

ABOUT THE ORGANIZATION

Moneris Solutions Corporation ('Moneris') is Canada's largest processor of credit, debit, wireless, and online payment services for merchants in virtually every industry segment. They process more than three billion transactions annually. With more than 350,000 merchant locations throughout Canada, Moneris provides the hardware, software, and systems needed for organizations to improve business efficiencies and manage payments.

SUMMARY

Moneris has 600 users on Dynamics 365, managing the customer experience from onboarding and post-sale, to call center and field service interactions. Beyond the customer-facing roles, which make up about half of their end users, Moneris also uses Dynamics 365 for some of their back-office and risk management teams. This ensures that all customer information is tracked and managed in one system.

CHALLENGE

Moneris originally identified a need for a CRM solution because of issues they were experiencing with their legacy ticket management system. The platform lacked the ability to scale into a full-fledged CRM, which prevented them from making customer experience improvements and fully maximizing their call center capabilities. Customer service representatives needed too many screens to view customer information, too many steps were required to access data, and they frequently relied on email to manage customer issues. The knowledge base was also home grown and not integrated to other systems.

SOLUTIONS

Moneris now uses Dynamics 365 for managing customer alerts, case management, field work order creation, approval management, customer notifications, marketing campaigns, sending surveys, and social listening. Also, by using Dynamics 365, they have knowledge articles suggested contextually at the right place and time in the application. They're also using Unified Service Desk for a third of their user base, mainly in call center roles, with an integration with their telephone system.

Moving from a Legacy System

Before moving to Dynamics 365, Moneris managed a plethora of customer data via an outdated system. After deciding to make the switch, Moneris opted to implement and start using Dynamics 365 for all new support inquiries immediately following the implementation. "For a short time, we ran our old ticket system as a reference tool alongside Dynamics 365," explains Allan Measor, Director of Service Management at Moneris. "We analyzed our old ticket data, and over 80% of our inquiries were one and done, with 90% solved in a week or less. Because of this, we chose not to import our old tickets." In terms of data migration into Dynamics 365, Moneris imported standard items like customer company data, name, address, account numbers, email address, phone numbers, all key payment device data, and work order information. They also authored over 1,900 knowledge articles into Dynamics 365 for reference.



*WITH DYNAMICS 365,
MONERIS NOW HAS
MORE STANDARDIZED
PROCESSES IN PLACE,
RESULTING IN A DECREASE
IN ONBOARDING TIME
AND AN INCREASE
IN EMPLOYEE
PERFORMANCE.*



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"We looked at other big consulting firms but liked the agile and flexible approach that PowerObjects offers, along with their deep Dynamics experience, so we went ahead with PowerObjects and haven't regretted it once."

ALLAN MEASOR

Vice President, Business Transformation and Customer Enablement, Moneris

SOLUTIONS |CONTINUED|

Life is Better in the Cloud

Moneris is committed to the Cloud, both with their own products and with their internal tools, including Office 365 and Dynamics 365. "Our legacy systems tended to take longer in terms of features and updates, so the idea that Cloud solutions get features firsts, thereby empowering our organization to be more current, was appealing to us," says Measor. "We also could avoid costly infrastructure investments and gain reliability and redundancy when on the cloud."

Because Moneris handles sensitive information, PowerObjects worked with them to architect a system, which would allow them to continue to utilize the cloud for their Dynamics data but restricts any sensitive data from being stored in the cloud. "Our internal system stores data off the Cloud that can be viewed via Dynamics 365 so that the data is protected from risk. Meanwhile, users benefit from all the features that Dynamics brings to the table for customer experiences," says Measor.

Choosing Microsoft Dynamics 365 and PowerObjects

When looking for a new platform, Moneris' top priority was to ensure that their customer experience would be as unified as possible. They were already committed to Office 365, so Dynamics 365 quickly rose to the top of their list for consideration. "Our team members were able to easily adjust to the platform and our customers now receive a seamless experience because of our investment in the Microsoft stack," says Measor. "The value of Microsoft's Canadian data center, the feature richness of Dynamics 365, and the ease of integration into our existing technology footprint were key deciding factors for us."

After choosing Dynamics 365 as their platform of choice, Moneris moved on to selecting a professional services partner. "PowerObjects came highly recommended from multiple individuals at Microsoft. We also had several vendor meetings with them, and ultimately liked their collaborative approach," says Measor. "We looked at other big consulting firms but liked the agile and flexible approach that PowerObjects offers, along with their deep Dynamics experience, so we went ahead with PowerObjects and haven't regretted it once. We also liked that PowerObjects has an office and local staff right here in Toronto."



CHALLENGE

Moneris identified that their legacy ticket management system lacked the ability to scale into a full-fledged CRM. Their customer service representatives required more efficient processes and their knowledge base was not integrated into their other systems.

SOLUTION

Moneris now uses Dynamics 365 for the following and plans to continue building out their capabilities.

- + managing customer alerts
- + case management
- + field work order creation
- + approval management
- + customer notifications
- + marketing campaigns
- + sending surveys
- + social listening
- + knowledge articles suggested contextually
- + Unified Service Desk

BENEFITS

Since their deployment Moneris saw a 4% reduction in average handle times (AHT) and a 5% increase in first call resolution (FCR).



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BENEFITS

Since their deployment, Moneris saw a 4% reduction in average handle times (AHT) and a 5% increase in first call resolution (FCR) on top of their already high FCR which was around 80%. Moneris has also seen improvements in their onboarding processes for new team members.

With Dynamics 365, there are more standardized processes in place, resulting in a decrease in onboarding time and an increase in employee performance. Moneris is also experiencing better Interactive Voice Response to Dynamics integration, improving screen pop accuracy for Customer Service Representatives.

NEXT STEPS

Moneris has already seen success with Dynamics 365, and they plan on continuing to integrate more customer systems into Dynamics, including their work system. Future phases include integrating their customer portal which will expand self-service by allowing customers to access their own support tickets.

Additionally, Moneris plans to dive into proactive offer guidance, adding business intelligence to Dynamics 365 to enhance the customer experience throughout the customer service lifecycle.



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