



MICROSOFT DYNAMICS 365 CUSTOMER ENGAGEMENT IMPLEMENTATION G-CLOUD 15

SERVICE OVERVIEW

Telefónica Tech provides a Customer Relationship Management (CRM) service based on Microsoft Dynamics 365 Customer Engagement to support organisations in managing and improving customer, citizen and member interactions across sales, marketing, customer service and field service functions.

Microsoft Dynamics 365 Customer Engagement brings together core CRM capabilities including Sales, Marketing, Customer Service, Field Service and Project Service Automation within a single, cloud-based platform. The service enables organisations to centralise customer data, streamline customer-facing processes and deliver consistent, personalised experiences across digital and assisted channels.

Designed to be flexible and scalable, the service can be configured using individual CRM modules to meet organisational needs. It integrates with the wider Microsoft ecosystem, supporting secure, compliant and extensible CRM solutions that can evolve as requirements change.

KEY FEATURES

- Microsoft Dynamics365 for Customer Engagement - full CRM platform.
- Pick from CRM modules to create a CRM solution.
- Dynamics365 Sales for classic CRM citizen management.
- Microsoft Dynamics365 Customer Service for case management.
- Microsoft Dynamics365 Field Service for mobile workforces.
- Dynamics365 Marketing for lead generation, event s and business development.
- Upgrade Dynamics CRM to cloud-based Dynamics 365Customer Engagement.
- Dynamics365 offers role-based CRM capability.
- Single Microsoft CRM platform for all areas of your business.
- Expand with integration to third-party apps and Microsoft products.
- Sales Automation: Automates sales processes, from lead management to opportunity tracking and quotation generation, to increase sales productivity and win rates.
- Marketing Automation: Enables targeted marketing campaigns, email marketing, lead scoring, and campaign tracking to attract and engage prospects effectively.
- Customer Service Management: Provides omnichannel customer service capabilities, including case management, knowledge base, and service analytics, to deliver timely and personalised support.
- 360-Degree Customer View: Consolidates customer data from various touchpoints into a single view, empowering sales, marketing, and service teams with actionable insights.



- AI-Powered Insights: Utilises artificial intelligence (AI) and machine learning to provide predictive analytics, sentiment analysis, and recommendations for smarter decision-making.

KEY BENEFITS

- Provides a 360-degree view of your customer.
- Maintain GDPR compliant contact details for members, suppliers and citizens.
- Run branded, professional marketing campaigns and events.
- Bring your old CRM data into your cloud CRM platform.
- Comprehensive suite of tools for all your customer-facing interactions.
- Real-time access to data through your CRM.
- Available in the Microsoft Cloud and accessible 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.
- Enhanced Customer Relationships: Enables businesses to build deeper connections with customers through personalised interactions and tailored experiences.
- Improved Sales Performance: Increases sales efficiency and effectiveness by providing sales teams with the tools and insights they need to close deals faster.
- Efficient Marketing Campaigns: Drives marketing effectiveness with targeted campaigns, lead nurturing, and real-time performance tracking.
- Optimised Customer Service: Delivers exceptional customer service experiences across multiple channels, leading to higher customer satisfaction and loyalty.
- Data-Driven Decision Making: Empowers businesses with actionable insights and analytics, enabling informed decisions to drive business growth.

ADDITIONAL SERVICES

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



Thank you

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