Microsoft Dynamics 365

tecman

Four roles transformed with Dynamics 365 and Microsoft 365

SALES REPRESENTATIVE

PRODUCTION MANAGER

WAREHOUSE MANAGER

CUSTOMER SERVICE AGENT

E-BOOK
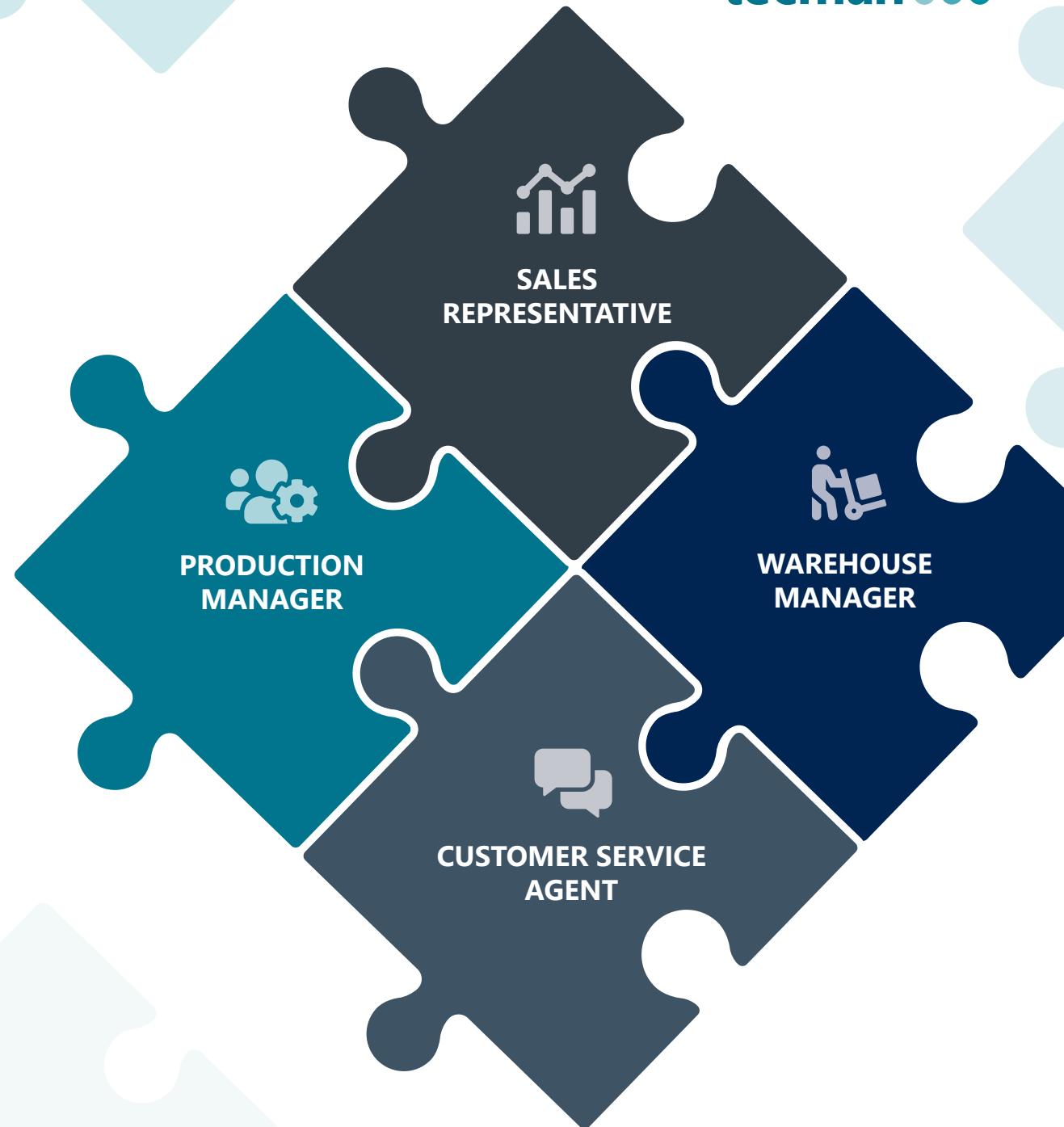
Building a modern customer experience

