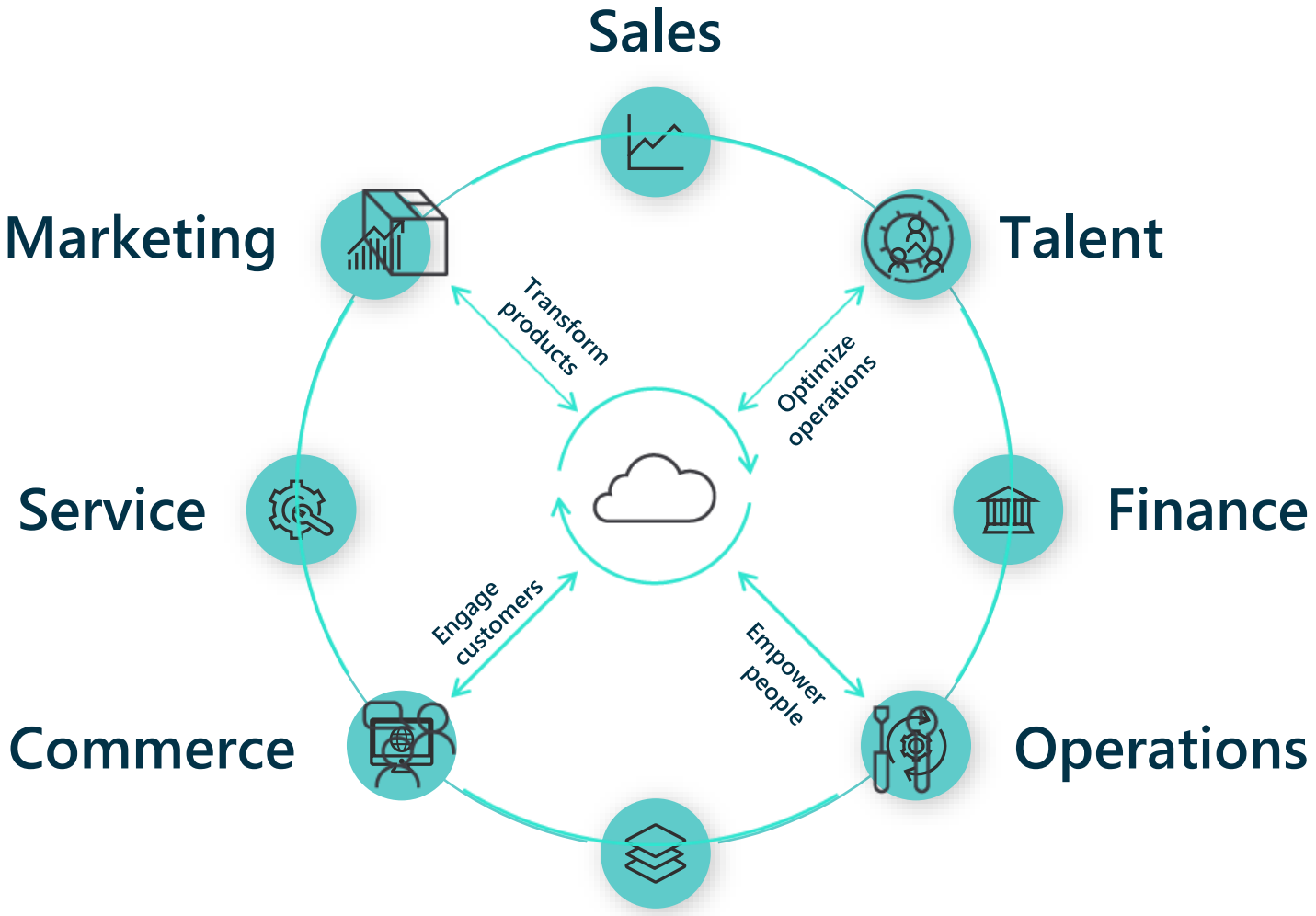
Microsoft Dynamics 365

Connected field service

PANGEA | ONE WORLD ONE SOLUTION

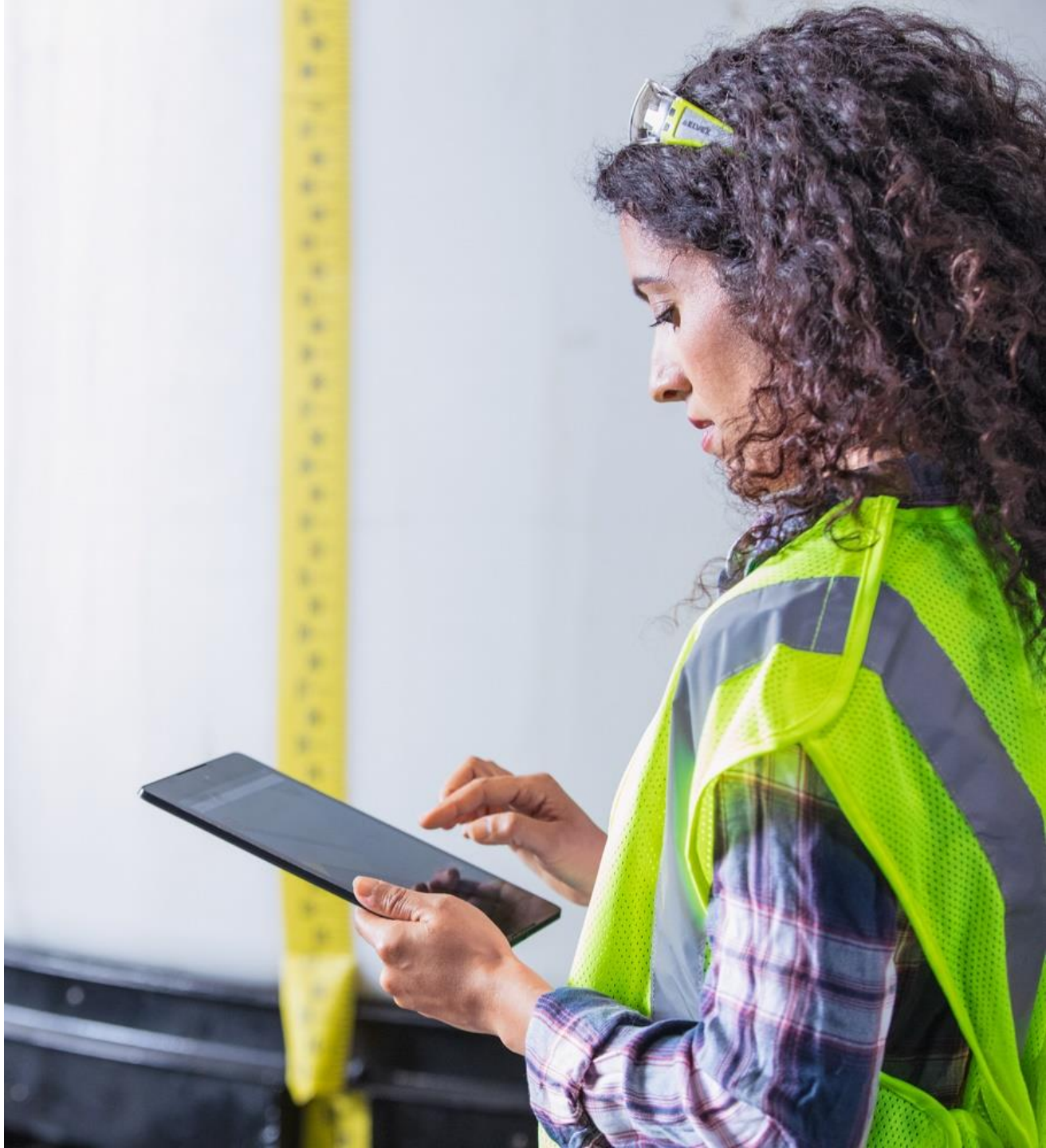
How do you want to transform your business with Dynamics 365 Field Service?

The world's connected AI business cloud



Dynamics 365 & Power Platform

Supporting connected field service



Key considerations for delivering connected field service

Do your systems improve technician efficiency and enable monetizing new business models?

Are the technologies you're using today supporting your business needs?

How are you using analytics to predict issues and proactively provide solutions?

Business concerns

Organizations with budgets earmarked for proactive support technologies in 2018/19[1]

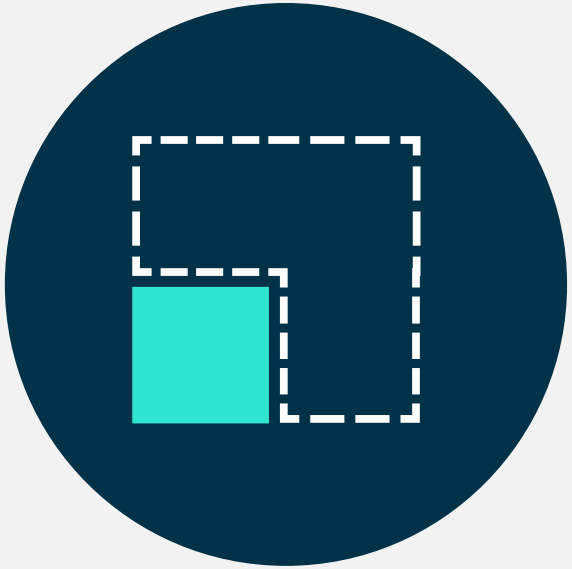
Cost for every time a service company dispatches a truck[2]

Field service organizations that provide technicians with mobile apps[3]

Average productivity increase through connected field service[4]

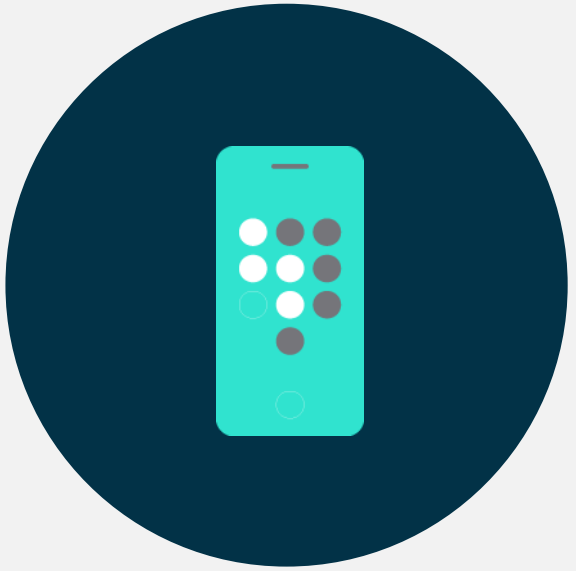
1. 2017 TSIA report on field service spending
2. MSDynamicsWorld
3. Gartner Field Service Report 2017
4. Gartner Field Service Survey

