

Important Webinar Notes

- For audio, please use your computer or dial the number listed in your login notification.
- All participants will be in listen-only mode throughout the entire webinar.
- To ask a question during the presentation, please utilize the questions/chat feature in GoToWebinar. Type your question in the text box and click “send to staff.” Questions may be answered during the webinar if time permits; otherwise, a Wipfli associate will follow up with you directly after the webinar.
- A copy of the slides will be sent to all participants after the webinar.
- If you are facing technical difficulties while joining the webinar, please visit: <http://support.citrixonline.com/webinar>
- The webinar will begin promptly at 1 p.m. CT.

Thank you for attending!



Accelerate Your Field Service with [Microsoft Dynamics 365](#)

Dynamics 365 for Field Service

Ryan Swiderski, Senior Manager, Wipfli

Ryan Rademann, Senior Consultant, Wipfli

Agenda



Field Service and Dynamics 365



Why invest in Field Service?



Demonstration

- Field Service in Dynamics 365 overview
- IoT, case management, and work order creation
- Scheduling and dispatching
- Work order completion and Voice of the Customer survey
- Power BI and analytics

Dynamics 365

Intelligent business applications in the cloud

Microsoft AppSource

 Office 365

Microsoft Dynamics 365



Field Service



Sales



Operations



Customer Service



Project Service
Automation



Dynamics
Marketing

Customer Insights

Portals

IoT

Geotracking



Power BI

Service | Microsoft Dynamics 365

Omni-channel

Portal

Agent enablement

On-site service

Knowledge

Service intelligence



Improve efficiency and profitability

73%

of consumers say valuing their time is the most important thing a company can do to provide good service

65%

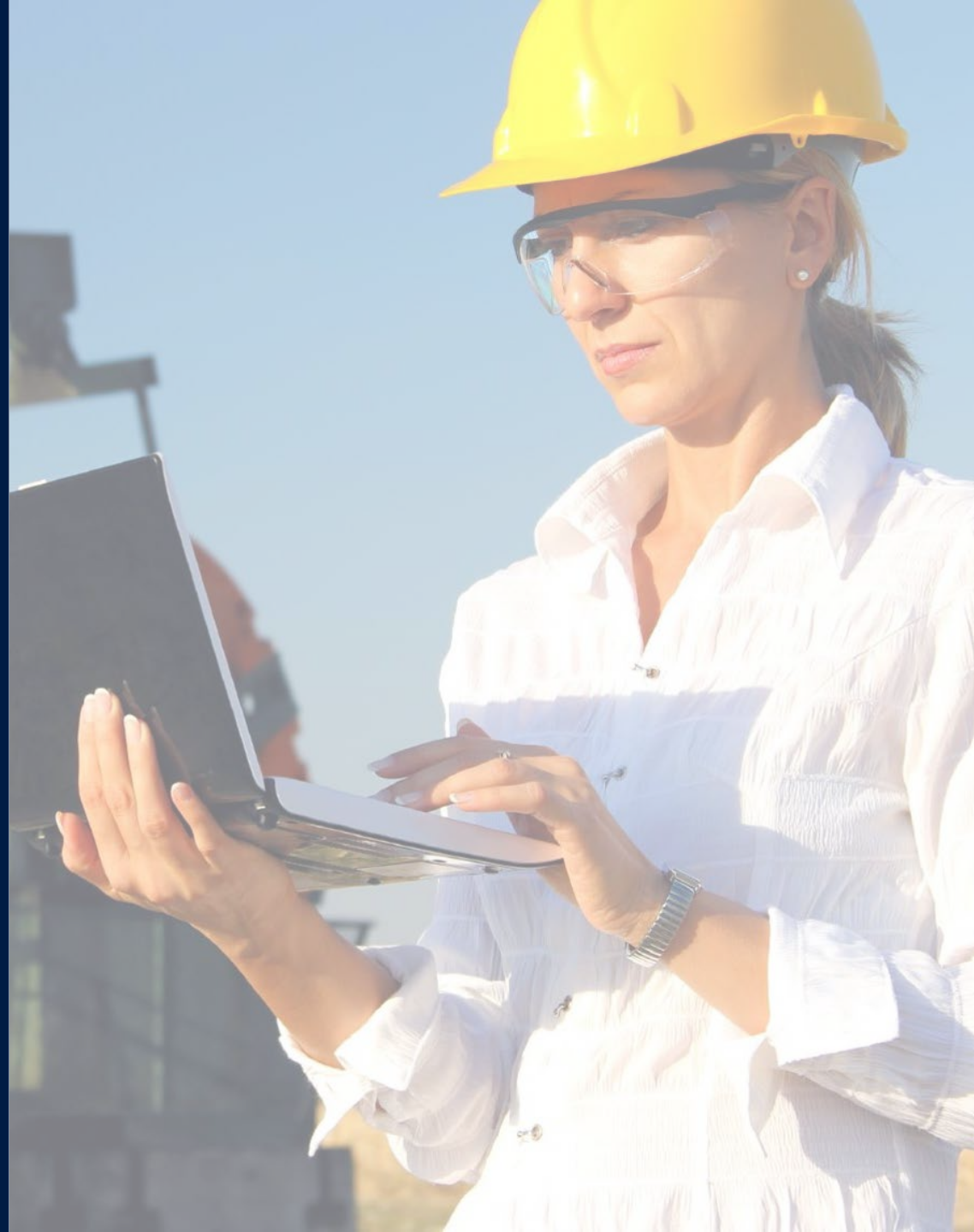
of incoming service requests require field visits AND of those service visits

