



Mitel Contact Center Solutions (6100) and Microsoft® Customer Relationship Management

What is Microsoft Customer Relationship Management (CRM)?

Microsoft Customer Relationship Management (CRM) enables you to know your customers intimately and use that business intelligence to deliver better products and services, improve customer service, and increase sales opportunities.

CRM software allows you to shorten sales cycles and improve customer loyalty by automating day-to-day tasks and improving contact interactions in sales, customer service, field service, and marketing departments.

How does CRM benefit my contact center?

Your contact center is the central service center to your customers. In order for your employees to provide the best service possible, they must have detailed customer information:

- Current issues
- Support history
- Sales/purchase history
- Up-sell/cross-sell opportunities

CRM provides employees with detailed customer information so they can make quick, intelligent business decisions to resolve issues and provide efficient service.

How does Mitel Contact Center Solutions (6100) integrate with CRM?

Mitel's Contact Center Solutions (6100) integrates with CRM to provide efficient customer interactions, regardless of the contact method used: voice, email, chat, web, or fax.

Together, Contact Center Solutions and CRM immediately benefit your company:

Enhance productivity through screen pops

When a contact arrives at an agent's desktop, the customer's CRM file instantly opens. Regardless of the media type used to contact the center, primary information including the customer's name, account number, address, phone, fax, and mobile appears on the agent's screen. With a CRM screen pop, you'll see an increase in productivity and ensure your business is capturing critical customer interaction information.

Accurately track interactions with activity records

CRM dynamically creates an activity record in a customer's file when a contact arrives. With CRM's unified Case Number Management, the employee simply needs to begin typing details on the interaction. Similarly, when an employee contacts a customer, CRM generates a record that enables the business to track all service details.

Know your customers with interaction history

CRM provides a complete, unified history of all customer-employee interactions. Contact history is logically organized by case number, inbound/outbound session, and contact media type. With CRM, your employees always have a coherent historical view of previous issues, solutions, opportunities, and sales.

Enhance agent efficiency with direct CRM action

You can control all incoming and outgoing interactions directly using CRM. Employee use attributes of existing customer profiles to make contact. Employees can send faxes or emails, or dial customer phone numbers with the click of a button.

Mitel and Microsoft: The benefits of an integrated CRM system

Microsoft Business Solutions designed CRM to meet the wide range of integration requirements needed for today's business systems. Not only does CRM integrate information from multiple sources across your business, it also works with a variety of business software applications from Mitel and Microsoft. Why is that so important? Microsoft defines the top five reasons as follows:

Get a complete picture of your customer

Contact Center Solutions and CRM work together to provide up-to-date customer information that you can share across department lines. The sales and customer service modules integrate with your Microsoft environment and enable employees to access all of the customer information gathered throughout the organization.

Connect and streamline your business processes beyond system boundaries

Because CRM shares all customer information with employees, businesses can find new ways to better serve customers and identify new opportunities. CRM also frees employees from the time-consuming task of re-entering information captured by other departments.

Take advantage of a smooth integration with other information systems

CRM was designed from the ground up using the Microsoft .NET framework. This key Microsoft Windows technology enables CRM to readily integrate with other applications including Microsoft Business Solutions for Financial Management.

Work beyond the reach of your network

With CRM, your sales force can work far beyond the boundaries of your network. The CRM sales module, in conjunction with Microsoft Outlook, enables you to work offline. Your employees can work wherever, whenever.

Customize and integrate CRM with other products and services

Built on flexible .NET technologies and powerful integration tools, CRM enables developers to integrate its functionality with third-party applications and Web services. Together, these systems enable your company to build a powerful, custom solution.

Contact Center Solutions and the CRM Customer Service module

Offer superior customer service and increased capacity to handle requests, without adding employees. Microsoft CRM Customer Service helps your employees track customer requests, manage support issues from initial contact to successful resolution, and provide customers with consistent, efficient service to ensure satisfaction.

