



intelli-CTi™

for Microsoft Dynamics 365

“intelli-CTi™ makes tracking phone calls a breeze, which was something we had struggled with before. Having the ability to add notes, follow-ups, and even create records that flow right into our CRM is a huge benefit.”

Kevin Bailey, Microsoft CRM Administrator at MidAtlantic Farm Credit

intelli-CTi™ transforms your customer engagements by making them connected, personalized and efficient.

Creating stronger connections between you and your customer is essential in order to compete within the modern business.

intelli-CTi™ for Microsoft Dynamics 365 provides your users with caller context to ensure telephone calls are always personal and to the point.

Integrating Dynamics 365 with your telephone activity will intelligently and automatically surface key customer information to best assist in customer interactions.

Benefits

- Deliver personalized customer experiences
- Hold shorter, more concise and contextual conversations
- Maximize your CRM data with minimal effort
- Ensure business processes are adhered to
- Decrease user and customer frustration from long, unproductive calls
- Achieve greater customer loyalty
- Keep development and license costs down
- Empower users to increase their call throughput and follow best practices

intelli-CTi™ ensures your customers feel known, familiar and valued.

Today, more than 75% of consumers are more likely to purchase from companies that know them and are familiar with their purchase history and buying preferences.

In the age of big data, AI and process automation, the information we hold about our customers and how we intelligently use this to better assist them has become a crucial part of customer interaction and very much what customers now expect.

intelli-CTi™ ensures Microsoft Dynamics 365 users achieve better telephone calls.

Microsoft Dynamics 365 users are now empowered to use information from Dynamics 365 to proactively engage with customers on each and every telephone call.

Being instantly informed with the context of each caller, users can spend less time fishing for data and more time providing an efficient and consistent customer experience both during and post the call.

The screenshot displays the 'intelli-CTi Call Manager' interface. At the top, it shows 'Virtual Telephony Server (VTS) (1234)' and 'Active Call List [1]'. The call details include the number '5553211234' and a duration of '00:01:55'. The caller is identified as 'Daniel Thompson, Manager, Bike Boutique'. A call transcript is visible, showing a conversation about a damaged brake lever on a new bike. Below the transcript, there is a 'Call Assistant' section with 'Call Associations: Reassociate'. A 'Caller Content' sidebar on the right lists the caller's name, company, and a specific issue: 'Brake Lever Damaged' with the case ID 'CAS-01004-L1B4P1', a 'Normal' priority, and a creation date of '21 Jun 2019'.

intelli-CTi™ - Connect with your Customers



Inbound Call Handling

Empowering your Microsoft Dynamics 365 users to instantly take action of inbound telephone calls, to efficiently engage with customers in a professional and personalized experience. A core capability of intelli-CTi™ provides fast and reliable caller recognition of inbound calls to intelligently identify the calling party and automatically associate them with information from Dynamics 365.



Outbound Dialing

Improve the experience of Dynamics 365 users with increased calling accuracy, throughput and efficiencies gained by the capabilities of intelli-CTi™ outbound dialing. intelli-CTi™ streamlines the making of outbound calls by reduced misdialing and removing the need to manually dial telephone numbers.



Call Flow Management (Lifecycle)

Actively encourage best practices within your Microsoft Dynamics 365 users with effective management and control throughout all aspects of telephone call interaction. intelli-CTi™ empowers your users with access to caller contextual data, allowing them to easily access and efficiently manage information from Dynamics 365 throughout the lifecycle of the call.



Post-Call Processing

Ensure that after every telephone call your users are capturing with ease all the relevant customer information right within Microsoft Dynamics 365. Distilling notes and history and managing every follow-up action to build stronger future customer engagements. intelli-CTi™ post-call processing automatically brings together all of the relevant touch-points from the call into a single management pane, enabling the productivity of Dynamics 365 users to quickly and easily capture, manage and close off the call.



Call Reporting, BI and Analysis

Realize full visibility of the telephony engagement you make with your customers over the telephone, with Business Intelligence (BI) reporting and analysis gained from the richness of telephony information held within of your Microsoft Dynamics 365. With intelli-CTi™ every telephone call interaction (both inbound and outbound) is automatically recorded (statistically) within Dynamics 365, along with details of the call metrics, each is stored with context to the related Dynamics 365 entities, history and activities.

Key features

- Incoming caller recognition (screen-pop)
- Automatic contact/call association with ability to reassociate
- Entity dialing with relationship context
- In-call note capture
- Post-call wrap-up with ability to capture call outcomes
- Case & opportunity creation with a few clicks
- OAuth & MFA support
- Unified Interface integration
- Flexible deployment
- Subscription-based licensing allowing for optimized investment
- Compatible with all major telephone systems and hosted telephony platforms
- Citrix/Terminal Server support
- Open telephone API driver support

Free Trial

Transform your customer engagement by starting your free 30 day trial here today:

www.intellicti.com