

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
- ✓ SQL 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 of CRM whenever a call lands up on EPABX switch.

The screenshot shows the 'Agent Desktop' application window. On the left is a 'Session Explorer' with a list of sessions for 'S Priya - 2351212'. The main area displays 'Customer Details' for 'S Priya' with tabs for 'Core Banking', 'Mutual Fund', and 'Billing'. The 'Information' tab is active, showing a form with fields for personal and contact information. The status at the bottom is 'Active'.

Customer: S Priya Information	
Salutation	
First Name *	S
Middle Name	
Last Name *	Priya
PAN #	
Customer Type	Distributor
Business Phone	2351212
Home Phone	2351212
Mobile Phone *	2351212
Fax	2351212
E-mail	priya.s@contoso.com
Job Title	Sales Distributor
Address	
Address Name	Maple
State/Province	KA
Street 1	597 maple
ZIP/Postal Code	560078
Street 2	Near Bus stop
Country/Region	India
Street 3	J P Nagar 6 th Phase,
City	Bangalore
Phone	080345678996

- 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.

This screenshot shows the same 'Agent Desktop' interface, but with the 'Mutual Fund' tab selected. It displays a 'MY BANK' interface with a 'Mutual Fund' section. The 'Profile Information' and 'Mutual Fund Details' are visible. The status remains 'Active'.

MY BANK Mutual Fund	
Change Password My Contact Details Log Out Instant Alerts InfoQuery Registration Contact Us Help	
Account Summary Place Order New Fund Offer Purchase Redeem Switch Systematic Investment Systematic Withdrawal Systematic Transfer SI Order Status / Revocation	
Transaction Details Order Status Transaction History	
Portfolio Unit Holding Statement Log Out	
Profile Information First Name: S Country: India Last Name: Priya Zipcode: 560078 Street: 597 maple Phone #: 2351212 City: Bangalore E-mail: priya.s@contoso.com State: KA Submit Reset	
Mutual Fund Details Mutual Fund No. 003202903 Commencement Date 04/09/2001 Sum Assured (Rs.) NA Plan Market Plus Mutual Fund Term 10 Years Mutual Fund Type GROWTH	





Screen Captures

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

Agent Desktop

Session Explorer - 1 Session(s)

S Priya - 2351212

Customer Details Core Banking Mutual Fund Billing

Billing Software

Customer Information

Personal Information

First Name: S Middle Name:

Last Name: Priya Date of Birth:

Gender: Age:

Status: Active

Contact Information

Address Line1: 997 maple Address Line2:

City: Bangalore State: KA

Country: India ZipCode: 560078

Office Landline: Home Landline:

Mobile Number: 2351212 Email address:

Save Logout

- An agent can log a case in MS Dynamics CRM to track it effectively.

Agent Desktop

Session Explorer - 1 Session(s)

S Priya - 2351212

Customer Details Core Banking Mutual Fund Billing Tickets

Case: New

Information

Overview

Title: Block Credit Card Transaction For S Priya

Case Number: Case Type: Request

Customer: S Priya Subject:

Case Origin: Phone Satisfaction: Satisfied

Assignment Information

Owner: Bob J Status Reason: In Progress

Follow Up By: Priority: Normal

Warranty and Product Information

Transaction #: Product Serial #:

Form Assistant

Form Assistant Help

Form Assistant Help

Select a lookup field.

Status: New



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 www.positiveedge.net or email pprahlad@positiveedgesolutions.com