

A Microsoft Dynamics Customer Solution Case Study

 **Microsoft**
DYNAMICS 365
FOR CRM

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DIRECTION
Software LLP



Customer Journey in Banking Sector

A milestone was achieved in the history of Direction Software LLP in the year 2007 by stepping into the Banking domain catering to the implementation of Microsoft CRM Version 3.0 for a major International Bank.

It has been a proud and successful journey of more than a decade (until this hour of the day) of providing support to this Bank on the application built upon Microsoft Platform and the agility in the design provided by Direction Software LLP has allowed this Bank to remain on the same Microsoft stack and proudly choose Direction Software LLP for not only regular AMC of the application built but also for upgrading themselves on the newer version of Microsoft Dynamics 365.

It started with implementation of Customer Service Module and then scaled up to various other business processes being mapped in the XRM modules of CRM.

They were looking for a solution to address the pain areas that needed immediate attention and were of immense criticality to the reputation of the in-house Customer Service team by resolving the queries, complaints, requests to all of their customers.

With 800+ customer service team using the Microsoft CRM 24*7, the solutioning of the pain areas was crafted in conjunction with functional & technical team working in tandem.

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Benefits: What did the new solution provide them?

Single Platform: A unified platform that integrates seamlessly with the other core banking solutions to ensure one call resolution is provided to the end customer by the customer service executive.

MIS & SLA tracking: with a custom SLA built for this Bank, feature allowed to auto escalate the cases if the threshold has elapsed.

Risk Calculator: Calculating the risk of the customer using different parameters and dynamic configuration to achieve the same. This helped the Bank not only to identify which are the big risk customers but also to upsell or cross sell to the existing customers. And other host of custom feature that helped them enrich the end customer experience.

Solutions: How we did it?

Direction Software LLP, firmly believes in the Sure-Step Methodology which is a comprehensive client engagement methodology - outlining the best practice processes necessary to implement Microsoft Dynamics solutions and write customer success stories.

Diagnostic: Right even before we kick started the project we thoroughly studied the detailed proposal for the overall project implementation, detailing all required license and service cost etc. to ensure that nothing goes amiss.

Analysis: In this phase, we compiled the fit gap analysis spreadsheet, matching the business requirement with Dynamics functionality and identifying any gaps where customization was needed. Needless to say, our team put together a functional requirement document, which helped us develop detailed requirements by role and functions.

We also put together a series of communication and training plans, helping us establish communication channels and types of training for different stakeholders within their business. Our team also put together a future state business workflow, stating how their core business processes would be accomplished with our new solution.

Design: Here we configured the solution, designed the customization that need to be perfectly met with their business requirements. We also created test script role by role, function by function to meet the critical business requirement and also helped us map out the process, which helped us to migrate the data from the current solution to a new one.

Development: Here all the customization that were determined were completed by system configuration screens, field security, roles ensuring the acceptance of system in training makes the user happy with the new system.

Deployment: Got the entire team together ensuring that the new Microsoft dynamics solution transition takes place effectively, conducted the end user training, prepared final system readiness plan for go live, and the final system acceptance testing ensured all the business requirements are met allowing us to determine the date & time for cut over and ensuring all the system data is migrated to the new solution.

Operation: Closing of the project was a heavy moment for us, but the ongoing support, reviewing the deliverables against the SOW helped us making the AMC of the product seamless. We also established an ongoing testing strategy and conducted a disaster recovery test for security purposes.