

# Telemarketing

## Telemarketing in Microsoft Dynamics AX

### BENEFITS:

- Improved lead qualification
- Execute guided calls efficiently with call center functionality
- Use data retrieved from the telemarketing activities directly in the sales process

**Telemarketing in Microsoft Dynamics™ AX helps you execute and manage telephone-assisted sales and marketing activities from one connected solution.**

The screenshot displays the Microsoft Dynamics AX Telemarketing module interface. The main window shows a list of call lists with columns for Call list ID, Description, and Questionnaire. A pop-up window titled '(demo) Telemarketing - Call list ID: CL-2765, 5003, Call list ID: CL-2765, Responsible employee: PUC, Call U...' is open, displaying a 'Service feedback' questionnaire. The questionnaire asks 'Quality of communication throughout your service request' and provides five radio button options ranging from 'I am extremely satisfied' to 'I am extremely dissatisfied'. The background window also shows a 'Targets' list with columns for Business account, Name of business relation, and Contact ID.

Designed for sales teams or telemarketing groups, the Telemarketing in Microsoft Dynamics AX module can be used for a variety of activities including sales-lead qualification, customer surveys and direct marketing campaigns.

Telemarketing is part of the sales and marketing solution in Microsoft Dynamics AX, which also includes sales force automation, sales management, and marketing automation functionality.

## **Improved lead qualification**

The effectiveness of telemarketing depends, to a large extent, on the quality of the leads selected for each campaign. Telemarketing in Microsoft Dynamics AX lets you draw up targeted call lists based on key customer information stored in your Microsoft Dynamics AX system. You can select customers and prospects using background and relationship-oriented information such as sales district, revenue, relation types, segment and past sales behavior. Telemarketing staff can also use this background information to more effectively identify customer needs.

Once a call list has been created, the Telemarketing in Microsoft Dynamics AX module makes it easy to distribute the list to your sales staff based on criteria you choose. For instance, calls can be distributed to your sales people who are responsible either for all contact with prospects, or individual business processes with prospects, or you can distribute them equally among your sales staff. You can follow up on failed calls easily, since the caller can be automatically reminded to repeat the call after a specified period of time.

## **Execute calls efficiently with call center functionality**

To simplify actual calls, Telemarketing provides a single window for managing phone calls. To give you a quick and complete overview, the Telemarketing window combines information on the each call in one simple view that presents information about business relations activities, open orders, projects, products purchased, etc.

To navigate directly to other windows of interest, the salesperson just has to click the menu buttons in the Telemarketing window. For example, if a customer would like to place an order during a call, it is easy for the salesperson to create a sales order or quote. By integrating an external Computer Telephone Integration system, calls can be made directly from the Telemarketing window by simply clicking the call button. When the call is finished, the system automatically prepares for the next call in the list. All the caller has to do is click the call button again.

## **Use telemarketing data in the sales process**

Every call made via Telemarketing in Microsoft Dynamics AX can be logged for use in the sales process. Using the call log, reports can be generated that summarize the result of telemarketing campaigns. They can also be used to generate new call lists for following up on specific call types such as "Call Back."

If you prefer to use telemarketing for electronic survey purposes or in a guided sales process, you can easily connect a questionnaire to your call list. Responses to your questionnaire are recorded in your database, and can be used to identify and understand your prospects or customer needs in future marketing campaigns.

## FEATURES:

### Telemarketing overview

- Manage and execute telemarketing activities
  - Telemarketing window with all relevant information at your fingertips
  - Computer Telephone Integration (CTI) via TAPI
  - Full call logging that includes time, date, duration, caller, etc.
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### Call list overview

- Create call lists based on contacts in business relation and contacts table
  - Distribute and administrate calls lists amongst sales staff
  - Integration between call list and questionnaire module to create surveys and guided sales scripts
  - Integration between campaigns and call list
  - Range of telemarketing reports
  - Integrate survey data in the sales process
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**For more information about Telemarketing in Microsoft Dynamics AX, visit [www.microsoft.com/dynamics/ax](http://www.microsoft.com/dynamics/ax).**

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