

Leveraging AI with Microsoft Dynamics 365: A Success Story from the U.S. Small Business Administration



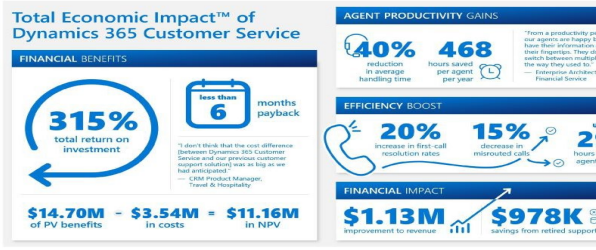
Transform your contact center with AI
Contact your Microsoft rep for a live demo

THE CHALLENGE

AI is transforming organizational operations with unmatched efficiency, cost savings, and better decision-making. The SBA's use of Microsoft Dynamics 365 has significantly benefited small businesses nationwide.

FORRESTER TEI STUDY

- Reduced call handling time by **40%**
- Improved first-call resolution by **20%**—and decreased misroutes by **15%**
- Saved up to **\$978,000** in costs on retired customer service solution(s)



Source: **Forrester Study, 2024**

THE SOLUTION

Microsoft Dynamics 365 Customer Service was chosen to address the SBA's challenges. Despite initial skepticism, the SBA implemented it in just six days, instead of the expected nine months.

Key Benefits

Operational Efficiency: Since implementing Dynamics 365, the SBA has managed 23 million cases, significantly improving case management efficiency.

Cost Savings: The adoption of Dynamics 365 has resulted in millions of dollars in annual operational cost savings.

Rapid Deployment: The swift implementation of Dynamics 365 demonstrated Microsoft's commitment to supporting the SBA, enabling the agency to quickly leverage AI capabilities.

Enhanced Tracking and Service: The integration of Power Pages, Power Automate, and Power BI with Dynamics 365 facilitated faster service and better tracking by automating previously manual processes. This comprehensive solution improved tracking of customer interactions, wait times, and service types, enhancing overall customer service capabilities.

THE ROI

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LEADERSHIP RESPONSE

"Since implementing Dynamics 365, we've managed 23 million cases and saved millions in operational costs annually,"

"It sounds absurd that we implemented Dynamics 365 Customer Service in six days. Everybody said it would be at least nine months to deploy a CRM solution. Microsoft really showed up for us."

- 40%** 40% backlog reduction in six months
- 50%** 50% faster loan approvals for eligible applicants
- 85%** 85% customer satisfaction with streamlined services

More information:

<https://www.microsoft.com/en-us/dynamics-365/products/contact-center>

Streamlining aid delivery: Lessons from SBA's digital modernization journey | FedScoop

US Small Business Administration saves millions with Dynamics 365 and Power Platform | Microsoft Customer Stories