



# Dynamics 365 in Retail

Engage Your Customers

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# Scenario Overview

## Engage Your Customers

Retail is rapidly transforming. Customers demand personal and seamless experiences that make shopping fun and rewarding across touchpoints and devices.

Stay ahead of the curve with Microsoft Dynamics 365. Dynamics 365 helps you predict what shoppers want, reach customers when and where they shop, enhance the in-store experience, and increase your brand's value through outstanding customer service.

Learn more about how Dynamics 365 can impact your business.



Increase loyalty through consistently excellent omni-channel experiences.

Mary

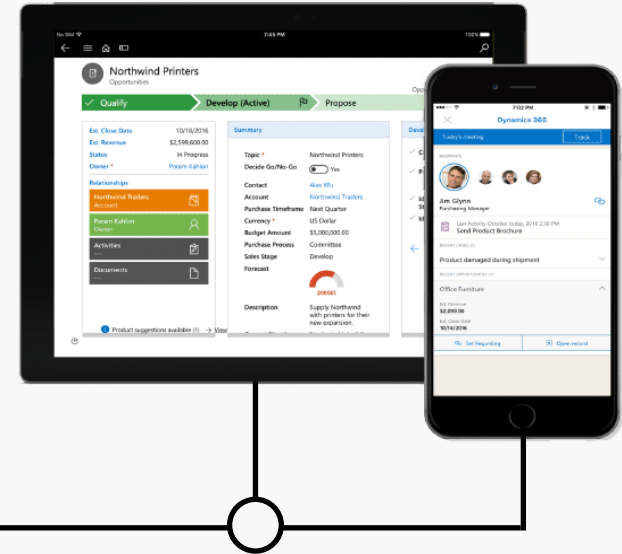
### Customer Service Representative

Mary is a customer service representative responsible for addressing customer concerns and removing blockers. Working remotely with customers, she gains personal satisfaction from solving their problems.

James is interested in a television but wants to research it before he goes to the store. He visits the store's website and has a question. He clicks the "Need help?" button, which opens a text chat window. Via text chat, Mary engages James, answering his questions. Soon they browse products together, continuing the conversation. When James has further questions, Mary escalates to a face-to-face video call with the customer.



Microsoft Dynamics 365 for Customer Service provides a single view into all information—from scripting to entitlements to recommendations. Agents can handle service interactions in one place on desktop and mobile devices.



With Customer Service, Mary can engage customers from anywhere. Her conversations continue and she can access the same information across devices, providing personalized service fast wherever she is.



Facilitate even more personalized, intelligent digital experiences by tapping into extended capabilities available through trusted partner apps. Representatives can assist customers through chat, co-browse, click-to-call, and video collaboration using a consistent UI across channels.

While assisting James, Mary seamlessly escalates the level of service. The experience is consistent throughout, and James is pleased with the level of service, especially from a remote agent. He'd shop on this website again.

Enhance your customer relationship through more meaningful in-store interactions.

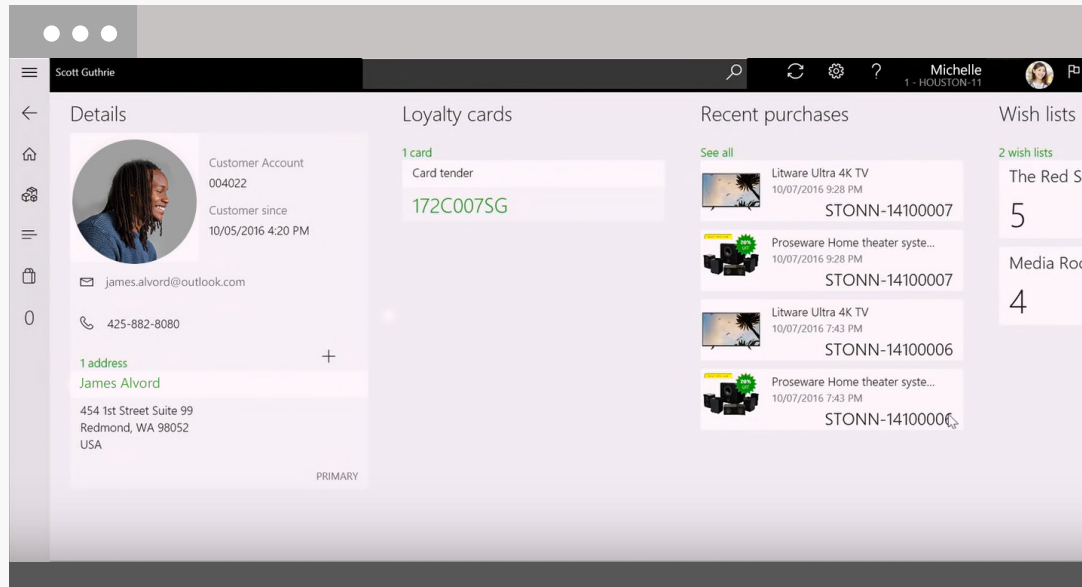
Michelle

In-Store Sales Associate

Michelle is an in-store sales associate who has been working at this store for the past year. She likes working face-to-face with customers to help them make informed purchases, and is passionate about the products she sells.

