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Complete and extend Microsoft Dynamics 365*

Elevate customer experiences with ServiceNow while maximizing your investment

*Microsoft and Dynamics 365 are trademarks of the Microsoft group of companies.

"B2B demand leaders deliver satisfying experiences across the customer lifecycle."

Forrester
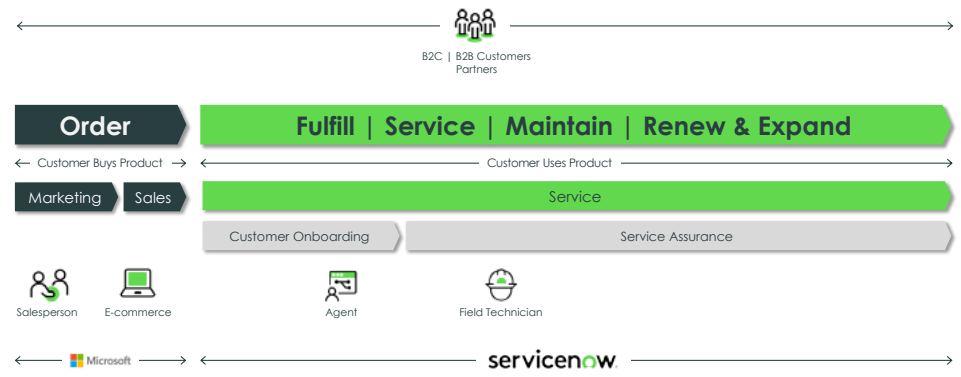"Predictions 2023: Fortune favors the bold and focused"

Great customer experience is your best differentiator

Customer service is your most important asset for delivering great end-to-end experiences

Customer experiences begin at the very first touch point with your company and continue throughout the customer lifecycle, as customers adopt, use, recommend, and make decisions on additional purchases.

Marketing and sales activities are key in these journeys; however, it's your customer service that makes up the majority of customer engagement opportunities. Customer service affects every aspect of the customer experience, from order fulfillment, installation, ongoing service, renewal, and expansion through lasting loyalty.

Customer journey

B2C | B2B Customers
Partners

Order | **Fulfill | Service | Maintain | Renew & Expand**

← Customer Buys Product → ← Customer Uses Product →

Marketing | Sales | Service

Customer Onboarding | Service Assurance

Salesperson | E-commerce | Agent | Field Technician

← Microsoft → ← servicenow →

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Traditional customer relationship management solutions may neglect key areas of the customer journey.

While marketing and sales are needed to engage customers, flawless delivery of customer service is critical to customer retention.

Challenges for customers	Challenges for organizations
• Helping themselves quickly via self-service requests	• Assigning customer issues to other departments
• Getting information regarding products, services, infrastructure, and devices they own	• Gaining visibility into customer details and uncovering cross-sell opportunities
• Bouncing between agents, technicians, and other resolvers because departmental workflows are disconnected	• Sharing customer product and service information across departments
• Giving vendors visibility into issues so customers can receive more applicable support	• Increasing agent efficiencies and reducing costs

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Comprehensive customer service solution

Purpose-built, flexible, and easily integrated

Customer service solutions must be purpose-built to support service processes and embrace technologies such as AI, chatbots, and workflows. By managing service processes from onboarding to issue resolution, these solutions optimize productivity and reduce:
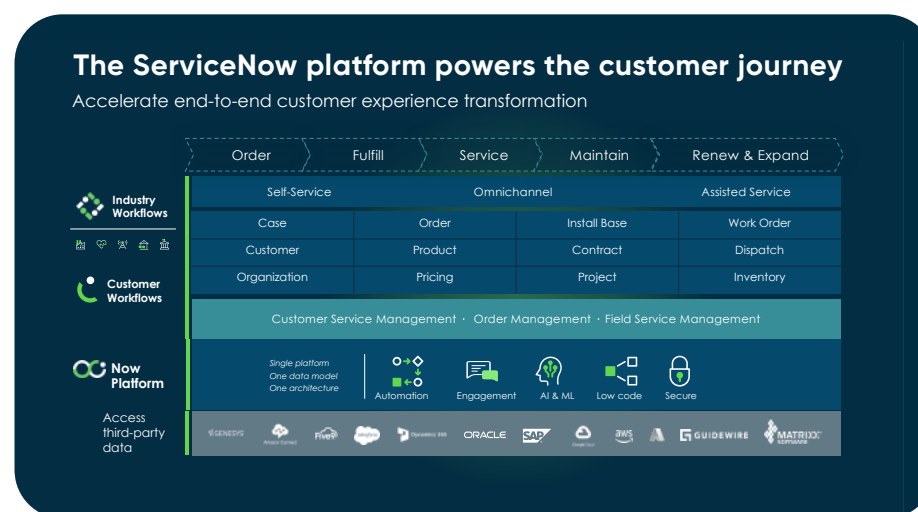
- Ongoing frustrations over delayed interactions

