service: A Guide to Empowering Flexibility



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Deliver meaningful engagements in changing conditions

Today, organizations are facing challenges and change at a rapid pace. There's never been a stronger need for flexibility within businesses of all types and sizes.

Organizations like yours need to evolve with agility, delivering meaningful engagement across existing and new channels and touchpoints—with your customers and employees.

This guide explains key sales and service scenarios to help you respond to rapid change—and even crises—quickly, using data to drive confident decisions. For each scenario, we'll explore a short list of questions to consider, recommended activities to help with planning, and resources to get you started.

Track the pulse of customers and employees

Quickly discern customer and employee sentiment across channels, tailor communications as needed, and drive informed next actions based on insights.

Questions to consider	Recommended activities
<p>1. How many channels and touchpoints do you currently have to connect with customers? How about employees?</p>	<p>Review your current customer and employee engagement channels, how these channels evolved, and any new channels to consider.</p>
<p>2. How many and what programs and tools does your organization use to capture employee and customer feedback?</p>	<p>Inventory your feedback programs and tools and rate them for ease of use, omnichannel capabilities, and data integration.</p>
<p>3. How much time do you spend creating and distributing surveys to your customers and employees?</p>	<p>Identify survey streamlining opportunities such as templates, suggested questions, and omnichannel feedback capture.</p>
<p>4. Do you have a clear sense of how customers view your brand?</p>	<p>Use customer data to gain insights into your business so you can more effectively target marketing.</p>
<p>5. How do you share visibility of that customer sentiment across customer support, sales, and marketing teams?</p>	<p>Pinpoint where in your processes stakeholders would most benefit from surfaced customer insights to take effective action.</p>

→ Get started with these resources:

- Start a [Dynamics 365 Customer Voice trial](#).
- [Watch](#) how to capture and incorporate real-time customer feedback.

Create experiences that build customer trust

Personalize and streamline buying experiences across digital and physical storefronts with a unified omnichannel and back-office solution.

Questions to consider	Recommended activities
1. What portion of your revenue comes from online sales and how have in-store activity restrictions impacted sales?	Augment your business processes and expand your customer reach with an intelligent e-commerce system.
2. How is your business delivering personalized customer experiences across channels and throughout the buyer's journey?	Personalize content and recommendations based on customers behaviors and habits to improve customer interactions.
3. Do you currently have the ability to deliver safe, secure, and contactless shopping experiences for your customers?	Enable contactless shopping experiences like curbside collection or intelligent distribution systems.
4. Do you lack access to data that could provide customer insights to better manage customer engagement and sales efficiencies?	Create a single source of truth for decision making so you can discover business insights that drive cost savings and streamline experiences.
5. How are you capturing marketing attribution and data insights as customers move between digital and physical experiences?	Assess how you can deliver an omnichannel experience across digital and physical channels to better engage shoppers and grow customer loyalty.

➔ **Get started with these resources:**

- Read this e-book about [creating personalized experiences](#).
- Learn about the [top seven retail trends](#).
- Learn about [Dynamics 365 Commerce](#).

Respond to customers quickly during a crisis

Tap customer data to quickly inform, create, and deliver proactive, relevant experiences that maintain strong customer relationships.

Questions to consider	Recommended activities
<p>1. How do you prioritize customer service and support interactions?</p>	<p>Outline policies, procedures, and responsibilities in a communication readiness plan for faster launches.</p>
<p>2. How long does it take to unify customer data from multiple systems and make it available to client-facing teams in your organization?</p>	<p>Empower staff to improve customer service and engagement by providing innovative tools and the training to use them effectively.</p>
<p>3. How quickly can you launch email or multichannel campaigns?</p>	<p>Improve the cost-effectiveness of email and multichannel marketing campaigns by using customizable templates and user-friendly design tools.</p>
<p>4. What guidance is available to customers, and is it effective across channels?</p>	<p>Free up employees to focus on valuable tasks and challenging cases by automating routine tasks and customer questions using AI.</p>
<p>5. What can you do to help your teams be more available to customers in their preferred channels?</p>	<p>Unify customer engagement with an omnichannel service, support, and marketing solution.</p>

➔ **Get started with these resources:**

- Learn about [Dynamics 365 Marketing](#) and [Dynamics 365 Customer Insights](#).
- Find out how to [tailor digital and one-to-one customer interactions at scale](#).

Create a remote sales organization

Enable smarter remote selling with contextual insights that build customer relationships at scale with authentic, personalized customer engagement.

Questions to consider	Recommended activities
1. Do you expect a permanent shift to remote selling? What percentage of your sellers will be remote?	Explore a flexible solution that supports a wide range of sales models, from physical to digital to any mix in between.
2. Is your team ready to scale quickly for increased demand?	Identify solutions that help your team adapt with agility, such as e-commerce self-service, live chat, and chatbots.
3. How do remote sellers stay focused and productive while working on multiple deals? Do they get prioritized leads?	Investigate how AI can help sellers prioritize activities.
4. How do remote sellers strengthen relationships with multiple key customers—even those who are not yet ready to buy?	Proactively track relationship health and efficiently move deals forward based on data.
5. Do sellers have the right skills and organizational support to succeed in remote selling?	Identify online learning solutions that simplify sales team training and capture seller sentiment with surveys.

→ Get started with these resources:

- [Watch](#) how to accelerate digital buying experiences.
- Try the [LinkedIn Learning Path](#) for sales professionals.

