



CUSTOMER RELATIONSHIP MANAGEMENT (CRM) G-CLOUD 15

SERVICE OVERVIEW

Telefónica Tech provides a Customer Relationship Management (CRM) service based on Microsoft Dynamics 365 to help organisations manage and improve interactions across sales, marketing, customer service and related customer-facing functions.

Microsoft Dynamics 365 for Customer Engagement (CRM) brings together core CRM capabilities including Sales, Marketing, Customer Service, Field Service and Project Service Automation within a single, integrated platform. The service supports organisations in building stronger customer relationships, improving visibility across customer interactions and delivering consistent experiences across channels.

Designed to be flexible and scalable, the Dynamics 365 CRM service can be configured to meet the needs of organisations of different sizes and sectors. It integrates with the wider Microsoft ecosystem, enabling organisations to extend CRM capabilities while maintaining security, compliance and operational control.

KEY FEATURES

- Sales Automation: Streamlines all phases of the sales process,
- Marketing Automation: Facilitates targeted marketing campaigns
- Customer Service Module: Provides tools for case management, automated ticketing, and customer support channels,
- Field Service Management: Integrates scheduling, dispatch, and service analytics to manage field operations efficiently.
- Customer Insights: Offers deep analytics capabilities to gather actionable customer data, enhancing personalised marketing and sales strategies.
- Microsoft Dynamics 365 Customer Engagement (CRM) - full CRM platform
- Pick and mix from CRM modules to create your solution
- Upgrade Dynamics CRM to Dynamics 365 CRM in the cloud
- Single Microsoft CRM platform for all areas of your organisation
- Expand further with integration with third-party apps and Microsoft products.

KEY BENEFITS

- Improved Customer Relationships: Enables personalised customer interactions that drive engagement and loyalty.
- Increased Sales Efficiency: Automates and optimises sales processes to improve win rates and reduce sales cycles.
- Enhanced Marketing Effectiveness: Allows precise targeting and tracking of marketing campaigns to maximise ROI.
- Superior Customer Service: Provides comprehensive tools to resolve issues quickly and efficiently, improving overall customer satisfaction.
- Unified View of Customers: Centralises customer information from multiple touchpoints, providing a 360-degree view that informs better decision-making.

- Easily maintain up-to-date, GDPR compliant for contact details.
- Comprehensive suite of tools for all your customer-facing interactions.
- Real-time access to data through your CRM, on any device.
- Dynamics 365 offers modular licensing for scale-ability of cost.
- A CRM that supports multi-currency transactions.
- Compatible with Microsoft's Common Data Model for easy integration.

ADDITIONAL SERVICES

- CRM discovery and readiness assessments
- Configuration and deployment of Dynamics 365 CRM modules
- Migration and upgrade from legacy Dynamics CRM solutions
- Integration with Microsoft 365, Power Platform and third-party applications
- Data migration, cleansing and enrichment services
- Process optimisation across sales, marketing and service functions
- Reporting and analytics configuration
- User training and knowledge transfer
- Adoption and change support
- Ongoing optimisation, support and managed service options

Thank you

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