

Success Story:

Customer-Centric Thinking in the Digital Age. Service Quality Elevated to a New Level.

How 4B Systematically Improves Customer Experiences, Optimizes Service Processes and Builds Long-Term Customer Loyalty.

audius

Customer Service as a Strategic Component of Customer Relationships

4B is part of the international Dovista Group and a leading manufacturer of window and façade systems in Switzerland. Since 1896, the company has developed, produced, and installed innovative and energy-efficient solutions, standing for Swiss quality, close customer relationships, and reliability.

With eleven locations throughout Switzerland, 4B is firmly rooted in the region. The goal is to support customers in building and renovating sustainably and living comfortably.

However, the company's service does not end with installation: 4B accompanies its customers throughout the entire lifecycle of windows and façade systems – from planning to maintenance. Customer service is thus a central component of the business model.

For 4B, the customer – whether private or corporate – is always the focus.



Complex Service Processes and Inconsistent Customer Communication

In the context of construction and renovation projects, numerous stakeholders work together, including architects, site managers, property owners, and residents. For customer service, this means considerable coordination effort with all construction participants and intensive information exchange between internal and field teams. Individual steps, such as construction inspections, were sometimes still handled manually.

As a premium provider, it is critical for 4B to respond quickly to customer inquiries and always ensure transparency regarding the processing status. To achieve this, inquiries must be structured, service appointments must be planned strategically, and feedback must be reliably documented.

It became apparent that customer contact was not managed consistently. Different contact persons and procedures made it difficult to maintain a clear view of the customer and ensure consistent interaction across all touchpoints – along the entire customer journey.

This created a clear imperative for 4B: to systematically embed a strong customer focus and align processes so that they place the customer at the center while remaining efficiently managed.



Digitally Manage and Efficiently Execute Customer Service

With the „Virtus“ project, 4B fundamentally reconceived and digitally mapped its customer service processes. The name „Virtus“ symbolically stands for courage, initiative, and determination – precisely the mindset required to consistently integrate customer service into the integrated system landscape, rethink existing workflows, and drive change collectively.

In collaboration with audius, an integrated platform was developed based on Microsoft Dynamics 365, which centrally manages all service-relevant processes, from capturing an inquiry to executing and documenting the service appointment.

Service inquiries received via the website are automatically created in Microsoft Dynamics 365 and can be processed immediately by the internal team. The transmitted information is fully available in the system. This ensures that no request is lost, follow-up questions are reduced, and responsible employees can respond faster and in a more targeted manner. When necessary, a service appointment can be scheduled promptly.

Service technician appointments are centrally planned and coordinated in Microsoft Dynamics 365. Customers automatically receive appointment confirmation via email. Additionally, they receive a reminder via SMS one day before the scheduled appointment. When the service technician is on route to the customer, the customer is informed again via SMS. This way, the customer knows what happens next and can prepare for the service visit.

Services performed and materials used are digitally documented on-site. The customer signs the service report electronically and automatically receives it via email. The information captured in the report also forms the basis for invoice generation and dispatch with support from Microsoft Dynamics 365. This ensures that service appointments, documentation, and billing work together efficiently.

After a service case is closed, customer feedback provides valuable insights into how the service is perceived and where service quality and processes can be further improved. Customer feedback thus becomes an integral part of a continuous improvement process.

The goal was not only to digitize processes but to design them in a way that actively supports personal customer contact and prevents errors.



„For us, the customer is consistently at the center – technology works in the background. Our objective is to design processes that support users optimally and make the service feel simple and natural for the customer.“

Stefan Wambacher

Managing Director audius GmbH

From First Contact to Evaluation: An End-to-End Process

Customer Submits Inquiry

Web form:
Service, Contact, Renovation
Dynamics 365 Customer
Insights - Journeys

1.

2.

Capture and Assignment

Dynamics 365 Sales & Field Service

3.

Inquiry Qualification

Dynamics 365 Sales

4.

System Decision

Lead / Sales or Service Process

5.

Appointment Planning

Disposition & Scheduling
Dynamics 365 Field Service

6.

On-Site Service

Mobile Service Technicians

7.

Documentation and Processing

Digital Service Report
and Invoicing

8.

Feedback & Evaluation

Customer Satisfaction and
Continuous Improvement
Dynamics 365 Customer
Insights - Journeys

Greater Visibility, Faster Processes, Better Decisions

Digitalization ensures that customer inquiries are structured and processed seamlessly without switching between systems. Information is centrally available and accessible to all stakeholders at any time.

For 4B, this means that inquiries enter the relevant workflows with all the necessary information. Fewer follow-up questions, clearly defined responsibilities, and better coordination between internal and field teams enable faster and more targeted processing.

Service appointments can be planned strategically and digitally supported. At the same time, customers are reliably informed and guided from the receipt of their request through appointment scheduling to the service technician's visit. From an operational perspective, the integrated platform also provides a better foundation for managing customer service.

Central data, transparent processes, and the linking of service appointments with downstream processes support 4B in efficiently managing operations and making informed decisions.

Furthermore, the platform creates the foundation for consistent management of marketing, sales, and customer service along the entire customer journey. In this way, 4B combines efficient processes with personalized and consistent customer communication.

With the „Virtus“ project, 4B was able to noticeably increase customer satisfaction with service and thus achieve a central goal of strategic realignment.



„The commitment of everyone involved in the project has paid off. The project objectives were achieved, and employees recognize the value of the changes. Initial customer reactions are very positive.“

Reto Andenmatten

Head of Digitalization / Strategic Projects 4B

Consistently Advancing Customer-Centric Thinking

With the established platform, 4B has a stable foundation to strategically optimize customer service and flexibly integrate new requirements.

The next step involves refining existing processes further, making customer interactions even more transparent, and strategically leveraging the data gained for improvements.

In this way, 4B strengthens its position as a service-oriented company and strengthens customer relationships, efficiency, and service quality over the long term.



„A future-ready platform must be able to grow with requirements. Microsoft Dynamics 365 offers flexibility to strategically develop processes and align customer service with new needs. This is exactly what we are working on together with 4B.“

Stefan Wambacher

Managing Director audius GmbH

A Shared Vision as the Foundation

In implementing the project, 4B and audius worked together as a joint project team. The foundation was a clear vision for future customer service that guided business departments, IT, and project managers. audius brought not only technological expertise but also a deep understanding of 4B's business and service processes.

This made it possible to translate business requirements into tailored applications and strategically leverage the capabilities of the Microsoft Dynamics 365 platform.

audius supported 4B holistically – from analysis and design through implementation to training and support. Equally important was involving everyone in the project, taking their perspectives seriously, and making sound decisions together.

Mutual listening, and close coordination characterized the collaboration and contributed significantly to the successful completion of "Virtus".

Your Contact



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