

## CASE STUDY

# MICROSOFT DYNAMICS 365 FOR COMPLAINT MANAGEMENT



Equiniti ICS partnered with a UK Investigative office to develop a complaints management system, enabling for the efficient management of complaints from receipt through to resolution and reporting.

### CHALLENGES

The independent body required a new solution to replace a legacy complaint management system using both paper and a Microsoft Access database.

Core client requirements were that complaints could be handled via an internal workflow system that was adept at managing permissions, had the functionality to view and add comments, insert media files or PDFs to existing cases, develop customised fields for data entry as well as displaying the status of each complaint. Staff needed functionality to assign cases to appropriate case workers as well as gain access to specific documents on case files. On top of this the client required an efficient reporting mechanism for submitting reports that allowed for measurement against key performance indicators.

### SOLUTION

Equiniti ICS developed a comprehensive case management solution leveraging the power of the customised Dynamics 365 cloud based customer service portal.

The construction of an online platform permitted members of the public who wished to make a complaint to register and lodge their grievance. Once submitted, complainants were able to check on the progress of a complaint and receive regular updates on the status of their complaint via the organisations online portal or through email updates as the case progresses.

Workflows were developed to model each stage of the case lifecycle which in turn guides the user through the submission process. In conjunction with this, Equiniti ICS developed workflows to automate tasks such as document and email generation, document approval cycles, automatic upload of documents from Dynamics 365 to SharePoint Online and various key performance indicators (KPI). Following this process case lifecycle process had been simplified and stream lined.

Equiniti ICS also deployed Power BI to the Dynamics 365 solution delivering powerful business insights displayed on easy to read dashboards, allowing for KPI measurement and improved reporting capabilities for both users and management.

### RESULT

Based on the specific requirements of the brief, Equiniti ICS developed an efficient and streamlined complaints management system built on Microsoft Dynamics 365. The custom-built platform written within the confines of Microsoft code, allowed for the flexibility of the prerequisites to be linked into a fully functional Dynamics 365 solution from Microsoft allowing for the successful launch of an online portal where members of the public could submit complaints with ease and be led through a transparent process to resolution.

#### KEY BENEFITS TO CLIENT:

- Creation of complaints via publicly available online portal
- Complainants can monitor and receive updates of their complaints via online portal
- Online portal customised with clients corporate brand and colour
- Online portal has drastically reduced complaints via letter
- Elimination of all paper based complaint case documents
- Automation of tasks such as document and email generation
- Simplification of case lifecycle
- Easy to use end-to-end user interface