HCLTech | Supercharging Progress™

TDECU migrates from Salesforce to Dynamics 365

A customer success story

HCLTech delivers **best-in-class** customer service delivery platform

Texas Dow Employees Credit Union (TDECU) formed in 1955 when a group of Dow employees came together to provide financial help for the hourly worker. **That mission of people helping people continues today.** Based in Lake Jackson, Texas, TDECU has over 372,000 members and manages nearly $5B of assets annually.

They were looking to replace Salesforce and develop a new platform, *MyTDECU Experience*, that would provide its customer service teams with 360-degree views of their members and serve up the appropriate information to resolve any member request. HCLTech leveraged Microsoft Dynamics 365 Customer Service and the full Power Platform suite to automate key processes, enable omnichannel customer support and effectively report on the overall workstream to serve valuable real-time insights to system users and leadership teams.

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assets annually

The Challenge

Outdated CRM solution lacked the capabilities needed to deliver world-class customer service

TDECU had been using Salesforce as their CRM, and while it performed adequately in terms of their sales operation, it lacked the comprehensive customer service capabilities required to support TDECU's desired platform, *MyTDECU Experience*. Initially, TDECU was considering two potential replacements: Microsoft Dynamics 365 and Pega. Microsoft ultimately won out because of its numerous other available workloads (namely Sales and Marketing) that TDECU could implement with seamless integration in the future. HCLTech was instrumental in framing that conversation, helping TDECU see the bigger picture and future potential.

Microsoft Dynamics 365
- Sales
- Customer service
- Marketing

The Objective

Bring the *MyTDECU Experience* CRM platform to life

The requirement was straightforward: an all-encompassing CRM with strong capabilities across the board and the ability to fully support *MyTDECU Experience*.

The platform needed to be best-in-class, including AI and robotic process automations that would empower members to resolve issues through self-help channels. Of course, the human touch is also a critical part of the customer support experience, so the ability to automate the smooth routing of each request to the right channel was of paramount importance in the new solution.

The Solution

A platform built on Microsoft Dynamics 365 Customer Service and the full Power Platform suite

The scope of this first initiative included Dynamics 365 Customer Service with Omnichannel, as well as components of Power Platform, especially Power BI (for reporting) and Power Virtual Agents (for chatbot).

The core components of the D365 implementation were:

01 Case Management	02 Customer Management	03 Knowledge Management	04 Omnichannel
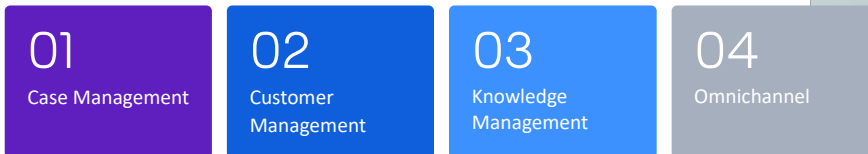
While all are of course required, the most vital in terms of delivering the capabilities *MyTDECU Experience* requires is certainly Omnichannel.
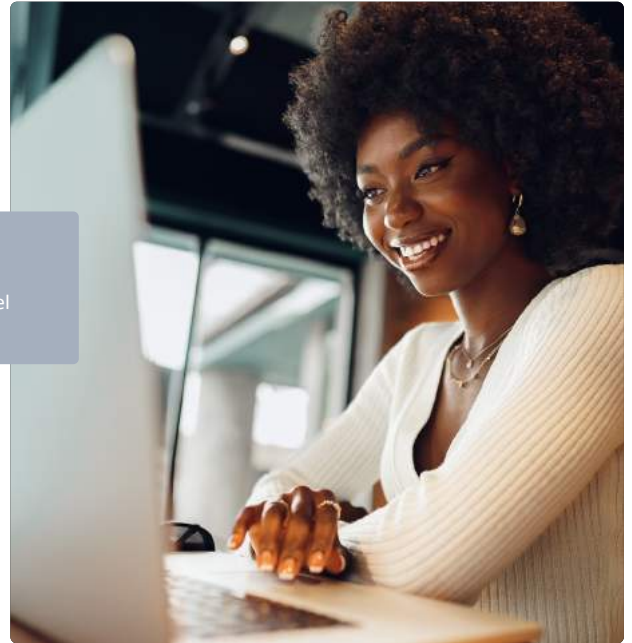
Enabling True Personalization

Microsoft's Omnichannel extends the functionality of Dynamics 365 Customer Service in ways that enable TDECU to not only leverage case management within Dynamics 365, but combine Call Routing, Email, SMS and Chat session management. HCLTech developed a custom omnichannel solution that leveraged several capabilities of Dynamics 365 Customer Service, including:

- **Sessions / Channels**
  - o Phone
  - o Chat (Live + Power Virtual Agent)
  - o Email
  - o SMS
- **Work Streams**
- **Agent Scripts**
- **Script Action Macros**
- **Users** – Defined associates and their capacity.
- **Skills (User Skills)** – Added skills to user records that define the work that each user does best
- **Skill Attachment Rules** – Created automated rules to distribute specific member calls/work to users with specific skills (e.g., multilingual)
- **Notifications** – Created visual alerts for associates
- **Workstreams** – Created routing settings to define how conversations should be routed and allocated to user queues

To date, we've implemented Case Requests (Customer Service), Leads and Referrals for the Commercial and Retail sides of the business, as well as Wealth and Branch Activities for Retail. On deck is Lead and Referrals for the Mortgage side, and eventually the same for Insurance.

In FY23, we will be implementing the Dynamics 365 Marketing workload for the Corporate Marketing Team at TDECU, as described on the next page.

Building for the future

TDECU's journey with HCLTech began with Dynamics 365 Customer Service, but it didn't end there. Within the Holdings side of TDECU, we are moving forward with full implementations of the Sales and Marketing workloads of Dynamics 365. The plan is to expand the rollout to all five lines of business by the end of 2023.

The core components of this second round of D365 implementations are:

The same four from the initial installation with additional entities:

- **Case Management**
- **Customer Management**
  - **Activities**
    - Target Groups: Retail & Member Care
    - OOB D365 Phone Calls, Emails, In-Branch Interactions
    - Set Follow Up Activities
    - Interactive Dashboard for Report-Outs
- **Knowledge Management**
- **Omnichannel**

Plus

Marketing Campaign Management	Digital member Engagement Tool
Opportunity Management	Lead Management · Customer Correspondence System
Customer Insights	An intercompany portal to facilitate lookups across companies

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The Impact

A complete digital transformation, under budget and ahead of schedule

Before, TDECU was using multiple systems with poor or no integration, but HCLTech was able to streamline all processes into a common ecosystem. Key wins include:

Automated and simplified processes empower agents to resolve member issues more promptly and increase resolution rates for member requests.	**A clearer view of members and their current needs.**	**Ability to create and track actionable follow-ups with members.**

This project is a perfect illustration of what can be achieved when all sides of an engagement are tightly aligned in pursuit of a common objective: to achieve complete customer satisfaction through delivery excellence. And while the initial project was limited to replacing Salesforce with Dynamics 365 in a direct compete with Pega, it is a testament to how well the teams worked together that HCLTech and Microsoft were able to reposition and expand the engagement with TDECU to include multiple modules of Dynamics 365 across all lines of business.

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