

Digitally Transforming the Customer Experience:

A blueprint for customer
service leaders



1.

Omnichannel engagement:

Connect with customers on
the channel of their choice

[Page 06](#)

2.

Intelligent self-service:

Help customers help themselves

[Page 10](#)

3.

Accelerate resolution:

Enable agents to close cases
faster with AI and data

[Page 14](#)

4.

Optimize with data:

Maximize efficiency and run
your business lean

[Page 18](#)

Pick any industry:

Chances are, competition for customers is fierce—and it hinges on the customer experience you can deliver. Before, during, and after purchases, customer service is the key. Great service makes customers feel understood and cared for on a personal basis. It drives revenue, loyalty, and repeat business.

96% of customers will leave without warning if they experience poor customer service. ¹

But expectations are high. Customers expect responsive, personal assistance 24/7, throughout their journeys. They want it on the channel of their choice, whether it's social, chat, email, phone, or in person. There's no question that technology choices can make or break your ability to meet growing demand.



¹ [Ninety-Six Percent Of Customers Will Leave You For Bad Customer Service, Forbes, 2020](#)

The right technology makes service excellence possible

Modernizing legacy systems is key to keeping pace with how customers communicate and engage today. Competitive service requires technology that:



Supports consistent, omnichannel engagement, helping customers receive a personal and connected experience.



Enables intelligent self-service to maintain personalization while using resources efficiently and scaling your teams.



Gives agents the tools and data they need to gain a 360-degree view of customers.



Empowers agents with AI that enhances efficiency by providing the right information at the right time.

Companies that view customer service as a value center achieve 3.5X more revenue growth than those that view customer service as a cost center. ²

By taking advantage of a modern, cloud-based platform, service leaders can stay at the forefront of the customer experience revolution. Digital transformation can unify formerly disconnected tools and data to make life easier for customers and agents alike—

while reducing IT cost and complexity. These technologies help organizations do more by offering customers robust, personalized self-service experiences and optimizing agent efficiency.

In this blueprint, we'll cover four key areas of customer service excellence, the role of technology in each, and how leading companies are making it happen. In each section, we provide suggestions for technology choices that can enable key capabilities, along with space for you to consider where you are today and what you need to level up.

² [Accenture Report Finds 3.5x Revenue Growth for Companies that View Customer Service as a Value Center](#), Accenture, 2022



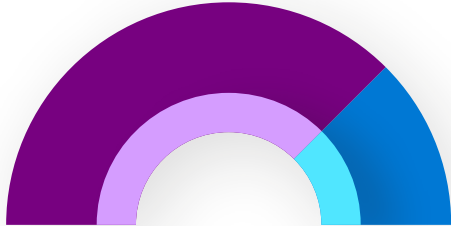
1 Omnichannel engagement:

