

# How to Serve Clients: A Guide for Account Managers with Teams



FEATURING

**Alexandra Banica**

Head of Operations and Support for Applications



**BearingPoint®**

# Do You Serve Clients?

Insurance  
Advertising Appraiser Audit Investment  
**SERVE CLIENTS**  
Management Support Tax  
Architect Accountant  
Legal Finance



# The Way We Work with Clients Has Changed...



## Yesterday

Individualized

Opaque

Inefficient



## Today

Collaborative

Transparent

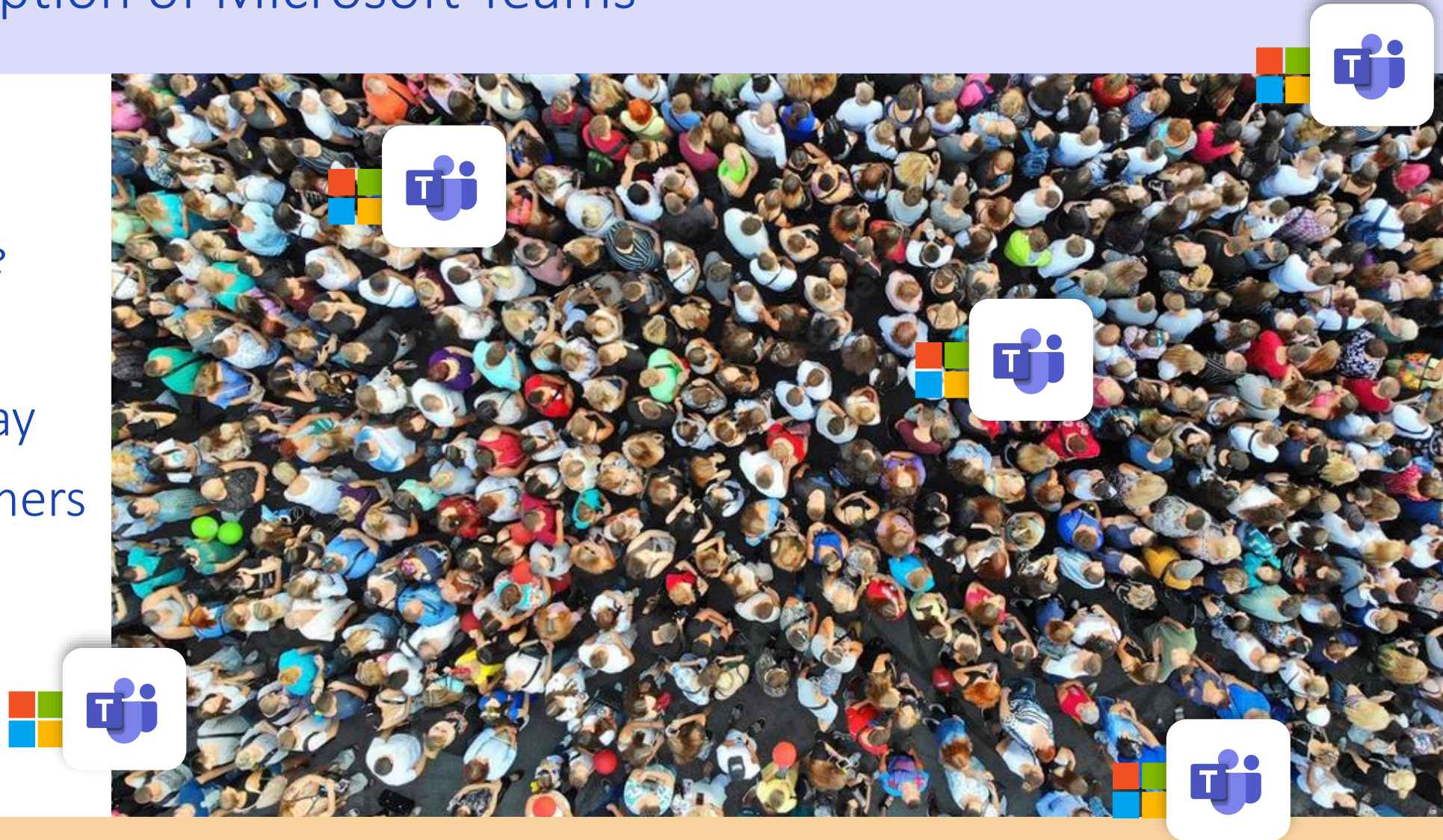
Efficient



# The Opportunity

## Massive Adoption of Microsoft Teams

*You already have  
the tools to  
transform the way  
you serve customers*



# ServiceMate Demo The Business Case



# The Client – Ravenwood



Sam Cooper  
*Business Analyst*

Sam has questions  
about taxes.

He turns to his trusted  
advisors:

A D V I  E Consultants

# The Business Consultant – A D V I Z E Consultants



**David Lavenda**  
*Client Manager for Ravenwood*

A D V I Z E  
*Team of Experts*



Maya  
*Legal Expert*

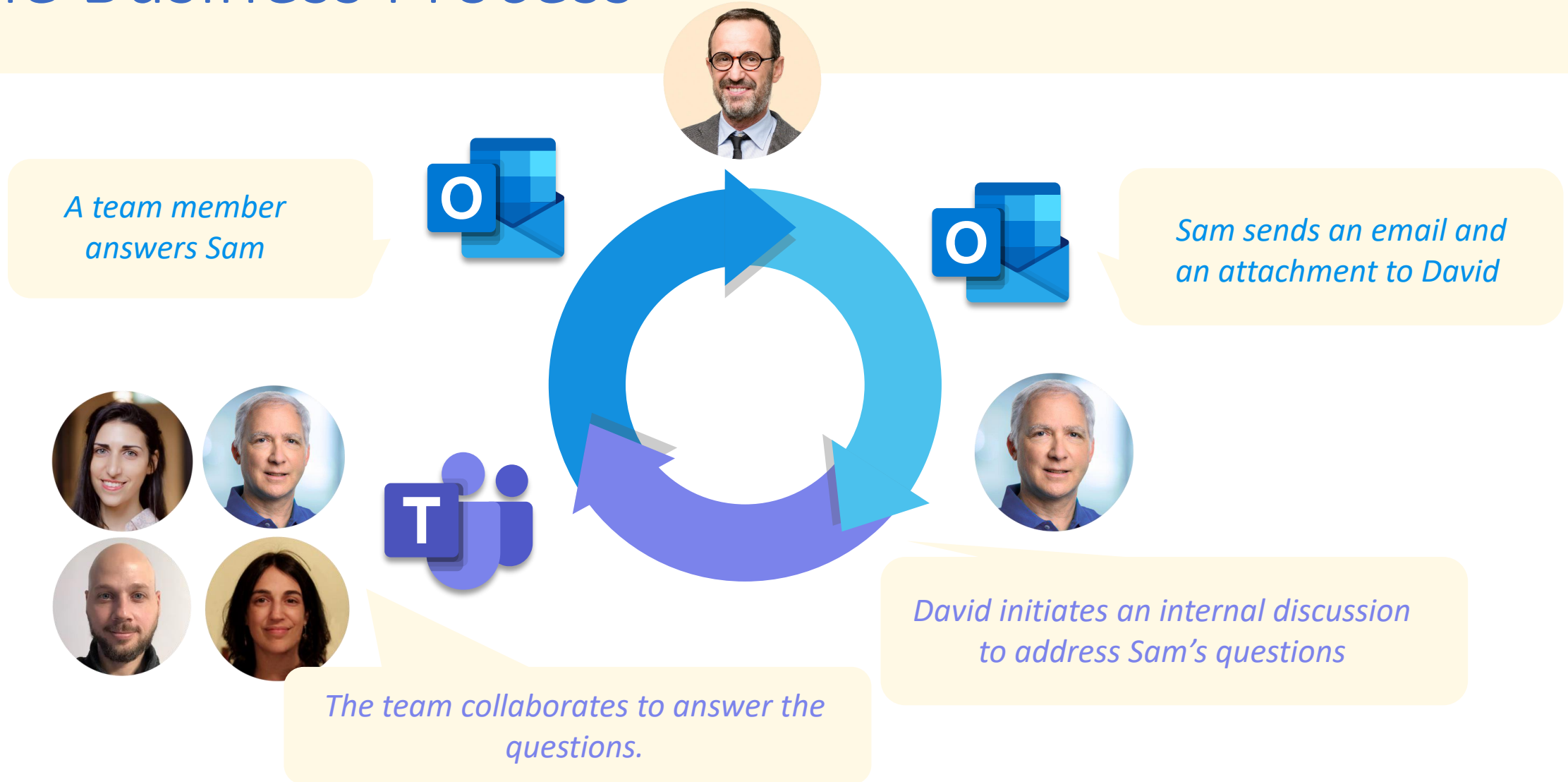


Itay  
*Tax Expert*



Hila  
*Compliance Expert*

# The Business Process





# ServiceMate Demo



# The New Way to Service Clients

ServiceMate Demo

# Collaborating Around Client Inquiries in Microsoft Teams

← Reply



ServiceMate 9/1 11:14 AM Updated

### Ravenwood merger?

**From:** Samuel Cooper <samc@ravenwood-corp.com>

**To:** harmon.ie Support <support@harmon.ie>  
Wed 09/01



Hello,  
As we have previously discussed, we are exploring a possible merger with Honor Inc. Attached to this email, you will find a document that describes the current proposal for the merger structure. Please provide feedback and guidance on the ta

Show Email Conversation

Open Task Board



David Lavenda

▼ Collapse all



David Lavenda 9/1 11:39 AM

Team, we just got this inquiry from Sam at Ravenwood. They are considering a merger and they have a number of questions about how best to structure the deal. In the email above, you will see a document outlining the proposed merger structure. [Itay Pahima](#) Please address the questions related to tax. [Maya Bickson](#) Please address the questions related to the legal aspects of the deal.



Itay Pahima 9/1 11:40 AM

The merger is very complex. The documents and the list of questions are comprehensive. They leave no doubt that the company has to take some specific steps before entering in this merger to avoid an enormous tax liability. I will detail this in an opinion letter.



Maya Bickson 9/1 11:41 AM

After looking over the documents, the merging entity should definitely be the US company. Any other option would have significant legal implications for Ravenwood. It wouldn't be in their interests to do it any other way.



David Lavenda 9/1 11:42 AM

Thanks guys. I believe we have enough information to address Sam's questions. I will send him an email. Stay tuned for more information. This is a complex deal; there are sure to be more questions.



