

# Connect your field service. Deliver seamless customer experiences.

Microsoft Dynamics 365 Field Service

Steven Vlaanderen Oldenzeel  
Cloud Solution Architect



# Today's field service customer is expecting a seamless experience



**80%** of customers expect a personalized service experience



**58%** will sever relations with a business due to poor customer service



Loyal customers are **5x** more likely to purchase again

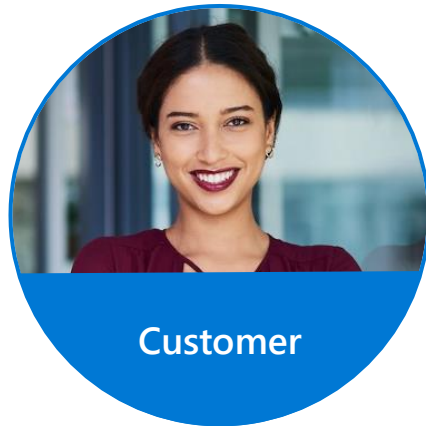
You need a **connected field service** that transforms your field operations by using data and intelligence to empower technicians and improve customer experiences.

<sup>1</sup> Forbes, [50 Stats Showing The Power of Personalization](#), 2020

<sup>2</sup> Microsoft, [Global State of Customer Service](#), 2019

<sup>3</sup> Forbes, [50 Stats That Prove The Value Of Customer Experience](#), 2019

# The shift in service is impacting everyone



**88%**  
expect  
self-service  
options<sup>2</sup>



**25%**  
field service organizations are  
still using spreadsheets and  
whiteboards for scheduling jobs<sup>3</sup>



**54%**  
of technicians say getting service  
history to help prepare for a  
visit is their #1 challenge<sup>1</sup>



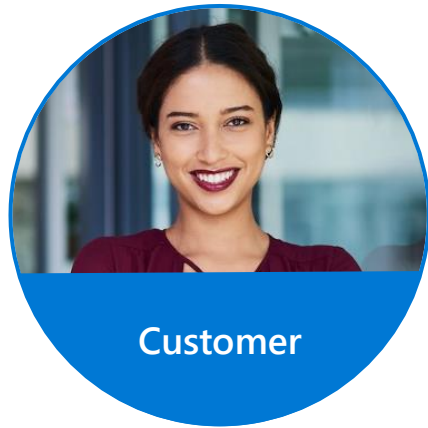
**92%**  
want to transform their  
service model to meet  
consumer needs<sup>3</sup>

<sup>1</sup> [111 Crucial Field Service Management Software Statistics: 2023 Market Share & Data Analysis](#)

<sup>2</sup> [The Future of Field Service](#)

<sup>3</sup> [36 Vital Field Service Management Statistics](#)

# We hear from our customers that they need to:



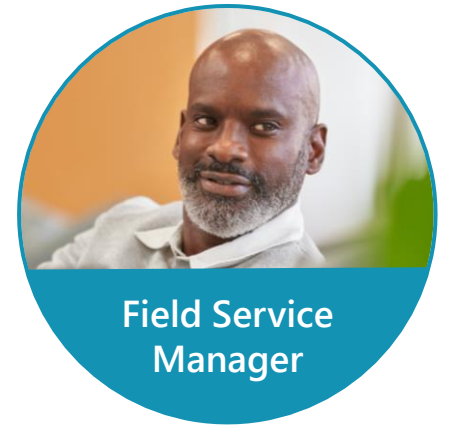
Personalize  
the service  
experience



Assign resources to  
solve customer  
problems quickly

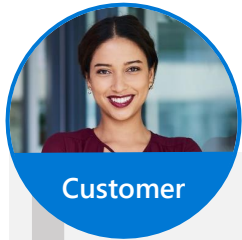


Fix customer problems  
the first time—  
every time



Gain cost-effective  
insights to improve  
customer experience

# Dynamics 365 Field Service



Customer

Personalize the service experience

Self-schedule service appointments

Automate customer communication and scheduling

Fix it right the first time



Dispatcher

Assign resources to solve customer problems quickly

Transparent and efficient work order scheduling

Optimize resources with interactive schedule board

Collaborate with technicians in real-time



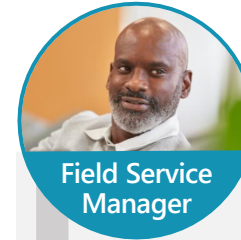
Field Technician

Fix customer problems the first time – every time

Manage assets and view service history via mobile app

Easily add and complete inspections

Get expert assistance remotely with Mixed Reality



Field Service Manager

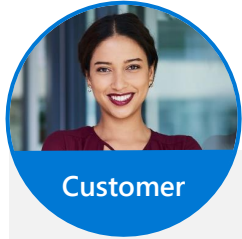
Gain cost-effective insights to improve customer experience

Seamlessly track performance metrics

Increase efficiency and standardize processes

Avoid equipment downtime through preventative maintenance

# You can do more with less with Dynamics 365 Field Service



Customer

Personalize the service experience to deliver exceptional **service as promised at the right time, the first time.**



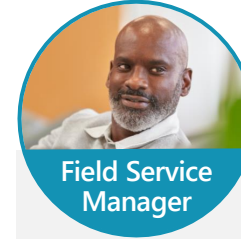
Dispatcher

**10% reduction** in dispatching technicians<sup>2</sup>



Field Technician

**50% reduction** in travel time<sup>2</sup>



Field Service Manager

**44% improvement** in SLA performance<sup>1</sup>

**18% increased** service profits<sup>1</sup>

**42%** better customer retention<sup>1</sup>

# Why Microsoft

1

Common data model  
across all business  
applications

16

Analyst reports where  
Microsoft is positioned  
as a Leader

500k+

Microsoft business  
application customers

97%

Fortune 500 companies  
use Business Applications

Leader

- **AI** with large language model (GPT3), ML, Azure Cognitive Services
- **Collaboration and productivity**, infused in business processes
- **Low-code platform** which is embedded in Dynamics 365



