

Customer Story

Golden Charter

Financial services company dedicated to providing superior customer service gets 90%+ rating with Dynamics Telephony



The Challenge

Golden Charter had a consumer sales team that utilized Microsoft Dynamics to manage their customer relationships however, when a client called, they wouldn't know if this was an existing prospect or a new prospect. The team also had manually dial all prospects which was time consuming with a lack of management control of the outbound operation.

Key Requirements

1. Click to Dial functionality
2. Inbound caller recognition
3. Identify the line a caller called in from. Automatic identification based on DNIS.
4. Disposition call outcome – ability to automate post call tasks based on a chosen call outcome.

How did Dynamics Telephony differ from other solutions you tested?

When reviewing the market there didn't appear to be any singular competitor that could meet our key requirements without a large volume of custom development. The functionality required was available "out of the box" from Dynamics Telephony.

The Implementation

During test and implementation, the Dynamics Telephony team were open and welcoming when dealing with a challenging customer and resolved the issues we raised in both a timely and effective manner. Whilst ultimately unrequired, Dynamics Telephony also offered to support an out of office hours deployment.

. Lewis Allan – Project Manager, Golden Charter

How does Dynamics Telephony improve your business?

The solution absolutely meets our needs. The solution helps our sales agents focus on sales and removes administration through identifying who is calling and displaying their record. We have seen a huge improvement in our conversion rates and this statistic continues to grow as we expand with more licenses.

Lewis Allan - Project Manager, Golden Charter

Why would you recommend Dynamics Telephony?

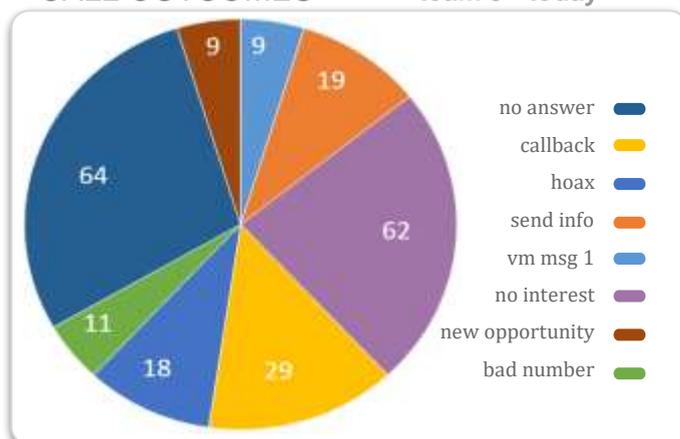
We have no hesitation in recommending Dynamics Telephony – the solution and the team – to any potential customers. I would recommend Dynamics telephony as it is an application that integrates telephony and CRM to provide insights that would normally require manual intervention and time to achieve. I would also call out that whilst this is an off the shelf solution, Dynamics telephony is customizable to meet your organisations needs and the team are very open to advice and suggestions for new functionality.

Lewis Allan - Project Manager, Golden Charter

The Dynamics Telephony team have great customer focus and business expertise to solve any issues that may naturally arise in an integration like this. It is extremely beneficial that the Dynamics Telephony team's primary and only focus is development of a product that integrates with Dynamics CRM/365. Dynamics Telephony is fully upgradeable – which means that we do not have to undertake further development when we upgrade our CRM system or our telephony system in the future.

CALL OUTCOMES

team 5 - today



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