ServiceMate 9/1 11:53 AM

New conversation

Discuss the email in Teams



ServiceMate 11:14 AM Updated

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Open Task

David Lavenda

Reply to the email by opening the task

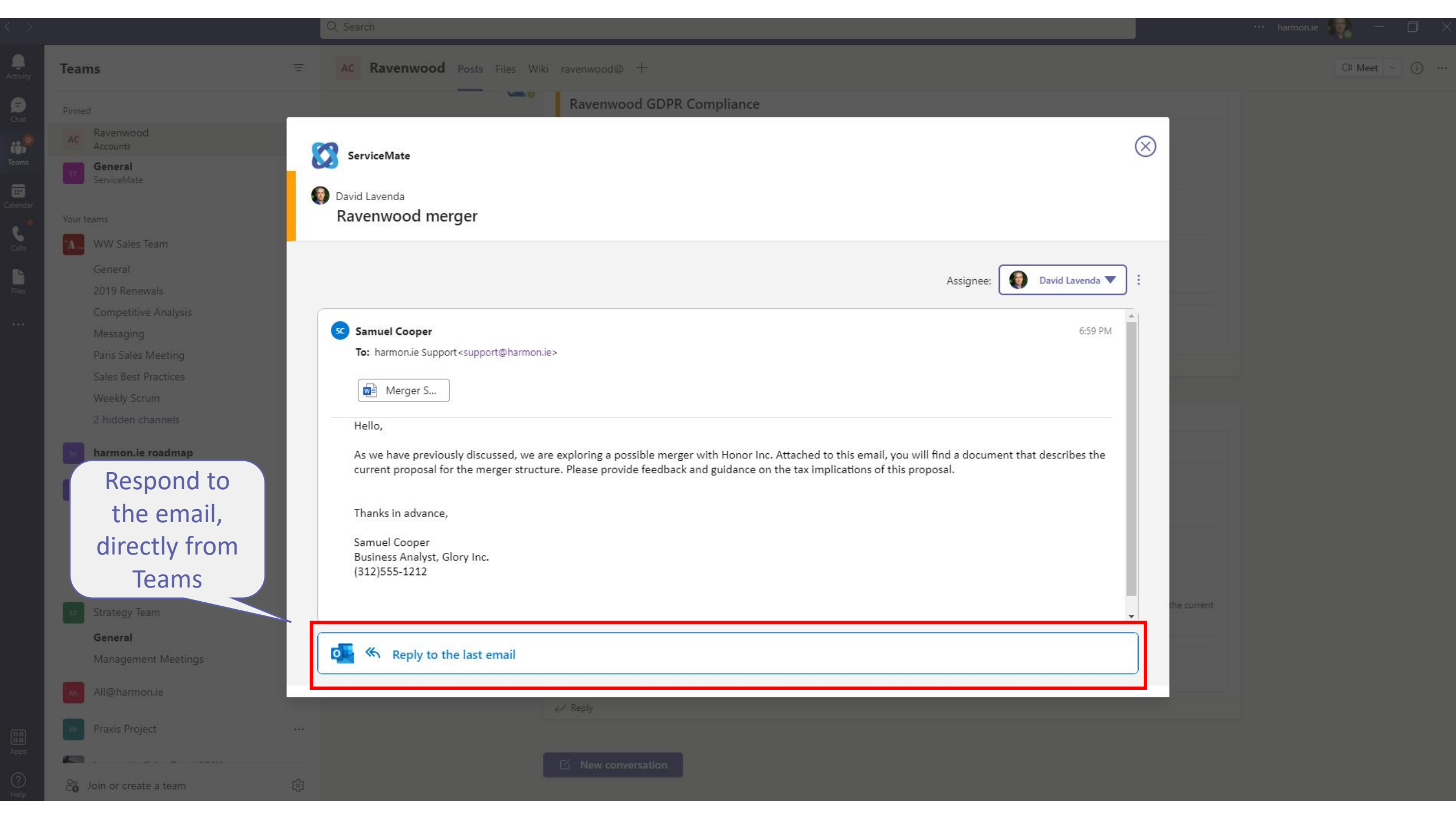
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Teams

Search

harmon.ie

AC Ravenwood Posts Files Wiki ravenwood@ +

Meet

Ravenwood GDPR Compliance



David Lavenda

Ravenwood merger

Assignee: David Lavenda

Samuel Cooper

6:59 PM

To: harmon.ie Support <support@harmon.ie>



Merger S...

Hello,

As we have previously discussed, we are exploring a possible merger with Honor Inc. Attached to this email, you will find a document that describes the current proposal for the merger structure. Please provide feedback and guidance on the tax implications of this proposal.

