Connect your field service. Deliver seamless customer experiences.

Microsoft Dynamics 365 Field Service

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Today’s field service customer is expecting a seamless experience

80% of customers expect a personalized service experience

58% will sever relations with a business due to poor customer service

Loyal customers are 5x more likely to purchase again

You need a connected field service that transforms your field operations by using data and intelligence to empower technicians and improve customer experiences.

1 Forbes, 50 Stats Showing The Power of Personalization, 2020
2 Microsoft, Global State of Customer Service, 2019
3 Forbes, 50 Stats That Prove The Value Of Customer Experience, 2019
The shift in service is impacting everyone

- **Customer**: 88% expect self-service options²
- **Dispatcher**: 25% field service organizations are still using spreadsheets and whiteboards for scheduling jobs³
- **Field Technician**: 54% of technicians say getting service history to help prepare for a visit is their #1 challenge¹
- **Field Service Manager**: 92% want to transform their service model to meet consumer needs³

¹ 111 Crucial Field Service Management Software Statistics: 2023 Market Share & Data Analysis  
² The Future of Field Service  
³ WCIV Field Service Management Statistics
We hear from our customers that they need to:

- Personalize the service experience
- Assign resources to solve customer problems quickly
- Fix customer problems the first time—every time
- Gain cost-effective insights to improve customer experience
Dynamics 365 Field Service

**Customer**
- Self-schedule service appointments
- Automate customer communication and scheduling
- Fix it right the first time

**Dispatcher**
- Transparent and efficient work order scheduling
- Optimize resources with interactive schedule board

**Field Technician**
- Collaborate with technicians in real-time
- Easily add and complete inspections
- Get expert assistance remotely with Mixed Reality

**Field Service Manager**
- Manage assets and view service history via mobile app
- Fix customer problems the first time – every time
- Seamlessly track performance metrics
- Increase efficiency and standardize processes
- Avoid equipment downtime through preventative maintenance

**Gain cost-effective insights to improve customer experience**

**Personalize the service experience**

**Assign resources to solve customer problems quickly**

**Fix customer problems the first time – every time**

**Self-schedule service appointments**

**Automate customer communication and scheduling**

**Fix it right the first time**

**Optimize resources with interactive schedule board**

**Collaborate with technicians in real-time**

**Get expert assistance remotely with Mixed Reality**
You can do more with less with Dynamics 365 Field Service

- Personalize the service experience to deliver exceptional service as promised at the right time, the first time.
- 10% reduction in dispatching technicians\(^2\)
- 50% reduction in travel time\(^2\)
- 44% improvement in SLA performance\(^1\)
- 18% increased service profits\(^1\)
- 42% better customer retention\(^1\)

\(^1\) Hitachi Solutions
\(^2\) Forrester TEI Study
Why Microsoft

1. Common data model across all business applications
2. Analyst reports where Microsoft is positioned as a Leader
3. 500k+ Microsoft business application customers
4. 97% Fortune 500 companies use Business Applications

- **AI** with large language model (GPT3), ML, Azure Cognitive Services
- **Collaboration and productivity**, infused in business processes
- **Low-code platform** which is embedded in Dynamics 365
Capabilities
Personalize the service experience

- Self-schedule service appointments
- Automate customer communication and scheduling
- Fix it right the first time
Personalize the service experience

Self-schedule service appointments

Single portal homepage for customer experiences and feedback

Provide transparency and visibility into service engagement, and collect pre-service information

View upcoming, active and past appointments

Built on Power Apps portal, brand customizable and accessible from any device
Personalize the service experience

Automate customer communication and scheduling

Enable customers to self-schedule, reschedule or cancel existing appointments and provide feedback on past appointments.

Allow customers to create work orders.

Available time slots based on real-time resource availability, location and skillset.