- Number of inquiries required to resolve any one issue or question

- Repeatedly providing basic profile and issue background information

- Lengthy processes made more complex when crossing departmental lines

To deliver seamless experiences, customer service platforms must integrate with sales, marketing, enterprise resource planning (ERP) systems, and middle- and back-office solutions. Most customer data resides in customer service and ERP/billing systems, and not in customer relationship management (CRM) or sales force automation (SFA) systems as often assumed. Customer service solutions need flexibility and the ability to provide seamless access to customer data and workflows used within an organization.

ServiceNow is designed for flexibility and integration
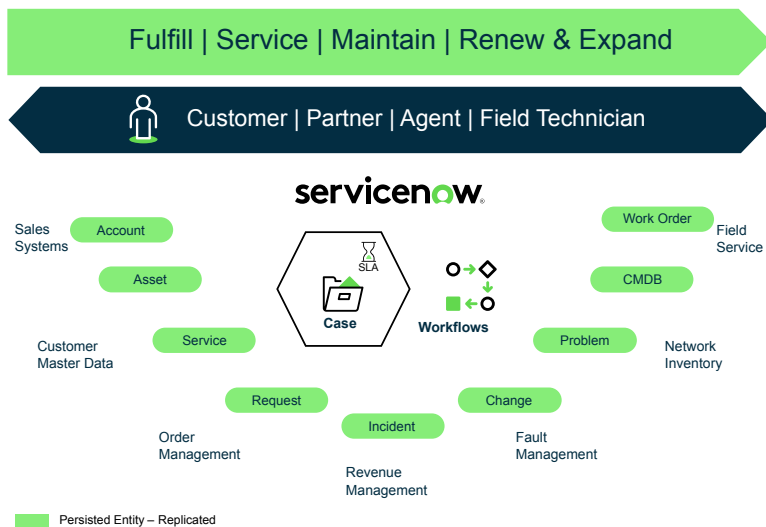
Exceptional customer experiences

ServiceNow® Customer Workflows (CWF) include Customer Service Management (CSM), Field Service Management (FSM), and Order Management (OM). The solution streamlines customer service operations, reduces costs, and enables teams to deliver seamless customer experiences. The solution connects front, middle, and back offices together, empowering your teams to proactively address customer issues and enabling more self-service through automation.

The ServiceNow platform powers the customer journey
Accelerate end-to-end customer experience transformation

	Order	Fulfill	Service	Maintain	Renew & Expand
Industry Workflows	Self-Service		Omnichannel		Assisted Service
	Case	Order		Install Base	Work Order
	Customer	Product		Contract	Dispatch
Customer Workflows	Organization	Pricing		Project	Inventory
	Customer Service Management · Order Management · Field Service Management				
Now Platform	Single platform One data model One architecture	Automation	Engagement	AI & ML · Low code · Secure	
Access third-party data					

Complete and extend Microsoft Dynamics 365 with ServiceNow

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Effectively address end-to-end customer issue resolution

ServiceNow and Microsoft Dynamics 365 together deliver visibility and access to everything from opportunities to quotes to contracts to service details. This enables a holistic view of the customer and drives complete and rapid issue resolution.

