

A Quick-Start Guide to Delivering Always-On, Always Exceptional Service



Over the last 5 to 10 years, customer and field service organizations have stepped up to become their companies' top competitive differentiators. However, during times of rapid change, the difficulties these organizations face when it comes to delivering consistent, always-on service come to the forefront.

This checklist targets common challenges your organizations are likely experiencing, with tips and tactics for addressing them. You won't find a lengthy list of to-dos—our goal is to provide you with a short list of concrete actions that will have the most impact, so you can deliver always-on, always exceptional service regardless of what the world throws at you.

Choose your challenge

Click on the arrows to learn how to tackle each challenge.



We struggle to maintain quality of service when customer demands spike.

[Learn more](#) 



Going digital has made it difficult to deliver personalized customer experiences.

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Rising costs are forcing us to do more with less.

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My teams need help working remotely.

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To respond to customer demands in real-time...



Learn how to deliver always-on service with Dynamics 365 Virtual Agent for Customer Service

Check off the tasks as you complete them

- Automate repetitive tasks to increase the amount of time agents have to focus on actively engaging the customer.
- Meet any volume of support requests and extend support outside of office hours with self-service capabilities like portals and chatbots.
- Identify relevant support topics and incorporate them into self-service FAQs, chatbots, etc.
- Integrate customer data to generate a 360-degree view of customers.
- Enable front-line workers to collaborate with experts from anywhere, anytime, using remote assistance technologies.
- Understand agent and technician skillsets so that you can deliver training targeted to their needs.

To deliver connected and empathetic customer experiences...



Learn how to provide personalized support with Dynamics 365.

Check off the tasks as you complete them

- Enable agents to elevate virtual interactions beyond live chat—engaging with customers via video or remote assist, for example.
- Track customer feedback and sentiment so agents and technicians can engage appropriately and authentically with customers.
- Make it easy for agents to personalize customer conversations by providing profile and interaction data consolidated within a single view.
- Maximize engagement by deploying seamless, user friendly technology that frees agents to focus on the customer and not the technology.

To drive meaningful action with proactive service and resource optimization...



Watch how smart scheduling with Dynamics 365 Field Service can optimize your resources.

Check off the tasks as you complete them

- Use advanced scheduling tools that allow you to optimize agent and technician schedules.
- Provide proactive maintenance by remotely monitoring customer assets via IoT capabilities.
- Leverage automated voice and text appointment reminders to provide predictable service that increases customer satisfaction.
- Maintain customer relationships with meaningful and recurring outreach.
- Automate contract renewals to protect revenue streams and maintain customer relationships.

To empower technicians and agents with the right tools at the right time...



See how Dynamics 365 Remote Assist can empower employees to work together from anywhere.

Check off the tasks as you complete them

- Increase first-time fix rates by giving agents and technicians the tools they need to connect with experts in real time.
- Give agents and technicians access to critical information on the job in the form of digital work instructions with augmented reality.
- Provide technicians with a complete view of customer assets to ensure that the right parts are on hand during service calls.
- Use surveys, incentives, contests, and leaderboards to engage employees regardless of where they're working.

Close the gaps and enable always-on service

Customer and field service organizations are under increasing pressure to be always-on and to deliver exceptional service regardless of the changes occurring in the world. This is a tall order, but it's not impossible. Organizations have already proven they can be responsive to business needs and surpass customer expectations. With the tips and tactics outlined in these checklists, even more companies can make this a part of how they do business.

If you need help addressing your always-on service challenges or checking off the boxes on this list, our experts are happy to assist you.