Connect with customers on the channel of their choice

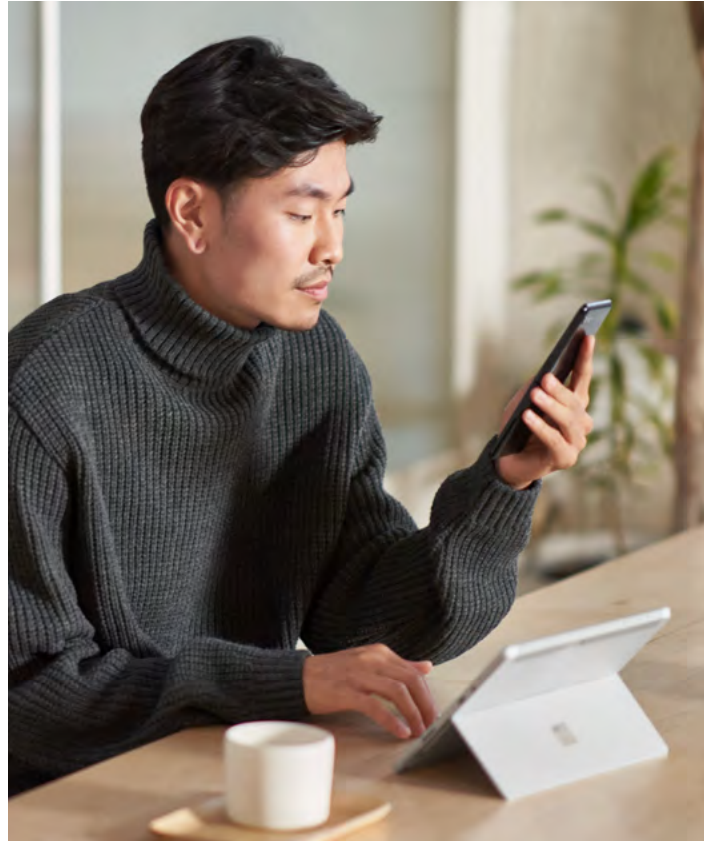


The first principle of customer service today is to show up where and when your customer wants you. No matter which channel they choose, they expect the interaction to be personalized and efficient. If your competition delivers on these expectations more effectively, they will win the customer's business.

Many companies scrambled to deploy new channels during the pandemic-driven digital wave. In other cases, organizations have simply accumulated disparate technologies over time. Both face the challenge of delivering a unified experience.



74% of respondents say creating a seamless customer journey across assisted and self-service channels is "important" or "very important." ³



At NatWest Bank, one of the largest banks in the UK, the channels were there, but the single customer view was lacking. **"What we need is a way to stitch together all those different interactions with the customer,"** says Andrew Harrison, Head of Business Banking at NatWest.

To achieve that goal, the company adopted a cloud-based customer service solution from Microsoft.

³ 2022 Customer Service Trends and Priorities, Gartner®, as of November 2022

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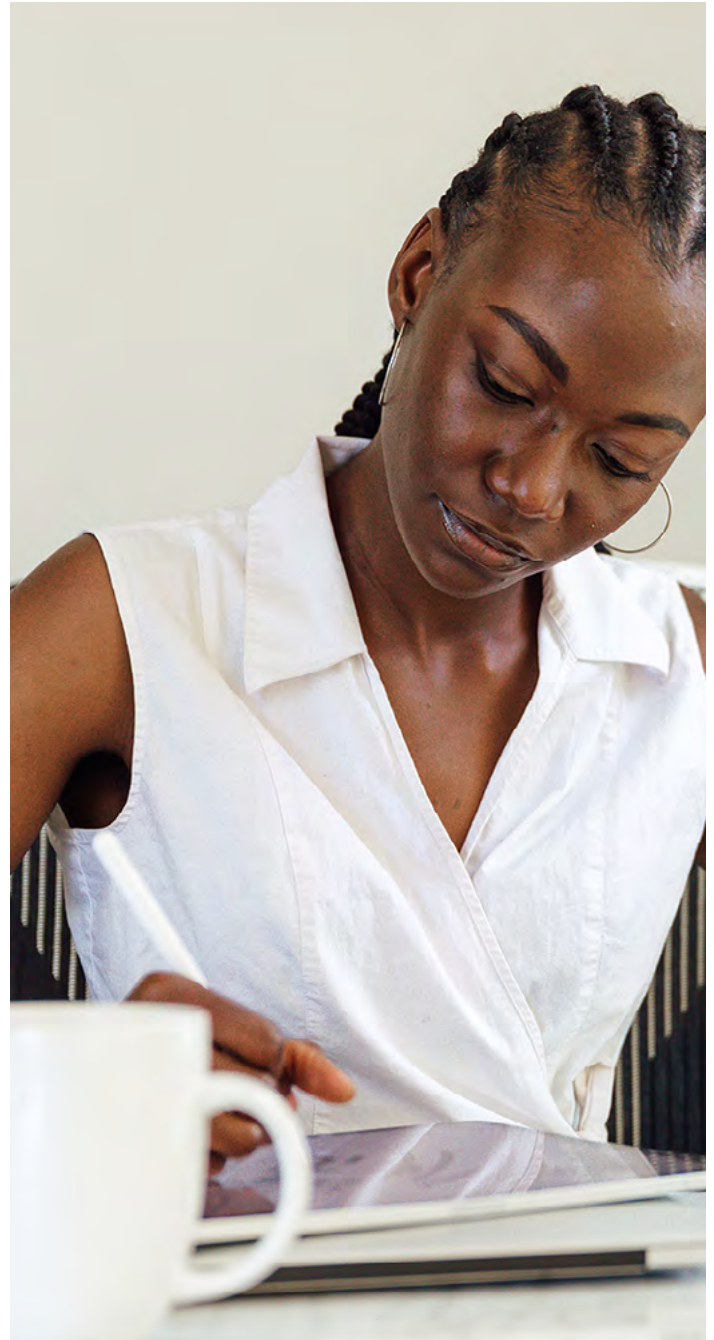
We've got that seamless one single view of the customer so they can start off their journey on the website, for example, but we would know all that interaction through this platform, whereas previously we didn't have that kind of information."