ServiceNow end-to-end service assurance

Fulfill | Service | Maintain | Renew & Expand

Customer | Partner | Agent | Field Technician

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Sales Systems — Account
Asset
Customer Master Data — Service
SLA
Case
Workflows
Work Order — Field Service
CMDB
Problem — Network Inventory
Request
Incident
Order Management
Revenue Management
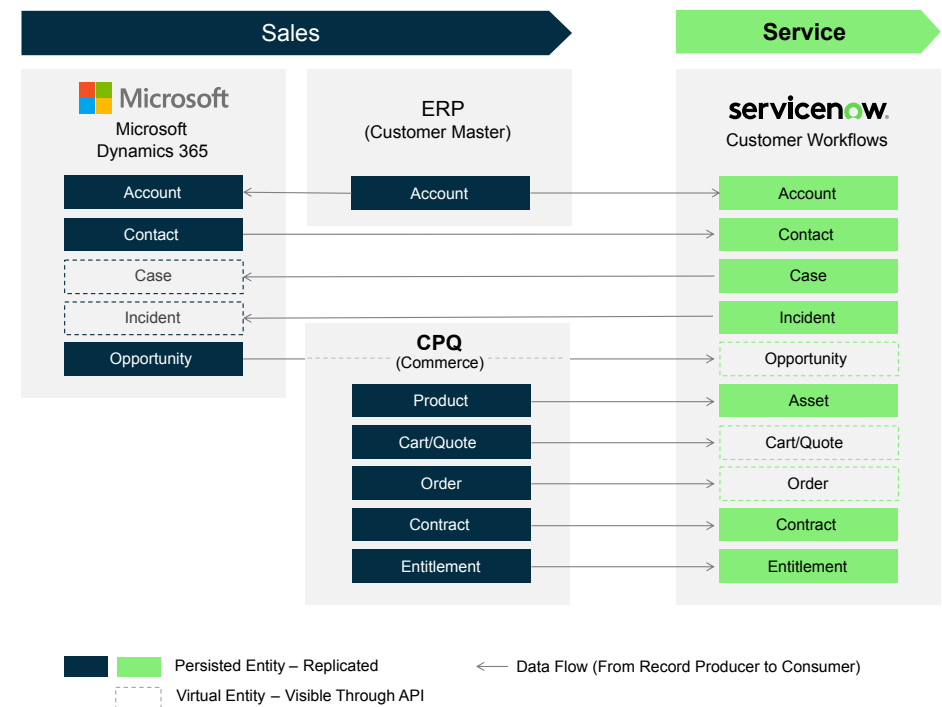Change — Fault Management

Persisted Entity – Replicated

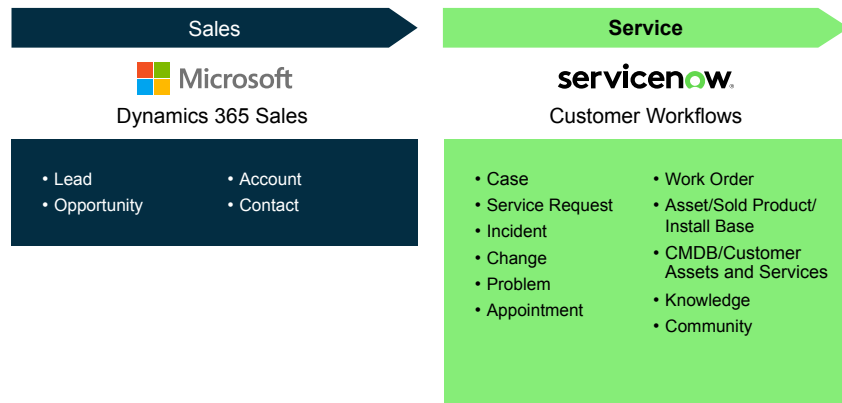## Improve operational efficiency with ServiceNow integrated service operations

- Provide a single system of action that spans customer engagement and service management