Typical functional concerns



Reactive, break-fix business models and inability to scale

Outdated/siloed systems causing inefficiencies

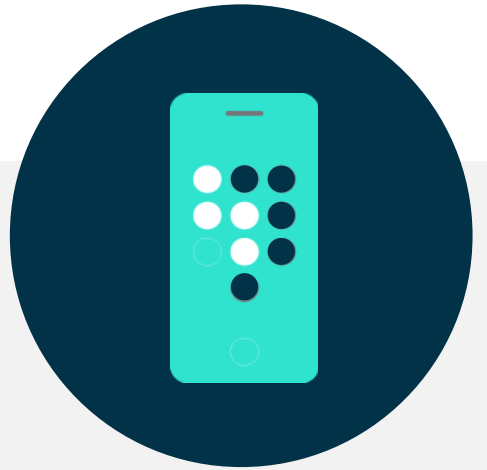


Poor technician enablement due to lack of mobile capabilities

The changing landscape

Increased use of proactive support models

Real-time insights and troubleshooting through augmented reality capabilities

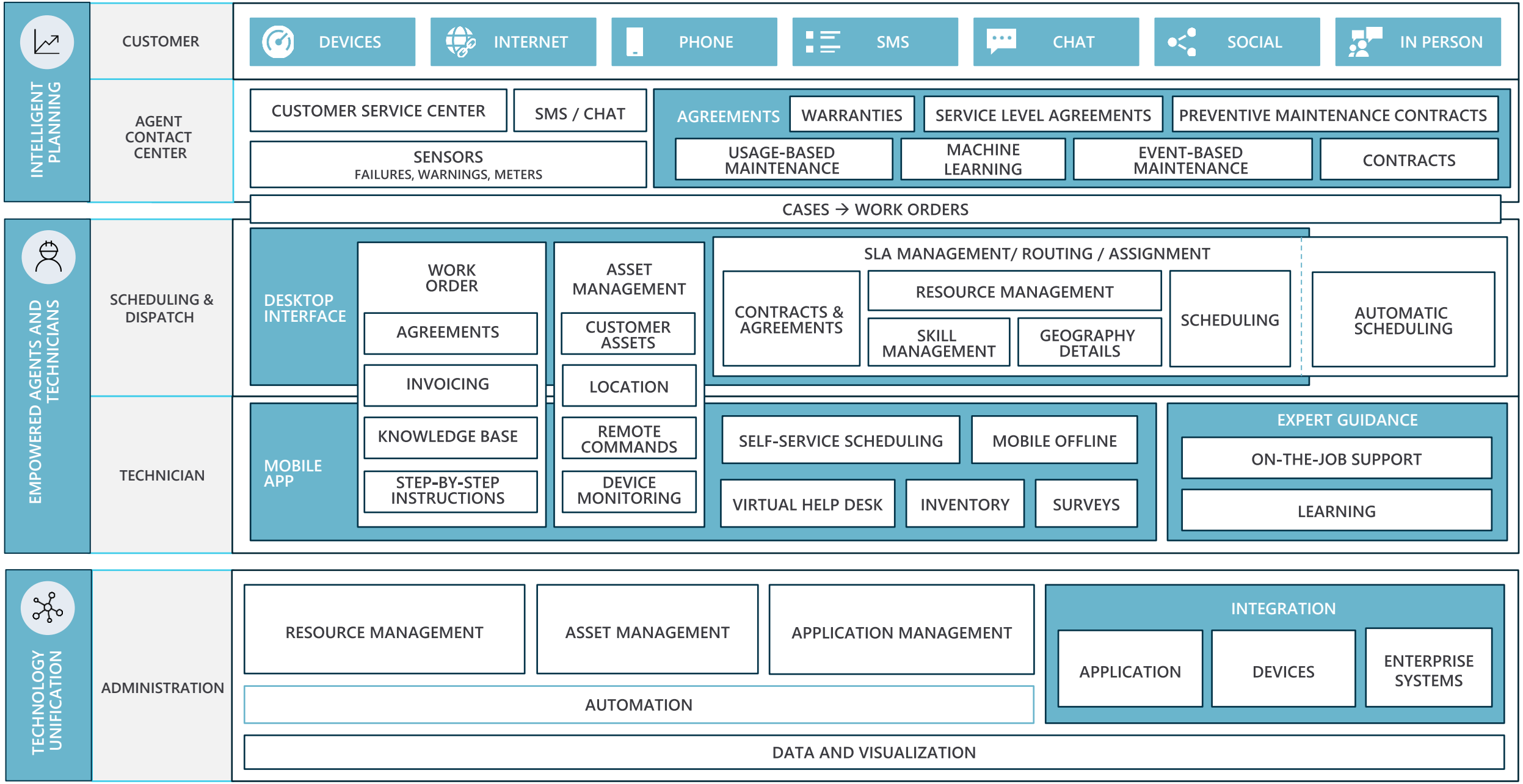


Predictive maintenance driven by data analytics, ensuring proactive customer engagement

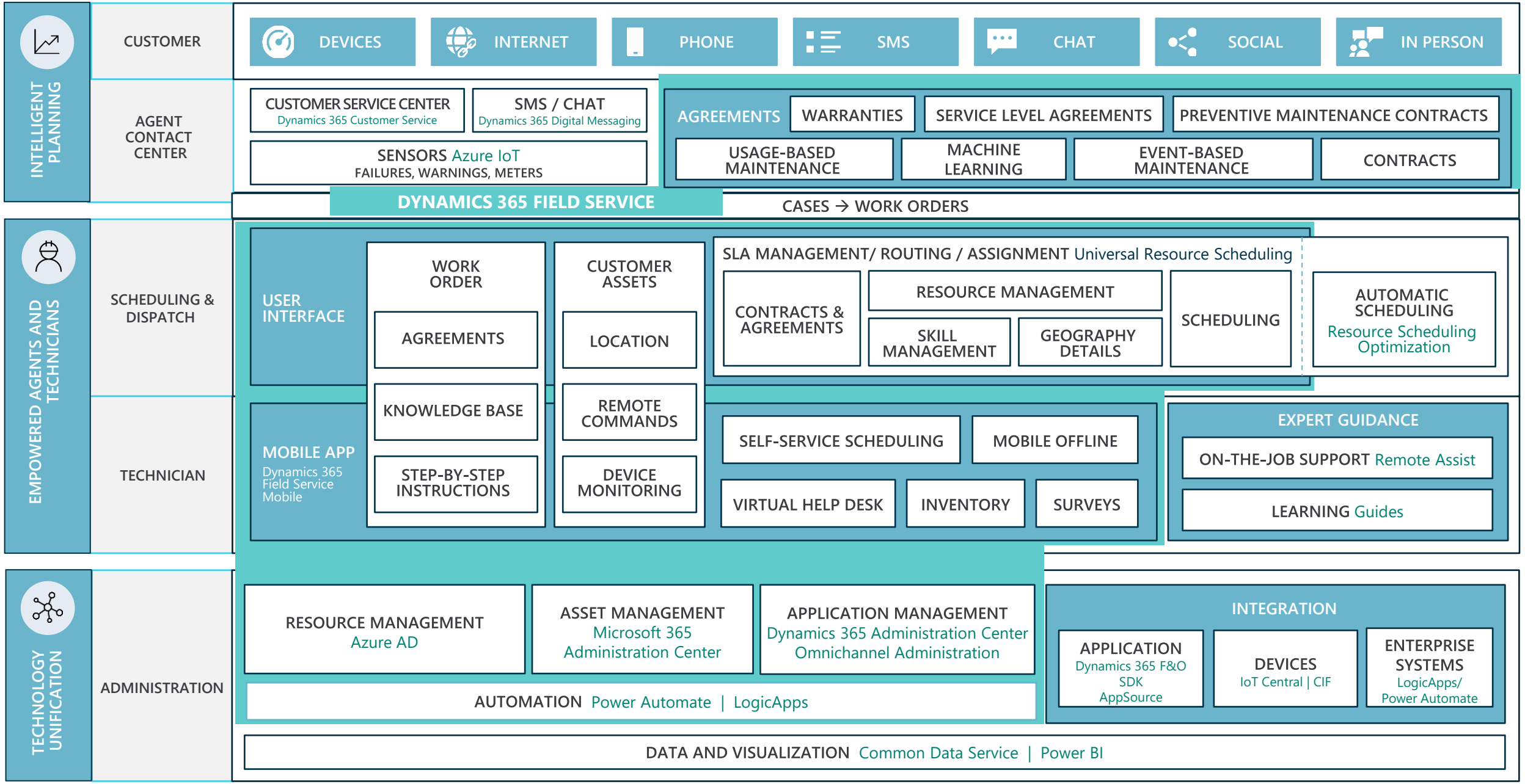
Product complexity and increasing customer demands have surpassed existing technology stack abilities to support operations[1]

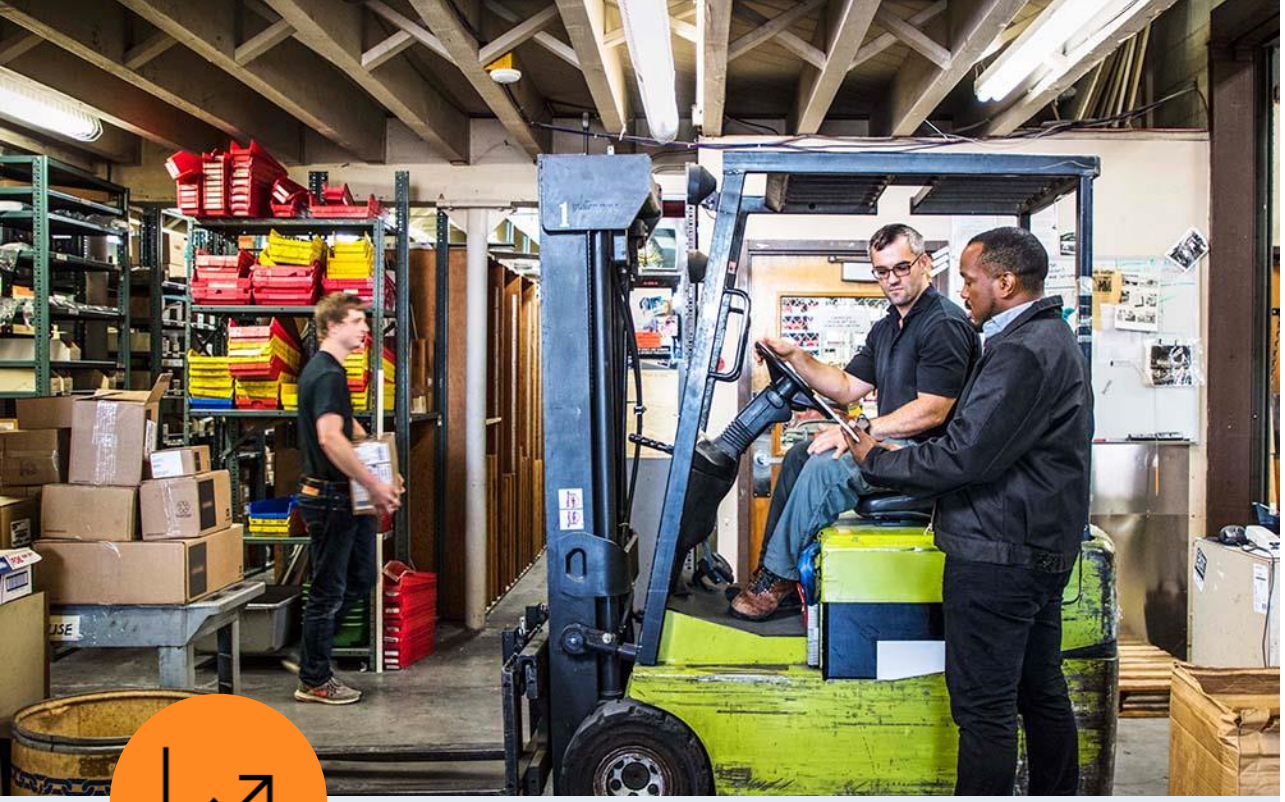
[1] TSIA 2019

Functions enabling connected field service



Microsoft ecosystem supporting connected field service





Intelligent planning

- Multichannel customer engagement
- Service agreements and preventive maintenance
- Predictive maintenance enabled by IoT
- Proactive field service driven by machine learning

