



## The Cisco Unified Communications and Microsoft Dynamics CRM Small and Medium-Sized Business Solution

As a small or medium-sized business (SMB) competing against larger companies, you know you need to work harder, faster, and smarter to win market share. You also know that customer satisfaction plays a crucial role in winning customers and keeping them.

Why is real-time access to comprehensive customer history information so important? Because each interaction presents an opportunity to provide better customer service or to up-sell or cross-sell additional solutions and services.

Integrated customer relationship management (CRM) and IP Communications can help you win and retain customers by giving you powerful tracking and information access tools that your entire company can use. Converged voice and data networks and applications offer real business value by streamlining communications and pulling together vital customer information exactly when you need it.

### Microsoft and Cisco—Teaming Up to Design a Solution Just for SMBs

Until now, price and complexity have limited CRM and IP Communications applications to larger organizations. But those barriers are crumbling. Microsoft, the world's leading supplier of software solutions, and Cisco, the worldwide leader in networking for the Internet, have teamed up to create an enterprise-class solution designed especially for small and medium-sized organizations.

Together, Cisco Unified Communications and Microsoft Dynamics CRM offer a full-featured, but right-sized approach that enables you to more effectively identify and address customer needs and build profitable customer relationships.

#### Create a clearer, more complete view of your customers

- Unified e-mail, telephone, and database records provide a single view of all customer-related information
- Integrated interaction history helps you understand customers better and build stronger business relationships
- Immediate access to customer preferences lets you respond more quickly and efficiently to customer needs

#### Grow your sales by focusing on what really matters to your business

- Easy-to-use tools capture, analyze, and share information and target marketing efforts
- Customer-centered content search helps pinpoint key details that can close deals
- Clearer insight into customers offers opportunities for up-sell, cross-sell, and contract renewal

#### Gather useable knowledge, not just data

- Knowledgebase tools build a customer picture that builds with every interaction
- Customer call metrics provide valuable feedback for staff training and coaching
- Executive dashboard and other reports give managers needed, timely updates

*(continued)*



### Increase customer satisfaction. Expand your small and medium-sized business.

Now you can equip your entire workforce with the knowledge they need at their fingertips on one screen. No more hurriedly trying to access that database file or flipping through folders and vainly trying to refresh your memory during a customer phone call. Everything about your customer—current and past product purchases, sales information, account relationships, billing information—is displayed onscreen using the familiar Microsoft Outlook interface. From screen pops that automatically open contact records with new activity screens as calls arrive, to call information capture and click-to-dial from onscreen record features, your staff works faster and more effectively during incoming and outgoing calls.

**Provide a better sales and support experience for contacts and customers**

- Real-time access lets you respond and complete transactions more quickly
- Flexible call routing quickly targets the appropriate resource regardless of location
- Call load balancing automatically responds to shifts in staffing or traffic so calls are never missed

**Increase the effectiveness of your limited resources**

- Intelligent lists and tools let you use resources more efficiently, streamlining sales, marketing, customer service, and reporting efforts
- Single-source entry and display eliminates duplicate efforts and scattered information
- Data views and queries are easily tailored to yield exactly the information you need

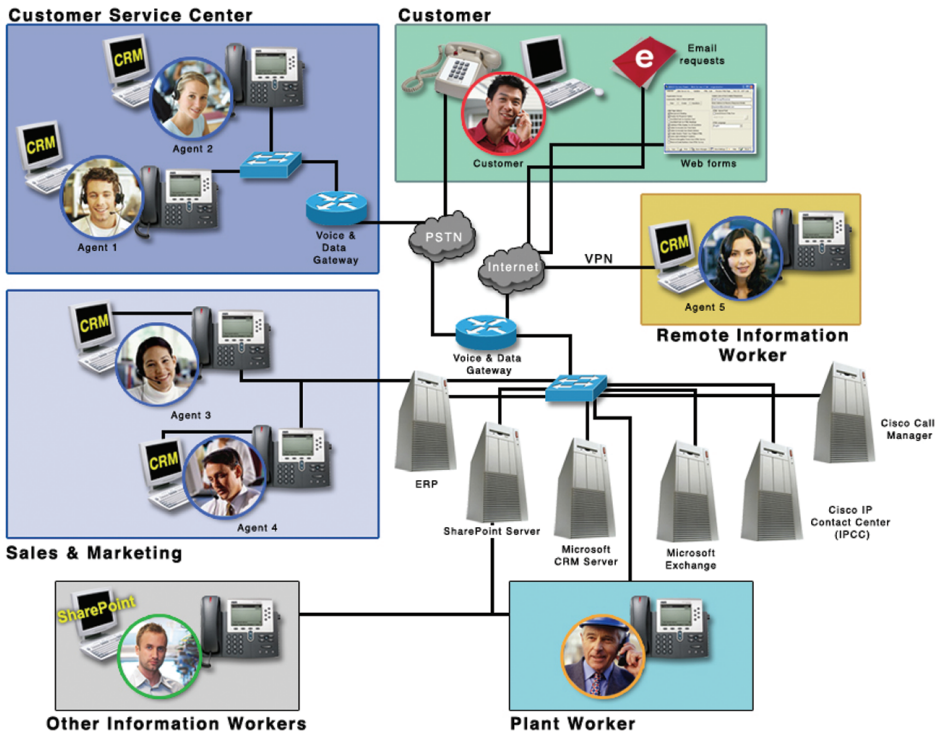


Fig 1. The Customer Centered Company. Using the Cisco Unified Communications and Microsoft Dynamics CRM solution to grow your business by placing customers first.



## A Complete Communications Solution

Cisco reliability, Microsoft expertise, and a trusted integration partner create the solution you've been waiting for: enterprise-class functionality with customizable tools tailored for small and medium-sized business environments. Integrated functionality and a familiar Outlook-based interface get you and your employees up and using the system in no time.

Depending on your requirements, the Cisco Unified Communications and Microsoft Dynamics CRM solution components can include:

- Microsoft Dynamics CRM (hosted or on-premise)—A full-featured productivity application that displays a single view of the customer through integrated sales, marketing, and customer service interactions.
- Cisco Unified CallConnector for Microsoft Dynamics CRM—A software “bridge” at the desktop that integrates Cisco Unified Communications and Microsoft CRM components.
- Cisco Unified Communications phone products—Devices that combine the power of data networks with the convenience and ease-of-use of telephones.
- Cisco Unified Communications Manager—Software that supports unified messaging (e-mail, voice-mail and fax messages in a single inbox), voice and videoconferencing, and collaborative contact centers.

### Cisco Unified Communications Solution Features and Benefits

- Flexible framework combines communications and work styles into one highly productive work environment.
- Unified messaging lets users access and manage voice-mail, e-mail, and fax messages from a single inbox to simplify their workday.
- Consolidated voice and data network cuts the costs of user moves, adds, and changes, and eliminates costly toll charges and recurring leased-line fees.

### Microsoft Dynamics CRM Features and Benefits

- Works the way you do, with features to help develop customer relationships and make better informed decisions.
- Works the way your business does, with a flexible platform that adapts to changing information needs.
- Works the way IT expects it to, with tools to rapidly deploy and manage the solution.



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### Next Steps

By integrating Microsoft Dynamics CRM and Cisco Unified Communications, Cisco and Microsoft provide a complete offering that will help your company raise its profitability and expand your business.

The Cisco Unified Communications and Microsoft CRM solution is currently available from select Cisco and Microsoft Certified Partners. For more information, visit [www.cisco.com/go/microsoftsmb](http://www.cisco.com/go/microsoftsmb).



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