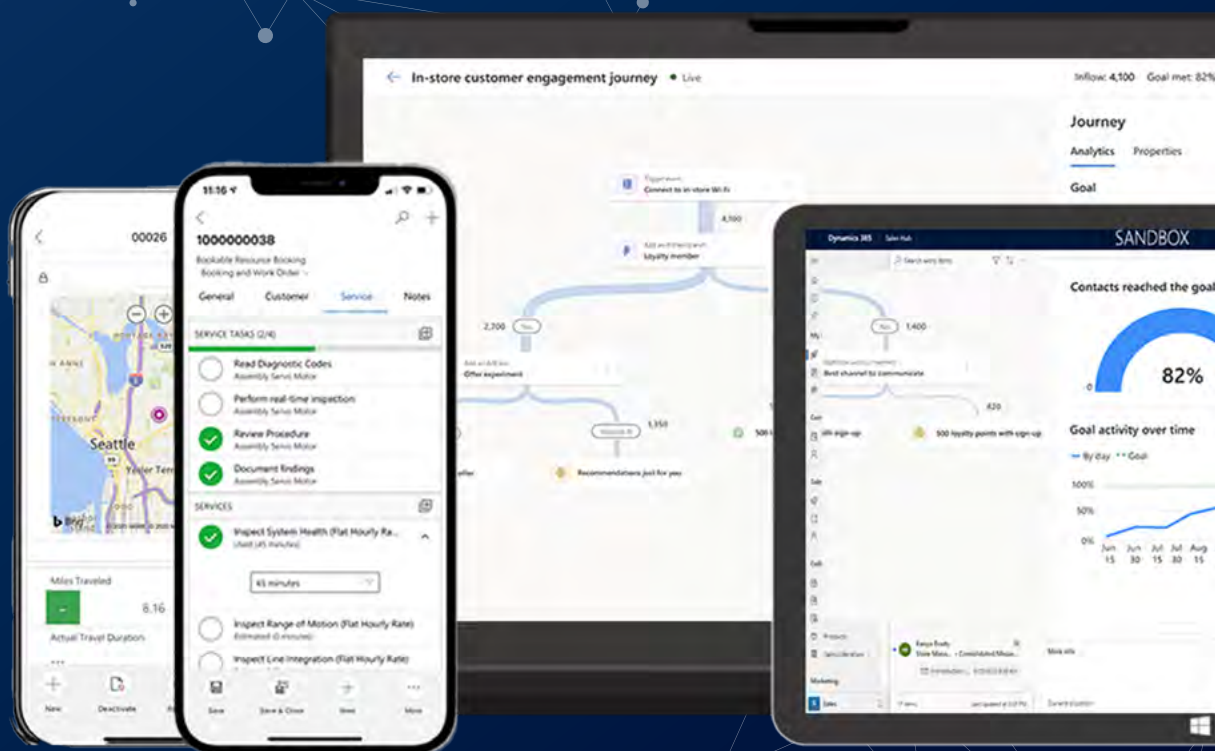




# Microsoft Dynamics 365 Customer Engagement

Microsoft Partner



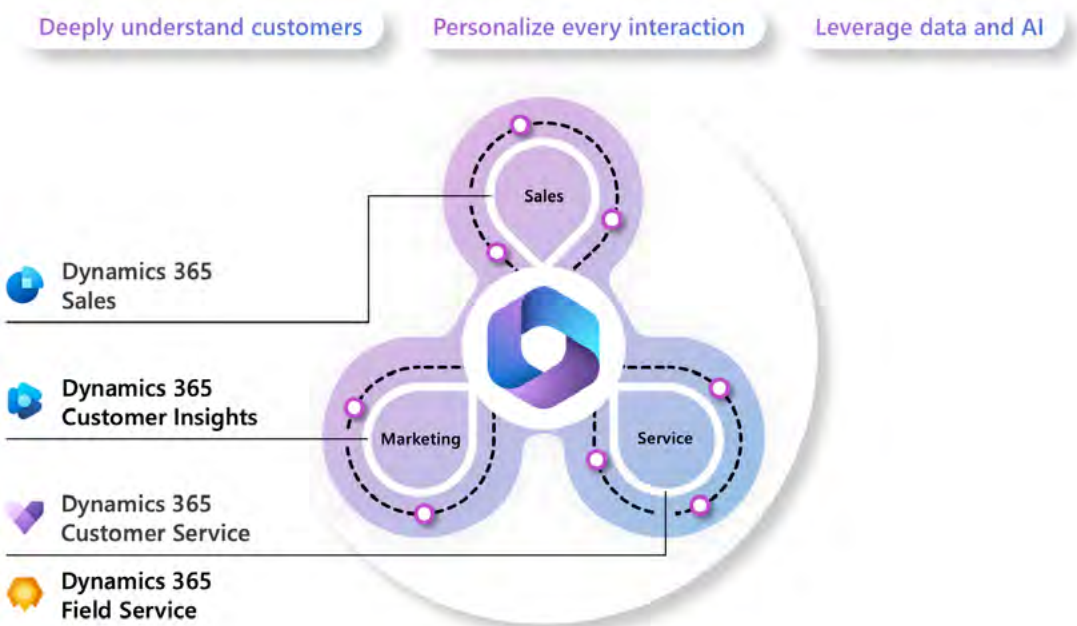
# Trusted Advistors for Everything Microsoft

Customer expectations are higher than ever, are your employees equipped to deliver on those customer expectations? Delivering great customer experiences requires a 360-degree view of the customer from every role at every touch point. Microsoft Dynamics 365 suite of customer engagement applications helps to deepen customer relationships and build long-term customer loyalty by enabling seamless and personalized customer experiences as well as empowering productivity and collaboration for sales, marketing, and service teams. What is your customer journey and are my marketing, sales and services teams aligned to deliver exceptional experiences at every touchpoint along this journey?

Growing the sales pipeline and managing costs are on the mind of every execute. With the need

to do more with less is higher than ever, it is imperative that your teams have a solution that will provide them with a full view of their customer that automates their processes where applicable so that they are able to focus on acquiring, selling and providing exceptional services.

enVista is a Microsoft Solutions Partner with two decades of experience implementing and supporting Microsoft Dynamics 365 Customer Engagement applications (a.k.a, CRM). enVista's Microsoft solutions allow your teams to stay focused on engaging, closing deals, supporting and solving your customer's needs and not on the technology. Additionally, enVista can help you navigate the suite of Microsoft business application options and provide clarity and direction to strategic, operational and technical considerations.



