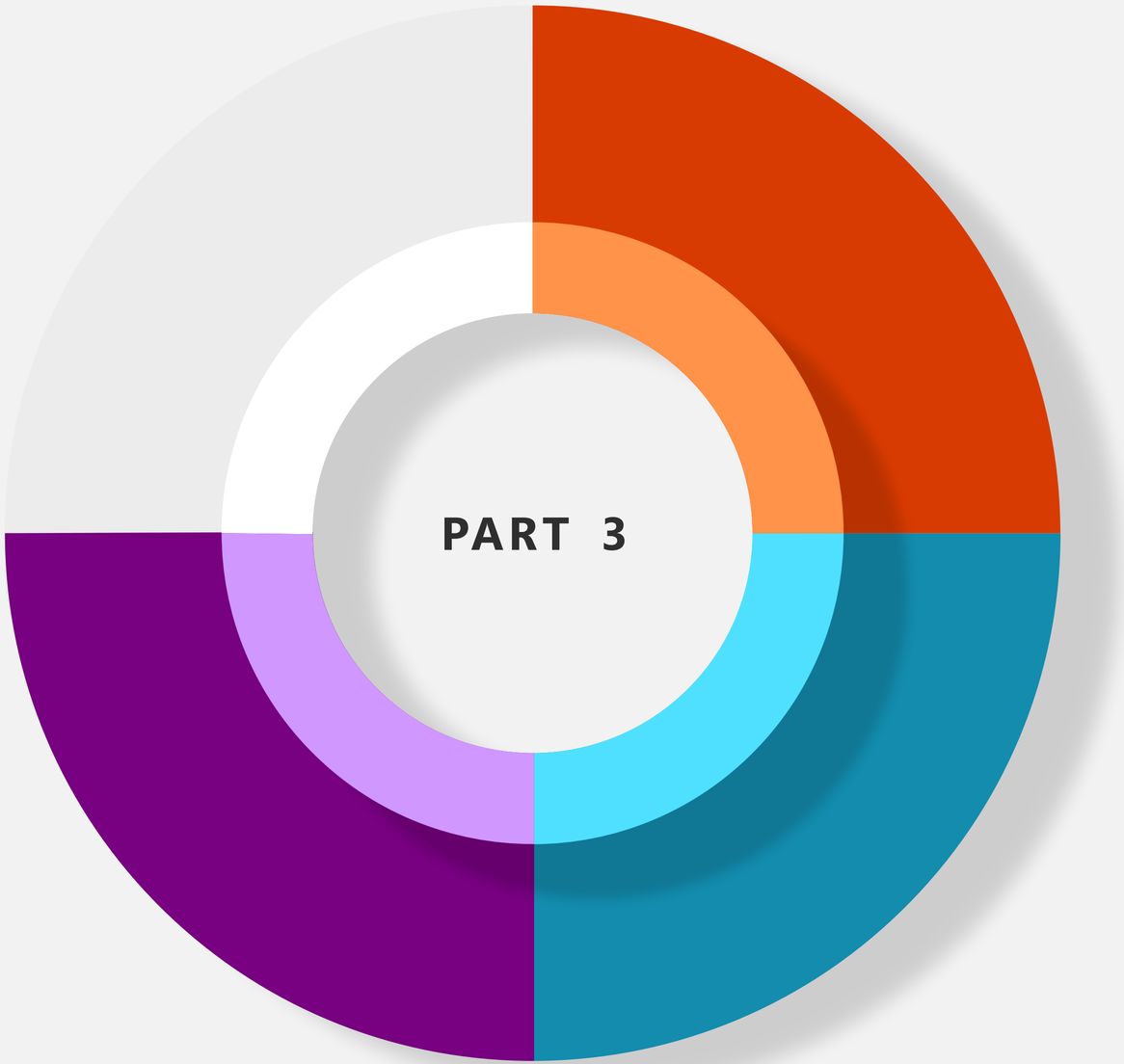
E-book Series

Efficient Case Management and Resolution



A customer service sophistication model

Microsoft Dynamics 365

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Who this is for:
Service and contact center leaders responsible for customer experiences.

Estimated reading time:
9 minutes

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Definition / Service sophistication model:

A tool to help organizations assess and understand the complex mix of strategies they need to deliver a specific service experience.

Make customers feel seen, heard, and satisfied

Customers know right away when the agent they're connected with is truly set up to handle their need. To enable service teams to deliver consistent support that resolves complex issues fast and puts customers' minds at ease, organizations need to provide the structure.