INTELLIGENT
PLANNING

Multichannel customer engagement

Connect with your customers

Effectively create work orders

Engage with your customers

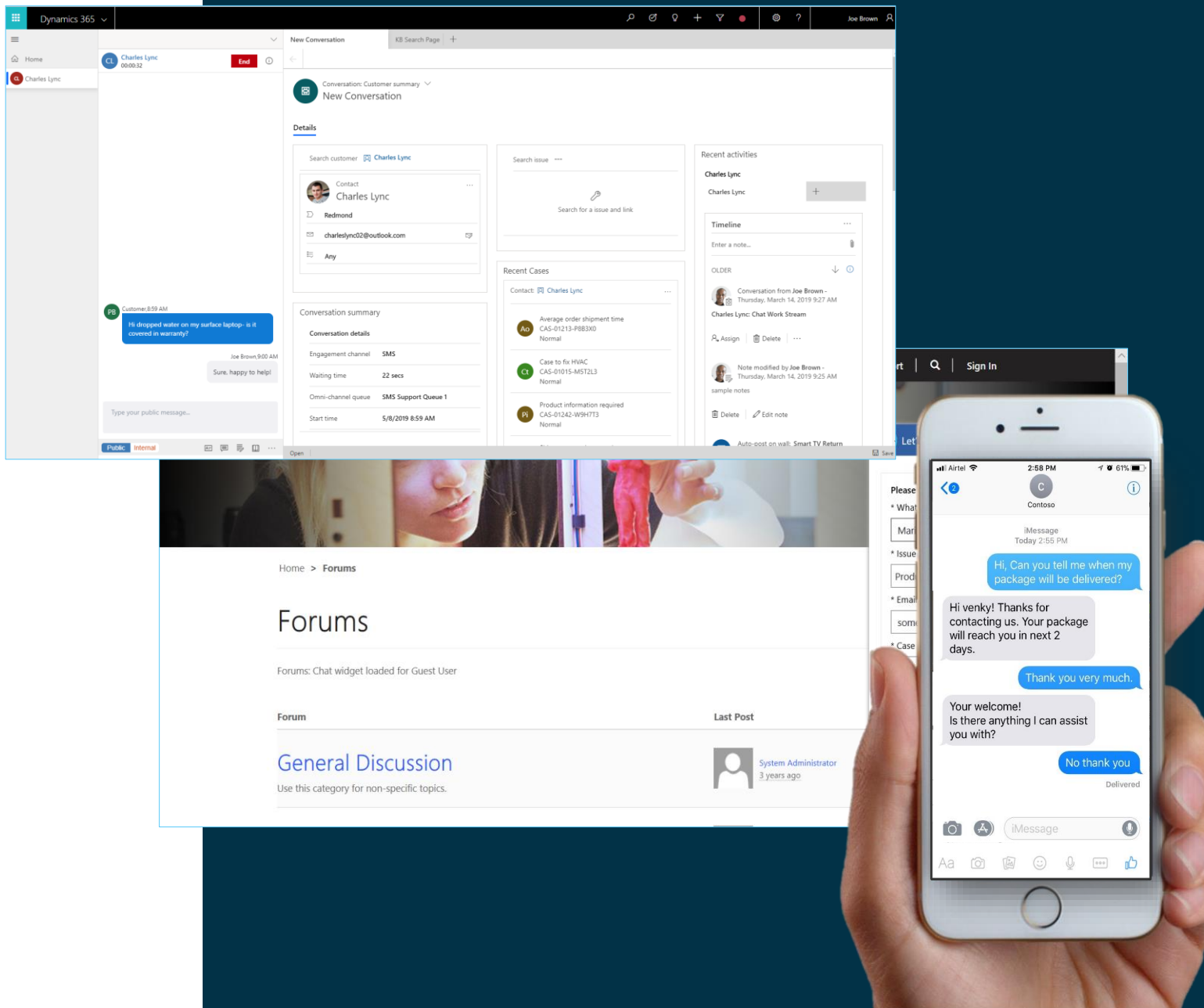
Keep track of all service interactions

INTELLIGENT PLANNING

Multichannel customer engagement

Connect with customers

- Use multiple channels, like chat in Dynamics 365 and SMS, for contextual engagement with customers
- Deploy the chat widget to enable technicians and agents to connect with customers
- Automatically identify and load customer and work details

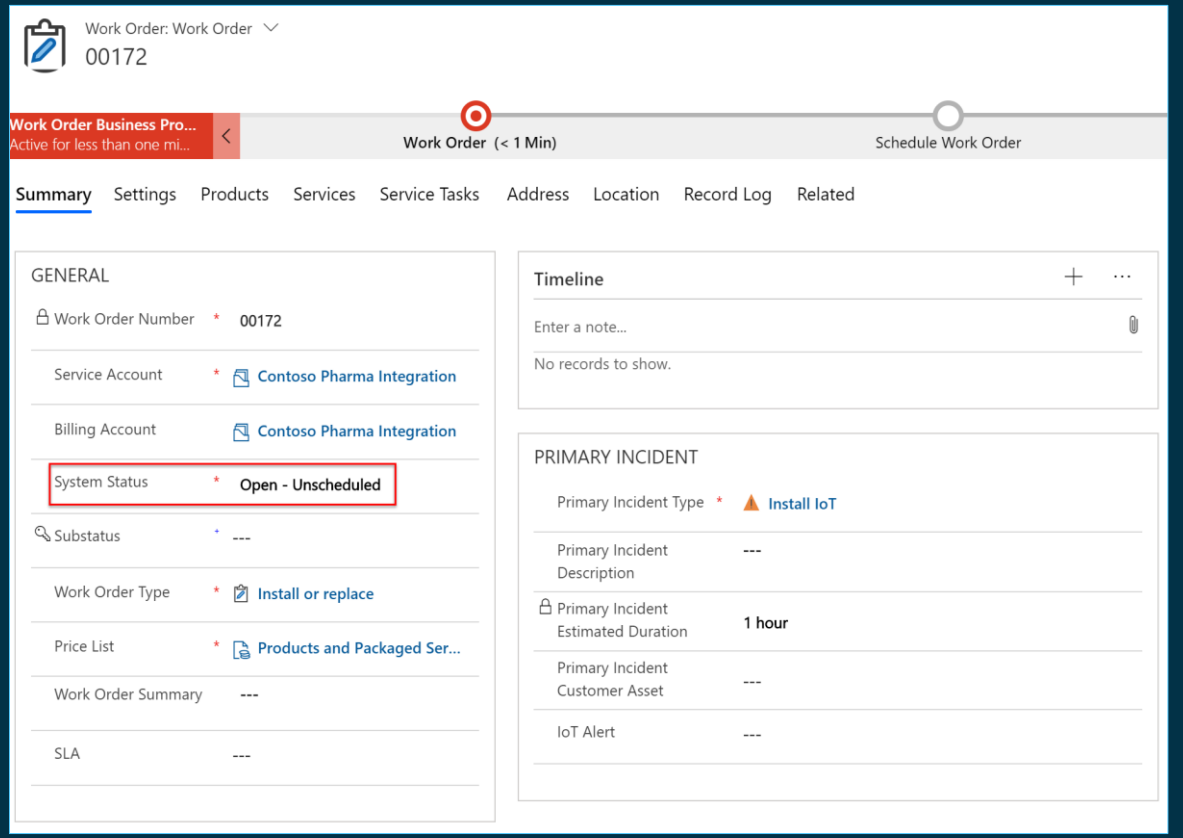


INTELLIGENT PLANNING

Multichannel customer engagement

Effectively create work orders

- Create different work orders types, specify customized work order sub status, and add/set priorities
- Pre-define work order types to specify the various types of service jobs that can be performed within an order
- Maintain detailed record of work order timeline to enable customized customer engagement