- Streamline cross-functional business processes with structured workflows

- Manage assets, services, and relationships that affect the customer experience

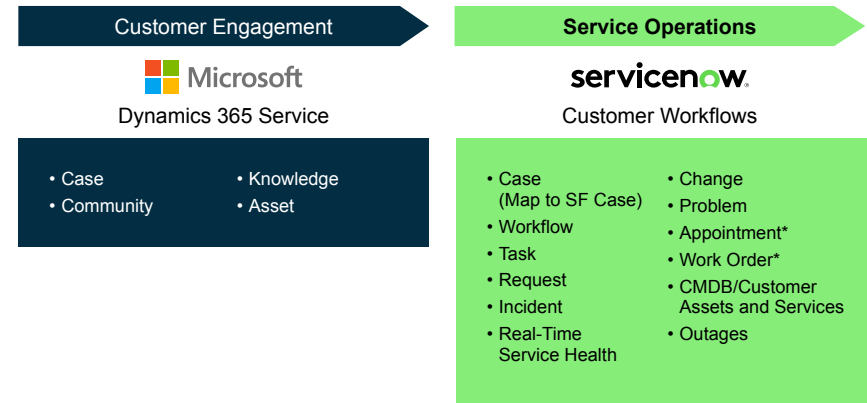## ServiceNow and Microsoft Dynamics 365 integration

ServiceNow provides full integration with Microsoft Dynamics 365. For example, expose ServiceNow information in Microsoft Dynamics 365 to ensure sales visibility into customer issues or to integrate opportunity or contact information directly into ServiceNow account records without moving any data.

Sales | Service

Microsoft Dynamics 365 | ERP (Customer Master) | **servicenow** Customer Workflows

Microsoft Dynamics 365	ERP (Customer Master)	Customer Workflows
Account	Account	Account
Contact		Contact
Case		Case
Incident		Incident
Opportunity	CPQ (Commerce)	Opportunity
	Product	Asset
	Cart/Quote	Cart/Quote
	Order	Order
	Contract	Contract
	Entitlement	Entitlement

Persisted Entity – Replicated
Virtual Entity – Visible Through API
Data Flow (From Record Producer to Consumer)

Microsoft Dynamics and ServiceNow sales, service, and operations

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Microsoft Dynamics 365 Sales extended with ServiceNow Customer Workflows system of action

Sales	Service
Microsoft Dynamics 365 Sales	**servicenow** Customer Workflows

Dynamics 365 Sales
- Lead
- Opportunity
- Account
- Contact

Customer Workflows
- Case
- Service Request
- Incident
- Change
- Problem
- Appointment
- Work Order
- Asset/Sold Product/ Install Base
- CMDB/Customer Assets and Services
- Knowledge
- Community

Microsoft Dynamics 365 Service extended with ServiceNow Customer Workflows system of action

Customer Engagement	Service Operations
Microsoft Dynamics 365 Service	**servicenow** Customer Workflows

Dynamics 365 Service
- Case
- Community
- Knowledge
- Asset

Customer Workflows
- Case (Map to SF Case)
- Workflow
- Task
- Request
- Incident
- Real-Time Service Health
- Change
- Problem
- Appointment*
- Work Order*
- CMDB/Customer Assets and Services
- Outages

*If Microsoft is being used for field service, these objects could reside in Microsoft.

Benefits of Microsoft Dynamics 365 Sales and ServiceNow Customer Workflows complete and extend strategy

- Provides full visibility of complete order history, from opportunity to quote to order
- Ensures sales has the complete customer service context, displays ServiceNow cases and incidents in Microsoft Dynamics 365
- Keeps sales and service up to date with the latest account information from opportunities or cases, notifies either system upon update
- Streamlines expansion and upsell opportunities, initiates opportunity from ServiceNow
- Creates service cases in ServiceNow from any customer touch point throughout the lifecycle, from any integrated system

Benefits of Microsoft Dynamics 365 Service and ServiceNow Customer Workflows complete and extend strategy

- Powers cross-organizational workflow with service operations capabilities, unique in the customer service space
- Retains investment in Microsoft Dynamics 365 for customer engagement
- Enhances visibility using the powerful ServiceNow workflow to manage middle- and back-office tasks
- Keeps front-line customer service informed with the latest updates from middle- and back-office teams
- Enables proactive monitoring and visualization of impacted customers when problems occur with products or services
- Fixes the root cause of issues using the structured ServiceNow approach, driving down costs

Integration scenarios

Drive improved efficiency and visibility

ServiceNow and Microsoft Dynamics 365 operate in a variety of integration scenarios.

