

# Access Financial



## SOLUTION

Dynamics 365  
Customer Service

## VERTICAL

Call Center  
Loan Management

## TIME FRAME

2020-2021

## SIZE

1,001-5,000 Employees

## OBJECTIVE:

*Enhance the Ticketing Process:*

- *Optimize the ticketing process and streamline service level agreements (SLAs) with meaningful key performance indicators (KPIs).*
- *Implement dashboarding for ticket queues, provide enhanced reporting using Power BI, manage feedback with AI guidance, and automate record creation.*

In 2020, we developed advanced logic using C# plugins, JavaScript, and Dynamics Business Rules to create a guided experience for call center representatives navigating various ticket types. By integrating SLA features within Dynamics, we standardized and improved the process, making it more user-friendly and accelerating ticket resolution, despite the numerous variables that can affect a ticket.

In 2021, we launched a pilot for an AI Builder Category Classification model. This model automatically identifies the appropriate ticket type and sends email responses to customers as soon as they reach out. This innovation enables the creation of different record types, giving customer service representatives a head start in addressing the tickets.