



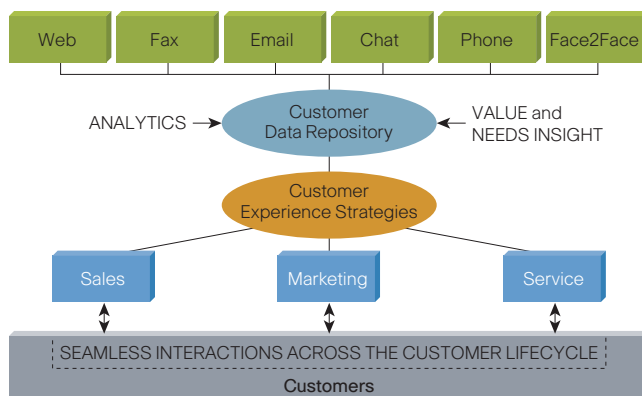
Cisco Unified Communications and Microsoft Dynamics CRM 4.0 The Customer-Centric Opportunity

Regardless of the size of a company, there is an increased focus today on maximizing the value of each and every customer interaction. Both small and medium-sized businesses and large companies must compete globally to capture the hearts, minds and wallets of their customers. More than in prior years, companies are finding that they must provide meaningful, compelling and consistent experiences for their customer. To provide that level of service requires not only great people and strong processes but also the right enabling technology from Microsoft and Cisco.

Why the Customer Experience is Critical to Business Performance

Companies that focus attention on the customer experience tend to have better customer satisfaction ratings and perform better than their competitors. This can create substantial financial gains for those companies. In fact, according to a study published in the Harvard Business Review, “companies with high customer satisfaction scores have blown the S&P 500 out of the water, especially over the last few years. Not only have they produced higher stock returns, but their stock values and cash flows have been less volatile.” Similarly, a JD Powers study found a 52 percent average improvement in shareholder value for those companies that improved customer satisfaction rankings and conversely, a 28 percent decline for those whose customer satisfaction rankings decreased.

How are companies capitalizing on this tremendous opportunity? By better managing the customer experience.



Source: Peppers & Rogers

According to Peppers & Rogers Group, the customer experience represents all of an individual customer's interactions with a company and its brand over time. Customers view a company as a single entity, not as a collection of departments or offices. Regardless of where, when, or with whom an interaction occurs, the customer expects an interaction to pick up exactly where the last one left off. As the chart below illustrates, customers expect seamless interactions in every channel and department throughout the customer lifecycle.

“It has to be a seamless experience, which requires employees to have access to customer interaction upfront,” says Becky Carroll, Senior Consultant at Peppers & Rogers. “They must be able to identify the value and needs of a customer and deliver the best response, whether it's fast resolution of a service issue, follow-up to a marketing campaign, cross-sell, up-sell, and so on.”

Managing customer experiences to build profitable relationships is the path to competitive differentiation and growth. For instance, a simple 5 percent increase in customer loyalty can yield a 25 percent increase in profitability (source: Fred Reichheld, *The Loyalty Effect*).

“To remain competitive, you must figure out how to keep your customers longer, grow them into bigger customers, make them more profitable, and serve them more efficiently. And you want more of them,” state Don Peppers and Martha Rogers, Ph.D., in their recent book, *Return on Customer: Creating Maximum Value from Your Scarcest Resource*.





A Complete Customer Experience Solution

The fact is that customer experience is the cornerstone for competitive advantage and growth. With this understanding, Cisco and Microsoft have developed an industry-leading customer service solution to address the needs of both small and medium-sized businesses and large companies. At the heart of the solution is Microsoft Dynamics™ CRM that delivers a comprehensive set of capabilities to manage the customer experience. This powerful customer relationship management (CRM) solution lets you deliver customer information, case management, sales information, service history, and support knowledge directly to your employees. Microsoft Dynamics CRM offers a familiar, easy-to-use interface to enhance user adoption. At the same time, Microsoft Dynamics CRM provides robust, pervasive workflow and customization capabilities to match the application to the needs of your business. As your business grows or changes, Microsoft Dynamics CRM is designed to change along with your business. Microsoft Dynamics CRM helps you provide consistent, effective service that improves the customer experience.

A Cisco Unified Communications network completes the solution. Cisco Unified Communications brings together all your voice, video, and data communication onto a single network. It helps your business:

- **Keep costs under control**, managing just one network instead of two.
- **Be more productive**, giving your employees the mobility and flexibility to deliver service anytime, anywhere.
- **Serve customers better**, by giving employees immediate access to the people, information, and communications tools they need—regardless of where they are working or how they are communicating.

“The close integration provided by Cisco Unified CallConnector (to Microsoft Dynamics CRM) lets our calling agents be more knowledgeable about customers to better address their needs.”

– Nicolas Fuhrs, CRM Consultant, connectiv!

Cisco Unified CallConnector for Microsoft Dynamics CRM

Cisco Unified CallConnector for Microsoft Dynamics CRM lets you deliver rich CRM detail to the computer screen of any customer-facing employee—the instant the customer calls.