Account and opportunity sharing

Keep systems up to date with the latest information by pushing any information changes from ServiceNow to Microsoft Dynamics 365. Sales teams have the most recent customer data as well as visibility into any customer inquiries.
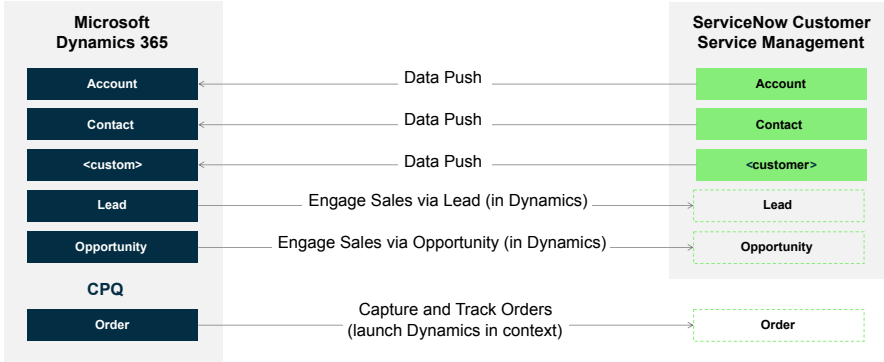

Import opportunities

Trigger updates when an opportunity is closed in Microsoft Dynamics 365 to ensure your entire organization has the latest account information and visibility.
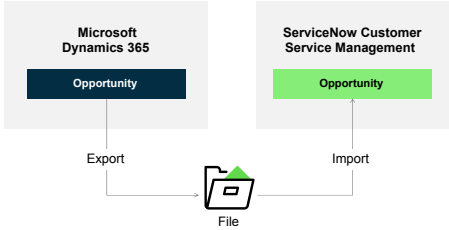
On-demand account and product updates

Upload account information from your organization's financial system to ServiceNow and Microsoft Dynamics 365. Ensure sales and service departments use accurate and up-to-date customer context. Provide this same information to your configure, price, quote (CPQ) system for accurate pricing, quoting, and configuration.
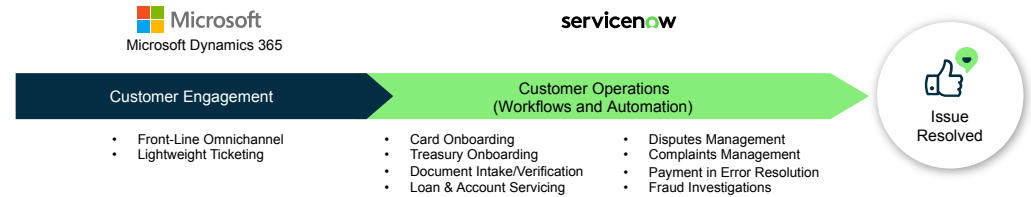
Examples of industry scenarios (more available upon request)
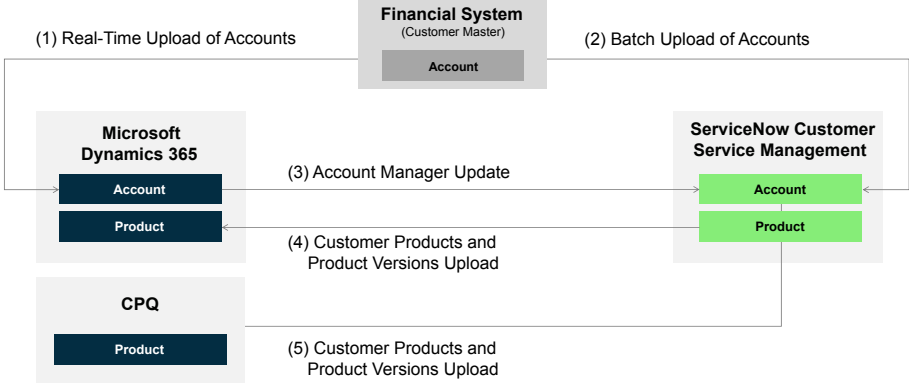
Banking

