



Microsoft Dynamics Partner Solution Brief



Service Capabilities Within Robust CRM Application

Overview

Country or Region: EMEA & North America

Industry: Information Technology

Partner Profile

Microsoft® Gold Certified Partner Neocase Software is a world leader in customer service software solutions which help companies maximize the productivity and quality of their service operations.

Business Needs

Businesses need more and more sophisticated solutions to deliver effective customer service within their unique business environment and integrated with the entire spectrum of CRM.

Solution

Neocase integrated its robust customer service software with Microsoft Dynamics™ CRM to deliver a robust CRM application with enhanced customer service capabilities.

Benefits

- Higher quality customer service delivery model
- More avenues to market solution
- Expanded business opportunities
- Reduced time to market

“The architecture of Dynamics CRM 4.0, along with its powerful workflow and reporting services, provides... the scalability and rich features mandatory for any customized CRM application.”

Philippe Gaillard, CEO, Neocase Software

Customer service is often the most complex, company-specific aspect of customer relationship management (CRM). Whereas sales and marketing processes can be similar across companies, customer service can be very unique to each organization. Thus, many companies require more sophisticated, flexible solutions by which they can deliver customer service within a single, integrated CRM application. To meet this need, Microsoft® Gold Certified Partner Neocase Software leveraged the open architecture and extensive capabilities of Microsoft Dynamics™ CRM to create Neocase CRM. By embedding its robust, stand-alone customer service application within Dynamics CRM, Neocase offers a way to deliver highly sophisticated customer service within a robust application that features powerful collaboration, flexible workflow, extensive reporting, and seamless integration with third-party applications.



"Because Dynamics CRM 4.0 offers so many alternatives for integration...we can integrate any third-party application—no matter how unique or dated—both successfully and effectively to meet the specific needs of our customers."

Dan Walsh, Director of Technology Services,
Neocase Software

Business Needs

One of the most complex, company-specific aspects of customer relationship management (CRM) is around the area of customer service. Whereas the overall processes for sales and marketing have much in common across companies and industries, the customer service delivery needs can be unique to each organization. As businesses grow, their customer service strategies and needs usually further deepen and expand to cover new levels and types of service agreements, contracts, priorities, and escalation procedures.

In addition, because the level of customer service can make or break future sales opportunities, it must be tightly integrated with the sales and marketing processes in order to avoid losing deals, while creating up-selling and cross-selling opportunities. Thus, businesses need more and more sophisticated solutions to deliver effective customer service within their unique business environment and integrated with the entire spectrum of CRM.

Solution

Established in 2001, Microsoft® Gold Certified Partner Neocase Software has specialized in providing comprehensive customer service applications. Their applications have always emphasized usability and adoption. According to Philippe Gaillard, CEO, "Our Neocase CS Customer Service application has always been focused on equipping the end user. In fact, it was originally developed as an internal application specifically designed for that purpose. It was only by its success that it became externally available."

He adds, "Our focus on usability continues, based on our conviction that without strong adoption, business data will be incomplete and therefore less accurate, trustworthy, and useful." Thus, when Neocase decided to

integrate its Customer Service application into a full CRM solution, usability and adoption were primary considerations.

Usability and Adoption

With the release of the initial version of Microsoft Dynamics™ CRM with its flexibility, familiar user interface, and tight integration with Microsoft Office Outlook®, Neocase was convinced that it would provide the perfect platform for its application and for its customers. Therefore, they immediately invested the resources to rebuild the data structure of their application to fit the data structure of the Dynamics CRM platform.

Integrating with Dynamics CRM

The result of the integration is Neocase CRM, which delivers the extensive customer service expertise of Neocase CS within Dynamics CRM. To create the solution, Neocase embedded its stand-alone application, Neocase CS, to replace the standard customer service module within Dynamics CRM. Using this approach, the embedded Neocase CS leverages the same database and data model and thus provides a seamless, transparent experience to the end-user.

