CORTERRA SOLUTIONS

Managed Services Center

How Corterra manages incoming requests

Dynamics 365 Customer Service Power Platform

Summary

As a provider of managed services, Corterra Solutions receives copious requests from our clients for support. We had developed ticketing systems to provide cost effective request management solutions for our clients without additional licensing costs. These legacy systems worked great but these solutions were just that, legacy. As our business and number of support requests have grown over the years, the amount of formal tickets and emails we receive became unmanageable, we needed a different solution. Our options were to either buy an existing solution, or leverage our technical capabilities and existing systems to build out a modern solution. By leveraging Dynamics 365 Customer Service, Corterra successfully deployed our *Managed Services Center*. Read on to find out more!

Problem

Tracking requests from clients and customers can be challenging due to multiple methods of input for IT tickets, such as email, phone call, Teams message, and automated integrations from clients' systems. With these different mechanisms, visibility into status and who has the next action can become limited to client teams and leadership. Ensuring efforts are not duplicated and all requests are tracked and identified is paramount to successfully delivering the white-glove service that Corterra prides itself in. Additionally, without a consolidated system *accurate* analytics and reporting is near impossible. There are many vendors of customer service and IT ticketing systems. While those can work well, they are yet another cost, both with licensing, setup, and learning curve. Corterra did not desire to incur another set of licensing costs. With all that said, we asked "What can we do?". Our options were clear, build it ourselves or spend money. Luckily with the power of Dynamics 365 Customer Service and the Power Platform, we found a middle road. Continue reading about our solution on the next page.


Solution

By leveraging Dynamics 365 Customer Service, Outlook, Power Automate, and Power BI, Corterra was able to take the robust functionality delivered by Microsoft and extend it to our needs.

- **Dynamics 365 Customer Service** was deployed, utilizing existing licenses we already had. Forms and business process flows were extended to meet how we wanted to manage our request lifecycle.
- **Power Automate** and Outlook allowed for ingesting emails, parsing the data, and creating support cases without *any* manual intervention
- **Microsoft Teams** for instant notifications when support tickets arrive, sent to groups of users allowing whoever is available to pickup the ticket and work towards solving our clients issue.
- **Power BI** for trending and analytics to support our clients and our internal leadership.
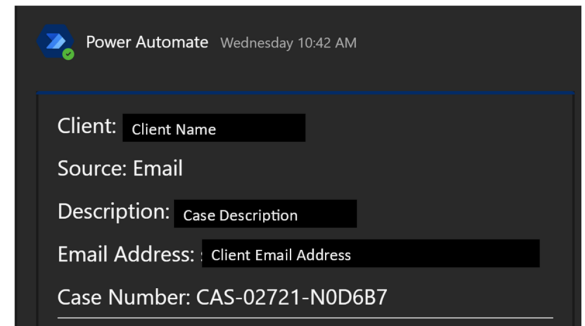
Teams Notification
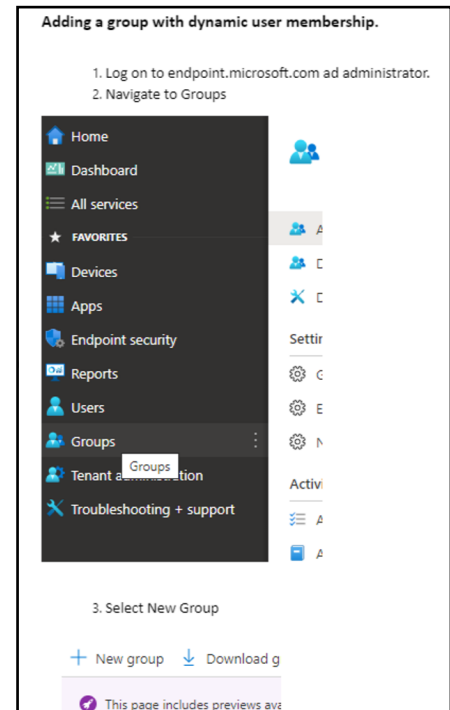
Knowledge Base Article

Results

- **Consolidation of requests** into a single database within Dataverse regardless of how they were received
- **Standardized procedures** to allow people to work across different clients and product types.
- **Firm metrics** to determine areas of improvement when resolving cases.
- **Reduced triage time** with automated record creation and assignment rules.
- **Visibility and tracking** of status and communication across support requests.
- **Improved knowledge sharing** allowing anyone to troubleshoot issues that were once allocated to one or few individuals.

ABOUT CORTERRA SOLUTIONS

Corterra Solutions offers IT infrastructure, ERP implementation, cloud migration, cybersecurity, and analytics services that help medium and large clients operate and grow their businesses securely, efficiently, and intelligently. As a Microsoft Partner, Corterra has extensive experience with Microsoft technologies, including Dynamics 365. Our deep partnerships with clients, coupled with our reputation for outstanding service, give clients freedom to focus on meaningful work that drives their companies' success. For more information, please visit www.corterrasolutions.com.