Microsoft Dynamics 365: customer service intake

ServiceNow: dispute management process

Large bank achieved $10M savings per year in reduced processing time plus fee avoidance for debit card disputes

Microsoft
Microsoft Dynamics 365

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Customer Engagement
- Front-Line Omnichannel
- Lightweight Ticketing

Customer Operations (Workflows and Automation)
- Card Onboarding
- Treasury Onboarding
- Document Intake/Verification
- Loan & Account Servicing
- Disputes Management
- Complaints Management
- Payment in Error Resolution
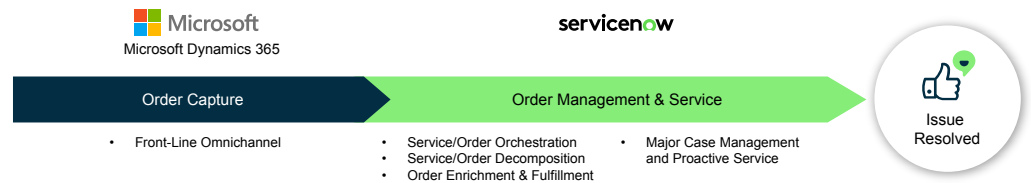- Fraud Investigations

Issue Resolved

Telecommunications

Microsoft Dynamics 365: order capture

ServiceNow: order management and B2B service

Telecommunications company achieved customer lifecycle post order capture: fulfillment, account servicing, service assurance

Microsoft
Microsoft Dynamics 365

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Order Capture
- Front-Line Omnichannel

Order Management & Service
- Service/Order Orchestration
- Service/Order Decomposition
- Order Enrichment & Fulfillment
- Major Case Management and Proactive Service
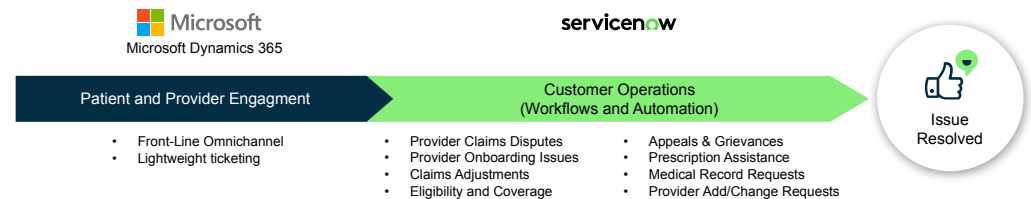
Issue Resolved

Healthcare

Microsoft Dynamics 365: front-line phone and email

ServiceNow: exceptions claims management

Healthcare provider was able to orchestrate and route work across six different claims systems for 50 business units with 13K claims professionals

Microsoft
Microsoft Dynamics 365

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Patient and Provider Engagment
- Front-Line Omnichannel
- Lightweight ticketing

Customer Operations (Workflows and Automation)
- Provider Claims Disputes
- Provider Onboarding Issues
- Claims Adjustments
- Eligibility and Coverage
- Appeals & Grievances
- Prescription Assistance
- Medical Record Requests
- Provider Add/Change Requests

Issue Resolved

Deliver exceptional customer experiences

ServiceNow and Microsoft Dynamics 365 work seamlessly together to drive great customer outcomes

Using ServiceNow to complete and extend your Microsoft Dynamics 365 deployment brings benefits throughout the organization. Every customer touch point will be updated with the latest information, and the root cause of issues will be rapidly addressed.

ServiceNow improves end-to-end service assurance. Operational efficiency will increase by using a single system of action that spans from the initial customer inquiry throughout the resolution process. Easily streamline cross-functional business processes with structured workflows, and manage the assets and services that directly impact customer experience. And with Now Assist for CSM, agents can use generative AI to accelerate responses by quickly composing summaries of support cases, customer interactions, actions taken, and resolution steps.