Thanks in advance,

Samuel Cooper  
Business Analyst, Glory Inc.  
(312)555-1212



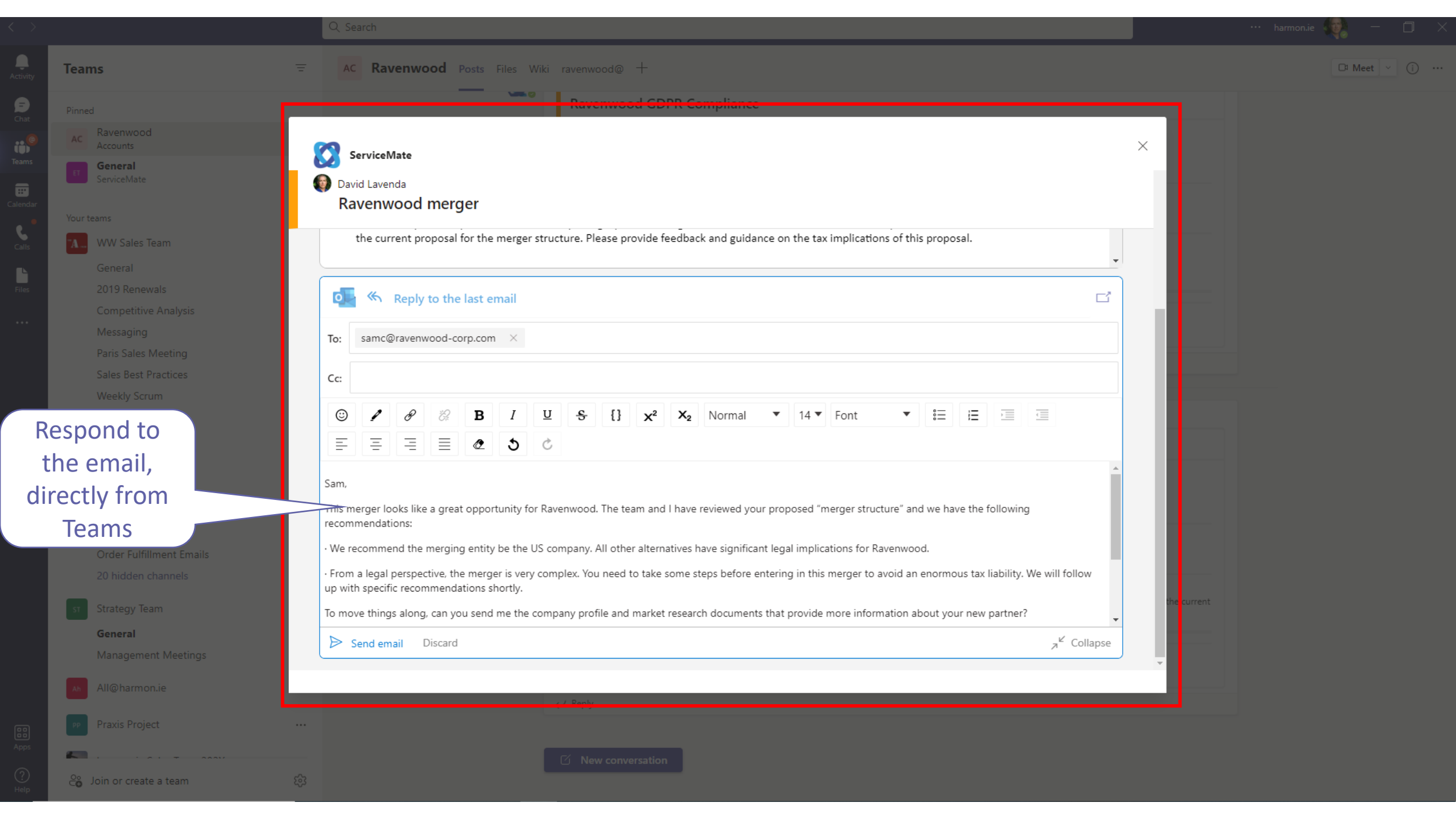
Reply to the last email

Respond to the email, directly from Teams

Reply

New conversation

Join or create a team



Respond to the email, directly from Teams

ServiceMate

David Lavenda  
Ravenwood merger

the current proposal for the merger structure. Please provide feedback and guidance on the tax implications of this proposal.