Contact Center Solutions and the CRM Customer Service module	
Case management	Create, assign, and manage customer service requests from initial contact through resolution, and manage communications and other activities.
Service requests	Automatically associate incoming voice, email, Web chat, and fax inquiries with the appropriate case. Inbound agents can access customer tombstone information by business line (banking, retail, etc.).
Routing, workflow, and tracking	Route service requests automatically to the longest idle employee for resolution, escalation, or reassignment. Maintain accurate records of customer inquiries with automated case numbering across all media types. Generate and send auto-response messages with case numbers to customer requests.
Searchable knowledge base	Resolve common support issues quickly by using a searchable knowledge base that contains relevant articles. Built-in review processes help ensure that published information is complete, correct, and properly tagged for search.
Contract management	Create and maintain service contracts within CRM to help ensure accurate billing for support incidents. Each time a support case is resolved, relevant contract information is updated automatically.
Reports	Use Contact Center Management (6110) reporting to help identify common support issues, evaluate customer needs, track service levels, and measure agent performance.

Contact Center Solutions and the CRM Sales module

Accessible from Outlook and the Web, CRM Sales assists sales employees in managing leads and opportunities, measuring and forecasting sales activity, efficiently tracking customer communications, and automating stages in the sales process. This helps to ensure a shorter cycle, higher close rates, and improved customer retention.

Contact Center Solutions and the CRM Sales module	
Microsoft Outlook integration	Work online or offline using Outlook, with access to accounts, opportunities, products, quotes, orders, sales literature, and more. CRM contacts, appointments, and tasks are integrated with Outlook.
Complete customer view	View and manage customer account activity and history, including contact information, communications, open quotes, pending orders, invoices, credit limits, and payment history.
Lead routing and management	Track information on prospective customers, and then qualify and assign inquiries. Readily convert qualified leads to opportunities without re-entering data and track opportunities throughout the sales cycle.
Order management	Create and convert quotes to orders, and then modify and save orders until you are ready to submit them. If a financial application is integrated, invoices for orders are published automatically into CRM from that system.
Reports	View, sort, and filter a wide range of reports. Identify trends, measure and forecast sales activity, track sales processes, and evaluate business performance.
Integration with Microsoft	CRM readily integrates with Microsoft Business Solutions Financials, including key data business solutions mapping for accounts, contacts, orders, price lists, and product catalogs.

MiService Solutions

Although some customers are able to use CRM directly out of the box, most customers customize CRM to address specific business needs. Whether you need to add functionality or broaden the reach of certain tools, with CRM, customization is simple.

As a CRM Business Solutions Integrator, Mitel can help you

1. Define your business processes.
2. Design your CRM solution and implement the most efficient business workflow.
3. Customize your CRM solution for integration with third party applications.

Mitel helps you define, automate, and enforce specific business rules, policies, and procedures according to your way of doing business.

Why Contact Center Solutions and CRM?

Benefit from a unified platform with Mitel and Microsoft. Leverage existing capital costs on the Microsoft infrastructure to reduce the overall cost of ownership, and lower ongoing maintenance costs with the familiar Microsoft infrastructure.

Contact Center Solutions is delivered using a Microsoft IT infrastructure. Mitel users are already familiar with Outlook, and CRM fully integrates with its existing IT infrastructure including Exchange and Outlook.

CRM's simple configuration and ease of use enable employees to become productive quickly, with little training.

With Contact Center Solutions and CRM

- All servers are Microsoft operating systems.
- All server software is standardized: SQL, Exchange, MS CRM.
- All agent and supervisor desktops run Microsoft operating systems.
- All agent and supervisor desktops run Microsoft Office tools: Internet Explorer for a universal application user interface, Outlook for the contact center agent interface, Excel for reports, and CRM for contact management.

Contact Center Solutions and CRM provide unified

- SQL database, one-point administration
- Reporting
- Real-time management
- Forecasting across media types
- Microsoft and Mitel look-and-feel to lower the learning curve

Contact MiService Solutions for questions concerning Microsoft CRM customization.