A single platform for understanding accounts, accessing knowledge, and collaborating with teammates is foundational to managing and resolving evolving customer service issues. It gives your customers:

- Consistent service across whatever channels they prefer to use.
- Help from agents with fast access to experts ready to assist.
- Empowered agents with relevant, extensible knowledge on hand.
- Personalized experiences delivered by agents with holistic customer and interaction data, context, and service history.

Customers can count on fast resolutions to their complex issues when agents have intelligent productivity tools and modern interfaces that make their jobs easier, right at their fingertips.

Read this e-book to learn how your organization can build toward managing and resolving customer issues with elegance and ease. It's third in a four-book lineup on advancing your customer experience, starting with the first e-book in the service sophistication model series—Engaging Customers on Their Terms—followed by the second book, Intelligently Routing Service Requests.

Service sophistication model

Level 1
Cost centric

Address basic needs with simple, standard processes.

Level 2
Metric centric

Make measurable improvements by organizing digital capabilities.

Level 3
Data centric

Enable proactive service and a growth mindset with insights from data.

Level 4
Profit centric

Use AI insights to clean up inefficiencies and intelligently predict issues.

Level 4+
Future centric

Optimize service support to focus energy on aspirational goals.

Move case management forward

The service sophistication model provides a 4+ level framework for assessing your service experience against what's happening in the market. It also helps you understand what's needed to progress from one level to the next.

If you're beginning with basic customer care solutions or already a mature organization offering world-class customer services, use the model to effectively evolve your capabilities.

The service sophistication model also assists organizations in assessing and modernizing employee experiences. Whether you're connecting with customers or employees, use the model to help plan your transformation. Your organization can achieve greater value and ROI with fewer technology investments.

LEVEL 1

Cost centric

TEAM COLLABORATION	AGENT EXPERIENCE (HOLISTIC CUSTOMER VIEW)	KNOWLEDGE MANAGEMENT
Asynchronous team communication via email or messaging	Form-based user interface with basic customer data	Static information, articles, or blogs with simple guidance for customer support

Tracking support requests with customer information helps agents learn from peers and experts who've solved similar cases.

You manage and resolve service requests raised by customers with relevant resources that address as many common service requests as possible.

What you're able to do:

- Track and manage all requests raised by customers with a basic, form-based user interface.
- Maintain basic customer information for understanding simple support needs.
- Offer essential support guidance with knowledge articles, blogs, and wikis.
- Provide communication tools to asynchronously share knowledge among team members.

What holds you back:

You're a bit too reliant on your agents' individual knowledge, procedures, and information gathering skills. This lack of consistency can lead to higher customer wait times and more unresolved requests, which may require escalation to experts and potentially multiple follow-ups.

How you advance to level 2 (metric-centric service):

- **Allow tracking of open, related, and historical requests** to organize and manage customer profiles and support information within standalone case management.
- **Create easy access to knowledge** articles, blogs, how-to guidance, and wikis on procedures with advanced search and filters for agent use and self-learning.
- **Give agents access to the most up-to-date information** by putting procedures in place to periodically update knowledge resources.
- **Coach agents on ways to effectively meet their targets** by giving them access to recorded health scores, survey feedback, SLAs, and KPIs from independent sources.
- **Help agents interact in real time with peers and experts** for additional guidance and mentoring, using intelligent communication tools.

LEVEL 2

Metric centric

TEAM COLLABORATION	AGENT EXPERIENCE (HOLISTIC CUSTOMER VIEW)	KNOWLEDGE MANAGEMENT
Synchronous, real-time team communication via live chat	Modern user interface with relevant customer and support information	Detailed, defined guidance and knowledge on steps for customer support on common and recurring issues

Add service capabilities to better focus on customers' service level agreements (SLAs) and KPIs.

You're able to resolve customer cases faster with organized, streamlined processes and expanded service capabilities.

What you're able to do:

- Track and manage service requests, detailed customer profiles, and support information like health scores and relevant metrics with streamlined case management capabilities.
- Build your team's knowledge and skills by retaining detailed guidance, helpful examples, and step-by-step guides to known or historic requests.
- Give your agents real-time access to expert guidance from agents who've resolved similar issues before, with synchronous live chat.