Rashpal Martin

Head of Relationship Management at NatWest.

Read the customer story: [Digitalization brings benefits for business customers at NatWest >](#)

With a platform designed from the ground up to unify customer data throughout the journey, you can maximize freedom of choice for the customer while maintaining the unified identity that supports personalization.



Omnichannel experiences: Service leader’s checklist

Strategic goal	Solution	What we have	What we need
<p>Deliver a personalized and connected customer experience across channels</p>	<p>A single platform for voice, chat, email, SMS, and social engagement enables a 360-degree view of customers for seamless transitions among channels and informed agent interactions.</p>		
<p>Provide faster and seamless service to customers on their channel of choice</p>	<p>Tools such as callback management and asynchronous messaging give customers increased control and reduce the time they spend getting their problems solved.</p>		
<p>Understand the customer’s emotions and needs and route the case to the right agent, every time</p>	<p>Live sentiment analysis and advanced AI provide a pulse on customer emotions and needs across channels, while intelligent routing delivers cases to agents based on skillsets and analysis of past performance.</p>		

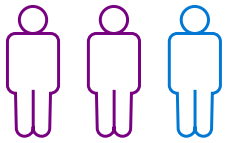
2

Intelligent self-service:

Help customers
help themselves



Customer service leaders pride themselves on their ability to solve challenges and build rapport with customers. However, customers increasingly want self-service options that are fast, easy, and convenient. This can be a win for companies looking to manage call volumes and agent workloads.



In a McKinsey survey of customer care leaders, nearly two-thirds of respondents who successfully decreased their call volumes identified improved self-service as a key driver. ⁴

The growing power and versatility of interactive voice response (IVR) create new possibilities for engaged, personalized self-service. With IVR, organizations can anticipate and respond to caller's needs, proactively



provide information, and facilitate rapid self-service. These AI-powered chatbots can replace the robotic, one-size-fits-all voice menus with contextual, human-like interactions that increase customer satisfaction and comfort. Additionally, the ability to create, curate, and update your knowledge base—and to integrate it with self-service technologies—gives your customers immediate access to a single source of truth to guide them.

⁴ [Customer care in 2022 and beyond](#), McKinsey, 2022

The Miami Dolphins football team used IVR to free its service agents from repeatedly answering routine questions. It chose Microsoft Power Virtual Agents as a platform, which makes it easy to build and update conversational IVR chatbots that speak to customers when they call in. The bot they created handled more than 40,000 conversations and has successfully resolved 97% of them, leaving the remainder to service agents, who now have more time to focus on delivering exceptional service.

Business users can update the information database used by the chatbot whenever needed instead of having to wait for the IT department. That means visitors always have current, accurate information.



With Power Virtual Agents, we've taken a lot of the manual work out of customer service and empowered ourselves to provide amazing experiences for the people coming here."

Maxwell Stiss

Director, Delivery, Information Technology
for the Miami Dolphins.

Read the customer story: [The Miami Dolphins give fans the information they want when they want it with Power Virtual Agents >](#)

Intelligent self-service: Service leader’s checklist

Strategic goal	Solution	What we have	What we need
Quickly resolve customer inquiries through intelligent, human-like interactions	A virtual agent can be used as IVR for the voice channel and also as a chatbot for SMS, live chat, and social messaging channels. This reduces the effort needed to create and maintain self-service experiences and provides consistency across channels.		
Provide customers with immediate access to the right content and knowledge articles	Intuitive, workflow-driven knowledge management capabilities, coupled with AI-driven suggestions surfacing the right information at the right time, provide a comprehensive single source of truth for customers and agents alike.		
Collaborate and share tips and rich insights with personalized community portals	Low-code tools make it simple to create external-facing websites that allow users outside the organizations to sign in, create and view data, and browse content.		

