UNLOCK CASE MANAGEMENT SOLUTION

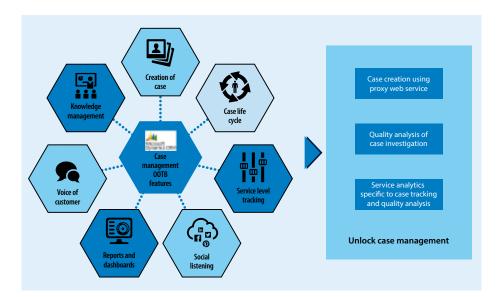## The Infosys unlock case management solution on Dynamics CRM

Customer satisfaction is an important KPI in every organization in every industry and case management plays a vital role in ensuring customer delight by tracking requests and ensuring transparency with customers.

The MS Dynamics CRM case management solution is used for enriching customer satisfaction, to store and track service / product-related customer requests, and issues relevant to any domain. Customer service and incident management being critical departments, require efficiency, accuracy, and security to achieve comprehensive business operations.

Infosys has developed an 'unlock case management' solution that supports the creation of service requests from a legacy application using proxy web service while ensuring quality analysis during case investigation. It also helps adhere to service level agreements (SLAs). The solution blends industry best practices and application capabilities, and can be configured to cater to organization-specific requirements that will help the client attain increased efficiency by effective reduction in customer response and resolution times.

Solution Features

- **Case creation using proxy web service:** The system facilitates integration with different legacy applications using a proxy web service which includes organizational internal applications, and external sites for automated creation of service requests.

- **Quality analysis of case investigation:**
  - The system supports customizable workflows for effective categorization, processing, escalation, and overall management of service requests
  - The SLAs can be configured easily as per organization guidelines
  - Automated warning activities / email / alert notification will be generated to indicate SLA breach
  - Case investigation process is defined for movement of cases from investigation to quality stage and also back to analyst, if correction is required

- **Management reporting:** Strong reporting capability built with SQL server reporting services (SSRS) helps the management in accelerating decision-making and getting a holistic view of the cases that are worked by analysts.

- **Dashboard-based reports service analytics:** The solution supports many roles and role-based reports, and dashboards to project daily case-work and status, compliance reports, and case aging reports. System recommended dashboard / reporting models can be used for trend projection and case analysis for future decision / strategy making.

Solution benefits

- Improved adherence
  - Enhanced escalation mechanism on SLA breach
  - Ensure superior and quicker service for closure of customer requests
  - Facilitate regulatory compliance as per industry norms and specific jurisdictions
  - Facilitate timely investigation of cases
- Customer care everywhere
  - Automates creation of cases from multiple application sources
  - Data integrity
  - Visibility across the organization
  - Improved customer experience and satisfaction
- Enhanced analytics
  - Increased visibility of customer request trend analysis based on the service request history
  - Enables more effective decision-making
  - Holistic visibility of cases for analysts for better planning
  - More informed customer responses based on analytics across parameters related to cases
- Quality analysis
  - Ensures quality of investigation
  - Protects the process that is followed for investigation of cases
  - Quality analysis ensures integrity and agility of investigation
- Better information management resulting in reduced reporting time and increased efficiency

Client success stories

A leading bank in the EMEA region chose Infosys, a Microsoft Global Systems Integrator and Gold Certified Partner, as its preferred partner to deploy the Microsoft Dynamics CRM solution. They faced challenges in providing repeatable and effective customer service. There was no single-source-of-truth about customer relationships and information. The client wanted to leverage workarounds and avoid customizations to keep the solution scalable, while meeting all their business needs. Infosys delivered a tight CTI and CRM integration that helped automate pop-ups from the IVR system and direct automatic access to customer 360° views to serve customers. The solution also automated the assignment of opportunities and cases to teams and helped measure sales and service effectiveness for faster turnaround time for customer requests. This in turn, provided better focus on more important facets such as data security and compliance check.

A leading US-based money transfer company that provides money transfer services with different products within the domain to over 200 countries through 339,000 agents was managing service requests through Microsoft Excel. Approval / closure was a big challenge, further increasing the complexity in decision-making. Infosys built a global Microsoft Dynamics CRM-based case management solution and developed an AML module to provide a platform for case creation, investigation, and CTR case and SAR case filing to FINCEN, the regulatory body. We also developed a global complaints module to address complaints from consumers and take it to a logical and customer-satisfied conclusion.

Testimonial

"This is a significant success story and my congratulations to the team! Thank you to everyone for your contributions to this effort, and looking forward to our many successes to come!!" – VP, AML and Fraud Prevention, Global Compliance

Core Competency:

- Excellent footprint in providing case management solution / framework based on our work in multiple geographies / domains
- A pool of certified Microsoft Dynamics CRM architects, functional, and technical consultants
- 360 degree alliance with Microsoft enabling us to bring greater value to our clients
- 34 years of undying rigor and focus on quality of people, processes, and services
- Strong know-how on quality analysis of case management
- Knowledge and learnings from implementation in various domains, specific to case management

Our Microsoft Dynamics CRM Practice: Key highlights

Partnered with Microsoft for their internal implementation of Microsoft Dynamics CRM	**Early mover advantage:** Involved in developing solutions on Microsoft products that have not been released to the marketplace	**End-to-end offerings:** Consulting, package evaluation, implementation, rollout, upgrades, and support

For more information, contact askus@infosys.com

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