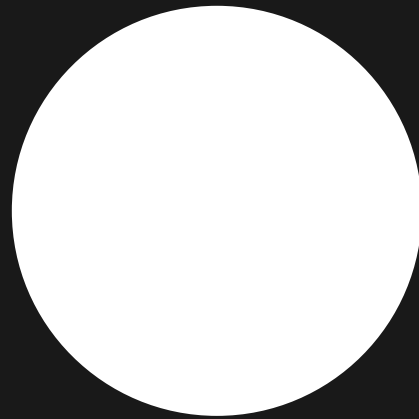


# A Quick-Start Guide to Building Resiliency with Customers



From protecting frontline workers to establishing distributed sales teams, organizations face unprecedented change. At the same time, their customers and employees need consistent, empathetic, and impactful experiences more than ever.

Organizations need to learn fast and evolve with agility, delivering meaningful engagement across existing and new channels and touchpoints.

This guide explains key workforce transformation scenarios to help you respond to rapid change—and even crises—just as fast, using data to drive confident decisions. For each scenario, we'll explore a short list of questions to understand your current situation, activities to plan for what's next, and resources to get started.

## **Pick a goal**

Click the arrows to choose where you want to start.

## To keep a pulse on your customers and employees...

Ask yourself these questions to help understand your situation.

- 1 How many channels/touchpoints do you use to connect with your customers?
- 2 How do you capture employee and customer feedback?
- 3 How easy is it to create and distribute surveys to your customers or employees?
- 4 Do you have deep and timely insight into how customers view your brand?
- 5 How do you make customer sentiment visible across customer support, sales, and marketing teams?

Use these activities to plan what's next.

Inventory current channels of customer interaction, how they have evolved, and new channels to consider.

Look at feedback mechanisms you use today and rate them on ease of use, omnichannel capabilities, and ability to use the data across your business.

Streamline survey creation and distribution using templates, standard question sets, and omnichannel feedback capture.

Analyze customer data for characteristics that support targeted marketing.

Pilot and iterate ways to empower decision makers with actionable data insights.

Quickly distribute customized surveys at the right moment and generate actionable insights with data across your existing business processes.



Get started with these resources:

- Hear how [Australian Red Cross](#) safely connects volunteers to those in self-isolation.
- Read how [DHI](#) deepens customer relationships.
- Learn about [Microsoft Forms Pro](#).

## To create buying experiences that build customer trust...

Ask yourself these questions to help understand your situation.

- 1 What percentage of your revenue comes from online channels and what factors limit its growth?
- 2 How effectively can you personalize customer experiences across channels and the buyer journey?
- 3 Do you offer safe, secure, contactless shopping experiences for your customers, and if not, what would it take to get there?
- 4 What data do you need to improve customer engagement and increase sales efficiency?
- 5 How do you analyze customer behavior and marketing attribution across digital and physical touchpoints?

Use these activities to plan what's next.

Adapt to rapidly changing business conditions and customer behavior with robust and flexible omnichannel commerce capabilities.

Enable personalization, omnichannel reach, and insight-driven decision-making with an intelligent e-commerce system.

Ensure customer safety and drive sales with contactless shopping experiences such as curbside collection, home delivery, and buy-online-pick-up-in-store.

Unify data and analyze it for insights to drive sales, customer experience improvements, cost savings, and strategic decisions.

Deliver an omnichannel customer experience to grow customer loyalty, brand affinity, and customer lifetime value.

Personalize buying experiences across digital and physical storefronts with a unified omnichannel and back-office solution that streamlines shopping experiences, increases employee productivity, and optimizes store operations.



Get started with these resources:

- See how [Chateau Ste. Michelle](#) enhanced the customer experience.
- Learn how you can [create personalized experiences](#) by putting customers first.
- Learn about [Dynamics 365 Commerce](#).

## To respond to your customers quickly during crisis...

Ask yourself these questions to help understand your situation.

- 1 How quickly can you launch email or multi-channel campaigns?
- 2 How long does it take to make customer data from multiple systems actionable?
- 3 What guidance is available to customers and is it effective across channels?
- 4 What can you do to help your teams be more available to customers in the channels they prefer?
- 5 How do you prioritize customer service and support interactions?

Use these activities to plan what's next.

Outline policies, procedures, and responsibilities in a communication readiness plan.

Empower staff to improve customer service and engagement providing innovative tools and the training to use them effectively.