# Microsoft Capabilities

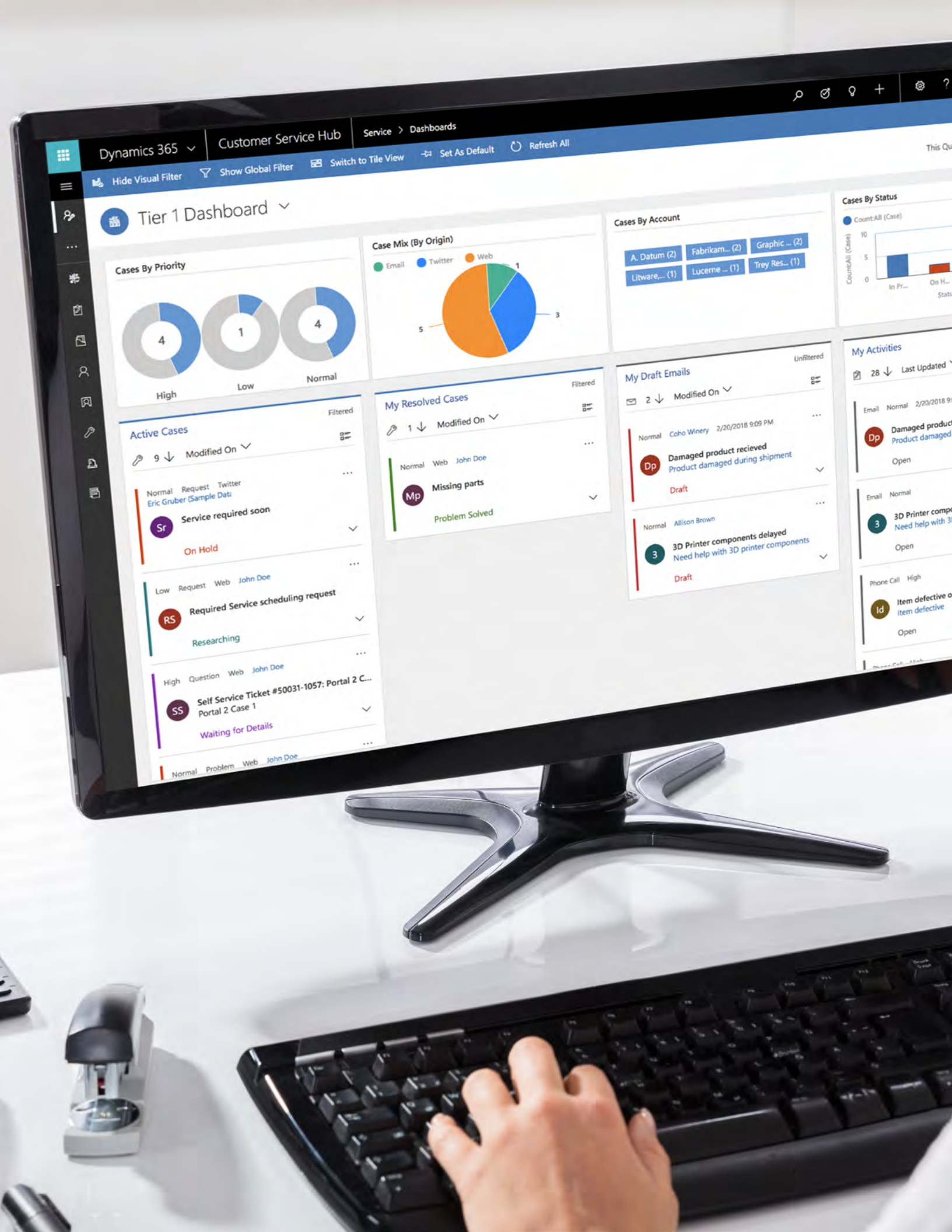
## Services

- Assessments
- Consulting
- Support
- Implementations
- Integrations
- Project Rescues

## Platforms

- Dynamics 365
- Power Platform
- D365 Customer Insights - Data
- PowerApps
- D365 Customer Insights - Journeys
- PowerAutomate
- D365 Sales
- Power BI
- D365 Customer Service
- Azure
- D365 Field Service
- SQL Server





# Microsoft Dynamics 365 Customer Engagement

**Create personalized engagements that drives loyalty and satisfaction while streamlining sales processes.**

Consolidate your siloed customer information into a single platform to generate insights into your customer that elevates your customer engagement strategy with the right message in the right channel at the right time. These insights help your sales team to identify high-potential leads and guide them through the sales funnel with precision, keeping your team focused on selling and not the administrative activities.

## Customer Insights – Data

Customer Data Platform that combines your customer data from siloed systems to generate insights about your customers that empower your teams to deliver personalized customer experiences.

## Customer Insights – Journeys

Market and engage on your customer's terms. Orchestrate customer journeys and deliver contextually relevant content to your customers in real time across all customer touchpoints for a truly end-to-end experience.

## Sales

Enable your sales teams to build strong relationships with their customers, take actions based upon insights, and close deals faster. Focus on the right customers with a prioritized pipeline with AI-based scoring models. Collaborate and update your customers and contacts, nurture your sales from lead to order and create sales collateral.



# Quickly and proactively support and resolve issues that increase customer satisfaction, retention and loyalty while reducing costs.