# Capabilities





# Personalize the service experience



Self-schedule service appointments



Automate customer communication and scheduling



Fix it right the first time



# Personalize the service experience

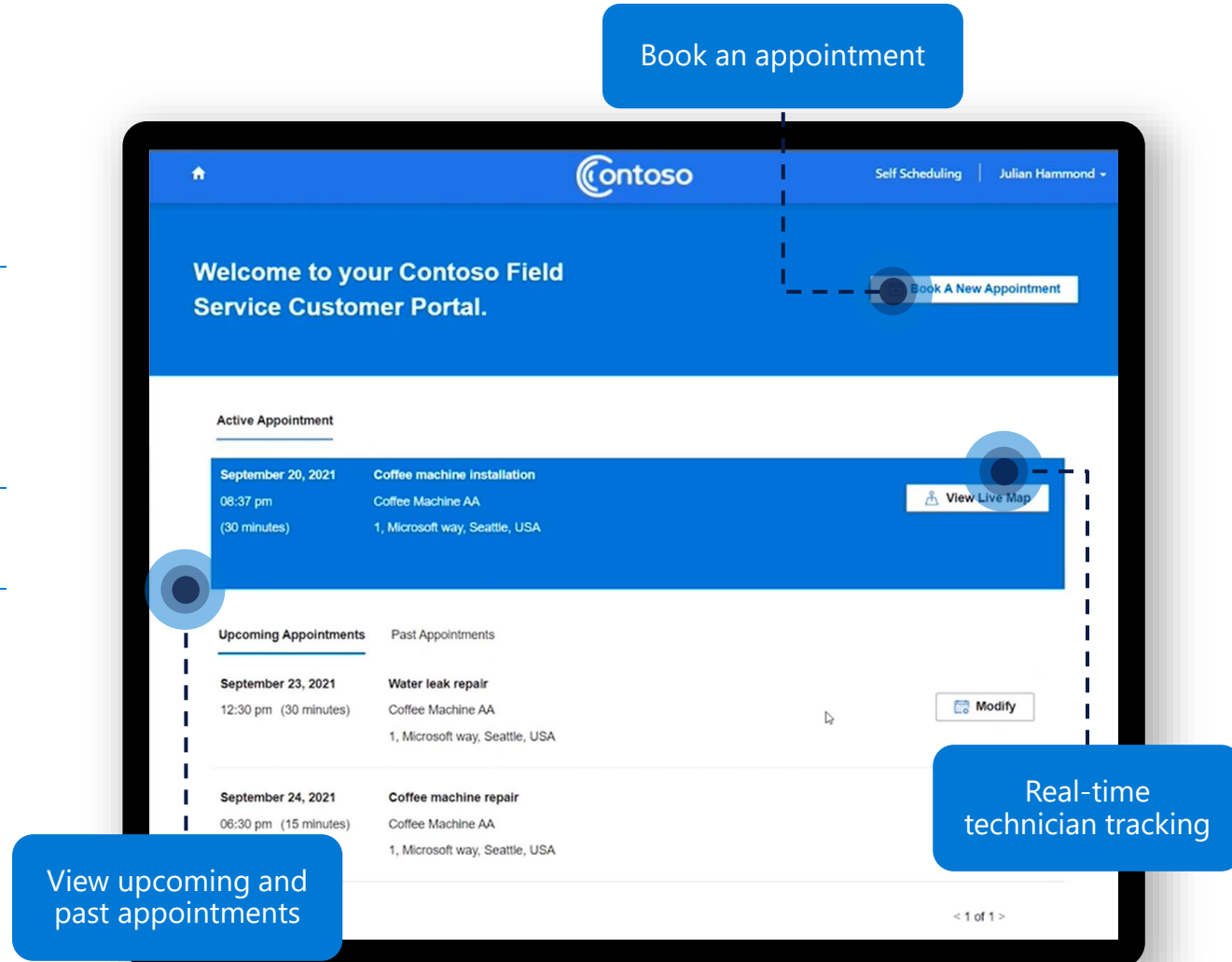
## Self-schedule service appointments

Single portal homepage for customer experiences and feedback

Provide transparency and visibility into service engagement, and collect pre-service information

