Improve customer experience and efficiency with an enhanced Dynamics 365 implementation

Benefits

- Easy setup with out-of-the-box integrations
- Immediate ROI with improved agent efficiency
- Customer interaction personalization
- Drive actionable insights with full business intelligence

Genesys-Dynamics 365 integration

As organizations leverage the power of Microsoft Dynamics 365 for both sales and service, it's critical they focus on providing a great customer experience across all communications channels. Customers expect personalized, relevant and timely information — whether they call in to a company or they receive messages from the companies do business with. Easy integration with Microsoft Dynamics 365 gives organizations the tools needed to provide a seamless and consistent experience.

When organizations handle inbound inquiries from customers, the Dynamics 365 integration lets them easily enhance their Microsoft Dynamics 365 implementations with powerful features that improve caller experiences and increase business productivity. The integration enables automated contact/case/lead creation and look up, personalized call routing and agent screen-pops with the ability to pass information to the agent. Now you can easily add both automation and customized call handling.

Additionally, when proactively contacting customers you can quickly execute campaign calling lists from Dynamics 365.Implement multichannel outbound campaigns, including alert messaging, outbound IVR and predictive/preview/manual dialing. Plus, after an outreach attempt is completed, results are automatically written into the activity log of the customer record.

Solution overview

With the Genesys-Dynamics 365 integration, you can add data-driven automation through self-service IVR applications by accessing Dynamics 365 data at the outset of every call. This enables each and every call to be personalized utilizing Genesys interaction controls and screen-pops. As a result, you can focus solely on the customer and position your business as best-in-class and not worry about your technology solution.

Benefits for Microsoft Dynamics 365 users:

- Personalize customer interactions: Use a "data dip" of the customers' account information and previous case history to greet each customer with a personalized message.
- Customize automated options for callers upfront: Present customers with the status of their case first through a self-service IVR application, and then give them the option to re-open the case, update that case or transfer to an agent.
- Interact with customers naturally: Use the highly effective speech recognition engine to save callers time.
- Screen-pop customer data to an agent: Leverage Genesys integration to customize a screen-pop with all information gathered through the self-service application, along with any customer's previous history, allowing the agent to provide a more personalized experience.
- Enable automated secure transactions: Transfer the customer to the self-service application menu for payments or other sensitive transactions and then the agent can take back the call to continue the conversation, leading to a more effective first-call resolution.
- When tickets are closed, automatically send multichannel customer surveys with the ability to escalate to live agents when necessary.
- Automatically capture consumer information to instantly create leads such as name, address and phone number prior to delivering the inbound call to the sales agent.

- Execute proactive campaigns utilizing lists of leads, contacts and cases for outreach via Genesys Proactive Customer Communications platform.
- Enable priority routing for inbound calls to ensure all "hot leads" jump to the front of the queue to increase closure rates.
- Create customized, multichannel contact strategies to new leads or updated contacts in real time.
- Store details about all customer communications (date, time, duration, agent, call result) and recordings in the Salesforce record.
- Provide screen-pops with information gathered from inbound and outbound interactions and previous history using Genesys integration, allowing agents to provide a more tailored experience.
- Simplify the agent experience by eliminating multiple systems needed and increase productivity through a single integrated, multichannel user interface.
- Gain insight into your pipeline via simple inbound calls. Managers can call in and obtain a voice rendition of their opportunities reports and pipeline status.

The Genesys and Microsoft Dynamics 365 integration advantage

Improve customer experience

Customer interactions are mapped against Dynamics 365 objects to find a record match based on the caller's phone number or any other defined data point. Genesys then screen-pops the Dynamics 365 record via Genesys integration to the agent, along with any other data collected. This allows the agent to greet the caller in a personalized manner, enhancing the customer experience. Provide superior customer experience, including self-service inbound IVR and proactive customer communications.

Increase agent efficiency

Save your sales or support staff time and increase the accuracy of your data. Agents can quickly place outbound calls by clicking on a phone number from any Salesforce record, whether they include cases or contacts. All calls placed are automatically logged in Dynamics 365, including call results, call details and any custom information. This automation increases agent productivity and ensures a systematic

tracking of all call activities. Additionally, all incoming calls are automatically logged into Dynamics 365 based on the parameters set up for the interaction record.

Deploy and maintain

The Genesys and Dynamics 365 integration does not require you to install any hardware or software. It's easy to deploy and can be accessed through browsers, such as Microsoft Edge or Chrome, running on any operating system. This eliminates any dependence on IT. Plus, Genesys-Dynamics 365 integration is compatible with both US and international phone numbers over a PSTN or IP network for added flexibility.

Make and receive phone calls, set the agent status and automatically record actions without leaving the Dynamic 365 desktop. Provide information and data about inbound calls to agent allowing them to personalize interactions.
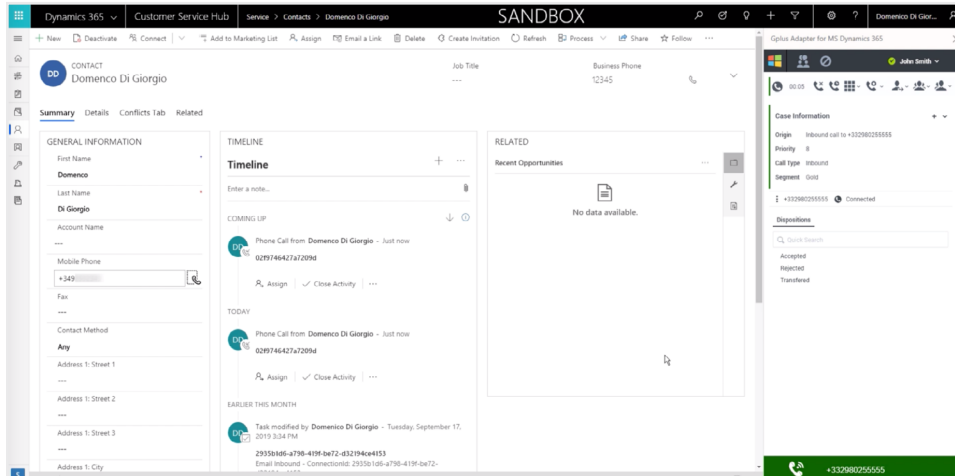
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