Reply to the last email

To: samc@ravenwood-corp.com

Cc:

Rich text editor toolbar with icons for emojis, link, unlink, bold, italic, underline, strikethrough, link, unlink, list, indent, outdent, font size, font color, bulleted list, numbered list, decrease indent, increase indent, undo, redo, and refresh.

Sam,

This merger looks like a great opportunity for Ravenwood. The team and I have reviewed your proposed "merger structure" and we have the following recommendations:

- We recommend the merging entity be the US company. All other alternatives have significant legal implications for Ravenwood.
- From a legal perspective, the merger is very complex. You need to take some steps before entering in this merger to avoid an enormous tax liability. We will follow up with specific recommendations shortly.

To move things along, can you send me the company profile and market research documents that provide more information about your new partner?

Send email Discard

Collapse



## RE Ravenwood merger 1.eml

Close

From David Lavenda <davidl@harmon.ie>  
Sent on 9/1/2021, 5:21 PM  
To Samuel Cooper <samc@ravenwood-corp.com>  
Cc harmon.ie Support <support@harmon.ie>  
Subject RE: Ravenwood merger?

Sam,  
This merger looks like a great opportunity for Ravenwood. The team and I have reviewed your proposed "merger structure" and we have the following recommendations:  
· We recommend the merging entity be the US company. All other alternatives have significant legal implications for Ravenwood.  
· From a legal perspective, the merger is very complex. You need to take some steps before entering in this merger to avoid an enormous tax liability. We will follow up with specific recommendations shortly.  
To move things along, can you send me the company profile and market research documents that provide more information about your new partner?  
Good luck with the merger! Let me know if you have additional questions.  
Cheers,  
David Lavenda  
Advize Consultants

---

From: David Lavenda  
Sent: Wednesday, September 1, 2021 8:53:01 AM  
To: Samuel Cooper  
Cc: harmon.ie Support  
Subject: RE: Ravenwood merger?

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Good luck with the merger! Let me know if you have additional questions.  
Cheers,  
David Lavenda  
Advize Consultants

---

From: Samuel Cooper  
Sent: Wednesday, September 1, 2021 8:05:06 AM  
To: harmon.ie Support  
Subject: Ravenwood merger?

Hello,

See the email  
thread,  
without  
leaving Teams





# Screening and Assigning Tasks

### Teams

Pinned

Ravenwood Accounts

Your teams

WW Sales Team

General

2019 Renewals

Competitive Analysis

Messaging

Paris Sales Meeting

Sales Best Practices

**Weekly Scrum**

2 hidden channels

harmon.ie roadmap

**General**

**Syntax**

Teams Manager Partnership

Strategy Team

General

Management Meetings

TeamMate Marketing Team

Join or create a team

AC Ravenwood Posts Files Wiki ravenwood@ +

<< From:samc@ravenwood-corp.co...

Last Week

Search task... Owned by (All)

Shared

Owned

Completed

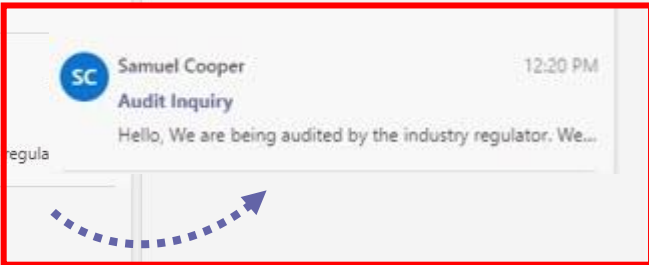
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SC Samuel Cooper 12:34 PM  
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Hi, We are in the midst of our GDPR evaluation, and we h...  
GDPR ques...

