



How **Direction Software LLP** helped a major **International Bank** in Saudi Arabia to enhance its Customer Services with the latest **Microsoft Dynamics 365 CRM**

Microsoft Dynamics 365 CRM Case Study

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DIRECTION
Software LLP



Solution Implemented:

Microsoft Dynamics 365 Customer Service Module and Sales Module of Dynamics 365 is a powerful tool used by the Bank to provide exceptional customer service and increase the sales effectiveness.



The Need for an Upgrade

- The client was using **Microsoft CRM 2011 On-Premise**, which was 5 generations old
- It was using the outdated technology and there were speed issues which resulted in slow opening of forms, and even the system getting hung
- The application was no longer supported by latest browsers like Chrome and Firefox or by the latest Windows Server



Direction Software LLP have upgraded the **CRM to Dynamics 365 v9.0 On-Premise**. Many features and entities which were customized in MSCRM 2011 were changed in D365 using the out-of-box features. Few examples are by way of configuring the SLA Module, Email Templates and using the OOB entities.

There were many features which were hard coded and were changed to Dynamic in D365 CRM using the Out of the Box feature.

The Solution:

The Customer Service Module helped the Bank in the following areas:

- **Manage customer inquiries:** Managing customer inquiries across multiple channels, including email, phone, SMS. The module provides a **unified view** of all customer interactions, allowing banks to provide a seamless and consistent experience to their customers
- **Automate case management:** Case management processes, including case creation, assignment, and escalation were automated. Banks used the Customer Service Module to define workflows and routing rules based on the nature and priority of the case, ensuring that cases are handled efficiently and effectively
- **Track service level agreements (SLAs):** The Customer Service module allowed the bank to define and track SLAs for different types of customer inquiries. This ensures that the bank meets its service commitments and provides a high level of customer satisfaction
- **Integration with other systems:** The Customer Service Module was integrated with multiple systems like the legacy system, Membership Rewards management system, Notification system, Courier partner system for example Blue Dart, DHL etc. This integration helped the users to get a unified view of the customer and provide personalized and contextualized service to their customers
- **Lead Management:** Effective tracking of leads via different sources and assignment to the right team to manage their sales pipeline more effectively, increase efficiency, and improve their ability to close deals, which can ultimately lead to increased revenue and profitability



About Direction Software LLP

We are a software services firm, specializing in developing & implementing Internet strategies for businesses & providing high-end software development services including Custom Programming & Offshore Development.

With 17,000 sq. ft. of space in a modern building in central Mumbai the hub of all business activities in Mumbai, Direction Software LLP is fully equipped with state-of-the-art infrastructure and networked with redundant 6 MBPS dedicated internet access from different providers.

Our vision is to be a trusted IT partner, leveraging our knowledge of tools and technologies to provide simple, integrated and innovative solutions that result in maximum customer satisfaction.

What the CRM Upgrade provided:

Overall, the Customer Service module of Dynamics 365 helped the Bank to further improve on it's already exceptional customer service and exceed customer satisfaction.

The Sales Module helped in increased revenue.

- **Improved User Interface and Functionality:** Dynamics 365 has a more modern and intuitive user interface compared to CRM 2011, which can help improve user adoption and productivity. Dynamics 365 also offers new features and functionality that can enhance business processes and improve overall efficiency
- **Enhanced Integration with other Microsoft Products**
- **Improved Customer Insights:** Dynamics 365 includes advanced analytics capabilities that allow organizations to gain insights into customer behavior and preferences. This can help improve customer engagement and retention, as well as inform business strategy and decision-making

Overall, upgrading from CRM 2011 to Dynamics 365 can help organizations improve their business processes, increase productivity, and gain deeper insights into customer behavior. It also offers enhanced security and support, ensuring that the system is always up-to-date and secure.

