Course 80545: Customer Service in Microsoft Dynamics CRM 2013

Length: 1 Days

Language(s):   English

Delivery Method: Instructor-led (classroom)

OVERVIEW

About This Course

This course focuses on how an organization can nurture customer satisfaction through automation of business processes within Microsoft Dynamics CRM 2013. This course provides an insight into all of the powerful Customer Service and Service Scheduling functionality capabilities within Microsoft Dynamics CRM 2013.

Additionally, this course guides you through the process of working with your customers in Microsoft Dynamics CRM 2013, including: resolution of customer complaints and services issues cost effectively, and provides insight on managing all related correspondence, documents, contacts and conversations. This course demonstrates the rich and relevant view of your customer that provides your team with actionable insights, including the use of knowledge management in a centralized knowledge base.

Audience Profile

This course is intended for individuals that plan to implement, use, maintain, or support Microsoft Dynamics CRM 2013 in their organization. The training is intended for customer service representatives, service schedulers, administrators, office managers, CEOs, and consultants who want to gain foundational knowledge of the application functionality.

At Course Completion

After completing this course, students will be able to:

- Identify the key set of terms, phrases and elements to effectively work with Customer Service Scenarios and Terminology
- Recognize why cases are the fundamental record type in service management, and represent a single incident of service.
- Use Queues to organize and store Activities and Cases that are waiting to be processed.
- Effectively search the Knowledge Base to access a repository of informational articles used to assist customer service representatives in the resolution of cases.
- Utilize Contract Management to specify the amount of support services a customer is entitled to.
- Use reporting functionality to gain insight into trends, performance, and identifying opportunities and potential issues.
- Practice Goal Management features to establish and track progress against target values for key performance indicators.
- Use the Service scheduling functionality and how it is designed to assist organizations when providing services that require complex combinations of resources.

Course Outline

Module 1: Introduction

Microsoft Dynamics CRM includes a comprehensive set of features that increases the efficiency of customer service operations. This module introduces Microsoft Dynamics CRM Customer Service terminology and customer scenarios that the Customer Service module might be used. The module discusses the basic components of case management, and works with the knowledge base, queues, and service contracts. The module also provides an overview of service scheduling and service management.

Lessons

- Customer Scenarios
- Customer Service Entities and Record Types

After completing this module, students will be able to:

- Understand and explain the basic record types utilized by the Customer Service functionality of Microsoft Dynamics CRM.
- Provide examples of customer scenarios where the Customer Service capabilities of Microsoft Dynamics CRM can be applied.

Module 2: Cases

Customer service is important to a customer relationship management strategy. Microsoft Dynamics CRM provides many features that organizations can use to manage the services they provide to customers. This module discusses cases and how the cases can be used together in service management functions.

Lessons

- Creating Case Records
- Understanding the Process Ribbon and Menu Options
- Case Resolution, Canceling and Deleting
- Assigning Case Records
- Other Actions on Cases From Forms and Views
- Working with the Subject Tree
- Working with the Case List and Views

Lab : Case Resolution Processing

- Create a case
- Associate a phone call with the case
- Resolve the case

After completing this module, students will be able to:

- Discuss the steps that are required to create a new case.
- Explain the case to resolution process and how it can be used effectively.
- Examine the effect of the activities and the procedures that are used for the knowledge base.

Module 3: Knowledge Base

Most customer service organizations use a knowledge base to provide customer service representatives (CSRs) with the information that they must have to answer questions about a product or service. In Microsoft Dynamics CRM, the Knowledge Base provides a central repository for an organization's information, stored as Articles and organized by Subject.

Lessons

- Article Templates
- Creating, Approving and Publishing Articles
- Using and Searching the Knowledge Base
- Cases and Knowledge Base Articles
- Sending Knowledge Base Articles

Lab : Managing Knowledge Base Articles

- Create, Submit, and Publish a Knowledge Base Article.