View upcoming, active and past appointments

Built on Power Apps portal, brand customizable and accessible from any device



Book an appointment

Book A New Appointment

View Live Map

Modify

View upcoming and past appointments

Real-time technician tracking

< 1 of 1 >

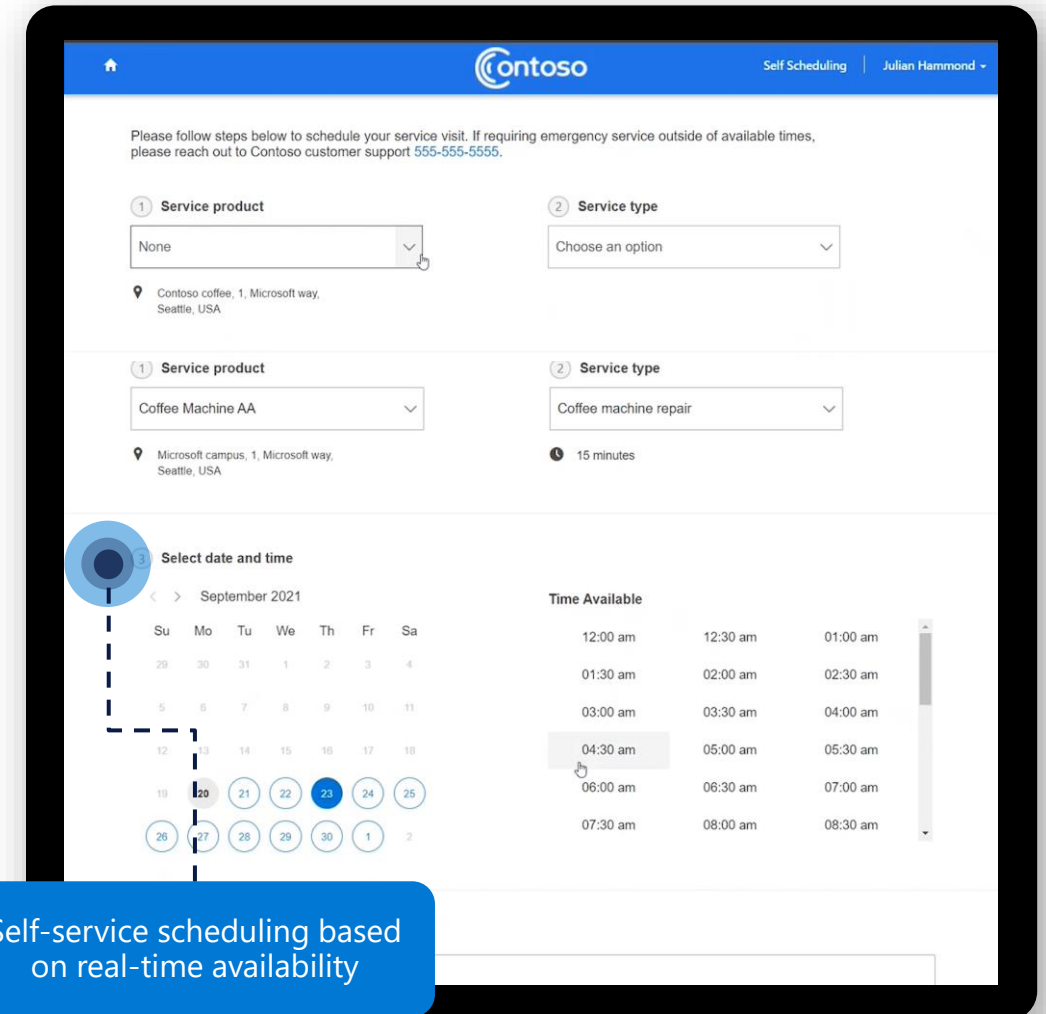
# Personalize the service experience

## Automate customer communication and scheduling

Enable customers to self-schedule, reschedule or cancel existing appointments and provide feedback on past appointments

Allow customers to create work orders

Available time slots based on real-time resource availability, location and skillset

A screenshot of a tablet displaying the Contoso self-scheduling interface. The interface is titled "Self Scheduling" and shows the user's name "Julian Hammond". It features a multi-step process to schedule a service visit. Step 1 shows "Service product" set to "None" and "Service type" set to "Choose an option". Step 2 shows "Service product" set to "Coffee Machine AA" and "Service type" set to "Coffee machine repair", with a duration of "15 minutes". Step 3 shows a calendar for September 2021 with the 23rd selected, and a "Time Available" table with slots from 12:00 am to 08:30 am. A blue callout box at the bottom of the screen reads "Self-service scheduling based on real-time availability".

Contoso Self Scheduling Julian Hammond

Please follow steps below to schedule your service visit. If requiring emergency service outside of available times, please reach out to Contoso customer support 555-555-5555.

1 Service product: None

2 Service type: Choose an option

Contoso coffee, 1, Microsoft way, Seattle, USA

1 Service product: Coffee Machine AA

2 Service type: Coffee machine repair

Microsoft campus, 1, Microsoft way, Seattle, USA

15 minutes

3 Select date and time

September 2021

Su	Mo	Tu	We	Th	Fr	Sa
29	30	31	1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	1	2

Time Available		
12:00 am	12:30 am	01:00 am
01:30 am	02:00 am	02:30 am
03:00 am	03:30 am	04:00 am
04:30 am	05:00 am	05:30 am
06:00 am	06:30 am	07:00 am
07:30 am	08:00 am	08:30 am