3

Accelerate resolution:

Enable agents to close cases faster with AI and data



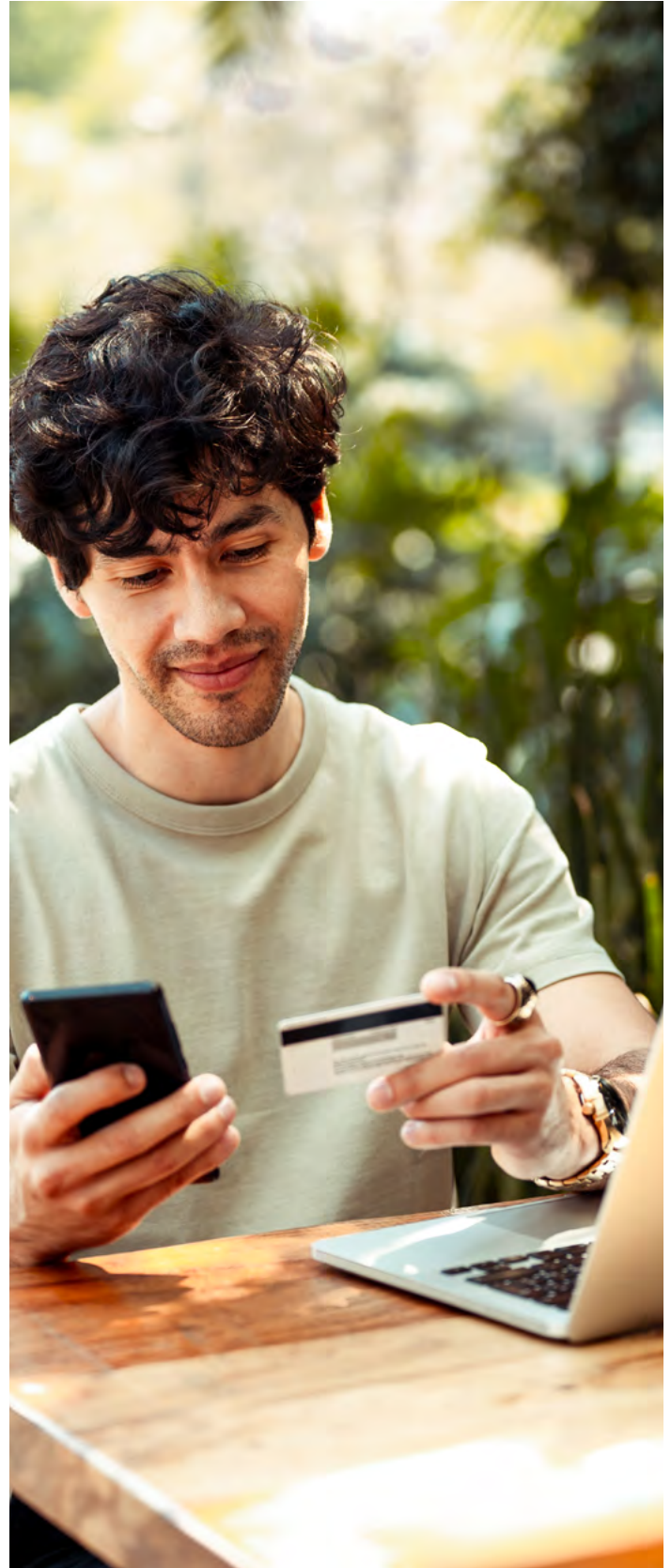
The right data at the right time is key to empowering agents to meet customers' needs quickly and accurately. However, as omnichannel customer profiles grow, agents need tools that proactively surface insights that matter in the moment.

Advancements in AI technology, especially natural language understanding, enable real-time analysis of conversations and the ability to surface real-time insights and knowledge. Agents can be alerted to similar cases and successful resolution steps, along with knowledge suggestions customized for the current context. All of these capabilities help agents solve customer issues more quickly, improving resolution rates and customer satisfaction.



A global survey of 11,500 consumers reports that timely offers and knowledgeable customer service are the most important factors in driving purchase decisions. ⁵

⁵ [Using AI to improve end-to-end customer experience](#), Deloitte Insights, 2021



Trustmark adopted an AI-enabled platform to improve customer service metrics, such as resolution time and customer satisfaction scores, and create a seamless omnichannel experience for its customers and partners.

“In the past, our customer service agents spent a lot of time looking for information while customers waited on hold,” says Brad Bodell, Chief Information Officer at Trustmark.