Cisco Unified CallConnector works hand in hand with Microsoft Dynamics CRM to give you a complete, in-depth view of customers. It empowers your employees to deliver more informed, responsive service. Customer records pop up automatically, making it easier for employees to see service history, answer questions, resolve issues or even initiate a sale.

The solution gives you immediate information about inbound and outbound calls. You can see the customer's recent activity, follow-up tasks, reports of previous calls, and service agreements in just a few clicks. To place a call to a customer, you can simply “click to dial” on your PC screen.

Cisco Unified CallConnector for Microsoft Dynamics CRM provides in-depth call reporting and tracking so you can make more informed decisions about your customers and business.

In addition to Cisco Unified Communications and Microsoft CRM, the solution can also include:

- **Cisco Unified CallConnector for Microsoft Dynamics CRM**
- **Cisco Unified Contact Center Express (or Enterprise edition)**

Building the Customer-Centric Company

A CRM solution running on your company network can help you win and retain customers by pulling together key customer information exactly when you need it. The solution gives your employees a complete view of customers, so they can deliver informed, professional service every time. At the same time, it can help you keep costs under control, giving employees the tools they need to accomplish more with less.

Cisco rich business communications and Microsoft expertise in business software applications can be delivered by trusted partners to give you what you've been waiting for: a complete CRM solution for your particular business needs. Together, the Cisco and Microsoft solution lets you unlock new benefits that change the way you do business including:

- **Superior Customer Service**—With the Cisco Unified Communications and Microsoft Dynamics CRM solution, you can make all of your business operations more efficient. Your employees can accomplish more, and your customers will appreciate better service. Putting the latest customer information at your employees' fingertips helps them anticipate customer needs, to help boost satisfaction.
- **More Effective Sales and Marketing**—The Cisco and Microsoft solution helps you grow sales by focusing on what really matters to your business. It gives your sales team the customer information they need to be more productive and tap new business opportunities. A complete customer profile lets you target marketing initiatives to the right customers, with the right message. You can automate campaigns, and instantly view customer status when they are on the phone.

“The Cisco and Microsoft solution gives us an instant customer view that lets us deliver better service to customers by pulling together all CRM information in one place. Providing a 360-degree view of customers lets every employee treat customers like they truly understand their business.”

– Thomas Truitt, Senior Vice President and CIO,
MidAtlantic Farm Credit

Cisco Unified Contact Center Express

Cisco Unified Contact Center Express, together with Microsoft Dynamics CRM, gives you everything you need to operate both a formal or informal contact center. Easy to set up and use, it lets your employees interact with customers over the phone, e-mail, or on the Web.

This “contact center in a box” lets you take control when handling incoming and outgoing calls. It delivers:

- Sophisticated call routing so callers quickly reach the person they need
- Workforce optimization to make business operations more efficient
- Contact and E-mail management to help employees respond to customers and colleagues faster
- Chat and Web collaboration for working with customers online
- Outbound dialing capabilities to reach customers easily
- Easy-to-use management tools

Automatic call distributor (ACD) manages your incoming calls and forwards them to employees. It helps your customers connect to the right employee, with the right skills, the first time. Interactive voice response (IVR) can answer the phone for your business and gives callers pre-recorded options.

The solution works smoothly with Microsoft Dynamics CRM. If a customer calls in, an employee will see a screen pop on their PC showing the caller's information. As an agent answers a call, he or she can review, validate and update customer information in the CRM application or work from Cisco Unified Contact Center Express.

The solution is available in different versions and can be easily upgraded from one version (Express edition) to the next (Enterprise edition) as your customer contact requirements grow.



- **Informed Management**—Boost business intelligence and understand your customers, how well they are being served and where to target resources. The Cisco and Microsoft solution can help give you better insight into how you relate to customers. You can see how well they are being served, focus on areas that need improvement, and decide where to target resources.
- **Empowered Frontline Workforce**—Deliver 360-degree views to all your customer-facing employees. Automated, instant access to all customer data in one place lets employees make informed decisions and better meet customer needs. Convenient access to tools like click-to-dial buttons on a PC helps employees save time on the tasks they do every day.

Next Steps

By delivering a complete customer experience solution, Cisco and Microsoft can help your employees be more responsive to customers, keep costs under control, and become more profitable and successful for years to come.

The Cisco and Microsoft solution is currently available from select Cisco and Microsoft Certified Partners.

Find out more:

For more information on the Cisco and Microsoft solution, visit www.cisco.com/go/microsoftcrm.

For more information about Microsoft Dynamics CRM, visit www.microsoft.com/dynamics/crm.

“Microsoft Dynamics CRM provides an almost unlimited view of the data we need. We can easily drill down to focus on specific data, or we can see an aggregate view in a report. Using the product with Cisco Unified CallConnector for Microsoft Dynamics CRM provides a much better view of what activities have taken place with our sales team, as well as services and operations teams.

Plus, we have the 360-degree view of the customer before we even say ‘hello,’ as the solution for Microsoft Dynamics CRM provides an automatic screen pop of customer information with both outbound and inbound calls.”

– Rick Morgan, CEO, Sunset Learning Institute



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