Improve the cost-effectiveness of email and multi-channel marketing campaigns by using customizable templates and user-friendly design tools.

Free employees to focus on valuable tasks and challenging cases by automating routine tasks and questions using AI.

Unify customer engagement with an omnichannel service, support, and marketing solution.

Respond rapidly using insights to distribute timely communications and multi-channel campaigns that personalize the buyer experience and increase demand.



Get started with these resources:

- Read how [Team Rubicon](#) serves communities during crisis.
- See how [TruGreen](#) enables customers to do business on their own terms.
- Learn about [Dynamics 365 Marketing](#) and [Dynamics 365 Customer Insights](#).

## To establish your distributed and remote service team...

Ask yourself these questions to help understand your situation.

- 1 How could remote or virtual agents benefit your customers and your business?
- 2 What capabilities do you need to find, hire, onboard, and retain a remote service workforce?
- 3 Which systems do your service team require that are currently inaccessible for remote workers?
- 4 How often do you see new service needs emerge that significantly shift volume, CSAT, or handle time?
- 5 What issues do you anticipate when supporting employee engagement and growth in a remote work scenario?

Use these activities to plan what's next.

- Explore a self-service plan to augment your workforce with chatbots to manage demand and lower costs.
- Identify solutions and strategies to drive engagement for distributed and remote service teams.
- Identify opportunities to adopt cloud-based solutions that support secure remote access to key capabilities.
- Evaluate how KPIs related to topic, channel, and CSAT should evolve based on changing customer and business needs.
- Increase the agility of your teams to pivot to emerging issues and collaborate across business silos.

Empower your service teams to resolve issues faster through intelligent recommendations, automated workflow processes, and omnichannel engagement.



Get started with these resources:

- Watch how automation can support [exceptional customer service](#).
- Learn about [Dynamics 365 Customer Service](#).

## To keep your frontline workers and experts safe...

Ask yourself these questions to help understand your situation.

- 1 Which tactics are most important for employee wellness, and what do you need to deploy them?
- 2 How will travel limitations affect your workforce capacity?
- 3 How effectively can your technicians provide remote service and maintenance, review projects, and visualize equipment?
- 4 What solutions do you have for onboarding and training a remote workforce?
- 5 Are you able to shift to remote inspections and audits? What would enable this shift?

Use these activities to plan what's next.

Confirm the percentage of your workforce who have mobile devices capable of supporting remote wellness check-ins.

Identify channels for sharing knowledge and guidance among remote employees.

Explore the use of mixed reality technology to support remote guidance for field service.

Nominate remote work champions willing to help drive training and upskilling programs.

Brainstorm how inspections and audits can be executed remotely using digital technology.

Empower your first-line workers to solve problems faster and more efficiently by working together from anywhere on HoloLens, iOS, and Android devices.



Get started with these resources:

- Watch how to [keep frontline works safe and connected](#).
- Learn about [Dynamics 365 Remote Assist](#).

## To create a remote sales organization...

Ask yourself these questions to help understand your situation.

- 1 Do you expect a permanent shift to remote selling for a percentage of your workforce? If so, what percentage of your sellers will be remote?
- 2 Is your team ready to scale and pivot quickly to adapt to changes in demand?
- 3 How do remote sellers stay focused and productive while working on multiple deals? Do your sellers have leads automated and prioritized?
- 4 How do remote sellers build strong relationships with customers throughout the sales cycle?
- 5 Do sellers have the right skills and organizational support to succeed in remote selling?
- 6 Are your sales and marketing teams aligned?

Use these activities to plan what's next.

Explore a flexible solution that supports a wide range of sales models, from physical to digital to any mix in between.

Identify solutions that help your team adapt with agility, such as e-commerce self-service, live chat, and chatbots.

Investigate how AI can help sellers prioritize activities.

Proactively track relationship health, and efficiently move deals forward based on data.

Identify online learning solutions that simplify sales teams re-skilling, and capture seller sentiment with surveys.

Align sales and marketing with shared data and coordinated campaigns to reduce costs.

Enable smarter selling with contextual insights that build customer relationships at scale with authentic and personalized customer engagement.



Get started with these resources:

- See how [Microsoft](#) accelerated digital selling.
- Watch how to personalize [digital selling experiences](#).
- Try the free [LinkedIn Learning Path](#) for sales professionals.
- Learn about [Dynamics 365 Sales](#).