FORRESTER®

180% return on investment

"By consolidating these systems with ServiceNow Customer Service Management, the organization has achieved greater transparency, and the newfound ease in gathering customer data, coupled with transparency on both staff and customer sides of the system, has reduced the cost of SLA payments significantly." [1]

Forrester found that using ServiceNow Customer Service Management helped centralize support systems to increase transparency, improve customer satisfaction, increase agent productivity, and reduce reliance on costly legacy systems.[2]

Additional benefits of ServiceNow Customer Service Management include:

- 38% reduction in customer churn rate
- 20% reduction in SLA payments
- 24% decrease in case handling time
- 60% reduction in case volume
- 25% faster time to productivity for new agents

[1] "The Total Economic Impact™ Of ServiceNow Customer Service Management, a March 2019 commissioned study conducted by Forrester Consulting on behalf of ServiceNow"

[2] "Business Value Of ServiceNow Customer Service Management, an April 2019 commissioned study conducted by Forrester Consulting on behalf of ServiceNow"
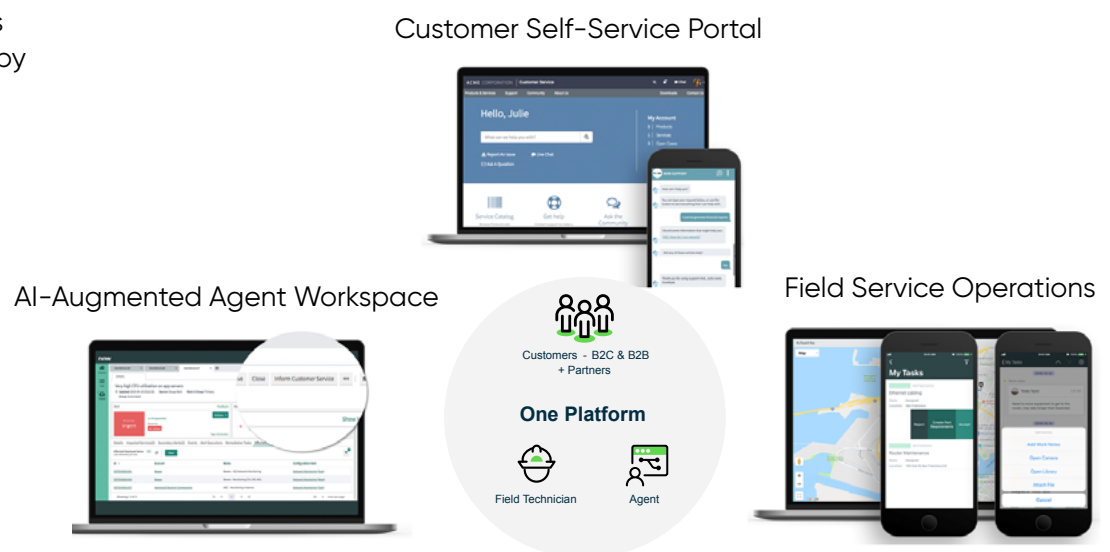
ServiceNow Customer Workflows

The ServiceNow Customer Workflows integrate customer engagement, service operations, and field service delivery to provide a seamless, closed-loop customer experience that helps to:

- Increase efficiency and fix the root cause of complex issues with seamless connectivity across your organization

- Proactively anticipate and intelligently fix potential problems before customers experience them

- Drive actions using personalized, self-service technology to instantly handle common customer requests

- Accelerate high-quality responses to customers using generative AI to gather the most relevant support case content.

- Retain existing customers by minimizing frustration with traditional customer service roadblocks and notifying them of possible issues

- Maximize upsell, cross-sell, and word-of-mouth opportunities to reach new customers

Drive customer loyalty with ServiceNow

Ensure your end-to-end customer journey is seamless and provides the best customer experience possible by connecting existing best-of-breed solutions.

ServiceNow Customer Workflows platform

Customer Self-Service Portal

AI-Augmented Agent Workspace

Field Service Operations

Customers - B2C & B2B + Partners

One Platform

Field Technician

Agent

About ServiceNow

ServiceNow (NYSE: NOW) makes the world work better for everyone. Our cloud-based platform and solutions help digitize and unify organizations so that they can find smarter, faster, better ways to make work flow. So employees and customers can be more connected, more innovative, and more agile. And we can all create the future we imagine. The world works with ServiceNow™. For more information, visit **www.servicenow.com**.

Learn More

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