Neocase CRM takes advantage of the robust and open architecture of the Dynamics CRM platform. Gaillard emphasizes, "The architecture of Dynamics CRM 4.0, along with its powerful workflow and reporting services, provides Neocase CRM with the scalability and rich features mandatory for any customized CRM solution."

User Experience

According to Gaillard, "The end-user is the key to customer service. Therefore, the software has to be so intuitive, easy, and natural to use that the end-user has no excuse to not use the solution." In addition to the familiar interface of Dynamics CRM and the tight integration with Outlook, the

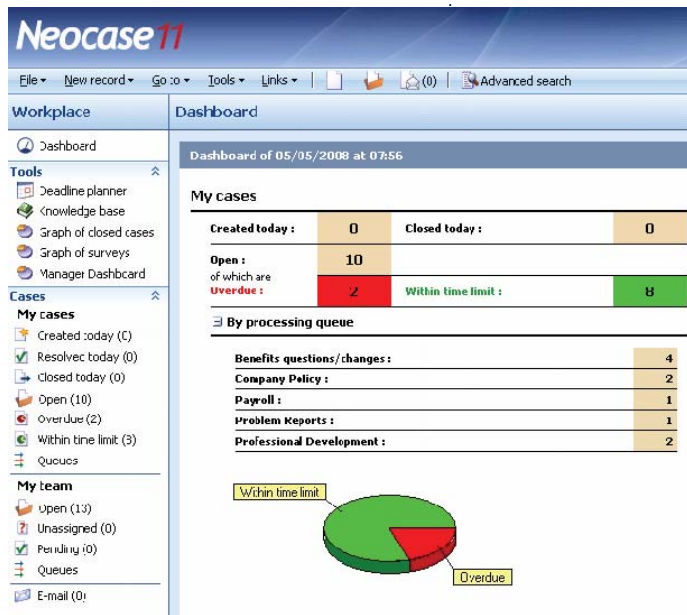


Figure 1 - Customized Neocase CRM Dashboard

flexibility of the interface allowed Neocase to insert a Neocase button in place of the Dynamics CRM customer service button and provide the exact look and feel of Dynamics CRM within the interface of the Neocase CS module. This is additionally powerful for Dynamics CRM customers who implement Neocase CRM because the only difference to their interface is the look of one button.

Improved Collaboration

By integrating the sophistication of Neocase CS with Dynamics CRM, end users get a 360-degree view of each customer. The deep, expanded, integrated view of the customer includes account, contracts, and service agreements. Thanks to the seamless integration provided by the Dynamics CRM platform, these can be presented in a holistic fashion, over the history of the relationship with the customer to provide:

- More collaborative workflow, including up-selling and cross-selling opportunities;

- Increased customer retention, through more informed customer service interactions;
- Improved case resolution processes, tailored to the context of the customer request;
- Fewer lost deals by identifying and prioritizing customer service, based on pending sales, upcoming contract renewals, or other customer segmentation; and
- Additional context-specific information and expertise around each customer or case.

Integration with Third-Party Applications

According to Dan Walsh, Director of Technology Services, “Integration with third-party applications and systems is vital to gather accurate data and provide efficient (automatic) customer service responses. For example, many of our customers provide service to high tech firms. These firms have applications and systems that report bugs, fixes, and customer support requests. Because Dynamics CRM 4.0 offers so many alternatives for integration (direct access/interaction through links and IFrames, data delivery only, web services integration, etc.), we can integrate any third-party application—no matter how unique or dated—both successfully and effectively to meet the specific needs of our customers.”

Flexible Reporting

Dynamics CRM 4.0 also provides improved, flexible reporting that equips end users to easily fill in standard reports, modify reports, and even create ad-hoc custom reports, using Microsoft SQL Server® Reporting Services. Previously, Neocase CRM relied mostly on a few standard reports that customers could run as needed along with some basic queries, searches, and views. With Dynamics CRM 4.0, Neocase has been able to provide customers with expanded, flexible reporting, including advanced queries, searches, views, and dashboards (see Figure 1, previous

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Philippe Gaillard, CEO, Neocase Software

page), along with the capability to export to Microsoft Office Excel® spreadsheets.