After completing this module, students will be able to:

- Create, activate, deactivate, and delete Knowledge Base article templates.
- Examine the complete process to create, edit, and publish Knowledge Base articles.
- Search for Knowledge Base articles through the Workplace, Service Area, and Advanced Find.
- Search Knowledge Base articles from a case record.
- Use Knowledge Base articles to help resolve cases.

Module 4: Queue Management

A queue is an area that is used to organize and store activities and work items that are waiting to be processed. A queue is also used for activities and work items that are currently being worked on. Microsoft Dynamics CRM includes queuing and workflow tools to improve how incoming requests for sales, marketing, and customer service are handled.

Lessons

- Queue Management

Lab : Create and Manage Queues

- Create a New Public Queue for Incoming Questions

After completing this module, students will be able to:

- Explain the differences and the details of Default/System Queues and Personal Queues.
- Create and maintain Queues and Queue Items.
- Work with Routing Queue items. This includes Adding, Working on, and Releasing.

Module 5: Contracts

Microsoft Dynamics CRM provides many features that organizations can use to manage the services they provide to customers. This module describes how contracts can be used together with other record types in Microsoft Dynamics CRM to help service and manage functions.

Lessons

- Contracts and Contract Templates
- Creating and Working with Contracts
- Using Contracts with Cases

Lab : Resolving a Case with a Contract

- Create a Contract Template
- Create a Contract using a Contract Template
- Open a case and associate a contract
- Create and Close an Appointment Activity a With the Case
- Resolve the Case

After completing this module, students will be able to:

- Understand and explain the components of contracts.
- Create and manage contract templates.
- Create and manage contracts.
- Understand the role of contract lines and add contract lines to a contract.
- Associate contracts with cases and understand the case resolution process when contracts are used.

Module 6: Analysis, Reports and Goals

In Microsoft Dynamics CRM, many methods are available to analyze and report Service Management information. By default, several reports are available, and this includes the "Case Summary Table" report. This report is discussed in this module.

Lessons

- Customer Service Reports
- Customer Service Charts and Dashboards
- Customer Service Goals and Metrics

Lab : Goals and Goal Metrics

- Modify a Goal Metric to Include in-Progress Cases

After completing this module, students will be able to:

- Work with the preconfigured service management reports.
- Build personal and system charts and dashboards to provide insight into important service management information.
- Use the Goal Management features to create and manage goals for service management.

Module 7: Service Scheduling

This module provides an overview of the service scheduling features of Microsoft Dynamics CRM. The organizations that use service scheduling require a complex combination of resources. Service scheduling considers the availability of employees, facilities, and equipment to make sure that the resources are available to deliver service activities for customers.

Lessons

- Service Scheduling Scenarios
- Service Scheduling Terminology
- Service Scheduling Process
- Resources, Services and Selection Rules
- Include Customer Preferences
- Understand Sites and Same-Site Requirements
- Manage Business Closures
- Explain the Service Activity Scheduling Engine
- Working with Service Activities and the Service Calendar
- Close, Cancel, or Reschedule a Service Activity

Lab : Schedule a Service by Using a Same-Site Requirement

- Create a Service Activity based on a Same-Site Requirement Service.

After completing this module, students will be able to:

- Explain common scenarios where the Scheduling Module can apply.
- Define the context of the basic elements of the Scheduling Module.
- Identify the important role and of the Service Activity Scheduling Engine and Scheduling Process.
- Show how to create and modify Services and Selection Rules for the resources that are required to perform a service activity.
- Include customer preferences when service activities are scheduled.
- Describe how important sites are, and how to associate resources to a site. Also describe how to enforce same-site restrictions on a resource selection rule.
- Configure resources and build selection rules to perform capacity scheduling.
- Describe how to create and manage service activities.

Prerequisites:

Before attending this course, students must have:

- General knowledge of Microsoft Windows
- General knowledge of Microsoft Office
- An understanding of Customer Relationship Management solution processes and practices