In today's landscape of on-demand information and real-time consumption, buyers have come to expect personalised experiences and their orders delivered on time and in full (OTIF) faster than ever before. Mobile, intelligent, and integrated business applications are now a key part of how companies provide that calibre of customer experience.
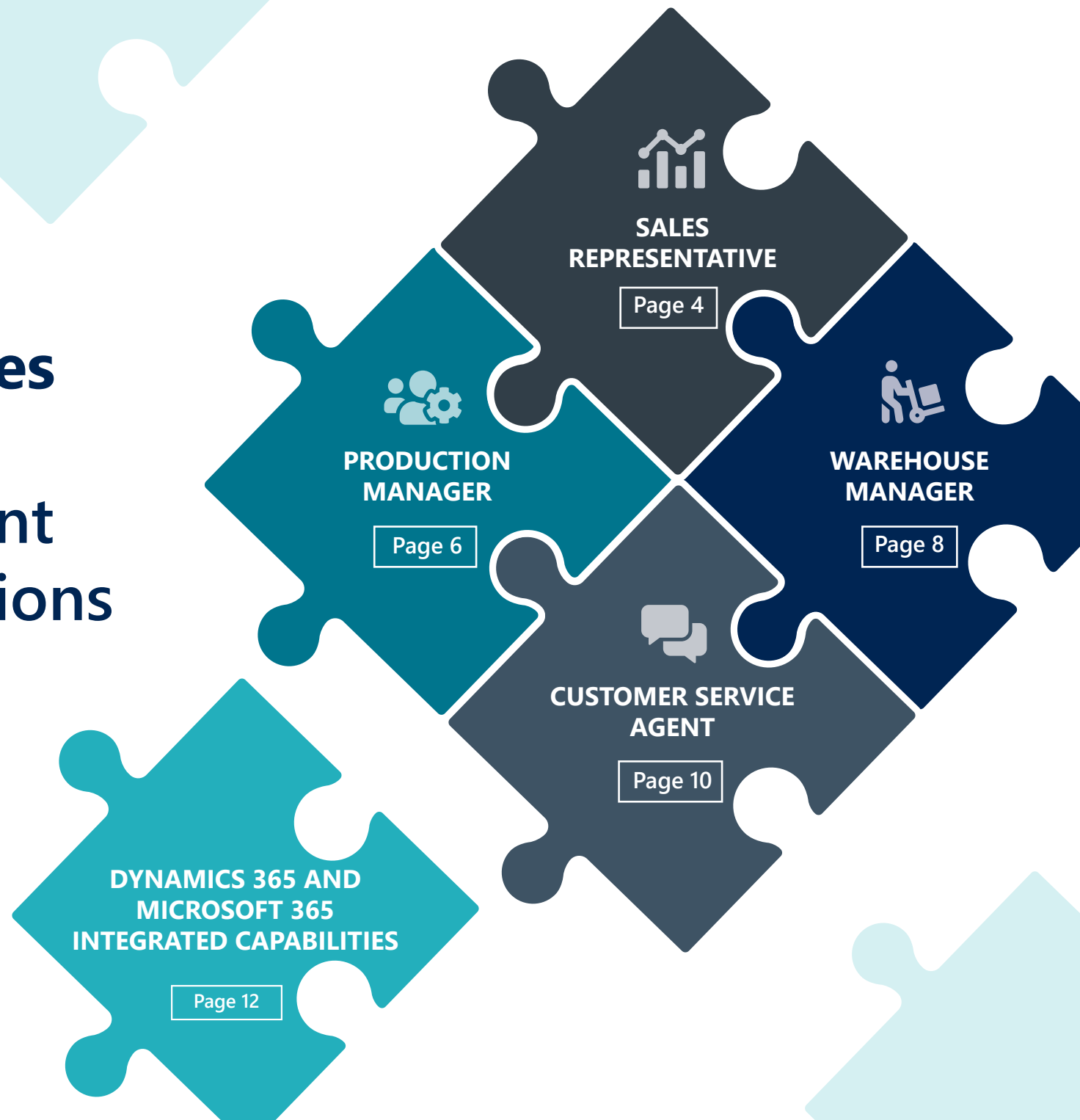
Truly personalised and proactive customer experiences stem from organisational unity - cross-silo data and processes to foster the collaboration and insight necessary for powerful customer driven experiences to exceed ever-increasing customer expectations. When a company's day-to-day productivity, customer relationship, and resource planning tools are fully and intuitively integrated - and the data they produce can be standardised and utilised - an entire workforce can be equipped with the AI-driven insights and predictive actions that transform business outcomes.

That's how Dynamics 365 and Microsoft 365 work together to equip firstline and information workers - from the shop floor to the top floor - with a 360-degree view of both the business and the customer. By blending cloud-based productivity and collaboration tools with a mobile and insight-rich customer data platform, your business can deliver the unified experiences that the modern consumer expects.