What holds you back:

Collaborating in real time and knowledge sharing during case resolution can be difficult. And because service requests are managed independently with basic capabilities, service history and related interaction data isn't well maintained.

How you advance to level 3 (data-centric service):

- **Maintain up-to-date, holistic customer profiles,** manageable by customers and agents, with interaction data, consumer characteristics, service history, and feedback.
- **Organize profiles in a comprehensive case management system** to help agents better understand and assist customers during escalations.
- **Provide a real-time collaboration tool** that allows agents to create dashboards and share files and workspaces to efficiently work with peers and experts on demand.

LEVEL 3

Data centric

TEAM COLLABORATION	AGENT EXPERIENCE (HOLISTIC CUSTOMER VIEW)	KNOWLEDGE MANAGEMENT
Team collaboration with peers and experts to share knowledge and expert guidance	360-degree view of customer profiles, service history, transcripts, and interactions via an integrated case management system	Detailed, defined guidance and knowledge on steps for customer support on complex or unique issues

Preserving the context of customer requests is critical when you need to revisit a case later, or if resolution requires escalation.

Your teams are empowered to efficiently resolve more requests with a holistic view of customer service communication, history, and feedback, along with structured management systems and real-time collaboration tools.

What you're able to do:

- Maintain a 360-degree view of customer data to better understand your customers' unique needs and requests using both first-party and third-party data.
- Preserve the context of each request you get with interaction and transcript data like feedback and service history.
- Enable real-time collaboration on customer requests with tools that help reduce case resolution time by improving ease of access to shared workspaces, dashboards, and file sharing during support.

What holds you back:

Real-time support personalization while engaging with a customer is tough, mostly because of limited predictive data, analytics, and insights. And it's difficult to balance repetitive tasks with customer engagement during resolution.

How you advance to level 4 (profit-centric service):

- **Improve agent experience** with AI-powered actionable insights, process guidance, and recommendations when handling support requests.
- **Develop insights and suggestions from dynamic, extensive databases** of interaction and behavioral data with sentimental and conversational feedback.
- **Personalize your customer experience** by proactively identifying your customer's intent and engaging them contextually.
- **Speed up onboarding and ensure consistent agent experiences** across all channels with agent scripts, smart assist, and AI bots.
- **Help agents more easily focus on your customers during support** by implementing robotic process automation and streamlining processes.

LEVEL 4

Profit centric

TEAM COLLABORATION	AGENT EXPERIENCE (HOLISTIC CUSTOMER VIEW)	KNOWLEDGE MANAGEMENT
Real-time team collaboration for shared workspace, dashboard, and file sharing	Multisession agent experience with AI-enabled intelligent agent productivity tools, interfaces, AI-driven analytics, and insights, and RPA	AI-enabled actionable or predictive insights and next-best actions for common and recurring issues

Industry leaders are focused on staff efficiency, faster training, better onboarding, and reducing process time with AI.

You're building customer loyalty and growth opportunities by prioritizing your agent experience and making it part of your market differentiation.

What you're able to do:

- Resolve issues proactively when a customer reaches out by surfacing open or related requests and actionable next-best actions.
- Increase customer satisfaction and trust with conversational, sentimental analytics and AI-powered predictive insights that personalize support and speed up resolutions in real time.
- Focus on customer engagement and resolution after automating repetitive tasks and bringing on intelligent productivity tools and interfaces.

What holds you back:

Your translation and transcription abilities are limited, as is integration between collaboration and case management on cases when you need real-time expert guidance. Your tools provide recommendations, but only to known or historical customer issues, and robotic automation is limited to simple, repetitive tasks.

How you advance to level 4+ (future-centric service):

- **Capture information and context from all client interactions** by investing in collaboration platforms and automatic information-gathering processes like real-time and automatic translation and transcription.
- **Deepen understanding of each case** to optimize the path to resolution with intelligently generated next-best actions and recommendations.
- **Diagnose problems and help experts more easily weigh in** on resolutions with a collaborative platform that embeds business and productivity apps into the flow of work.

LEVEL 4+

Future centric

TEAM COLLABORATION	AGENT EXPERIENCE (HOLISTIC CUSTOMER VIEW)	KNOWLEDGE MANAGEMENT
Collaboration tool as UI for customer service, collaboration, and dashboard	Optimized intelligent recommendations, next-best actions, and guidance, and automation of complex repetitive tasks	AI-enabled actionable or predictive insights and next-best actions for advanced and complex issues

Allow agents to see and interact with a customer's web browser and efficiently troubleshoot issues by investing in co-browsing technology.

