

**FACT SHEET**

# Confirmit CRM Connector for Microsoft Dynamics

Optimizing Customer Interactions throughout the Customer Lifecycle

Each and every customer interaction is important to your business, and you know how critical it is to listen to, and act on, the Voice of the Customer. With Confirmit CRM Connector for Microsoft Dynamics, you can optimize all your customer interactions throughout the customer lifecycle, by integrating Confirmit Horizons directly with your Microsoft Dynamics environment.

## Solutions for Sales and Services

Whether you sell to businesses, consumers or both, you have multiple customer touchpoints throughout the customer lifecycle. Integrating your VoC program with your CRM system enables you to optimize all these different touchpoints, from both your customers' and your business perspectives.

- 01 As part of your initial customer on-boarding process**, and with every significant Microsoft Dynamics transaction that follows, initiate a VoC transactional survey to capture feedback on the customer experience. Also build workflows to ensure you close the loop for issues that are unresolved.
- 02 Select customers from Microsoft Dynamics** for regular relationship feedback, and use Confirmit Horizons to manage the business rules for distributing the surveys.
- 03 Trigger surveys after each service interaction**, and use business rules in Confirmit Horizons to generate activities for sales or cases for services to follow up..
- 04 Leverage key customer data** from Microsoft Dynamics to deliver contextual information about your customers into your business reporting and executive dashboard.

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## Optimized Experience for Customers

Don't frustrate customers by asking questions to which you already know the answer.

By integrating your VoC and CRM solutions, the relevant data is automatically available. This ensures that the survey is targeted to the specific environment of the customer – streamlining the process, and showing that you value them.

Similarly, you can create highly targeted customer lists to enable you to ask very specific, valuable questions. For example, you can focus on resolving localized issues – such as delivery problems that affected only customers who bought a particular product in a single region during a defined period of time – and find out exactly how the situation impacted them, and what you need to do to keep their business in future. Or build lists of customers who are coming to the end of their contract with you, and gain valuable feedback about their intention to renew while you are still able to impact that decision.

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## Optimized Experience for Business Users

Many different stakeholders will benefit from an integrated CRM and VoC solution.

In a B2B environment, along with your VoC team, you will have marketing teams, new business sales and account management teams, and services and support teams all undertaking different forms of customer interaction.

With the enterprise capabilities of Confrimit Horizons, it isn't necessary for all users to have access to the CRM system, which can be prohibitively expensive. Confrimit Horizons users do not need end user access to the CRM system to pull sales and services information and deliver the required surveys, reports, dashboards and action management programs to benefit from CRM data in their job function.

The flexibility of the integrated solution ensures the right kind of access for different business users. For example:



**Sales teams** may want to work mainly in Microsoft Dynamics, while VoC and marketing teams want to access both systems



**Business users** outside these domains will probably only need access to Confrimit Horizons.



**Services teams** that use Microsoft Dynamics for case management will work in Microsoft Dynamics





## Optimized Customer Interactions

All this requires an enterprise-grade VoC solution that is tightly integrated with a CRM system such as Microsoft Dynamics.

When users access their business reports, executive dashboards and business applications, they should always see the most up-to-date and relevant customer interaction data, whichever solution they work with. It should also be easy to configure and manage the integration without always having to draw on resources from the VoC software vendor. Conformat CRM Connector for Microsoft Dynamics delivers all of this, so you can ensure that your customers get the best experiences possible.

### 01 Account Managers

Want to see the latest KPI scores – satisfaction, NPS®, etc. – from their customers and their contacts

### 02 Customer Experience Teams

Require actions triggered within Microsoft Dynamics to close the loop on issues raised by customers

### 03 Service Delivery Teams

Need cases automatically created for them when customers flag product or service issues, and they want to see the current context of the account when responding to a service issue

### 04 Senior Business Executives

Must have dashboards to intelligently analyze key customer metrics alongside the VoC feedback to identify the most important drivers of satisfaction and revenue

### 05 Line Managers

Want to see reports that combine key business performance metrics along with customer feedback from interactions with their team.



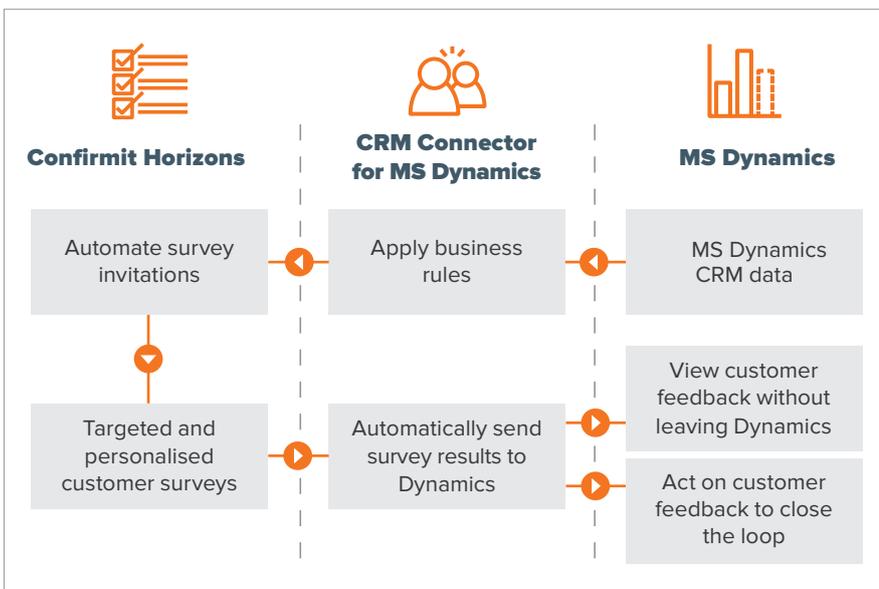
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## Simple Setup and Maintenance

CRM Connector for Microsoft Dynamics provides an easy-to-use setup wizard for mapping the Microsoft Dynamics data to the corresponding data points in Conconfirm Horizons.

The wizard also includes easy configuration to select and filter the relevant data in Microsoft Dynamics to be sent across to Conconfirm Horizons. The software can transfer all new and changed data from Microsoft Dynamics into Conconfirm Horizons on a regular basis, e.g. once every hour or once a day.

Survey response data and e-mail invitation delivery information can also be sent back to Microsoft Dynamics where it can be presented in Microsoft Dynamics reports combined with other CRM data, or used to trigger actions to close the loop on customer feedback. Your organization can see and act on the VoC feedback data without leaving their familiar Microsoft Dynamics CRM environment. This not only saves time, but ensures your teams stay on top of all their latest customer feedback.



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## About Conconfirm

Conconfirm is the world's leading SaaS vendor for multi-channel Voice of the Customer, Voice of the Employee, and Market Research solutions. The company has offices in Oslo (headquarters), Grimstad, London, Moscow, New York, San Francisco, Sydney, Vancouver, and Yaroslavl. Conconfirm's software is also distributed through partner resellers in Madrid, Milan, Salvador, and Tokyo. Conconfirm powers Global 5000 companies and Market Research agencies worldwide with a wide range of software products for feedback / data collection, panel management, data processing, analysis, and reporting. Customers include Aurora, British Airways, British Standards Institution, Copart, Cross-Tab, Dow Chemical, GfK, GlaxoSmithKline, GMO Research, KeepFactor, Morehead Associates, Nielsen, Research Now, RS Components, QRS, SSI, Sony Mobile Communications, and Swisscom. Visit [www.conconfirm.com](http://www.conconfirm.com) for more information.