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Discover **four roles** transformed with modern, intelligent business applications

SALES REPRESENTATIVE

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DYNAMICS 365 AND MICROSOFT 365 INTEGRATED CAPABILITIES

E-BOOK

Going beyond sales force automation to better understand customer needs, engage more effectively, and win more deals.

The scale and speed at which customer data insights must now be identified and incorporated into B2B sales efforts requires a comprehensive suite of intelligent tools. Combining flexible productivity and sales applications can help sales representatives build relationships that extend beyond a transaction - and simplify and expedite the lead discovery portion of the sales process. Here's how bringing together Dynamics 365 Sales and Microsoft 365 can help a sales representative SaaS company.

Offer personalised service

A sales representative is monitoring the progress of several key client relationships in Dynamics 365. Through AI-surfaced recommendations, they realise that they share mutual connections with a decision maker at a high-value company - allowing them to quickly identify the best path to a warm introduction.

Intelligent lead engagement

Using embedded Microsoft 365 tools, the sales rep starts preparing a personalised outreach message in Dynamics 365. Looking for peer-to-peer feedback and further context around the lead's company, the rep uses Microsoft Teams to seamlessly engage colleagues who have experience with the brand. Their collaborative feedback further refines the rep's outreach strategy and aligns it to parallel selling efforts.

Engage and nurture

The representative's tailored and timely message does the trick—the lead responds via email the next day. Dynamics 365 Sales automatically notifies the rep that they have received an email in Outlook, and with the conversation officially underway, the rep uses AI-powered suggestions from the assistant to take the next best action and move the deal forward.

1 SALES REPRESENTATIVE

Foster relationships

The rep uses the AI-generated relationship health score in Dynamics 365 and acts on suggestions about when their ongoing opportunities might need a bit more attention. When the time is right, the sales rep conducts a Teams call with the primary decision makers and talks with the group about tangible next steps.

Close the sale

The sales rep customises a templated contract in Dynamics 365 through the Office 365 integration. The sales manager opens an immersive Excel experience within Dynamics 365 Sales to evaluate and approve the proposal. Once the proposal has been sent, the sales representative follows up with the buyer via email and closes the deal with a series of secure digital signatures.

Identify new targets

With a deal now in place, the rep works with their sales manager to search for the next opportunity. The manager analyses their Power BI dashboard, visible right from within Dynamics 365, to get a full picture of how the team is doing against quota goals and where its sales pipeline is most concentrated.
Together, Dynamics 365 Sales and Microsoft 365 enable key sales capabilities to simplify and enrich the entire sales process, as well as unify data across customer relationships and productivity tools to give sales teams the most informed and actionable view of next steps. By ensuring time isn't lost on lead identification and data entry, Dynamics 365 and Microsoft 365 help sellers easily engage and close more opportunities

Maximise production efficiency, product quality and customer responsiveness

Businesses that manufacture have a unique set of obstacles that only they need to overcome. No other business must factor in BOM's, production scheduling, demand planning, and forecasting all whilst juggling the demands of the sales floor and the warehouse. Microsoft Dynamics 365 Business Central's manufacturing module gives you the tools to successfully manage your shop floor environment all whilst integrating seamlessly with the rest of the Dynamics 365 suite.

Production Planning with ease

Production planning (with finite capacity planning where needed) is simple in Dynamics 365 Business Central from TecMan. See instantly what upcoming manufacturing jobs are required, schedule machines, and assign employees to the jobs. Need to rearrange workers quickly due to absences or machine stoppages? This can quickly be organised, so that staff can continue their work promptly with all the documents and instructions they need at their fingertips.