Walsh states, “The most important thing is that end users don’t need technical assistance to create any of these on the fly.” Gaillard adds, “This is just another example of how Dynamics CRM empowers end users, which increases adoption, which drives more accurate, effective results, and thus leads to improved customer relationship management across the company.”

Enhanced Workflow

The enhanced workflow provided by Windows Workflow Foundation in Dynamics CRM 4.0 enabled Neocase to extend workflows across the entire solution. Walsh states, “This has allowed the application to incorporate more complex workflow back and forth between modules to effectively close the loop between customer service, sales, and marketing. An example of this is the improved ability to up-sell and cross-sell, initiated by a customer service event.” He adds, “Windows® Workflow Foundation also opens more opportunities for us to extend the workflow in Neocase CRM to third-party applications.”

Benefits

Higher Quality Customer Service Delivery Model

By leveraging the extensive features and functionality of Dynamics CRM 4.0, Neocase CRM delivers a more robust, integrated customer service solution.

Integration Opens More Avenues for Marketing

The openness of the Dynamics CRM platform, which made it possible for Neocase to integrate its customer service expertise within Dynamics CRM, has created several significant avenues for business. Neocase CRM can be effectively marketed to:

- Companies that have already implemented Neocase CS and are looking for a comprehensive CRM solution;
- Companies that have implemented Dynamics CRM, but are looking for a more sophisticated customer service module that can be quickly and easily implemented with little disruption to its workers; and
- Larger, more complex enterprises that require CRM applications with the advanced flexibility, third-party integration, and customization made possible by the Dynamics CRM platform.

Expanded Capabilities Lead to Expanded Opportunities

“The expanded multi-tenancy, multilingual, and multicurrency capabilities of Dynamics CRM 4.0 will vastly expand our business opportunities,” states Gaillard. “Now that Dynamics CRM 4.0 provides multi-tenancy Neocase CRM has the power of choice in deployment, expanding our potential customer base.” He adds, “Also, with the multilingual and multicurrency capabilities of Dynamics CRM 4.0, we can offer our entire Neocase CRM application to international customers, within a single multilingual environment.”

Expanded opportunities have also arisen from the partnership between Microsoft and Neocase. Gaillard declares, “The partnership goes beyond the technical. It extends all the way to the field where opportunities for our application can be identified, bringing us more business opportunities.”

Reduced Time to Market

According to Gaillard, “Microsoft has offered so much more than a powerful platform for our Neocase CRM application. They have supported every aspect of our business, from design and development to sales and marketing. By participating in the Microsoft early adoption programs, we have received advanced access to applications and help

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developing enhanced features and extensions. This has improved our time-to-market and helped us synchronize our releases with those of Microsoft.”

Gaillard concludes, “Dynamics CRM has come such a long way in such a short time. The leaps and bounds by which it has grown and the direction in which it is headed has convinced us that Microsoft is committed to being a market leader in the CRM space.”

Microsoft Dynamics

Microsoft Dynamics is a line of integrated, adaptable business management solutions that enables you and your people to make business decisions with greater confidence. Microsoft Dynamics works like familiar Microsoft software such as Microsoft Office, which means less of a learning curve for your people, so they can get up and running quickly and focus on what’s most important. And because it is from Microsoft, it easily works with the systems that your company already has implemented. By automating and streamlining financial, customer relationship, and supply chain processes, Microsoft Dynamics brings together people, processes, and technologies, increasing the productivity and effectiveness of your business, and helping you drive business success.

For more information about Microsoft Dynamics, go to: www.microsoft.com/dynamics

Software and Services

■ Products

- Microsoft Dynamics CRM
- Microsoft Office Outlook
- Microsoft Office Excel

■ Services

- SQL Server Reporting Services