Self-service scheduling based on real-time availability.
Personalize the service experience
Automate customer communication and scheduling

Provide customers automated service reminders and notifications via email and SMS

Notify customers of estimated technician arrival time

Share real-time location and travel duration of the frontline worker to the appointment
Assign resources to solve customer problems quickly

- Transparent and efficient work order scheduling
- Optimize resources with interactive schedule board
- Collaborate with technicians in real-time
Assign resources to solve customer problems quickly
Transparent and efficient work order scheduling

Access customer records or create new records on- and offline

Capture images, create videos and add mixed reality annotations to notes history

Easily collaborate with remote colleagues via Dynamics 365 Remote Assist or Microsoft Teams

Let technicians manage and access bookings, schedules, route mapping, and knowledge articles

Provide technicians with turn-by-turn directions

Dispatcher

At-a-glance schedule
Route mapping and turn-by-turn instructions
View resource bookings, tasks and work orders
Assign resources to solve customer problems quickly

Optimize resources with interactive schedule board

Automatically schedules jobs to the people, equipment, and facilities best equipped to complete the job

Schedules high volume jobs at once, maximizing utilization and minimizing travel time

Allows dispatchers to manage more resources

Uses historical data to improve efficiency and drive predictable arrival and completion times

Automatically assigns alternate technicians for urgent situations

Minimize travel time and maximize utilization

AI-driven scheduling books the best-suited technician closest to the customer
Assign resources to solve customer problems quickly
Collaborate with technicians in real time

- Seamlessly integrated within the work order
- Quickly get answers and fix issues the first time
- Initiate chats with one or multiple remote colleagues directly from a work order
- Automatically link chats to a case and work order
- Associate conversations to the work order for ease of viewing by team members
- Use spotlight and pinning to keep Dynamics 365 Remote Assist video feed on main stage
Fix customer problems the first time – every time

- Manage assets and view service history via mobile app
- Easily add and complete inspections
- Get expert assistance remotely with Mixed Reality
Fix customer problems the first time – every time
Manage assets and review service history via mobile app

Improve first time fix rates by providing technicians knowledge articles on and offline

Associate knowledge articles to various work order records like incident types, products, or customer assets

Easily configure search filters, author language and management knowledge categories

Save time by creating article templates in Power Apps

Access on and offline by automatically associating articles to the work order

Associate articles to a variety of records (incident types, products or assets)
Fix customer problems the first time – every time

Easily add and complete inspections

- Easy to create with drag and drop interface
- Seamlessly add inspections to work orders
- Complete inspections on your mobile phone or tablet and auto-sync when connectivity is restored
- Associate inspections with assets, view history of all prior inspections
- Perform virtual inspections using Mixed Reality and the Field Service app

Fix customer problems the first time – every time

Field Technician
Fix customer problems the first time – every time

Get expert assistance remotely with Mixed Reality

Share real-time views with experts remotely to get help with Dynamics 365 Remote Assist mobile or stay hands-free using HoloLens

Improve FTFRs by accessing 3D holographic service manuals using Dynamics 365 Guides

Avoid costly travel and reduce delays with remote support combining video, screenshots, and annotations

Capture asset information and integrate it with Microsoft Power Platform or other enterprise applications

Available for iOS and Android

Associate images with the work order

Recorded conversations are available in the chat history
Gain cost-effective insights to improve customer experience

- Seamlessly track performance metrics
- Increase efficiency and standardize processes
- Avoid equipment downtime through preventative maintenance
Gain cost-effective insights to improve CX
Seamlessly track performance metrics

Glean insights and action needed through AI-driven data analysis and visualizations

Leverage insights to streamline processes

Extensive out-of-the-box reporting for work orders, incident types, and other KPIs

Identify trends, gaps in service and SLA compliance

Drill down work order metrics to identify trends and opportunities to improve
Gain cost-effective insights to improve customer experience
Increase efficiency and standardize processes

Monitor metrics across resource and utilization, time spent on bookings, and miles on truck rolls

Get an end-to-end view of field service operations and drill down into individual worker performance

KPIs include resource and utilization rate, average travel time, mileage, resource utilization breakdown, resource scheduling optimization
Thank you