Step by step directions are displayed on touchscreen devices at the side of the machinery together with links to drawings and other documentation stored in SharePoint.
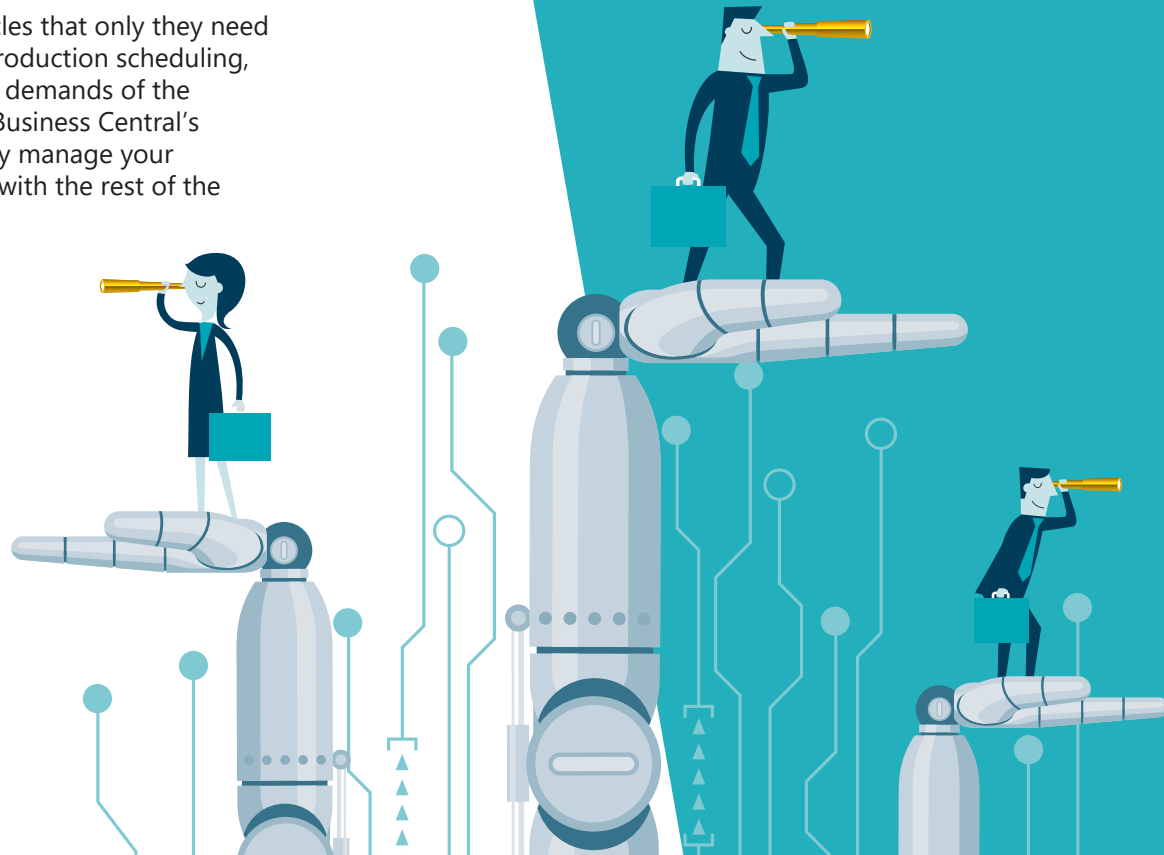
2 PRODUCTION MANAGER

Planning for the future

It's easy to look back even further ahead! Use the apps within Microsoft 365 to manage your complex manufacturing projects. By capturing project requirements, such as a the introduction of new machinery or a reshuffle of the shop floor, in One Note and plan detailed actions in Planner you can work collaboratively with all your team and allocate jobs to those who need to be involved.

Real-time insights

Want to monitor manufacturing costs and ensure that your profit margin does not dwindle? By analysing your production variances, you can spot cost issues before they become bigger issues and keep a hold of your finances. Spot trends within your materials usage and scrappages and take preventative action when needed to ensure that you are hitting your KPI's and targets.

Built-in intelligence to cut vital time off your processes

We all have times where we wish we could have more hours in the day. The warehouse environment is no different and it is well known that there is often a race against time to pick, pack and ship orders before the shipping deadline. Despatching orders is a combined effort with everyone based in the warehouse, including Goods Inwards, Pickers, and Shippers to name a few roles, all working together to achieve the end goal... getting the order out the door to customers as fast as possible! However, it is not just people who are required to work in partnership, your business software also needs to work collaboratively with all parties and with multiple systems to achieve a constant stream of real-time stock data.

Real-time stock data

So, how can you achieve the real-time data that can make that mad rush smoother?...

Dynamics 365 Business Central from Tecman gives you the functionality you need to accurately fulfil customers' orders when promised. As a single business application covering Finance, Manufacturing and the Warehouse – with integrated handheld (or even hands-free!) bar code scanners – Dynamics 365 Business Central delivers the accurate stock numbers you need and all updated in real time.

3 WAREHOUSE MANAGER

Reduce errors and improve efficiency

Make the move to integrated mobile barcode scanners to see transactions in Dynamics 365 Business Central as they happen, quickly and accurately. Use those same scanners to direct your warehouse operatives as to what needs to happen next to ensure the most efficient "path of the picker", quickly respond to changing customer demands as well as put an end to illegible scribbles on paper pick slips that slow things down and result in incorrect customer deliveries.

The built-in warehouse logic also takes account of customer delivery deadlines and courier cut-off times to make the entire process seamless and efficient instead of manic and chaotic.