Self-service scheduling based on real-time availability

# Personalize the service experience

## Automate customer communication and scheduling

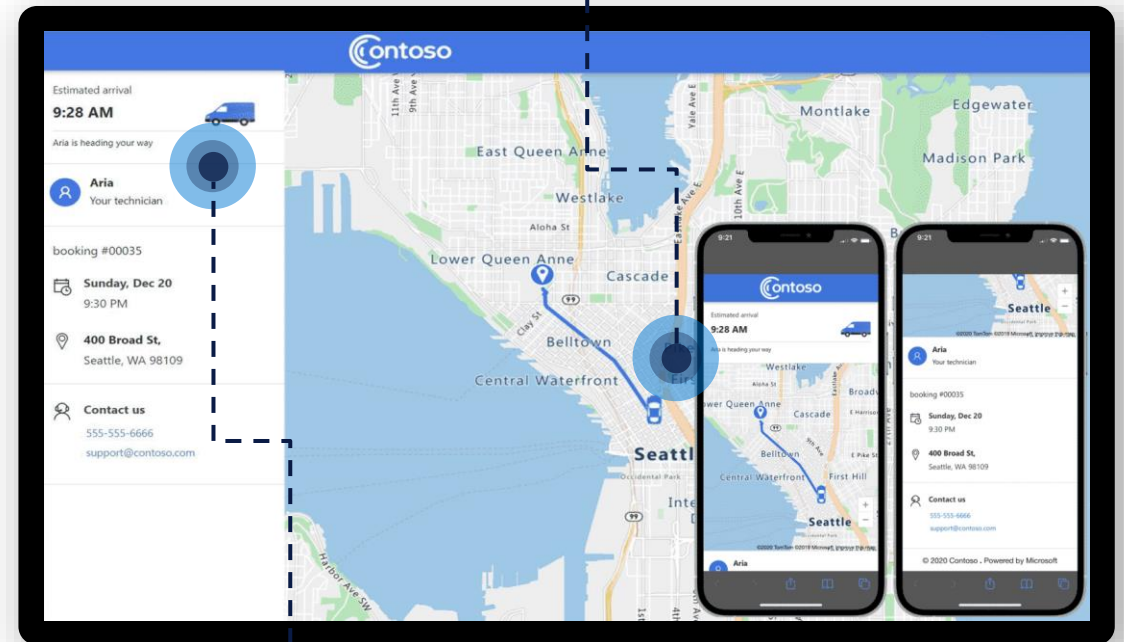
Provide customers automated service reminders and notifications via email and SMS

Notify customers of estimated technician arrival time

Share real-time location and travel duration of the frontline worker to the appointment



Provide real-time technician tracking via mobile or desktop



Provide technician information and estimated time of arrival

# Assign resources to solve customer problems quickly



Transparent and efficient work order scheduling



Optimize resources with interactive schedule board



Collaborate with technicians in real-time





# Assign resources to solve customer problems quickly

## Transparent and efficient work order scheduling

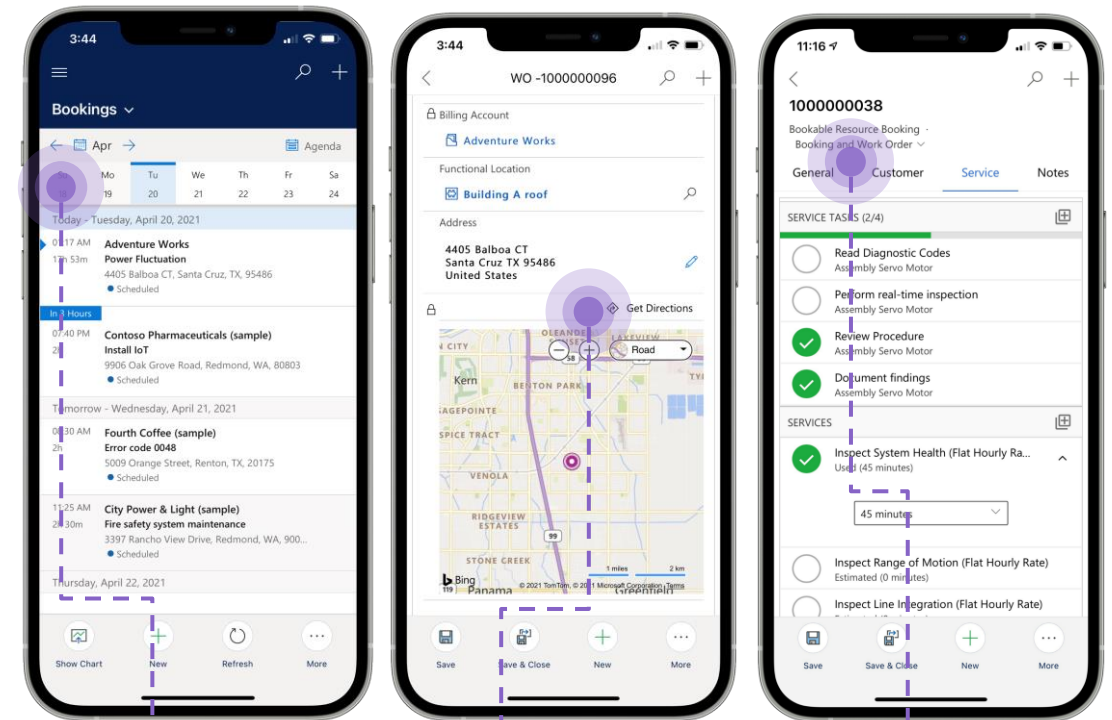
Access customer records or create new records on- and offline

Capture images, create videos and add mixed reality annotations to notes history

Easily collaborate with remote colleagues via Dynamics 365 Remote Assist or Microsoft Teams

Let technicians manage and access bookings, schedules, route mapping, and knowledge articles

Provide technicians with turn-by-turn directions



At-a-glance  
schedule

Route mapping  
and turn-by-turn  
instructions

View resource bookings,  
tasks and work orders



# Assign resources to solve customer problems quickly

## Optimize resources with interactive schedule board

Automatically schedules jobs to the people, equipment, and facilities best equipped to complete the job

Schedules high volume jobs at once, maximizing utilization and minimizing travel time

