

Conferenceware

Integration with Microsoft CRM

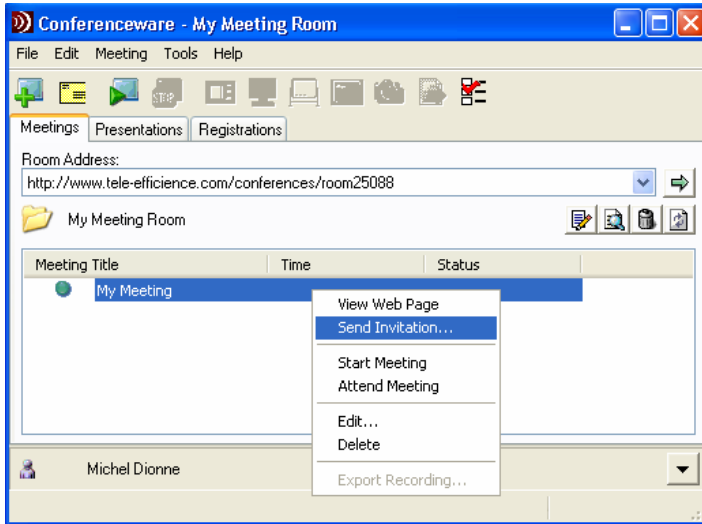


Tele-efficiency)))

Tele-efficiency is committed to helping our clients save their time, improve their synergy, and lower their traveling expenses. We offer superior WEBconference services at a fixed price under the trademark *Conferenceware*, integrated with most CRM applications and with Skype. Its interface is personalizable to the company. What's more, you can enjoy a free 30-day trial! Thereafter, you can continue enjoying the benefits of *Conferenceware* with a quarterly or an annual service contract.

From Conferenceware

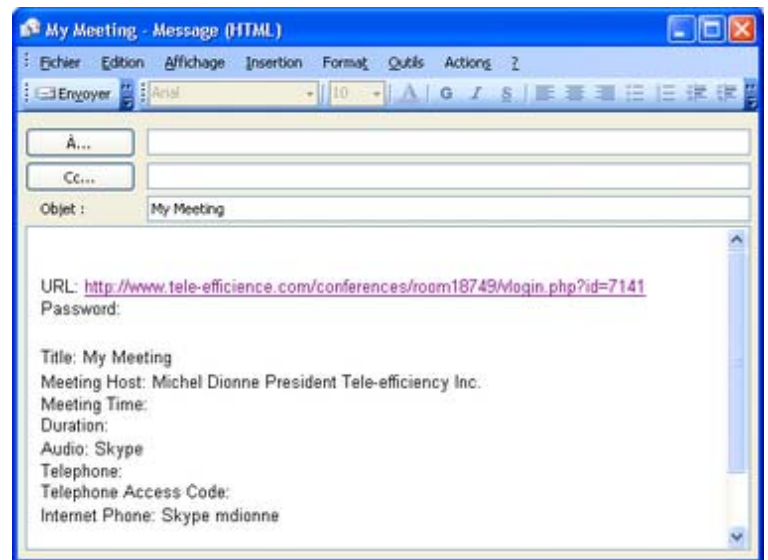
Conferenceware integrates with Microsoft CRM as your email client per default or via Outlook. In fact, it generates automatically the data for an invitation; description, agenda and voice broadcasting mode, in the template of a new email.



You invite the participants by sending an hyperlink to conduct them directly to the meeting. Click with the right button on the meeting's name, when selected the letters of the name will become grass and select *Send Invitation*.

Through your email client software

The information required by the participants, like the hyperlink to get to the meeting, the time and date, the necessary password, if that is the case, are already in the email information that opens within Microsoft CRM or Outlook.



Therefore, you only have to select people you want to invite amongst your contacts. Consequently, a copy of your invitation is saved with each contact file in Microsoft CRM.

To Microsoft CRM

eCRM



Tele-efficiency helps its clients to save time, improve their synergy and lower their travel expenses.

Offers WEBconference services at a fixed rate, under the trademark Conferenceware, integrated with CRM applications and with Skype. The greeting is customizable for each client's company image with their logo. Also offers a free 30-day trial period followed by a quarterly service contract or yearly.

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Introduction

The Customer Relationship Management is first of all and before anything else, a business strategy technologically supported and not the other way around. It consists on identifying the value of the clients, to keep them, develop them and get new ones. In this perspective, the prospecting of acquiring new clients begins with [WEBinar](#) while sales in itself, especially the presentation to prospects, is done in [eSales](#).

Preparation

Make the difference between the development of current clientele and market prospecting. In the first case, contacts are identified and are established in the client's account. Therefore, is convenient to organize a presentation since Conferenceware automatically generates the information required for an invitation, the description, schedule and the mode for voice broadcasting within the format of a new message. From there, you just have to select the persons you want to invite among your contacts. Consequently, a copy of the invitation is saved in each of your contact's file, in your CRM software. In the case of prospecting by [WEBinar](#), the list of registered persons is imported in CSV format in order to automatically build contact information in your CRM software.