SC Samuel Cooper  
**Audit Inquiry**  
Hello, We are being audited by the industry regula

SC Samuel Cooper 12:20 PM  
**Audit Inquiry**  
Hello, We are being audited by the industry regulator. We...



Drag an email to turn it into a task

SC Samuel Cooper 7:00 PM  
**Ravenwood merger - more information**  
 Hi, I appreciate your rapid response. As per your requ...  
 Company ... +1

SC Samuel Cooper 6:59 PM  
**Ravenwood merger**  
 Hello, As we have previously discussed, we are explori...  
 Merger Str...

SC Samuel Cooper 6:57 PM  
**Ravenwood GDPR Compliance**  
 Hi, We are in the midst of our GDPR evaluation, and w...  
 GDPR ques...

SC Samuel Cooper 6:55 PM  
**Urgent legal in...**  
 Hi, We have  
 raven...

HS harmon.ie C...  
**FW: harmon...**  
 Dear Maggie Weidenbaum Please find below the orde...

HS harmon.ie Customer Services 4:49 PM  
**harmon.ie Order Fulfillment for Fort Bend ISD, PO...**  
 To: Fort Bend ISD Dear ...

**Notify team members?**

Dragging this email to the Teams board will notify the channel  
 i.e. show a preview of the email in the conversation

**Ravenwood merger**

SC **Samuel Cooper** <samc@ravenwood-corp.com>  
**To:** support@harmon.ie  
 6:59 PM

Merger S...

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Remember my choice

No, don't notify Yes, go for it

The team is notified about the new task

2021  
 Ravenwood merger? 9/1/2021  
 Hello, As we have previously discussed, we are exploring a possible merger with Honor Inc. Attached to this email, you will find a documen...  
 David Lavenda

2021  
 nag...  
 we...

**Teams**

Pinned

- Ravenwood Accounts

Your teams

- WW Sales Team
  - General
  - 2019 Renewals
  - Competitive Analysis
  - Messaging
  - Paris Sales Meeting
  - Sales Best Practices
  - Weekly Scrum**
  - 2 hidden channels
- harmon.ie roadmap
  - General**
  - Syntex**
- Customer Success
  - General
  - ESDC**
  - Order Fulfillment Emails
  - 20 hidden channels
- Teams Manager Partnership
- Strategy Team
  - General
  - Management Meetings
- TeamMate Marketing Team

Join or create a team

AC **Ravenwood** Posts Files Wiki ravenwood@ +

From:samc@ravenwood-corp.co... x

Last Week

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Search task...

Owned by (All)

Shared Owned Completed

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David Lavenda

**Audit Inquiry** 12:47 PM

Hello, We are being audited by the industry regulator. We have some questions about how to move forward. Can you advise. Specifically: \*...

Assign To

Task has been created

Search Incoming Support E-mail

Search task...

Owned by (All)

Last Month

Shared

Owned

Completed

- Jean Buchnik** 12:45 PM  
**RE: Open Documents from Harmon.ie in Office Onl...**  
Hi, Please edit the underlying Sharepoint site from har...
- Samuel Cooper** 12:44 PM  
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- Gebauer Kathrin** 12:42 PM  
**Open Documents from Harmon.ie in Office Onl...**  
Dear Har...
- Samuel C**  
**Ravenwo**  
Hi, We ar
- Jean Buchnik** 12:23 PM  
**RE: harmon.ie Support Request**  
Hi, Per Citi's explicit request, please open a Citi Service...
- Domingo, Jessica Therese Bernal** 12:22 PM  
**harmon.ie Support Request**  
We are experiencing connection problems using harm...  
Connectio...
- Jean Buchnik** 12:05 PM

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Assign To

Start working on the task with colleagues

Task details area with a red border highlighting the 'Audit Inquiry' task. A yellow callout bubble points to the 'Show conversation' icon.