As your customers engagement needs are changing, they expect companies to understand their needs and expectations for when and how to communicate and resolve questions. Microsoft Dynamics Customer Service and Field Service solutions enables your organization to operate more efficiently, exceed customer expectations, and achieve substantial cost savings. Embrace data-driven decision-making, enhance compliance, and position your business for sustainable growth in a rapidly evolving market.

## Customer Service

Streamline operations and optimize scheduling and resource allocation to reduce travel time, minimize downtime, and boost productivity, enabling you to serve more customers in less time. Easily collaborate with experts across the organization to come together to drive issue resolution.

## Field Service

Streamline operations, optimize scheduling and resource allocation – reduced travel time, minimized downtime and increased productivity, allowing you to serve more customers in less time. Deliver exceptional service experiences with real-time updates, on-site problem solving with the right equipment at the right time leading to highly satisfied loyal customers.

## Copilot

Streamline work with Copilot – work smarter not harder.

- Customer Insights – Convert simple language prompts into new queries, insights and content
- Sales – Reduce mundane tasks, take best action
- Customer Service – Deliver faster and more focused customer care by drafting contextual and personalized answers to questions
- Field Service – Receive assistance with Work Order creation, management and scheduling recommendations





# enVista Customer Engagement Services

## Project Resources

Is your CRM project at risk? Are you missing targets and losing executive support? Failure is not an option. If your implementation partner is failing you and a rapid rescue, recovery, and delivery execution plan is the best option, enVista can lead the way. enVista has a proven track record of successful implementations across hundreds of clients. Our proprietary enABLE methodology (Assess, Build, Learn, and Execute) and industry-leading best practices for delivery ensures a successful implementation and on-time go-live.

## Consulting

Do you require enhancements or integrations but lack the expertise to confidently pull the trigger? enVista's Microsoft Consulting Team is experienced in all Dynamics Customer Engagement systems, including Dynamics 365 Customer Insights, Sales, Customer Service and Field Service. Additionally, enVista will place a strong emphasis on client ownership and end-user testing before go-live so that you have the ability to use, troubleshoot and manage the platform after a successful rollout. Our unique C-I-O model of Consult, Implement,

and Operate means that after the heavy lifting is over, we do not walk away, we can support the full lifecycle of your investments.

## Assessments

Are you using your CRM the way that you had intended or are we using the system in the right way? Is your organization going through changes and is your CRM system aligned to these changes? A current and future state diagnosis of how your organization utilizes CRM will provide insight into potential opportunities, risks, and areas of improvement. enVista's Assessment documents existing CRM systems, assesses your business requirements to determine feasibility for a successful implementation, provides actionable steps and guidance, and an estimate on how much an enhancement, implementation, or upgrade will cost.

## Support

Have you had to make some difficult decisions within your organization and need some assistance with operating/administering your CRM environment?



# Why enVista?

## Expert Technicians

Highly tenured in Dynamics ERP as well as all Microsoft technologies, including SQL, Azure, CRM, Power Platform, Office 365 and more.

## Diversified Skills

Microsoft Certified Consultants in development, EDI, integrations and more.

## Access to Microsoft

enVista's premier support arrangement with Microsoft allows access to the Microsoft team for issues that require a direct line to the software publisher.

## Vertical Expertise

Breadth of consulting experience across manufacturing, distribution and retail.

World-leading brands trust us with their Microsoft environments. You should too.





## About enVista

enVista is the leading supply chain and enterprise consulting firm and the premier provider of supply chain technology & strategy services, material handling automation & robotics, Microsoft solutions and IT managed services. With 20+ years of unmatched domain expertise, enVista serves thousands of leading brands. enVista's unique ability to consult, implement and operate across supply chain, IT and enterprise technology solutions allows companies to leverage enVista as a trusted advisor across their enterprises



Let's have a conversation.®

info@envistacorp.com | 877.684.7700 | envistacorp.com