Progress

The objective of commercial presentations is usually to get information regarding the prospect's business problematic and to identify the persons with power among the organization that have the weight to make the buying decision making. Is through the interactive questionnaire that is possible to evaluate the preoccupations in terms of problems along with the buying criteria of each of the persons influencing the process. While meeting with them, you are able to identify each person's role within the acquisition, user, evaluator, and their level of knowledge, beginner or expert as well as their attitude: ally, neutral or hostile. In the case of acquired clients, the interactive questionnaire is precious to evaluate their loyalty particularly their disposition to make referrals.

Follow up

The report of a reunion indicates not only the participants but also the answers they have provided to the questions submitted: problems, retained buying criteria, loyalty index. From there, you should be able to prepare a differential proposal, showing by the grade of pertinence, your understanding of the client's needs. Moreover, by recording a meeting, in which voice and image are synchronized, it can be replayed to check the fine tuning and be kept in the file as an attachment to opportunity.

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- Using Microsoft Dynamics CRM
- Services & Support
- Partners
- Community
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- Microsoft Dynamics Home
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- PartnerSource
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[Product Information](#)

Microsoft Dynamics CRM 3.0 and Microsoft Office—great business partners

By [Douglas Gantenbein](#)

For a business that wants to grow and succeed, few things matter more than connecting with customers. But adopting CRM (customer relationship management) software has been difficult for many organizations. CRM software can be complex and difficult to learn. And employees might require time to gain proficiency. Employees can sometimes even resist adopting CRM software because it forces change in their work routines.

Microsoft has brought CRM software into a new era with Microsoft Dynamics CRM 3.0. It is a flexible CRM solution that works the way a company works, adapting to each business culture with its unique way of responding to customers.

Microsoft CRM 3.0 integrates well with Microsoft Office

programs, including Microsoft Office Outlook, Microsoft Office Word, Microsoft Office Excel, and powerful data-sharing tools such as Microsoft SharePoint and Microsoft SQL Server Reporting Services.

Here's a quick look at how Microsoft CRM 3.0 works with familiar Microsoft products to give any business a new way to stay connected with customers.

Microsoft CRM integration with Microsoft Office programs

Microsoft Office—the essential business tool used by millions worldwide. Now Microsoft Office programs can be combined with the power of Microsoft CRM 3.0 to give any business new insights into customer needs.

- **Make Microsoft Office Outlook a powerful CRM tool.** Microsoft Outlook messaging and collaboration client already provides businesses with a reliable tool for communicating with customers, storing customer contact information, and scheduling appointments. Now Outlook can do more. With the Microsoft Sales for Outlook client in Microsoft CRM 3.0, all customer information can be managed from Microsoft Outlook. Sales, lead information, marketing pitches—everything you need to stay connected with customers. And because this information can be available company-wide, all employees have the power to see client histories and respond effectively to questions and requests.
- **Enable Excel to analyze customer information.** Microsoft Office Excel spreadsheet software is a powerful tool that is widely used to analyze critical company data. Compiling important data often means searching through multiple sources. Now, Microsoft Excel works with Microsoft CRM 3.0 to give businesses a new way to understand the impact of changes in sales, pricing, clients, and contacts. Data about sales and other business activities is easily imported to Excel from Microsoft CRM 3.0, making it easy to run scenarios, reports, and graphs for all aspects of a business. And data can be imported into Excel in three ways: As a static table, a dynamic table, or a PivotTable dynamic view. With the latter two methods, Excel automatically updates data as it is changed within Microsoft CRM 3.0.
- **Enable your employees to customize customer communications using Word and Microsoft Publisher.** Use data from Microsoft CRM 3.0 to target customers for marketing and sales campaigns using Microsoft Office Word and Microsoft Office Publisher. It's easy to select customers for a letter or marketing initiative—and personalized messages take only

Related Links

- [Talk with a Microsoft representative](#)
- [Microsoft Dynamics CRM 3.0 overview and key features](#)
- [Microsoft Dynamics CRM 3.0 system requirements](#)
- [What's new in Microsoft Dynamics CRM 3.0](#)

Microsoft CRM 3.0 offers the latest in security features. Customer and business information is guarded with a fail-safe system that offers the best safety and confidentiality possible. Overall, Microsoft CRM 3.0 offers businesses a complete customer management tool, helping to find a new level of success through high-quality customer care. And Microsoft technology is your assurance for an affordable, effective CRM solution.

For More Information

- [Want more sales? Focus more on customers, less on processes](#)
- [Talking CRM with your team](#)
- [More than a smile: How to sustain service excellence](#)

Doug Gantenbein is a journalist based in the Seattle area who has contributed to many leading business publications including The Economist, The Wall Street Journal, and Business 2.0.

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