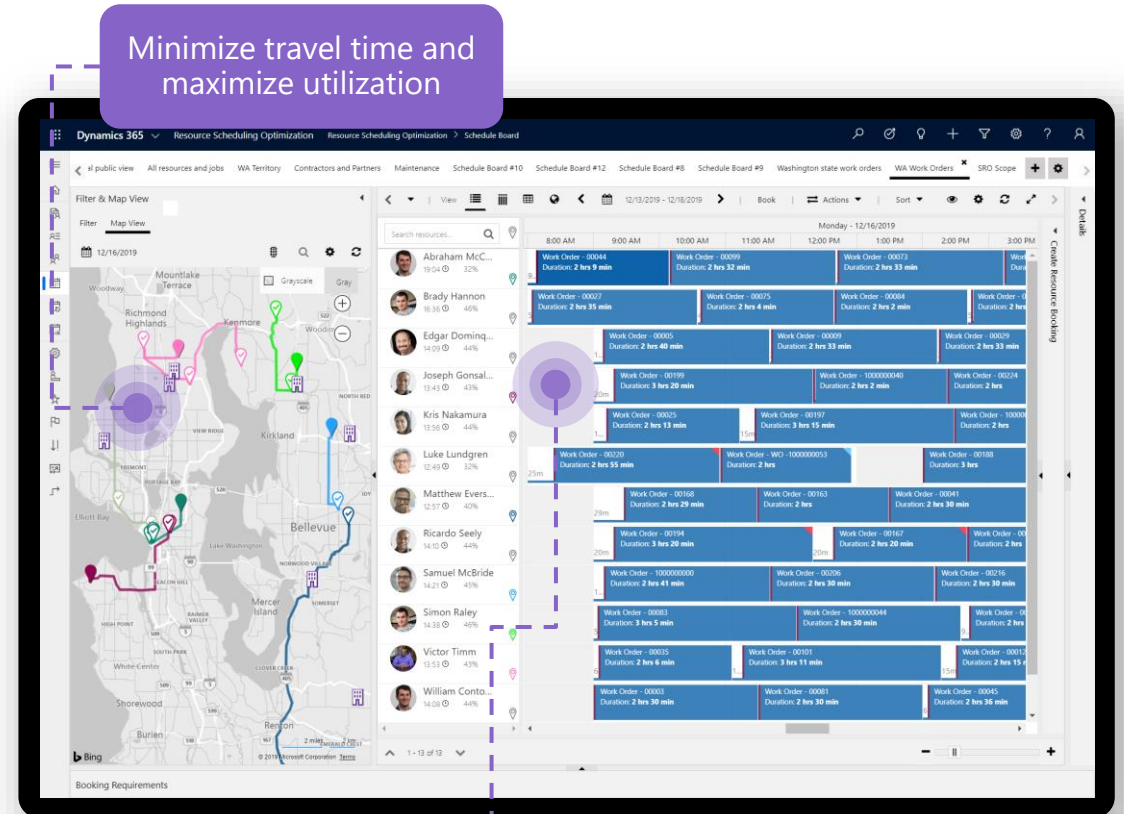
Allows dispatchers to manage more resources

Uses historical data to improve efficiency and drive predictable arrival and completion times

Automatically assigns alternate technicians for urgent situations



Dispatcher



Minimize travel time and maximize utilization

AI-driven scheduling books the best-suited technician closest to the customer

# Assign resources to solve customer problems quickly

Collaborate with technicians in real time

Seamlessly integrated within the work order

Quickly get answers and fix issues the first time

Initiate chats with one or multiple remote colleagues directly from a work order

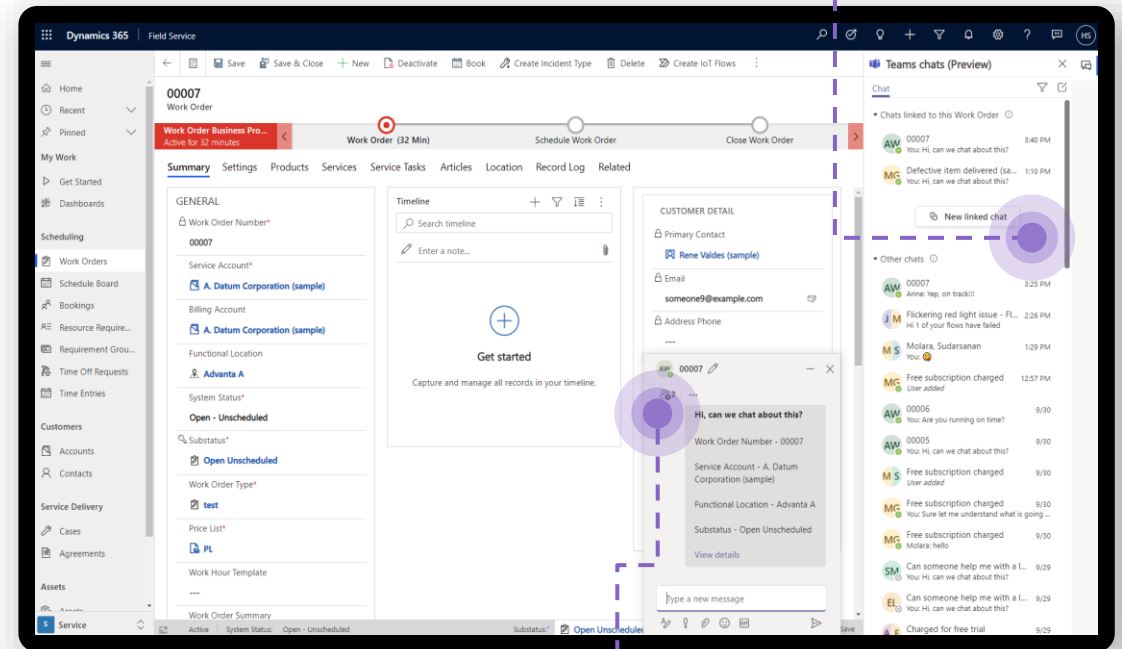
Automatically link chats to a case and work order