You're strengthening collaboration within your team and innovating together to solve complex client issues. You seamlessly connect customers with the exact expert they need, inside or outside your organization.

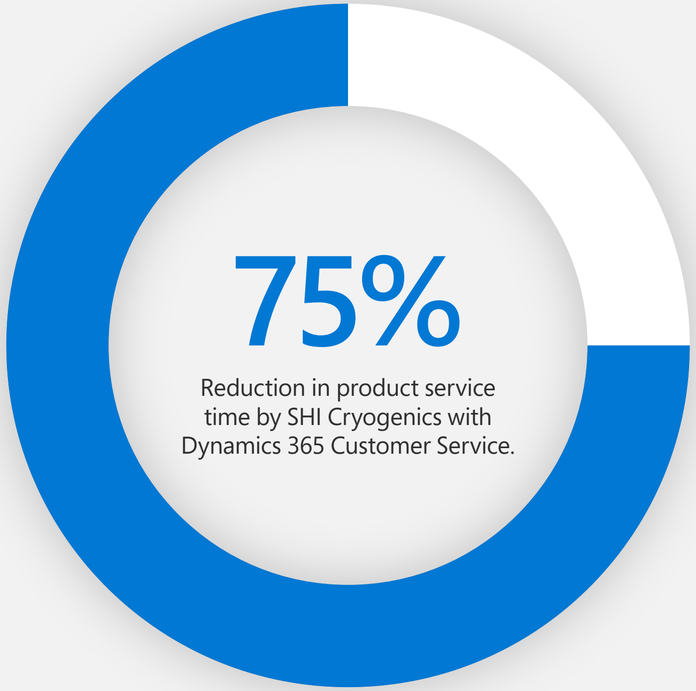
What do you strive to do?

- Empower agents with the right information, skills, and insights to manage customer requests through a rich collaboration platform that embeds proper context within business and productivity apps.
- Offer expert help in any language and at any time using real-time translation and transcription software.
- Support users, agents, and experts in resolving issues with next-best actions, recommendations, and suggestions generated by machine learning.
- Surface information, people, and insights the moment they're needed with collaboration capabilities integrated directly into the flow of work.

The following KPIs for level 4 organizations can help you define and establish your own measurements of success.

CUSTOMER KPI	COST KPI	EFFICIENCY KPI
↑ Customer Satisfaction (CSAT)	↓ Escalation rate	↑ Staff efficiency and training
↑ Service and quality (SERVQUAL)	↓ Staff turnover	↑ Number of resolved cases per agent
	↑ Process time savings	↑ First call resolution rate
	↓ Cost of manual data entry	↓ Case resolution time
		↓ Average handle time

Organizations that seamlessly resolve support cases achieve tangible outcomes in service, cost, and efficiency.



How SHI Cryogenics builds on the cutting edge

SHI Cryogenics is a globally recognized leader in cryogenics manufacturing for the medical, semiconductor, telecommunications, electronics, biochemical, and other industries. A longtime R&D innovator, SHI still relied on inefficient, time-consuming manual processes and tools like spreadsheets to meet customer requests.

To help them gain more visibility for better reporting and faster repair times, SHI Cryogenics used Microsoft Dynamics 365 to create a cloud-based engagement platform that was powerful, flexible, and scalable enough to meet the needs of its worldwide customer base, With Dynamics 365 Customer Service, SHI Cryogenics is able to access real-time product data, share it with customers, and give them insight into performance issues and service needs. Doing so reduced repair turnaround times from two months to two weeks while also increasing revenue.

Now SHI Cryogenics streamlines product service around the world and equips its engineers with critical information to better analyze problem trends, conduct preventative maintenance, repair equipment, and build better products down the line.

Make case management your competitive advantage

Closing cases starts by understanding your customer's needs, history, and the context that brings their experience together. When your agents have the tools they need to collaborate and engage customers where they are, it's easier for them to reduce escalations, follow-ups, and process time.

However you seek to modernize your service operations, use the guidance in this e-book—and a solution that helps agents resolve cases faster like Microsoft Dynamics 365 Customer Service—to get more out of your technology investments without added complexity and risks.

Read the next e-book in this series and learn how to use the service sophistication model to elevate customer satisfaction with automated, structured processes.

Continue the e-book series:
Optimizing Service Operations

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