James enters the store and is greeted by Michelle. Michelle looks at her tablet, sees James's customer snapshot, and assists James in locating the television and making the purchase. Cortana Intelligence also recommends a home theater system. Though he doesn't purchase the system at the time, James expresses interest, and Michelle updates the customer record so future meaningful contact can be made.





Microsoft Dynamics 365 for Sales offers actionable insights at the point of sale. Leveraging beacon technology, associates can retrieve customer snapshots on the spot. Recent purchase data and other information help frame initial conversations.

When James walked in the store, Michelle received an alert and James' browsing history, wish list data, and customer service record. Michelle can also video chat on the sales floor with remote product experts to answer James's technical questions.







Dynamics 365 for Sales provides social insights, up-to-date company information, and an embedded sales process. It helps associates personalize assistance and suggest additional products while creating meaningful interactions.

Michelle continued the conversation James started with Mary, and assisted James through his purchase. Michelle updates James's record so that other associates may provide personalized, intelligent service to James down the road.

Speak directly to your customer's needs by effectively leveraging the campaign data available to you.

Tim

Retail Marketer

Tim is an experienced retail marketer. He is responsible for maintaining communication initiatives for several customers in a dedicated region.

Tim is planning his latest email campaign, which offers a discount on home theater systems. Using data that measures the success of previous campaigns, he decides to target customers who have recently purchased certain electronics. Tim begins the campaign, with automated follow-ups, to continue the conversation with this group of customers—which includes James. Tim tracks the conversion rates of this campaign to shape future ones.



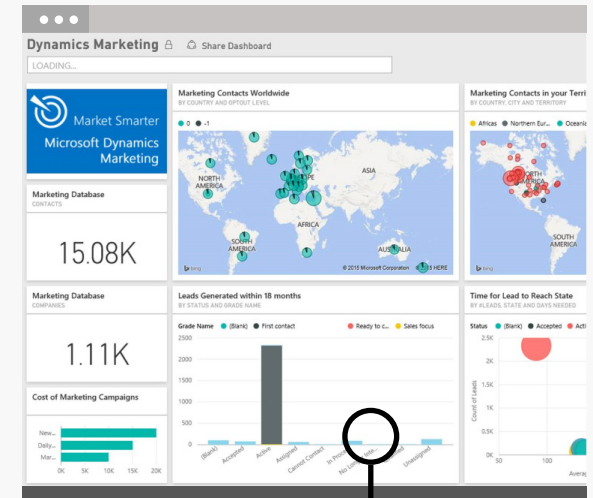


Microsoft Dynamics for Marketing personalizes communications and builds upon previous interactions. Marketers can speak to an existing need and customize communications—even automated offers shift based on customer behavior.

Tim can target a specific person, like James, rather than a mass of people. With limited time, he is able to make the most of his customer interactions and improve conversion rates for his campaigns.



Dynamics for Marketing leverages Power BI to capture a holistic view of customer segments and enable strategic decision making. A consistent UI makes it easy to see existing customer needs and plan for more targeted engagements.



Built-in Power BI helps Tim efficiently and effectively target customers for his campaign. James receives an email offer in his inbox for the home theater system he was thinking about, and visits the store website to learn more.

## Microsoft Services

The Microsoft Services for Enterprise organization includes a diverse group of technical architects, engineers, consultants, and support professionals dedicated to delivering on Microsoft's mission of empowering businesses on the planet to do more and achieve more in a mobile-first, cloud-first world.

Microsoft has tremendous breadth and depth in the products, services, and devices it offers, and Microsoft Services is uniquely positioned to bring them all together. We strive to earn the confidence, trust, and loyalty of our business customers by helping them get the most from their technology investments through strategy, planning, deployment, and support services.

<https://www.microsoft.com/en-us/microsoftservices/default.aspx>

## Microsoft Dynamics 365

Microsoft Dynamics 365 unifies CRM and ERP capabilities into applications that work seamlessly together across sales, customer service, field service, operations, financials, marketing, and project service automation. Dynamics 365 also includes analytics from Cortana Intelligence and Power BI, and the productivity power of Office 365. Built on an extensible platform with shared data and digital intelligence, Dynamics 365 helps your team make the most of every minute.

<https://www.microsoft.com/en-us/dynamics365/home>

