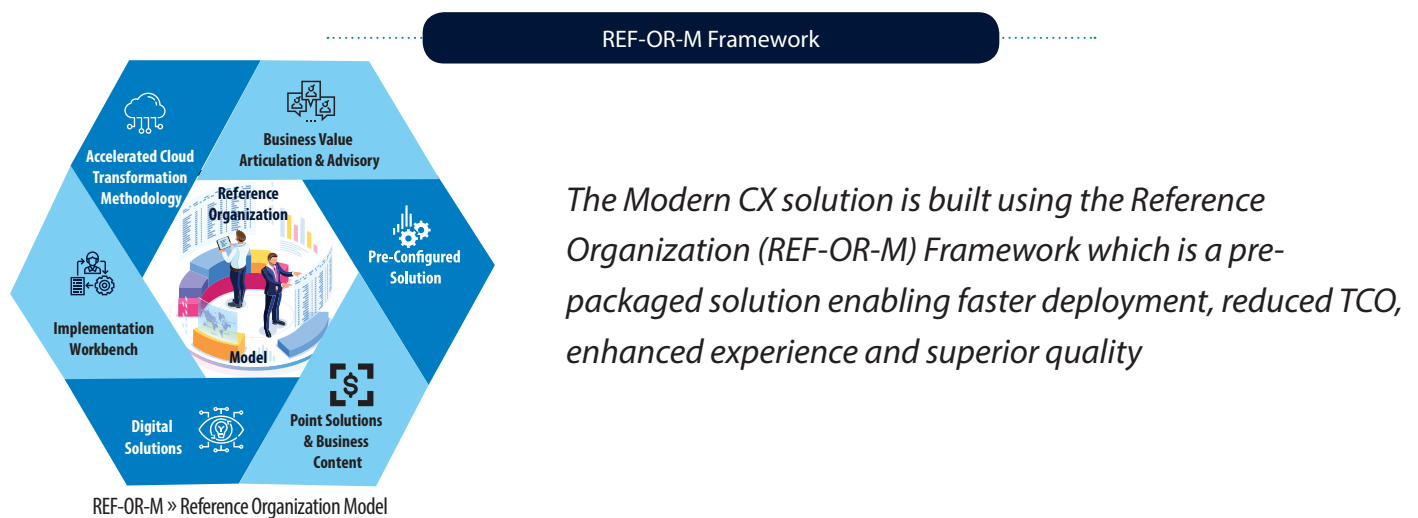


## REF-OR-M SOLUTION – MODERN CX

The REF-OR-M Modern CX solution is a pre-configured, end-to-end reference solution, tailored specifically to the CRM or CX line of business. It comprises of end to end process flows, proven best practices via accelerators and tools from successful, D365 transformation engagements to achieve greater business value. Given the changing dynamics of customer engagement and focus on superior experience, we advise, implement and help to co-create digital customer experience by using our solution capabilities. This is applicable across domains and industries for a Modern CRM requirement.

The REF-OR-M Solution for Modern CX offers solution components for efficient customer engagement with service metrics, Omni channel case and SLA management, customer facing chatbots based on Microsoft Bot framework, AIML based targeting, personalization, sales management, scoring for enhanced high-value interactions.



### Solution Capabilities & Business Process Breakdown

<b>Infosys Dynamics 365 for Modern CX</b>	<b>SALES</b> <ul style="list-style-type: none"> <li>Lead &amp; Opportunity Management</li> <li>Survey Insights – MS Forms Pro</li> <li>Relationship Assistant/ Insights</li> <li>Sales Forecasting</li> <li>Quote &amp; Order Management</li> <li>Contact/Account Management</li> </ul>	<b>MARKETING</b> <ul style="list-style-type: none"> <li>Dynamics Segmentation</li> <li>Campaign Management</li> <li>Campaign Response Management</li> <li>Lead Nurturing</li> <li>LinkedIn Integration</li> <li>Marketing Metrics &amp; Surveys</li> </ul>	<b>SERVICE</b> <ul style="list-style-type: none"> <li>Service Metrics &amp; Insights</li> <li>Chat for Dynamics 365</li> <li>Unified Service Desk</li> <li>Knowledge Management</li> <li>Omni Channel Case Management, SLA Management</li> </ul>
	<b>Infosys REFORM Solution Offerings</b>	<b>SMART SALES</b> <ul style="list-style-type: none"> <li>ML Based Targeting, Personalization</li> <li>Lead Scoring, Relationship Insights</li> <li>Chatbots for Sales Productivity, RM &amp; Sales Reporting</li> <li>Sales Notes Analysis &amp; Meeting Insights</li> <li>PowerApps for Sales Management</li> </ul>	<ul style="list-style-type: none"> <li>Auto Quotation, Smart Pricing, Opportunity Insights, Copy Quote Chatbots</li> <li>Pre-configured Customer Insights Dashboards on Power BI</li> <li>PowerApps for Compliance Management</li> <li>Intelligent Sales with Product Recommendations, Sales Insights</li> </ul>

## Deployment Approach

**Business Value Articulation** explore the solution to define road-map to form end-to-end business processes; where value resides in the execution of these process steps

### Pre-Configured Solution

- Tools, Accelerators & Templates providing customers with an accelerated path for cloud-enabled transformation
- LOB specific processes, pre-built configurations, security setup and foundational solution components

### Point Solutions, Business Content & Digital Solutions

- Accelerate & Simplify Digital Enterprise Transformation for organizations across industries with Digital Solutions powered by AI/ML, Chat-Bots, Mobility, Analytics etc. offered on top of Microsoft Dynamics 365 capabilities

## Applicability of REFORM Solution

- **Greenfield implementation, Upgrade** or move to modernization using a digital platform like Dynamics 365
- Focus on building application in **agile and incremental** way
- CRM workflows based on Industry leading practices and experience in contact center management
- Leverage **best practices from successful** Dynamics 365 transformation engagements and reduced handoffs between systems and groups to achieve greater business value
- Consolidation of customer records to create a single source of the truth that represents all channels and customer touch points i.e., **synchronized customer information**
- **Advanced customer analytics** to gain insights from data captured from customer interactions across various channels

## Key Benefits and Outcomes

### Net Revenue Enhancement

- Win Rate Improvement  
Opportunity: Size/Volume Increase
- Lead Conversion Rate Increase

### Operational Efficiency

- Support Cost Reduction
- Decreased Sales Rep Ramp-up time
- Forecast Accuracy/Revenue Visibility

### High Performing Sales Team

- Increase in Employee Engagement, Satisfaction and Connections
- Improved Goal Setting for Sales Team

### Customer Delight

- Increase in Case Deflection via Self-Service Portal
- Decrease in Case Resolution Time

### Customer Insights

- KYC and Compliance Documents Management
- Customer Accounts and Products
- Address Details
- Voice of Customer

### Marketing Insights

- CTI Integration and Unified Service Desk for seamless usage by Call Center Agents
- Intuitive Self Service Web Portals

### Sales and Market Insights

- Lead and Opportunity Scoring / Lifecycle Management
- Sales Performance Management
- Sales Collaboration

### Analytical CRM

- CRM Reports and Charts
- Custom SSRS Reports
- Advanced Search
- Excel Templates

For more information, contact [askus@infosys.com](mailto:askus@infosys.com)

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Navigate your next

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