Associate conversations to the work order for ease of viewing by team members

Use spotlight and pinning to keep Dynamics 365 Remote Assist video feed on main stage



Link new chats to the work order or review previously linked chats



Collaborate with colleagues using embedded Microsoft Teams or the mobile app

# Fix customer problems the first time – every time



Manage assets and view service history via mobile app



Easily add and complete inspections



Get expert assistance remotely with Mixed Reality



# Fix customer problems the first time – every time

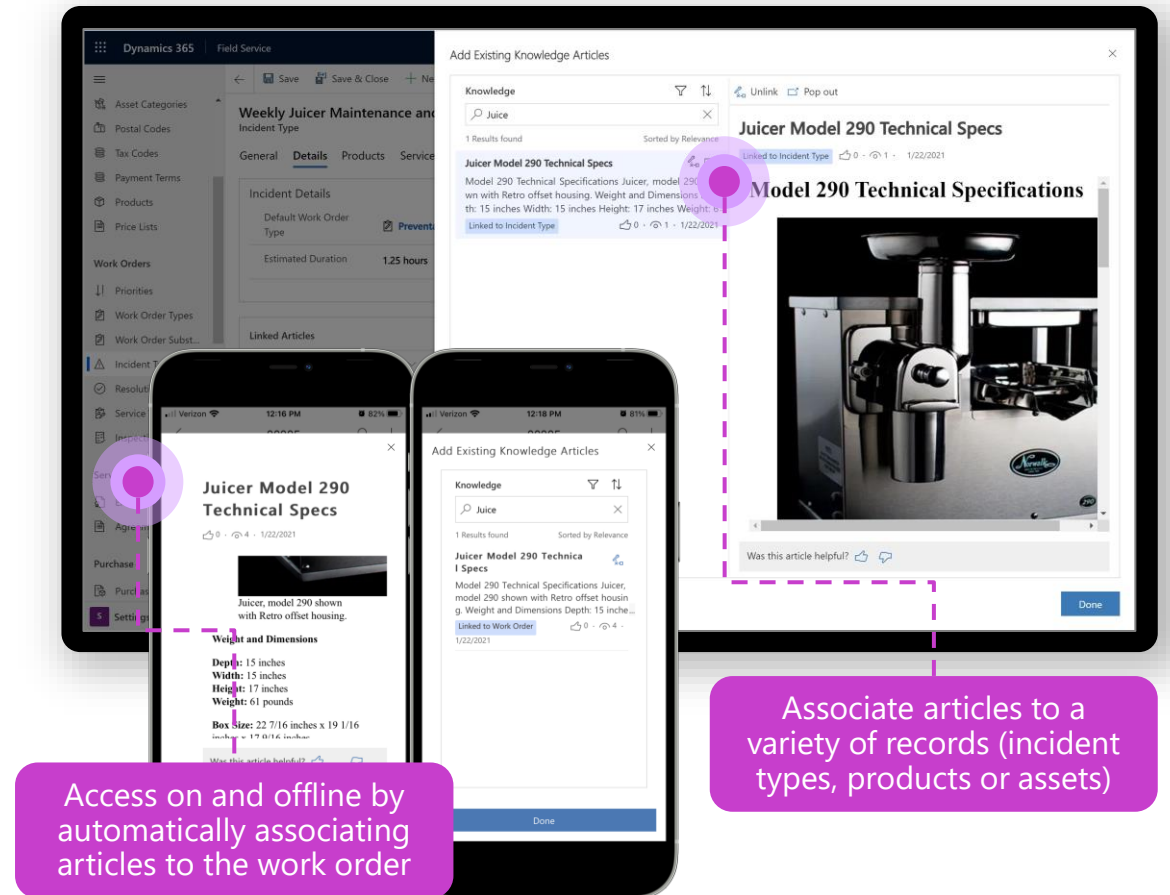
Manage assets and review service history via mobile app

Improve first time fix rates by providing technicians knowledge articles on and offline

Associate knowledge articles to various work order records like incident types, products, or customer assets

Easily configure search filters, author language and management knowledge categories

Save time by creating article templates in Power Apps



# Fix customer problems the first time – every time

## Easily add and complete inspections

Easy to create with drag and drop interface

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Seamlessly add inspections to work orders

