# MS Dynamics CRM with Integrated Desktop

PositiveEdge helps implement Microsoft Dynamics CRM CCA to manage their Sales, Marketing and Customer Service across service industries.

### **BUSINESS SITUATION**

Today many organizations requires a system to manage their Sales, Marketing and Customer Service which would enable each of these business areas to optimize their operations and increase productivity. The system would also need to serve as an interface across these business areas ensuring transparency of information across all levels.

#### **SOLUTION**

PositiveEdge proposes implementation of Microsoft Dynamics CRM 2011 with Customer Care Accelerator (CCA) to manage organization's Sales, Marketing and Customer Service to provide as an interface amongst their different business users. As part of the Integrated Desktop, PositiveEdge integrates Microsoft CRM CCA 2011 with existing telephony network for telephony call related information.

Below are our few of the offerings:

Everything working together and in one place

Integrated Desktop incorporates diverse business applications into single desktop providing employees with a 360° view of the customer interactions. A single user interface enables to integrate different kinds of applications (including Web, Windows Forms, Java and Terminal Services apps), task automation and so on with multi-session management feature. Customer Service Representatives (CSR) has immediate access to business critical information to serve customers quickly and efficiently.

Eliminating Duplicate Data Entry

Business process automation with desktop workflows eliminates the need for agents to re-enter the same data in multiple applications. Minimizing duplication helps to reduce human error and ensures a consistent customer service experience.

Computer Telephony Integration (CTI)

Organizations are provided with a consistent framework to connect CTI systems with key line of business applications.

**Activity Reporting** 

Contact center managers have swift access to agent desktop transaction reporting, helping them to identify process bottlenecks.

## **BENEFITS**

- Facilitates Dealers and Customer Care Agents to better interact with customers by using the readily available information from the CRM system during live calls.
- The CRM System with CCA complements organization's existing products as it interfaces with their legacy systems to provide a unified view.
- Reduced call handling times: The Contact Center Agents are having immediate access to complete case and customer data.
- Rapid response: There is a high probability of customer's issues getting resolved on first call.
- High customer satisfaction



Region: All Industry: All

## **Engagement Highlights:**

- ✓ Novell eDirectory Integration
- CTI integration with existing
  Telephony Network
- ✓ Interactive Voice Recording
- ✓ Unified Desktop for Dealers and Customer Care
- ✓ 360 degree view

#### Platform:

#### Microsoft

✓ Microsoft Dynamics CRM CCA 2011

## Tools and Technology used

- ✓ Microsoft Dynamics CRM
- Microsoft .NET Framework 4.0
- ✓ SOL Server
- ✓ SQL Server Reporting Services
- ✓ Microsoft Visual Studio 2010

## Results:

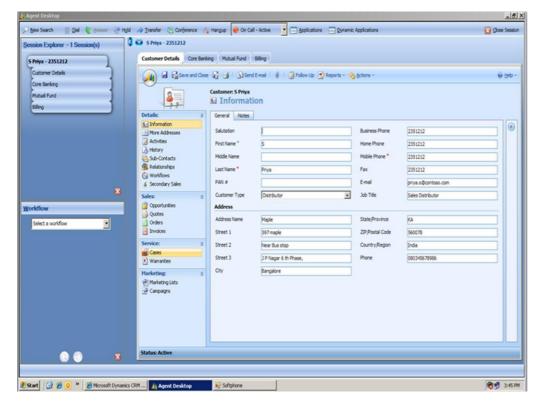
- ✓ An Integrated Desktop System with CTI integration
- ✓ Campaign Management
- Customer Services Management
- ✓ Dealer Dashboard

#### Clientele:

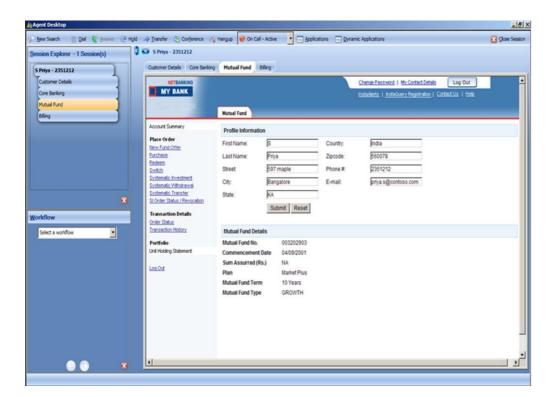
- ✓ Geojit BNP Paribas
- ✓ Fullerton Securities

# Screen Captures

• Integrated Desktop: An Agent's desktop popped up with customer details pulled out o CRM whenever a call lands up on EPABX switch.



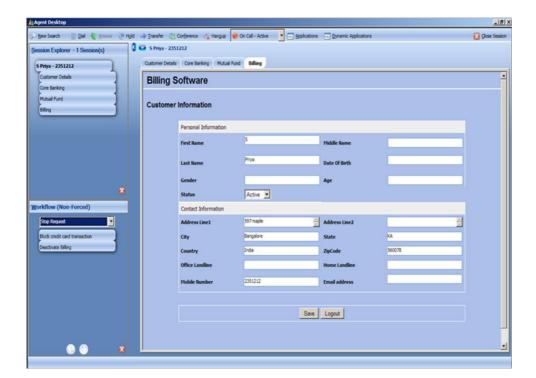
• During the call, relevant details for the same caller from different line of business applications appear in a new tab in the same single user interface.



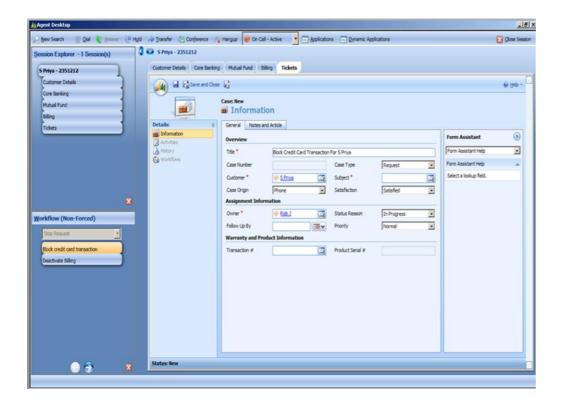


# **Screen Captures**

• At the same time, data is pulled out from your existing legacy application to have complete view of the customer.



• An agent can log a case in MS Dynamics DRM to track it effectively.









**Contact Us** 

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For more information about how to discover diamonds in the crevasses between your core systems or to learn more about how PositiveEdge can help, visit <a href="www.positiveedge.net">www.positiveedge.net</a> or email <a href="mailto:pprahlad@positiveedgesolutions.com">pprahlad@positiveedgesolutions.com</a>