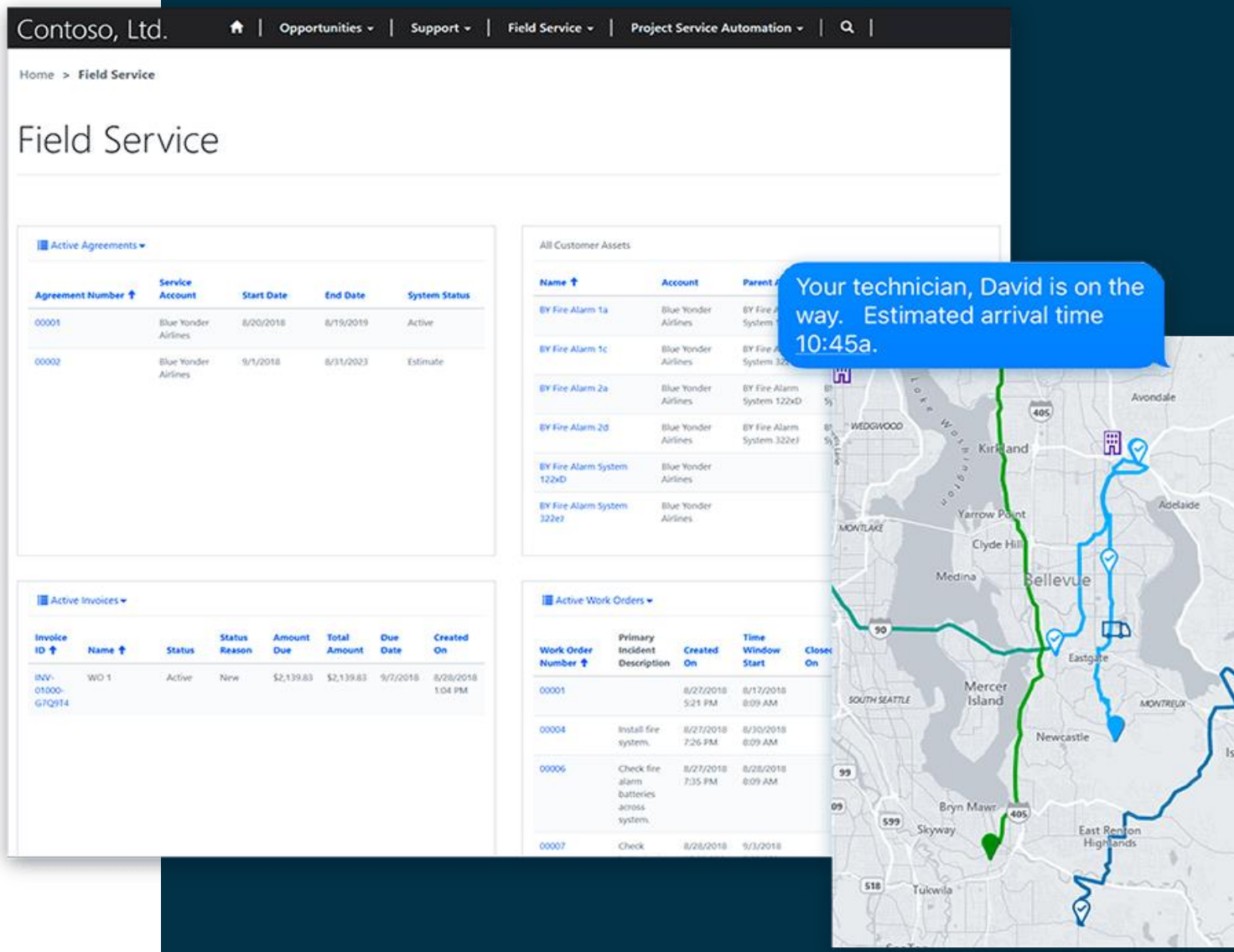


INTELLIGENT PLANNING

Multichannel customer engagement

Engage with your customers

- Send automated reminders and updates to customers through outbound text and phone capabilities
- Communicate proactively by providing your customers with real-time technician location tracking and automated voice and text appointment reminders
- Dispatch technicians using optimized routes and skills-based assignments and resources
- Send personalized surveys immediately after service calls with Microsoft Forms Pro—included with Dynamics 365 Field Service

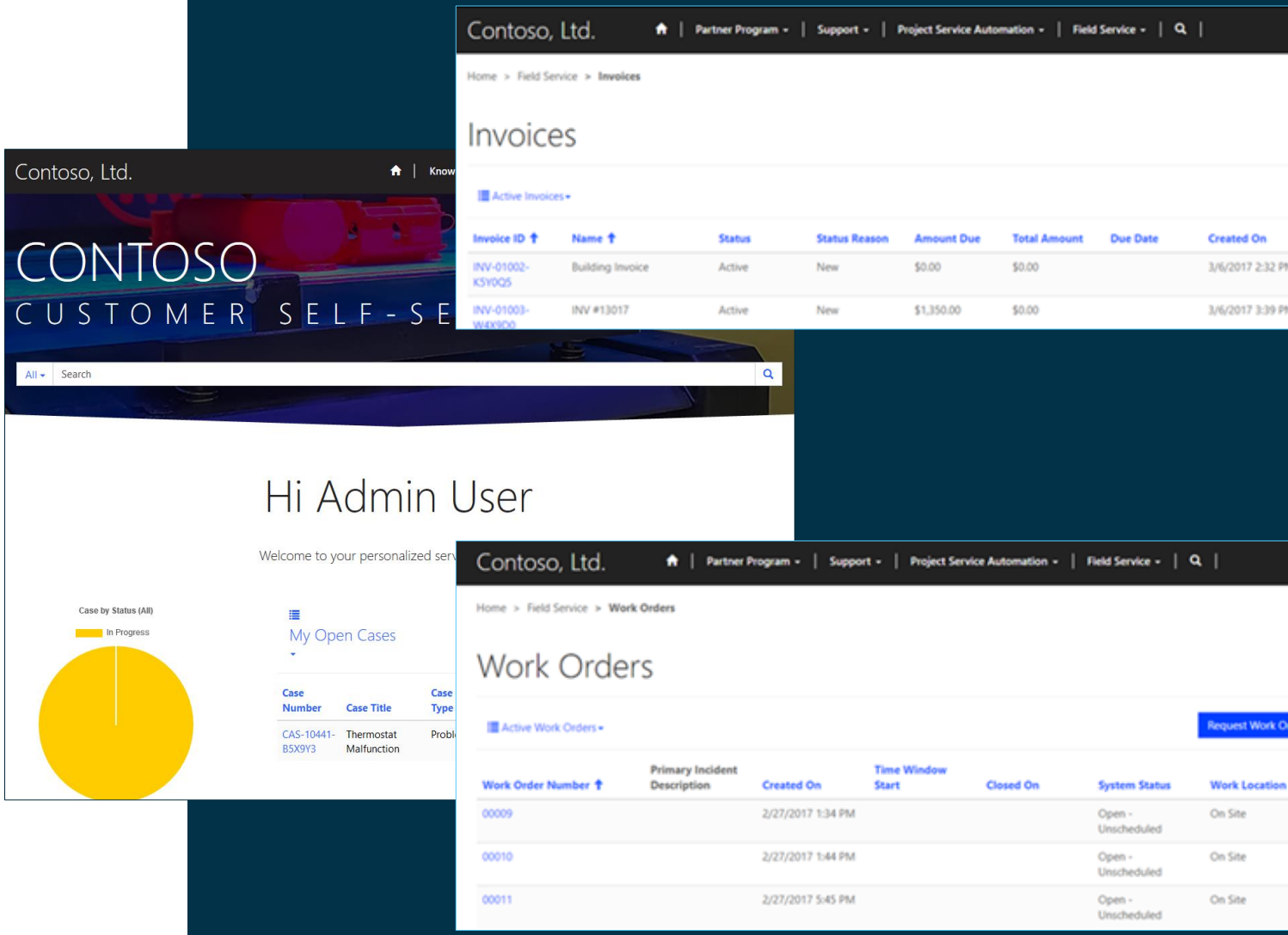


INTELLIGENT PLANNING

Multichannel customer engagement

Keep track of all service interactions

- Enable customers to open and track work order status, invoices, agreements, and assets
- Grant customer access to a knowledge base within the self-service portal to self-diagnose issues
- Empower customers to view and track work order data in real time
- Use a single portal to display content in multiple languages



INTELLIGENT
PLANNING

Service agreements and preventive maintenance

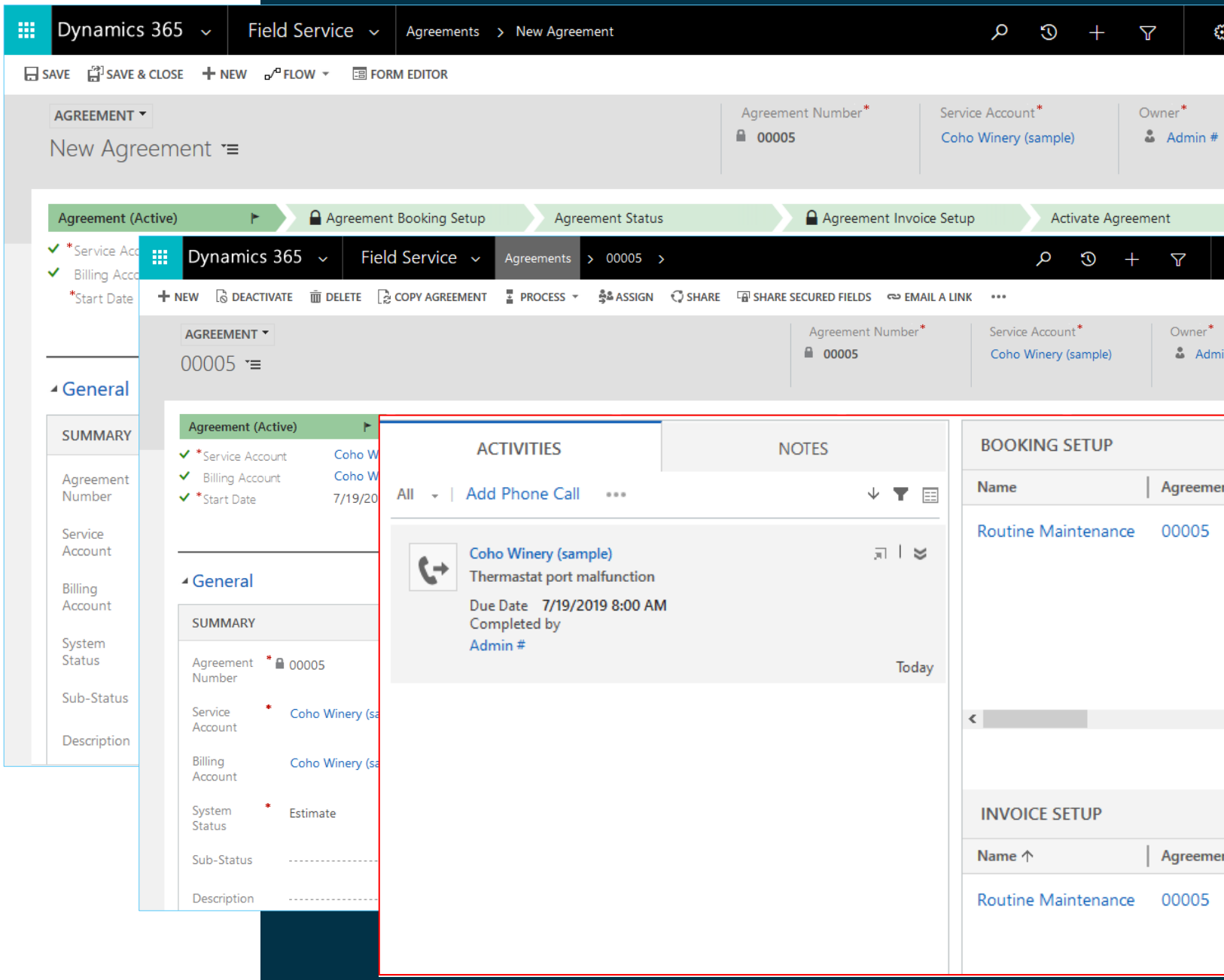
Generate preventive
work orders

INTELLIGENT PLANNING

Agreements and preventive maintenance

Generate preventive work orders

- Track, manage, and monitor the maintenance needs of an asset based on the manufacturer's recommendations
- Set up customer agreements so you can automatically generate work orders and invoices based on future need
- Use machine learning models to enable preventive maintenance based on EAM data