Establish a distributed remote service team

Empower your service teams to remotely resolve issues quickly through intelligent recommendations, automated workflows, and omnichannel engagement.

Questions to consider	Recommended activities
1. How could remote or virtual agents benefit your customers and your business?	Explore self-service options with chatbots to augment your team while managing demand and lowering costs.
2. What capabilities do you need to find, hire, onboard, and retain a remote service workforce?	Invest in communication, leadership, and management skills to lead teams through this new, flexible way of working.
3. Which of your systems do service teams need but cannot access remotely?	Identify opportunities to adopt cloud-based solutions that support secure remote access to key capabilities.
4. How often do you see new service needs emerge that significantly shift volume, customer satisfaction, or handle time?	Evaluate how KPIs related to topic, channel, and customer satisfaction should evolve based on changing customer and business needs.
5. Do you anticipate any issues with supporting employee engagement and growth in a remote work scenario?	Increase the agility of your teams to address emerging issues and collaborate across business silos.

→ Get started with these resources:

- Learn about [Dynamics 365 Virtual Agent for Customer Service](#).
- [Watch](#) how to automate common support issues with intelligent bots.
- Take free [LinkedIn Learning courses about leadership and communications during crises](#).

Protect your revenue and reputation

Help protect your revenue and reputation by decreasing fraud and abuse, while reducing operational expenses and increasing acceptance rates.

Questions to consider	Recommended activities
1. What is the impact of fraud on your bottom line?	Compare the cost of your current fraud solution to the impact of fraudulent transactions.
2. What is your bank acceptance rate? How much do manual transaction reviews cost your business?	Research options for improving bank acceptance rates while safeguarding customers from fraud and abuse.
3. How do you defend your system against account takeover, including by bots?	Talk to your team about ways to reduce fraudulent account access, creation, and takeover.
4. How effectively can you prevent shrinkage in physical stores?	Look for ways to improve tracking and to better follow up on merchandise mishandling and inventory turnover.
5. How much are you losing annually through return and discount fraud on a per-counter, per-store, or e-commerce basis?	Test solutions for minimizing discount and return fraud.

➔ **Get started with these resources:**

- [Read](#) how to combat the three biggest fraud threats in e-commerce purchases.
- [Watch](#) how to detect fraud and lower costs.
- Listen to the podcast [Preventing E-commerce Fraud with Steve Wilson](#).

Empower your frontline workers to do their best work

Enable your frontline workers to safely solve problems faster and more efficiently by working with experts remotely on HoloLens, iOS, and Android devices.

Questions to consider	Recommended activities
1. Which tactics are most important for employee wellness, and what do you need to deploy them?	Confirm the percentage of your workforce who have mobile devices capable of supporting remote wellness check-ins.
2. How will travel limitations affect your workforce capacity and skills development?	Identify virtual and hands-free channels for sharing knowledge and guidance among remote employees.
3. How effectively can your technicians provide remote service and maintenance, review projects, and visualize equipment?	Explore the use of mixed reality technology to support remote guidance for field service.
4. What solutions do you have for onboarding and training a remote workforce?	Nominate remote work champions willing to help drive training programs.
5. Are you able to shift to remote inspections and audits? What would enable this shift?	Brainstorm how inspections and audits can be executed remotely using digital technology.

→ Get started with these resources:

- Learn about [Dynamics 365 Remote Assist](#).
- [Read](#) about how mixed reality is reshaping how employees work.
- [Watch](#) how you can solve issues faster with mixed reality.

Enable remote monitoring and proactive maintenance

Blend customer service and field service functions to proactively monitor equipment and remotely dispatch technicians automatically.

Questions to consider	Recommended activities
<p>1. What technology do you have in place to maximize the number of cases that service technicians are able to handle?</p>	<p>Find the gaps in your current systems for effective scheduling of frontline workers to optimize appointments based on customer preferences and availability.</p>
<p>2. How are your field service and business information systems connected to provide a 360-degree view of your business, assets, and customers?</p>	<p>Provide proactive maintenance by remotely monitoring assets with Internet of Things (IoT) technology to decrease the number of unnecessary visits.</p>
<p>3. How long does it take to resolve cases where an expert needs to be dispatched?</p>	<p>Identify the right information, experts, and tools that technicians need to fix problems and resolve issues quickly the first time.</p>
<p>4. Do your technicians have access to experts in real time to help resolve issues?</p>	<p>Brainstorm ways mobile devices can provide the information and expertise that employees need.</p>
<p>5. Is your first-time fix rate as high as you expect it to be?</p>	<p>Scale expert knowledge with digital work instructions in context with augmented reality.</p>

➔ Get started with these resources:

- Learn about [Dynamics 365 Remote Assist](#).
- Schedule resources intelligently with [resource scheduling optimization](#).
- Learn about [Dynamics 365 Field Service](#).

Build flexibility into sales and service

In a changing environment, it's more important than ever to maintain customer and employee trust. When you're able to rapidly identify and address changing needs with data-driven processes, you protect and grow your revenue, brand, and customer and employee relationships. This flexibility will also help your organization meet evolving needs and connect with people when they need it most.

Dynamics 365 integrates with Microsoft 365 on the trusted Microsoft cloud, bridging the business processes, productivity, collaboration, and intelligent insights that power modern business.

Get help planning and implementing sales and service solutions, or get more information about any of the recommendations in this guide, by contacting a Microsoft sales advisor.