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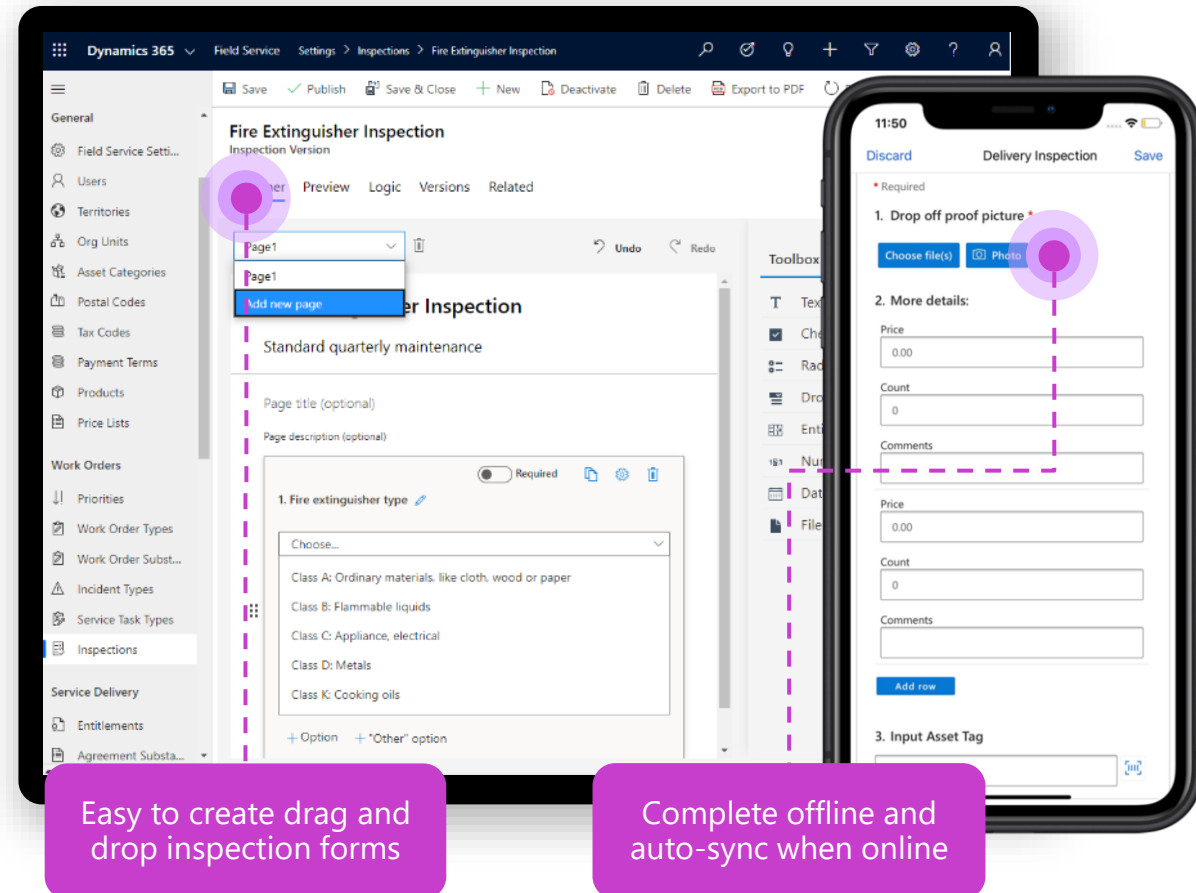
Complete inspections on your mobile phone or tablet and auto-sync when connectivity is restored

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Associate inspections with assets, view history of all prior inspections

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Perform virtual inspections using Mixed Reality and the Field Service app



Easy to create drag and drop inspection forms

Complete offline and auto-sync when online



# Fix customer problems the first time – every time

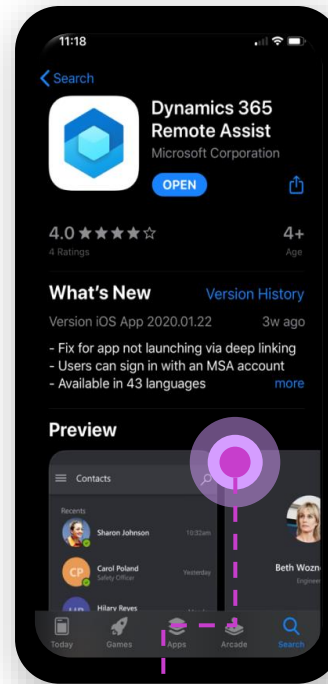
## Get expert assistance remotely with Mixed Reality

Share real-time views with experts remotely to get help with Dynamics 365 Remote Assist mobile or stay hands-free using HoloLens

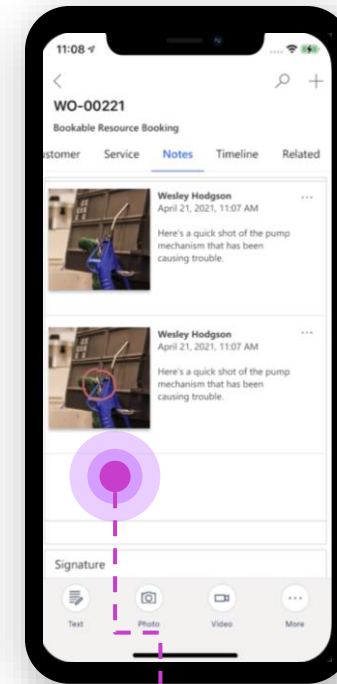
Improve FTRs by accessing 3D holographic service manuals using Dynamics 365 Guides

Avoid costly travel and reduce delays with remote support combining video, screenshots, and annotations

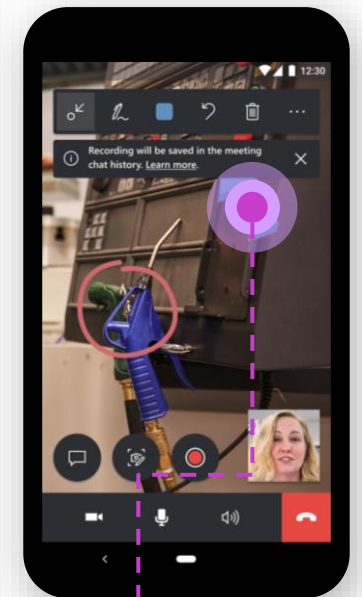
Capture asset information and integrate it with Microsoft Power Platform or other enterprise applications