INTELLIGENT
PLANNING

Predictive maintenance enabled by IoT

Gain insights to react quickly

Monitor devices remotely

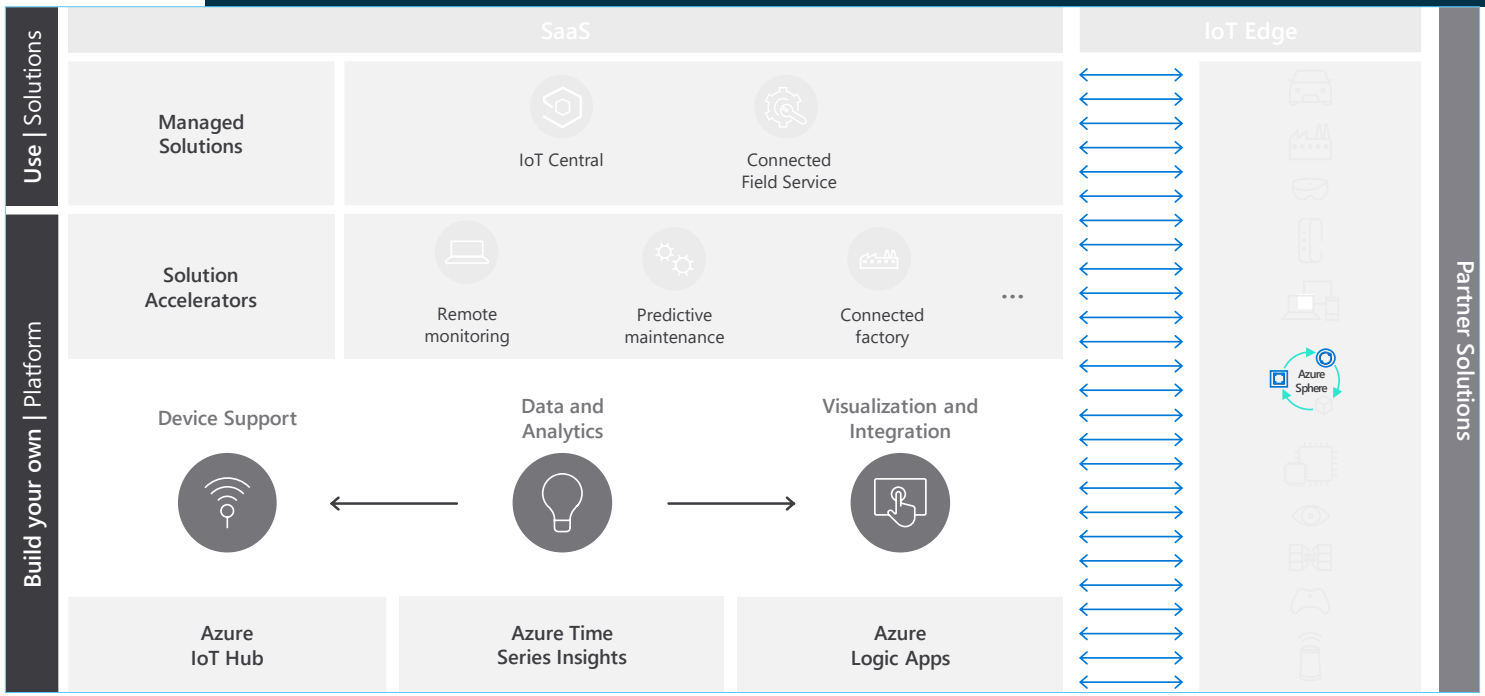
Automate maintenance

INTELLIGENT PLANNING

Predictive maintenance enabled by IoT

Gain insights to react quickly

- Enable real-time telemetry and interact with your customers' field environment
- Effectively integrate and support a wide array of Microsoft and third-party managed IoT devices
- Gain greater scale and efficiency
- Analyze and act on new data
- Integrate and transform business processes

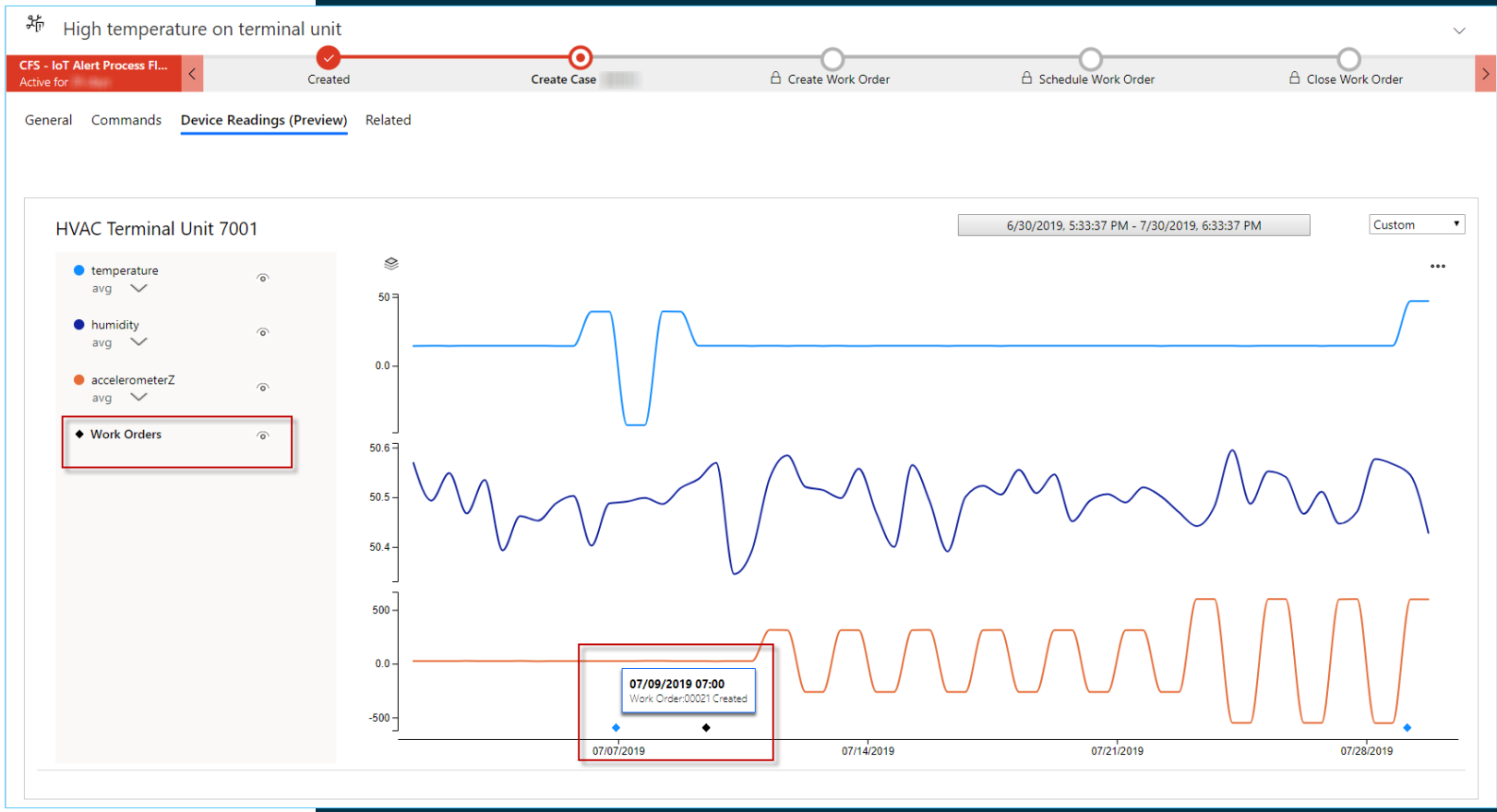


INTELLIGENT PLANNING

Predictive maintenance enabled by IoT

Monitor devices remotely

- Using the field service module, see and solve issues before clients are aware of them
- Reduce the number of service calls you receive by identifying and resolving issues before they occur
- With device telemetry and service maintenance data, make intelligent decisions around dispatching technicians with the right expertise, availability, and proximity to the job
- Create rules and configure Power Automate to integrate IoT-connected devices with an active alert system to receive updates on specific device activity