And all data collected by can be analysed in Microsoft Excel or Power BI for clear insight into how you can make your warehouse more efficient and responsive.

A 360-degree view of a customer's needs

A competitive business must have the ability to efficiently traffic and meet customer requests as issues arise. That depends on customer service agents having intuitive access to the right information, resources, and complete customer context that help resolve cases in real time. Modern business applications provide a holistic view of a customer's transaction history, allowing for a faster and more personalised level of customer service.

They can also house a continually updated library of product information and training resources, connecting employees to the resources necessary to navigating important customer relationships.

Here's how bringing together Dynamics 365 Customer Service and Microsoft 365 can help a service agent resolve a customer's platform issue...

Chatbot engagement and dispatch

Looking for assistance and troubleshooting tips on a recent wood burning stove purchase, a customer engages with a chatbot powered by Dynamics 365 Virtual Agent for Customer Service on a provider's website. The Virtual Agent resolves the customer's initial question, but then the customer requests a live agent for further assistance and is seamlessly transferred to an agent within the same chat conversation.

Identify the issue and group source a solution

The customer service agent is notified of a new case within the Dynamics 365 Customer Service dashboard. Because the agent can see the full transcript of the customer's conversation with the Virtual Agent, they quickly review the conversation details, read notes from the customer's warranty registration record to pinpoint a solution, and check knowledge base records for related articles, known problems, and recalls. The agent hosts a quick collaborative discovery session on Teams with internal product experts to compile the most up-to-date data and solutions, and they confirm a new part is needed to resolve the issue.

4 CUSTOMER SERVICE AGENT

Customer service agents often struggle to communicate up the chain or outside of their immediate team. But the combination of Dynamics 365 Customer Service and Microsoft 365 provides agents with a connected network of resources and expertise that allows them to better serve complex customer needs - and ultimately form more trusted and longer lasting brand relationships.

Deliver solution

After the agent has found a solution and is ready to engage with the customer, they make a phone call to the customer to confirm details about both their stove purchase and the issue they are experiencing. The agent quickly organises for a new part to be sent — and sets an alert in its email engagement module for when the "successful delivery" email is received.

Follow-up and data sharing

Once the customer has received the part, the agent calls them back to confirm that they have managed to swap out the part and the wood fired stove is now working. The agent then adds notes to the customer's record, shares helpful data across the service team, and closes the case with a thank you email that includes a link to a customer survey powered by Microsoft Customer Voice.

Modern, intelligent business applications

Dynamics 365 and Microsoft 365 are changing the way companies do business.

Their integrated capabilities are already driving innovation across a variety of industries and company sizes. Combining these powerful productivity, customer relationship and resource planning tools can help your company:

Unify data across the organisation

Dynamics 365 and Microsoft 365 connect vast amounts of data, surfacing actionable insights through built-in artificial intelligence and machine learning capabilities that amplify human ingenuity.

Improve workflows

Dynamics 365 apps organise common business tasks under customisable tabs in its user interface, allowing teams to more intuitively collaborate across functional areas.

Foster teamwork and collaboration

Microsoft Teams, Yammer, OneDrive, and other collaboration tools provide seamless sharing of contacts and documents, facilitating collaboration across complex processes and projects while minimising costly context switching.

Transform the roles of firstline and information workers

A 360-degree view of customer data, organisational knowledge bases, and real-time orders and inventory allows employees in a variety of disciplines to deliver more informed and personalised customer experiences.

If you are running your business today using multiple applications and productivity tools, you may be keeping data and people apart. By treating your solutions as one, you can optimise how your business performs — allowing you to draw on their joint capabilities as well as their individual strengths.

Leveraging the capabilities together allows you to align your operations, financials, sales, and service. This both supports collaboration internally and with customers and generates insights. Once this happens, you'll see your processes, customer interactions and decisions all improve. So, you can unlock what's next for your business.

One way to make your business applications and productivity tools work together is to use both Microsoft Microsoft 365 and Dynamics 365.

They unite your people and processes, which helps you to drive up performance and deliver great customer experience.

Our aim is to make the lives of Manufacturers and Distributors easier through the implementation of Microsoft Dynamics 365 business software.

Our unique combination of manufacturing and distribution industry know-how, Microsoft Dynamics implementation expertise and technical skills means we have delivered over 7000 successful projects for our customers.

We are a Microsoft Gold Certified Partner and can deliver Microsoft Dynamics solutions in the Microsoft Cloud or on your own IT infrastructure or. Based in the Midlands and North East, we support clients across the UK and further afield.

Take your first steps towards enhancing your business processes and contact us today:

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