Using Dynamics 365 Customer Service, agents get all the information they need rapidly. Our average resolution times have gone down—and we’ve seen agent retention improve too.”

Brad Bodell

Chief Information Officer at Trustmark.

Read the customer story: [Microsoft Customer Story-Trustmark increases customer engagement with omnichannel CRM platform on Dynamics 365 >](#)

Faster resolution through AI: Service leader’s checklist

Strategic goal	Solution	What we have	What we need
Improve agent productivity	AI-driven case and knowledge article suggestions based on case context and historical success rate, giving agents data-driven tools for improving resolution times.		
Provide a 360-degree view of the customer	Sentiment analysis enables agents and supervisors to see and react to customer satisfaction levels instantly during a case.		
Collaborate with colleagues, supervisors, and experts across the organization	Using collaboration features, agents can find experts, chat with peers in an integrated collaboration platform, and set meetings. Collaboration helps turn your business into a unified and cohesive customer service center.		

4

Optimize with data:

Maximize efficiency and run your business lean



Many customer service leaders are making it a priority to transform their departments from cost centers to growth centers. At the same time, they face continuous pressure to keep costs down.

Unifying tools onto a single, cloud-based platform reduces redundancy and enables cost flexibility to meet changing business conditions. If that platform has an open architecture and no-code/low-code development capabilities, the time and cost of development can be dramatically reduced—putting innovation within reach across the organization.

Westpac, a leading bank in New Zealand, transitioned its on-premises CRM environment to a cloud-based platform. Thanks to the resulting process automation capabilities, each week employees are saving 3,850 hours—the equivalent of more than US\$120,000.

The company is also taking advantage of low-code development capabilities to solve business challenges faster than ever. **“Power Apps has opened up the door for us to quickly develop new applications, while Power Platform has allowed us to better serve our customers with more streamlined, automated processes,”** says Mo Alwani.



We can compare the data quality in real-time, ensure inconsistencies are picked up, and reassure both our regulators and our team that the bank’s customer data is of the highest quality. The benefits reach all the way to our customers, who ultimately experience a more accurate and timely service.”

Mo Alwani

Tech Lead for Business Services at Westpac.

Read the customer story: [Leading New Zealand bank transforms customer experience with Dynamics 365 >](#)

Optimize with data: Service leader’s checklist

Strategic goal	Solution	What we have	What we need
Gain operational insights	Integrated dashboards display charts and metrics to help you understand the factors that can improve customer service for your organization.		
See trends instantly	Key performance indicators and visual breakdowns of your organization’s support cases are coupled with AI-generated insights on cases and topics that contribute to overall trends.		
Eliminate manual processes	AI-driven topic clustering and insights help identify support topics driving high assisted support response rates, automate them through virtual agents, and free up agents to handle more complex issues for customers.		

Level up your customer service with Microsoft

Customer experience is the engine of brand success. By adopting comprehensive, yet flexible cloud solutions, service leaders can meet growing customer expectations, empower agents to be more productive, and maximize efficiency across the organization.

Optimize your service with Dynamics 365 Customer Service

- 48% | expect to see higher CSAT with call outcomes by improving agents' access to internal collaboration tools ⁶
- 80% | decrease in call backlog ⁷
- 73% | decrease in average agent handling time ⁸
- 50% | time savings due to improved agent productivity ⁸
- 15% | improvement in first call resolution ⁸
- 131% | return on investment ⁸

⁶ Boost your CX with a Better Integrated Contact Center, CRM, and Collaboration Systems, a commissioned study by Forrester Consulting, April 2021

⁷ The Total Economic Impact™ of Microsoft Dynamics Customer Service, a commissioned study by Forrester Consulting, August 2020. Result achieved by interviewed government agency.

⁸ The Total Economic Impact™ of Microsoft Dynamics Customer Service, a commissioned study by Forrester Consulting, August 2020.

When pursuing cloud migration and digital transformation, there are many capabilities to consider: a unified customer record, intelligent self-service, AI, analytics, and automation, among others.

With Microsoft customer service solutions, you don't have to choose. You gain a flexible, scalable, integrated ecosystem that allows you to build on what you have today and grow into your strategic future—supported by an organization committed to empowering every member of your team to deliver customer-centric innovation.

[Find out how Microsoft can help you deliver seamless, end-to-end customer service >](#)



Microsoft Dynamics 365

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