26%

require secondary or follow-up visits

Field Service for Microsoft Dynamics 365

Deliver intelligent, world class field service, including scheduling, mobile and resource utilization while maximizing efficiency and minimizing costs.



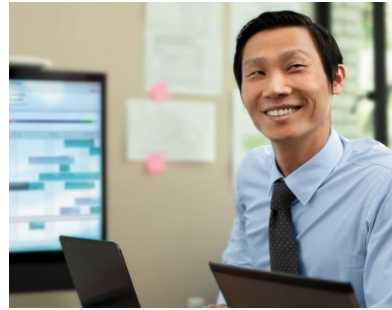
Field service capabilities for Dynamics 365 = Value across the enterprise

Field service is a core part Dynamics 365



Executive Mgmt.

- Increased bottom line with efficiencies
- Robust Reporting and Business Intelligence
- Revenue Expansion and Growth
- Delivering Productivity Gains



Operations Mgmt.

- State-of-the-Art Routing and Scheduling
- Advanced Work Process Automation and Reduced Back Office
- Improved Resource and Asset Utilization



Mobile Resources

- Increased Productivity
- Enhanced Coordination with Dispatch
- Electronic Capture of All Information, Including Signatures
- Familiar Format With Native Apps



IT Organization

- Flexible Deployment Options With Off-the-Shelf Functionality
- Highly Scalable Software Platform
- Comprehensive Integration With Existing Apps



End Customers

- Improved Customer Experience
- Faster Response and Ticket Closing
- Better Visibility and Status Information
- Driving Customer Loyalty

Accelerate Your Field Service with [Microsoft Dynamics 365](#)

Dynamics 365 for Field Service - Demo

Presenter Contact Information

Ryan Swiderski

Senior Manager

Office: 952.548.3412

rswiderski@wipfli.com

Ryan Rademann

Senior Consultant

Office: 312.871.3386

rrademann@wipfli.com



Thank you for joining us today!



WIPEFLIⁱ LLP
CPAs and Consultants

www.wipfli.com

Disclaimer

This information is provided solely for general guidance and informational purposes and does not create a business or professional services relationship. Accordingly, this information is provided with the understanding that the authors and publishers are not herein engaged in rendering legal, accounting, tax, or other professional advice and services. As such, it should not be used as a substitute for consultation with professional accounting, tax, legal, or other competent advisers. Before making any decision or taking any action, you should obtain appropriate professional guidance.

