



OUR SOLUTION

Equiniti's Customer Relationship Management (CRM) solution is delivered on the cloud based Microsoft Dynamics 365 platform.

Dynamics 365 is a commercial off the shelf (COTS), cloud-based customer relationship management solution. Equiniti's solution takes the processes and industry leading experience we have gained in customer relationship management and applies it to a Dynamics 365 tenant.

Our CRM solution delivers reliability, scalability and cost-effectiveness by driving consistent, measurable improvements across a range of business processes.

It provides organisations with access to customer and stakeholder information through a full suite of business process solutions, within a familiar Microsoft Office Outlook interface, to ensure rapid adoption and fast results.

Our solution can be customised to suit your organisational requirements and our CRM consultants will work with your organisation to identify achievable ways in which CRM technology can generate the greatest returns. From initial analysis through to implementation and onward development, we will work with you to identify practices that drive business process efficiencies, with the assurance of compliance.

KEY BENEFITS

Increased team collaboration	Improved customer service	Sophisticated analytical and data reporting	Increased revenue and profitability
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KEY FEATURES

- Direct customer interaction, management and communication through a public portal. The portal has a responsive design for use across all mobile and desktop devices via a browser
- Manage marketing campaigns, events and mailings to customers
- Predict customer needs, personalise relationships an increase customer satisfaction
- Access to the CRM management platform at any time, from any location via native APPs or all current mobile and desktop browsers
- User configurable business processes via workflow, which can be edited in browser by clients themselves
- Role access permissions that can be managed directly from Active Directory OR independently on the platform
- Built in escalation mechanisms against business specific Service Level Agreements (SLAs)
- Comprehensive reporting – Real-time dashboard reporting ensures that managers and team leaders are better able to make rapid decisions based on live data
- Scheduled reporting and powerful Management Information/capabilities allow clients to mine a huge depth of high quality information that can be used to assist with trend analysis, work monitoring, setting strategy and gaining business insight.

CONTACT US

028 9045 4166
 enquiries@equiniti-ics.com
 equiniti-technology.com