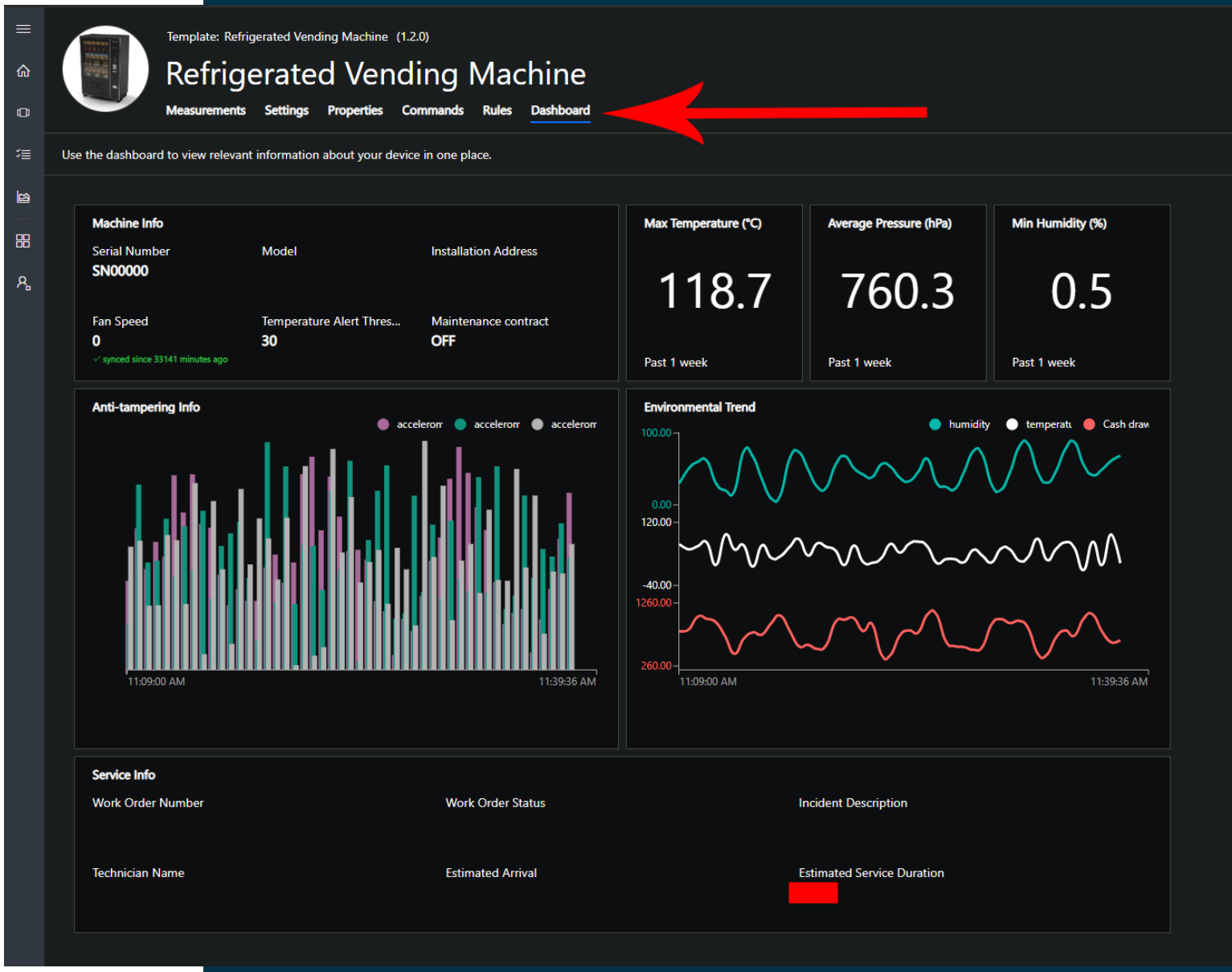


INTELLIGENT PLANNING

Predictive maintenance enabled by IoT

Automate maintenance

- Predict when a device needs attention and automate self-healing or maintenance steps before any kind of problem
- Use the remote monitoring dashboard to view telemetry from your connected devices, provision new ones, or upgrade firmware
- Visualize simulated devices on a map and respond to alerts
- View product usage, issues, and repair history from a central portal to diagnose problems and deliver predictive maintenance
- Get instant notifications and alerts about device health to automate the service-request generation process using predefined rules



INTELLIGENT
PLANNING

Proactive field service driven by machine learning

Optimize resource management

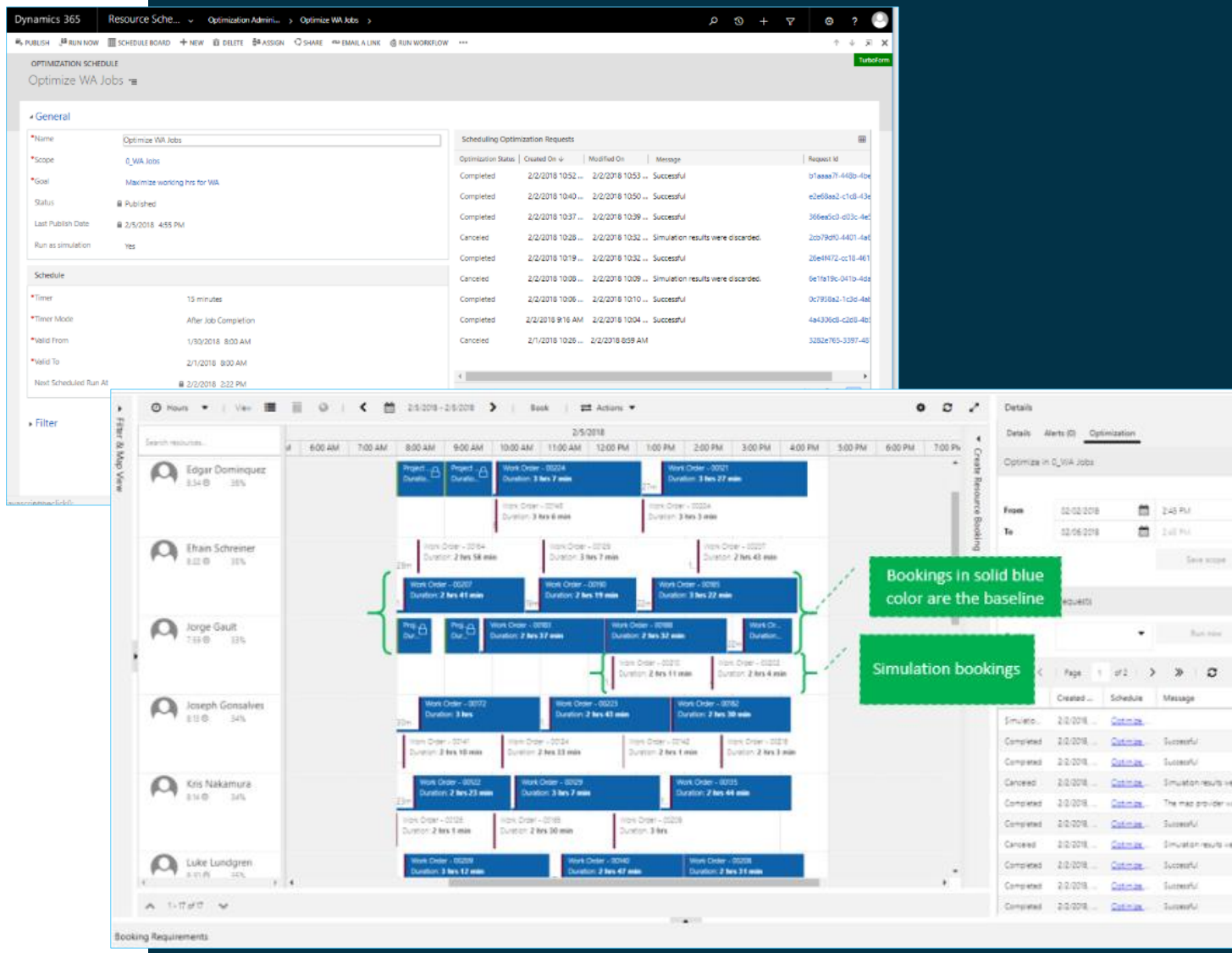
Improve customer service delivery capabilities

INTELLIGENT PLANNING

Proactive field service driven by machine learning

Optimize resource management

- Optimize resource assignments using multiple factors, such as a technician's experience in handling the specific failure, the customer's preferred technician, or proximity to the site
- Automatically assign the work order to the best available personnel
- Create the most efficient travel path for technicians, optimizing their schedules and allowing them to perform additional calls per day
- Using real-time inventory management, ensure that the replacement part is available on the scheduled date and that the technician has access to the tools needed to complete the job

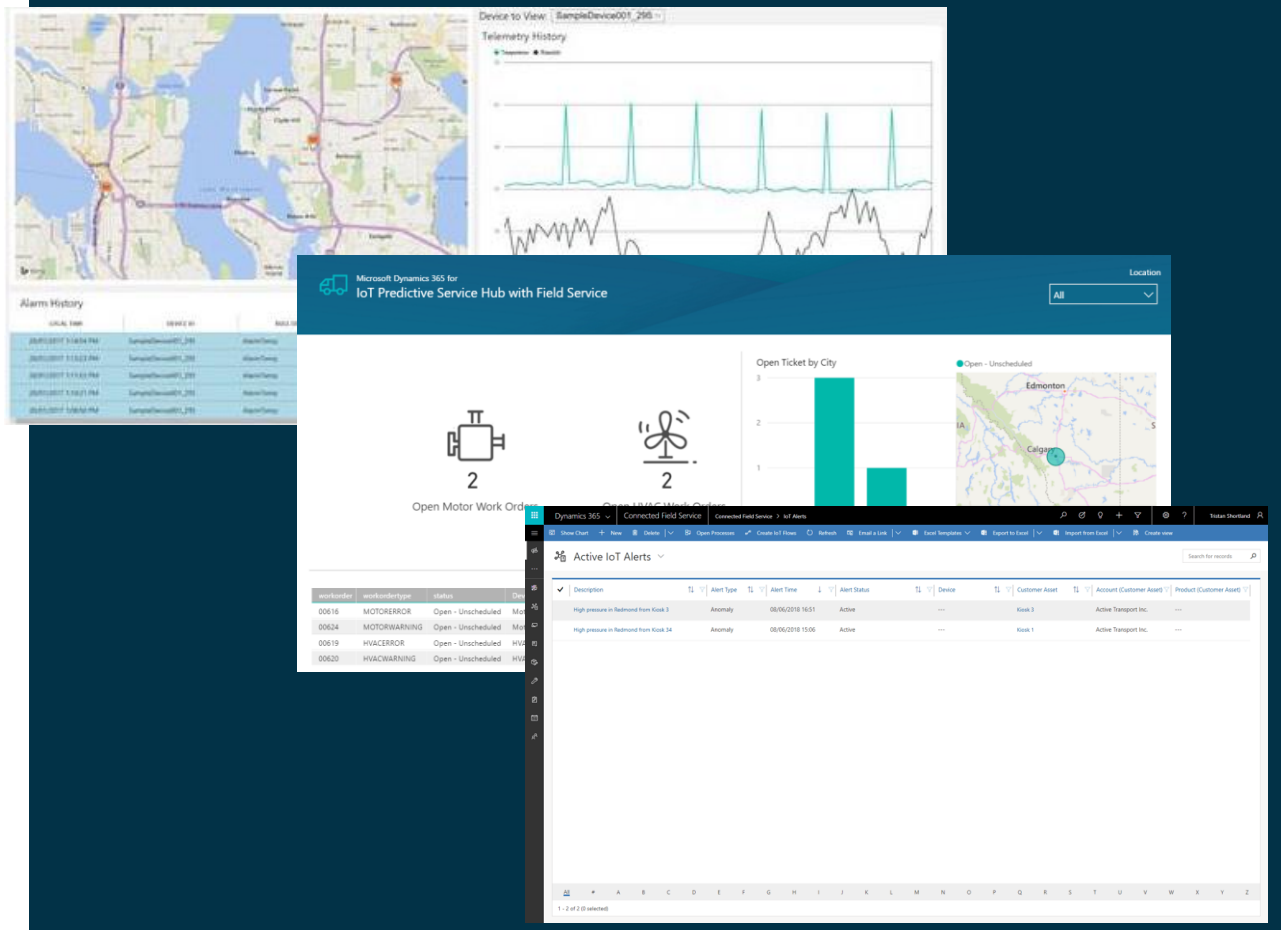


INTELLIGENT PLANNING

Proactive field service driven by machine learning

Improve customer service delivery capabilities

- Allow for automated, remote self-healing and predictive forecasting, monitoring, and analyzing connected devices for potential issues
- Using historical device data and predictive analytics, get system recommendations for scheduling technician site visits, heading off future problems and notifying the customer of the work order
- Using recommendations from the system, enable technicians to discuss additional products and services during site visits that meet their customers' specific usage and operating needs



