

Case Study

Microsoft Dynamics 365 Copilot Boosts Customer Service Efficiency for Manufacturer



Customer Overview

Customer

A globally recognized manufacturer of precision machinery

Profile

The manufacturer specializes in injection molding machines, die-casting machines, and machine tools and serves automotive, aerospace, medical, packaging, and job shops across the globe.

Industry

Manufacturing

Services

Dynamics 365 Copilot Implementation

Business Need

The manufacturer's customer service team faces several challenges in managing a high volume of cases, such as:

- Manually searching through emails, notes, and past interactions to gather complete case information.
- Difficulty tracking customer interactions, monitoring ongoing cases, and managing follow-ups effectively.
- Reviewing multiple emails, notes, appointments, tasks, and phone calls and gathering all information in one place.
- Limited visibility into past interactions, resolutions, and customer concerns when a case is reopened or reassigned to another agent.
- Time-consuming manual email drafting for each interaction, leading to inconsistencies, delays, and potential errors.

To improve workflow efficiency and decision-making, the manufacturer sought an automated way to:

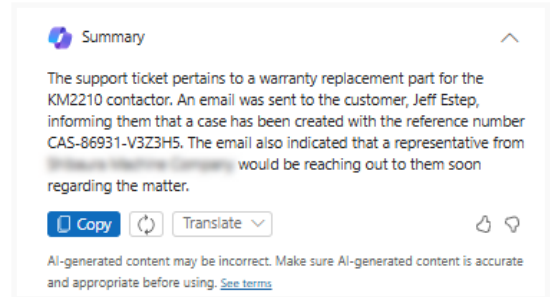
- Quickly extract key insights from the timeline without requiring agents to sift through extensive records.
- Consolidate relevant case information into a single, structured repository and get instant summaries of key activities, enabling users to grasp essential details in seconds.
- Draft context-aware emails using key case information, enhancing efficiency and improving communication speed and quality.

Solution and Approach

Synoptek helped the manufacturer customize and leverage Dynamics 365 Copilot capabilities to compile essential case details, provide instant summaries of key activities, draft customer emails, and ensure quick access to resolution notes, reassignment details, and customer follow-ups.

Case Summary

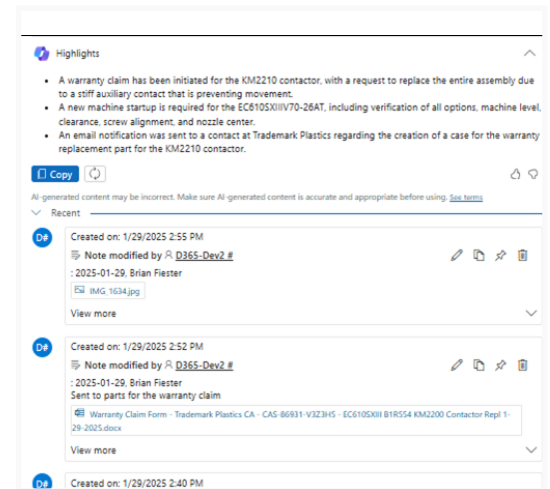
Implementing Microsoft Dynamics 365 Copilot's Case Summary feature allows the manufacturer to consolidate critical case details, such as issue description, customer contact details, internal notes, history of interactions between the agent and customer, and the complete body content with the case's entire history and status. This concise compilation helps agents access all relevant information quickly for effective case resolution.



Timeline Highlights

The Timeline Highlight feature in Dynamics 365 allows users to track customer interactions, monitor activities, and stay updated on record progress. With the introduction of Generative AI, timeline highlights now enable users to access key activity summaries quickly. These highlights streamline the process of reviewing emails, notes, appointments, tasks, phone calls, and conversations.

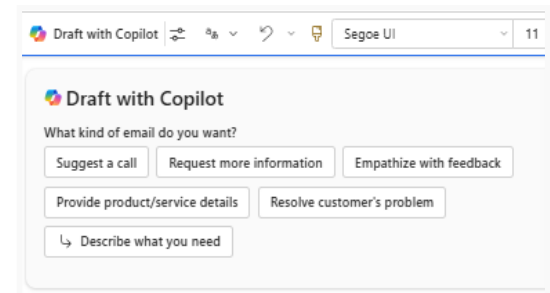
By clicking once, agents can view summaries of major events, including case records, accounts, contacts, leads, opportunities, and custom entities, enabling them to grasp essential details in milliseconds.



Email Drafts

Microsoft Dynamics 365 Copilot's email drafting feature streamlines customer communication by automatically generating email content based on case details. This includes using key fields like the case title, description, and customer information, making it easier for agents to respond efficiently.

By selecting suggested email options, users can quickly generate a draft email that can either be sent directly or edited to meet specific needs before sending it to the customer. This feature saves time by automating email drafting and ensuring accurate and timely responses. As a result, customer service agents can focus on addressing customer concerns efficiently while maintaining consistent communication.



Business Benefits

Dynamics 365 Copilot allows the manufacturer to enhance agent productivity and efficiency while boosting customer satisfaction. Case summaries, email drafts, and timeline highlights features enable customer service agents to:

- Quickly access all case details, enabling faster issue resolution without searching through multiple documents or communications.
- Have all relevant case information in one place, minimizing the probability of missing critical details and ensuring more accurate and practical solutions.
- Get concise, comprehensive case summaries and deliver quicker, more informed customer responses.
- Quickly review key activities, including email exchanges, notes, and tasks, and understand the status of a case immediately.
- Reduce the time spent searching for case details while accelerating decision-making.
- Leverage automated email suggestions to create emails in seconds, ensuring consistent messaging and reducing errors.

About Synoptek

Synoptek delivers accelerated business results through advisory-led, transformative full-life-cycle systems integration and managed services. We partner with organizations worldwide to help them navigate the ever-changing business and technology landscape, build solid foundations for their business, and achieve their business goals.