## To optimize your resource scheduling...

Ask yourself these questions to help understand your situation.

- 1 Are your first-line workers optimally deployed based on location, skills, and service level agreements?
- 2 Is your resourcing meeting customer needs?
- 3 How high is your first-time fix rate? What would help it improve?
- 4 How many of your employees work in remote environments without connectivity?
- 5 Do your technicians have detailed site maps that enable them to assess quickly and safely?

Use these activities to plan what's next.

Find the gaps in your current systems for effective scheduling of first-line workers.

Research best practices for optimizing appointments based on customer preferences and availability.

Identify the right information and tools technicians need to fix problems and resolve issues the first time.

Brainstorm ways mobile devices can provide information and expertise employees need.

Explore technology to provide technicians with a virtual 360-degree view of assets.

Increase customer satisfaction by dispatching the right resource at the right time consistently to deliver quality, proactive, and predictive service.



Get started with these resources:

- See how [Navco](#) optimizes resources scheduling.
- Schedule resources intelligently with [resource scheduling optimization](#).
- Learn about [Dynamics 365 Field Service](#).

## To deliver fast, reliable, and on-time fulfillment...

Ask yourself these questions to help understand your situation.

- 1 How much visibility do you have into your logistics, inventory, and factory operations at any given moment?
- 2 How quickly can your supply chain and production facilities adapt to a dynamically changing and unpredictable customer demand?
- 3 How do you determine your optimum fulfillment strategy across multiple channels and warehouses?
- 4 How efficient is your purchase order process across vendors?
- 5 How are you preparing for future disruptions?

Use these activities to plan what's next.

Gain real-time, end-to-end visibility of your supply chain with a control tower.

Improve merchandise planning by stocking the right product at the right place at the right time in the right quantity to reduce overstocks and stock-outs.

Ensure cost-effective, on-time delivery with global inventory visibility and an intelligent distributed order management system.

Streamline purchasing and ensure business continuity through supply chain disruption with a solution that supports vendor sourcing, procurement, and collaboration.

Increase the resilience and agility of your supply chain with cloud-based systems that unify data for a single source of truth.

Build a resilient supply chain with enhanced visibility for agile planning, distribution, and fulfillment to maximize operational efficiency and profitability.



Get started with these resources:

- Learn how [Twilfit](#) responded to customer demand faster and reduced excess inventory.
- Hear how [Dr. Martens](#) implemented virtual warehouses with real-time stock visibility.
- Learn about [Dynamics 365 Supply Chain Management](#).

## To protect your revenue and your reputation...

Ask yourself these questions to help understand your situation.

- 1 What is the impact of fraud on your bottom-line?
- 2 What is your bank acceptance rate? How much do manual transaction reviews cost your business?
- 3 How do you defend your system against account takeover, including by bots?
- 4 How effectively can you prevent shrinkage in physical stores?
- 5 How much are you losing annually through return and discount fraud on a per-counter, per-store, or e-commerce basis?

Use these activities to plan what's next.

Compare the cost of your current fraud solution to the impact of fraudulent transactions.

Research options for improving bank acceptance rates while safeguarding customers from fraud and abuse.

Talk to your team about ways to reduce fraudulent account access, creation, and takeover.

Look for possible improvements in tracking and acting on merchandise mishandling and inventory turnover.

Test solutions for minimizing discount and return fraud.

Help protect your revenue and reputation by decreasing fraud and abuse, reducing operational expenses, and increasing acceptance rates.



Get started with these resources:

- Read how to [combat the three biggest fraud threats](#) in e-commerce purchases.
- Watch how to [detect fraud and lower costs](#).
- Learn about [Dynamics 365 Fraud Protection](#).

## Stay connected to customers

In a changing environment, it's more important than ever to maintain customer and employee trust. By taking steps to understand your situation and getting started on a plan to move forward, you can increase organizational resiliency to meet evolving needs and connect with people when they need it most.

Dynamics 365 integrates with Microsoft 365 on the trusted Microsoft cloud, bridging business processes, productivity, collaboration, and intelligent insights that power modern business. Further extend and scale Dynamics 365 to meet any business challenge with a host of intelligent cloud technologies powered by Azure cloud services.

**Need assistance meeting customer experience goals or checking off the boxes on this list? Our sales advisors are happy to help.**

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