## Ravenwood GDPR Compliance

**From:** Samuel Cooper <samc@ravenwood-corp.com>

**To:** harmon.ie Support <support@harmon.ie>

Wed 09/01



GDPR questionnaire.docx

33.5 kB

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- How long should we keep customer emails
- What should be our approach to storing customer data; data that we need for

Show Email Thread

Open Task



David Lavenda

← Reply

Today

Last read



ServiceMate 7:05 PM

## Ravenwood merger

**From:** Samuel Cooper <samc@ravenwood-corp.com>

**To:** harmon.ie Support <support@harmon.ie>

Sun 10/24



Merger Structure.docx

32.5 kB

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Open Task

 I Will Take It

← Reply



New conversation

Team members can take ownership of the task

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[Show Email Thread](#) [Open Task](#)



↩ Reply

Today  
Last read



ServiceMate 7:05 PM Updated

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[Open Task](#)



↩ Reply

I own the task

[New conversation](#)

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David Lavenda

Reply

Today

Last read



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Open Task



David Lavenda

Reply

View the  
team's tasks



New conversation



# View Team Tasks

The Task Board

Search Incoming Support E-mail

AC Ravenwood Posts Files Wiki ravenwood@ +

Search task... Owned by (All)

Shared Owned Completed

Jean Buchnik 12:51 PM  
RE: Open Documents from Harmon.ie in Office Onl...  
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Task status

Search Incoming Support E-mail

Last Month

AC Ravenwood Posts Files Wiki ravenwood@ +

Search task... Owned by (All)

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The customer request is in progress

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Search task... Owned by (All)

'Search' and 'filter' help you find tasks

Shared

Owned

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David Lavenda

Close the customer request

Getting Started

### Teams



AC **Ravenwood** Posts Files Wiki ravenwood@ +

Share Comment Reply Refresh Refresh Refresh ... Meet

#### Pinned

AC **Ravenwood**  
Accounts

ET **General**  
ServiceMate

#### Your teams

WW Sales Team ...

General

2019 Renewals

Competitive Analysis

Messaging

Paris Sales Meeting

Sales Best Practices

Weekly Scrum


2 hidden channels

hr **harmon.ie roadmap** ...

Join or create a team

# Answer Customer Emails Within Microsoft Teams



 To get started please connect



The End

# BearingPoint® as a Design Partner

- Intro to the organization – ‘what do we do’
- We share the same ‘digital workplace vision’



# BearingPoint® as a Design Partner

- What is the Need (Business case – Portfolio Board)
- How Do You Solve the Problem Today (and what is wrong with it)
- What will be the new way of working with ServiceMate? (workflow and desired outcome)
- Why is Teams the right platform for this solution?
- What is the desired outcome? (benefits of product)



# BearingPoint® as a Design Partner

- Why We Joined the Design partner program (benefits of the program)
- Influence the roadmap
- Get the product that is valuable to us
- Joint exchange of value



# The Design Partner Program

## Benefits

- Early access to ServiceMate
- Influence the product roadmap
- One-year free subscription for your organization

## Commitments

- Feedback on product
- Feedback on pricing model
- Feedback on use cases and messaging
- Case study

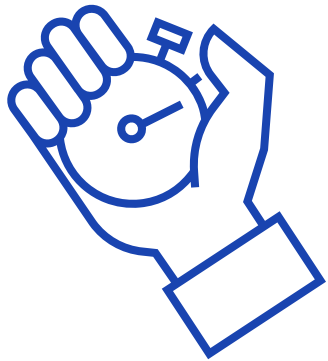
**One meeting every 3 weeks, to get updates and feedback**



# Design Partner Prerequisites

- ✓ Use shared mailboxes for working with clients
- ✓ Have ability to add apps to Teams
- ✓ Can provide Microsoft user consent for installing the app

# Become a ServiceMate **Design Partner**



**Only 3 slots left!**



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