Empowered agents and technicians

- Right people at the right time
- Effective asset and inventory management

EMPOWERED AGENTS
AND TECHNICIANS

Right people at the right time

Enable smart scheduling and routing

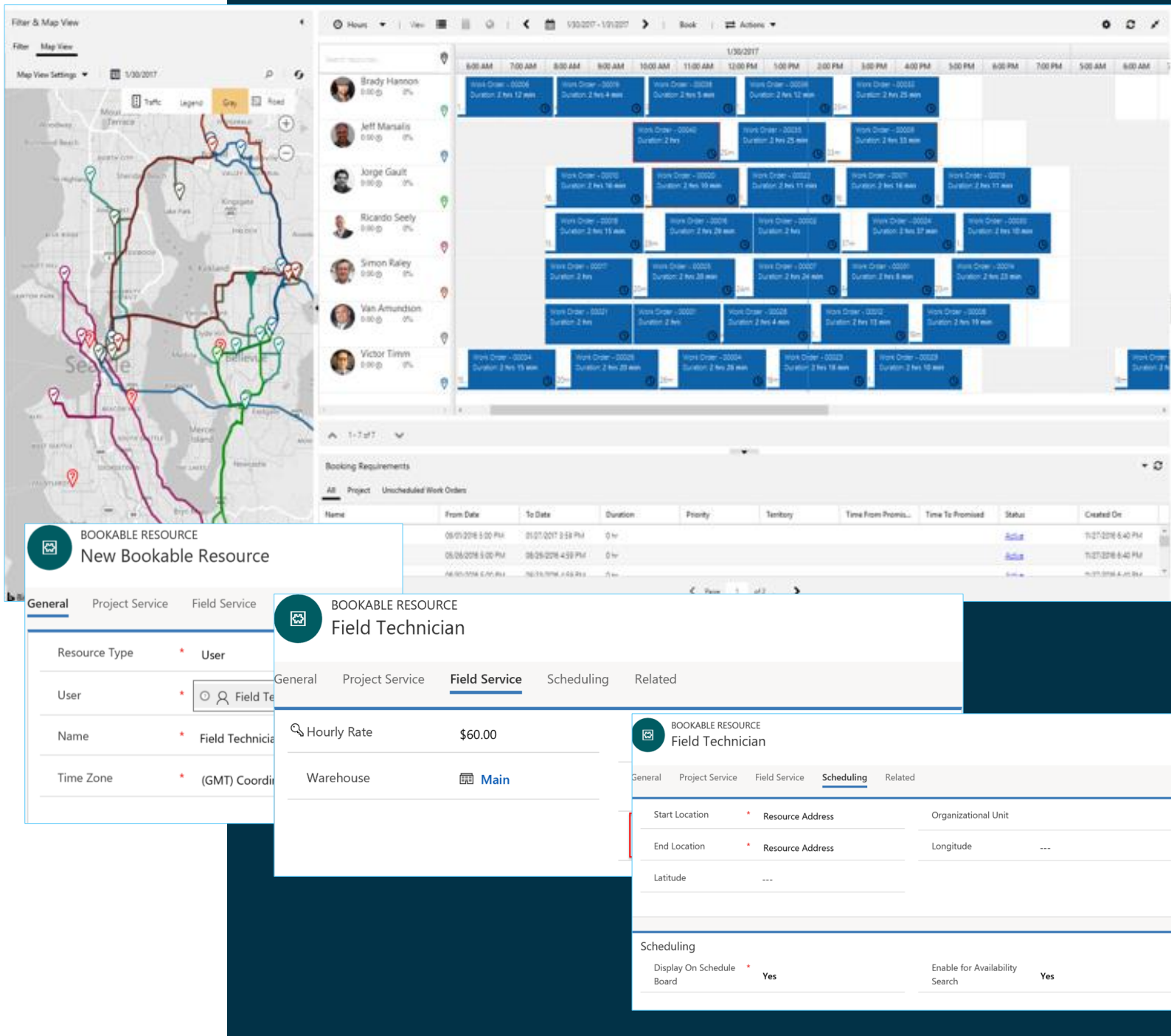
Automate and improve scheduling

EMPOWERED AGENTS AND TECHNICIANS

Right people at the right time

Enable smart scheduling and routing

- Assign resources to jobs and tasks based on location and need
- Ensure the right resources are assigned to customers at the right time and optimize resources to fit in the most appointments per day
- Schedule work orders for the most appropriate resources by optimizing bookings for the shortest travel time, available work hours, and more