Available for iOS and Android



Associate images with the work order



Recorded conversations are available in the chat history



# Gain cost-effective insights to improve customer experience



Seamlessly track performance metrics



Increase efficiency and standardize processes



Avoid equipment downtime through preventative maintenance



# Gain cost-effective insights to improve CX

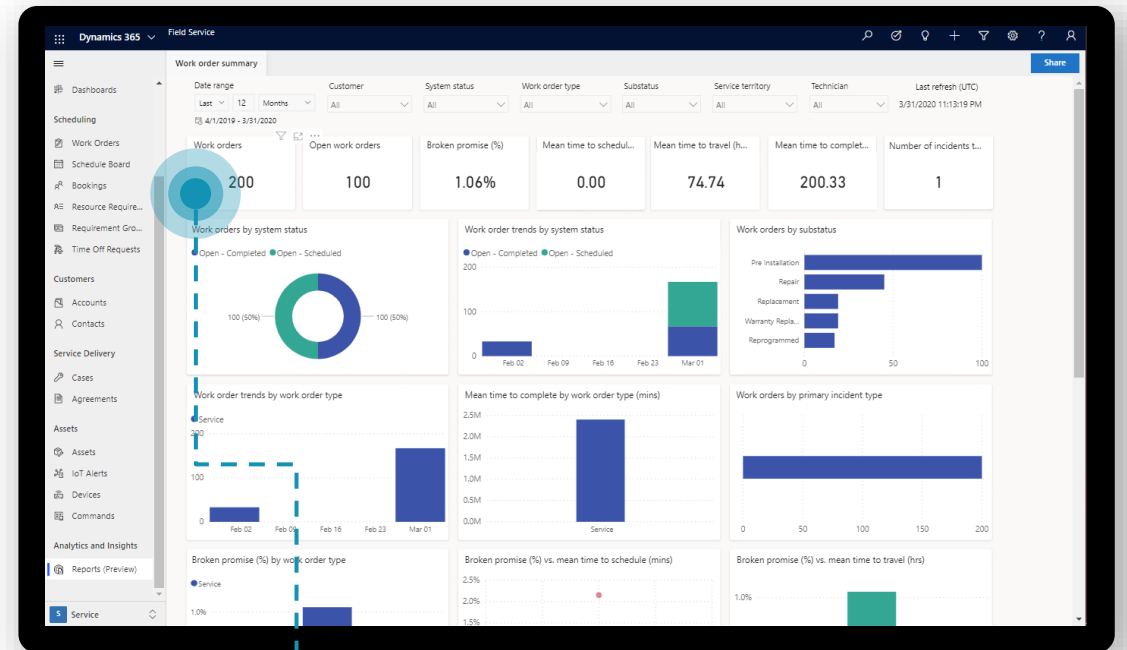
Seamlessly track performance metrics

Glean insights and action needed through AI-driven data analysis and visualizations

Leverage insights to streamline processes

Extensive out-of-the-box reporting for work orders, incident types, and other KPIs

Identify trends, gaps in service and SLA compliance



Drill down work order metrics to identify trends and opportunities to improve



# Gain cost-effective insights to improve customer experience

Increase efficiency and standardize processes

Monitor metrics across resource and utilization, time spent on bookings, and miles on truck rolls

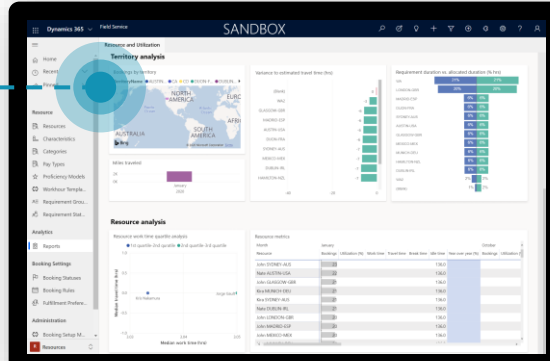
Get an end-to-end view of field service operations and drill down into individual worker performance

KPIs include resource and utilization rate, average travel time, mileage, resource utilization breakdown, resource scheduling optimization

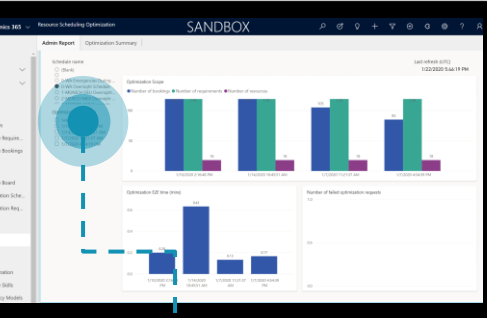
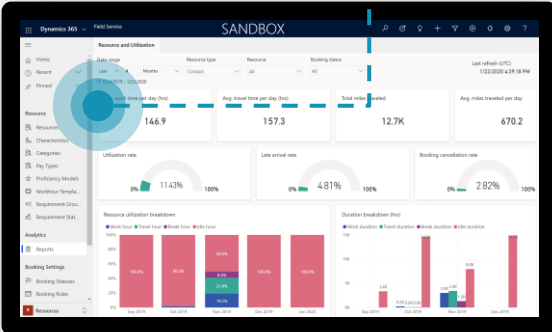


Field Service Manager

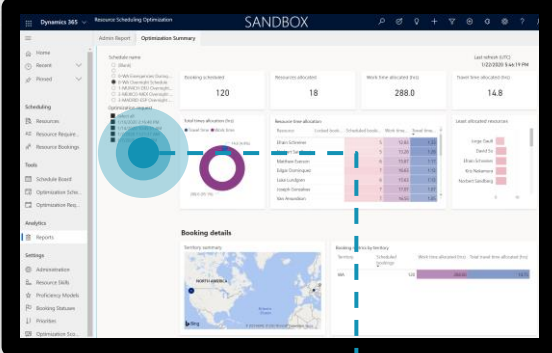
Territory & Resource Analysis



Resource & Utilization



Optimization summary



# Thank you