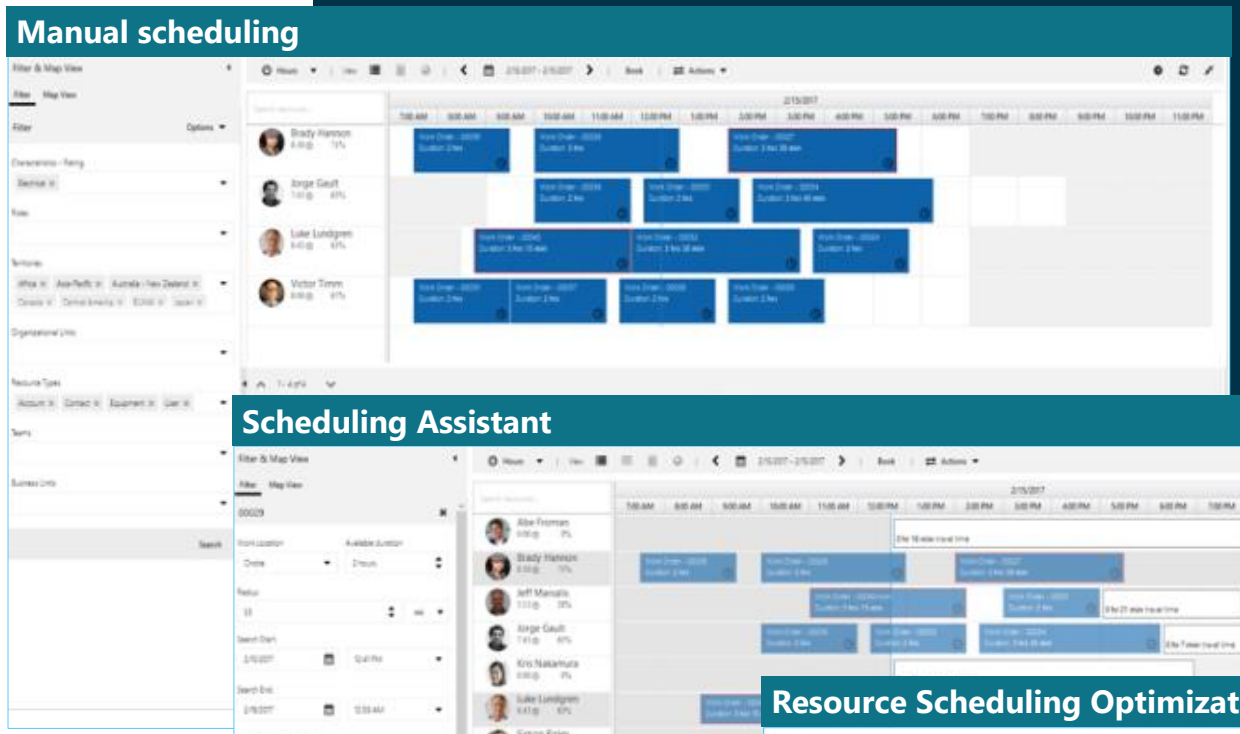


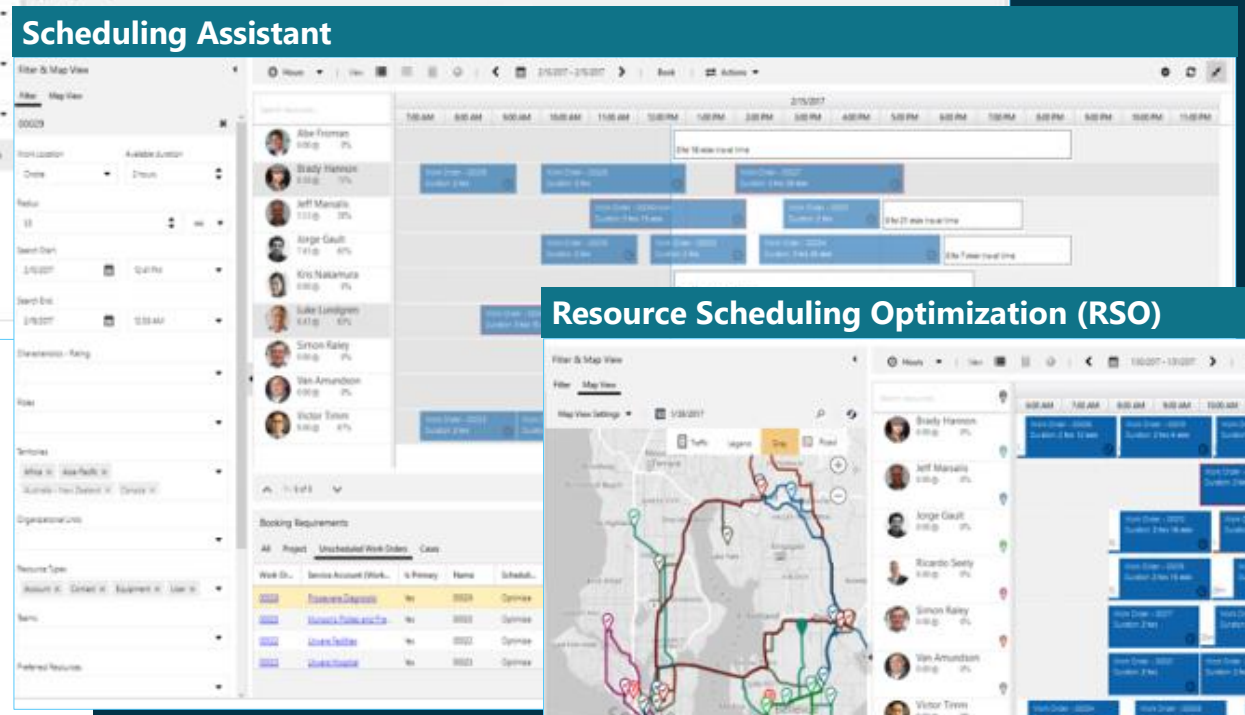
EMPOWERED AGENTS AND TECHNICIANS

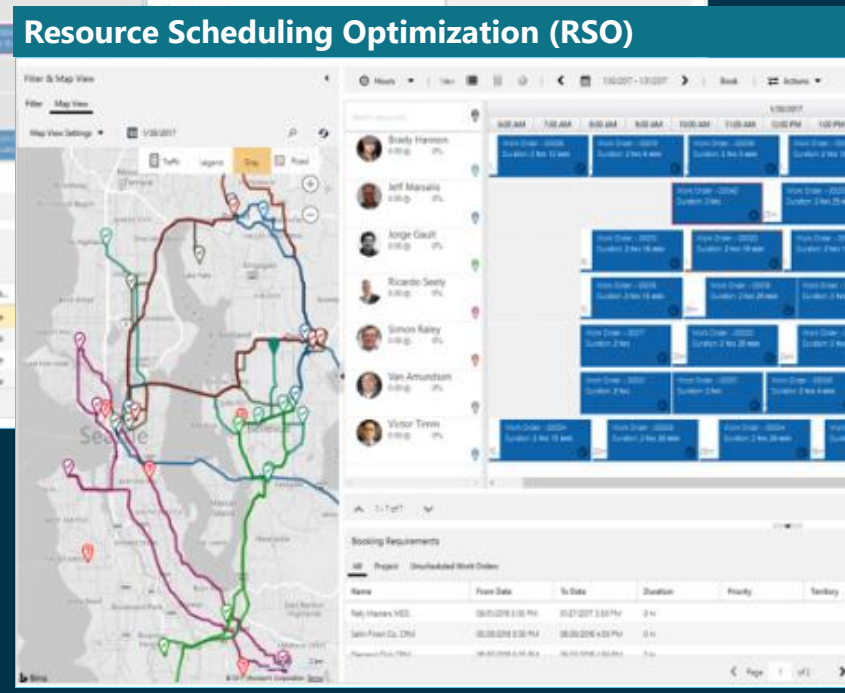
Right people at the right time

Automate and improve scheduling

- With Dynamics 365 Field Service, support the degree of automated scheduling automation that fits your needs
- Enhance manual scheduling using the schedule board to select requirements and create bookings
- Through the Schedule Assistant tool, take advantage of a semi-automated approach using available recommendations and most appropriate resources
- Using Resource Scheduling Optimization (RSO), automate the scheduling of your workforce, setting objectives such as “minimize travel time” and “maximize working hours”







EMPOWERED AGENTS
AND TECHNICIANS

Effective asset and inventory management

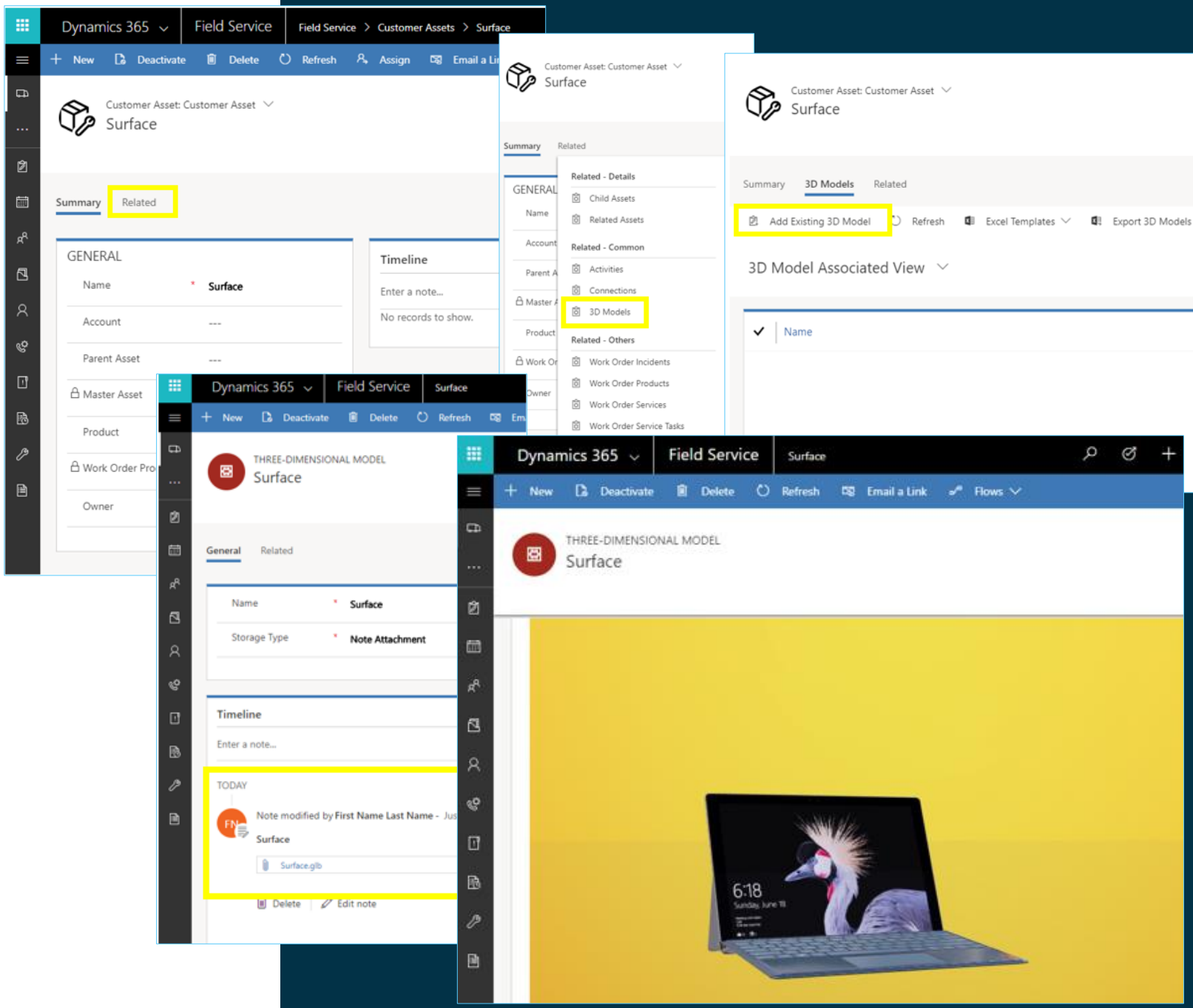
Asset and inventory management

EMPOWERED AGENTS AND TECHNICIANS

Effective asset and inventory management

Asset management

- Upload 3D knowledge articles and models of assets for field technicians to reference in the field
- Review work order history per asset using IoT device information
- Access multi-layer device hierarchy with links to product catalog for product trends

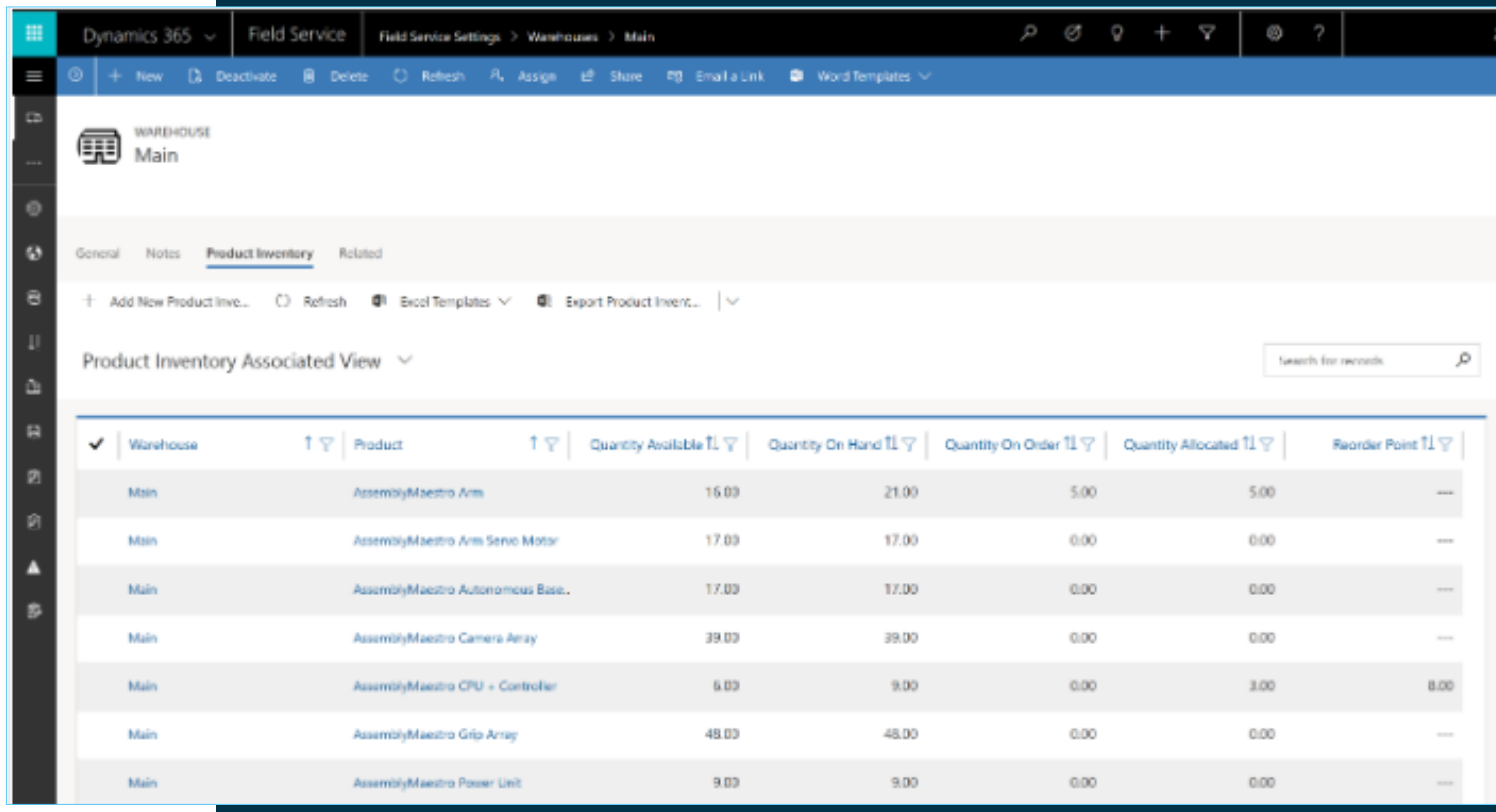


EMPOWERED AGENTS AND TECHNICIANS

Effective asset and inventory management

Inventory management

- Accurately track service stock at mobile and fixed locations, including available, on hand, on order, and allocated inventory
- Manage updates and stock history for any location, including truck stock
- Manage inventory information for transactions including requests, return material authorizations (RMA), a return to vendor (RTV), stock adjustments, or transfers
- Use the ship-via option to specify different shipping methods used by your company



Microsoft Dynamics 365

Next steps

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Take the next step

Get started with Dynamics 365 Field Service—empower your digital transformation through applying intelligence and connecting your data.

Contact us

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