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**Customer Success
Guide Series**

CRM Integration

4 Ways how CRM Integration can Improve your Lead Management

Effective Marketing Campaigns

Dynamics 365 enhances marketing efforts by facilitating and enhancing lead management and customer engagement.

Marketing campaigns help in increasing sales by promoting your brand. It is an effective step in acquiring leads and in turn converting them into clients. Most marketers and salespeople are aware that a well-integrated marketing automation and CRM system may reduce expenses and boost productivity, but there's more to it. The correct CRM and marketing automation combo allows you to fully utilize each tool's strengths while also empowering you to transform and increase your customer engagement. A CRM platform like Dynamics 365 enhances marketing efforts by facilitating and enhancing the entire process. It allows you to segment your target group, develop a tailored email sequence, and deliver it automatically in conjunction with other communications channels.



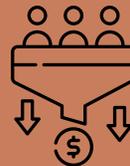
Customer Insights



Target Marketing



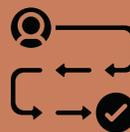
Email Marketing Automation



Lead Nurturing Automation



Managing and Scoring Leads



Automate the Customer Journey



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Omnichannel Interactions

Dynamics 365 CRM connects all channels and alerts you when there is any update in real-time.

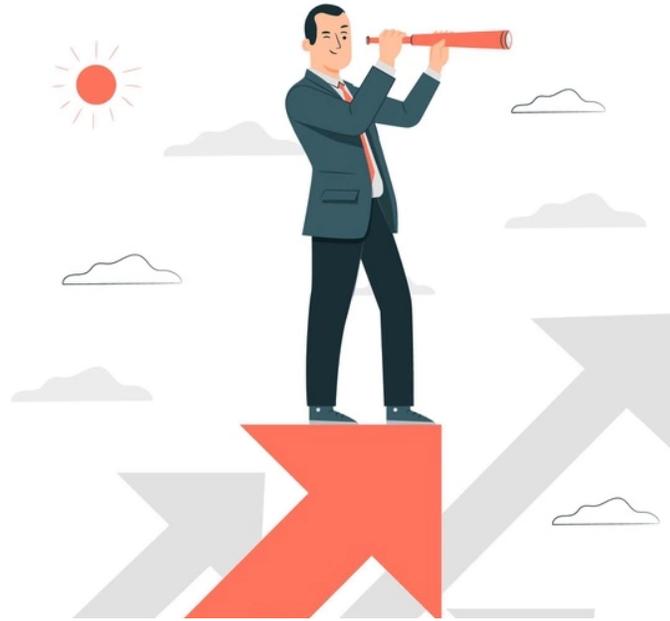
The term "omnichannel lead generation" refers to the use of all of your channels to communicate with potential customers in order to provide a consistent experience. You can send an email to a recipient who will respond via live chat, thus ending a LinkedIn conversation. All of this is achievable without ever leaving a single platform, and you have access to your entire conversation history. Obviously, a more natural, personalized, and engaging approach feels more natural, which is why it's so important for a successful lead generation plan. Companies require the assistance of technologies to facilitate omnichannel interactions, which is where CRM comes in. Dynamics 365 provides that visibility under a single roof. It connects all channels and alerts you when there is any update in real-time. CRM improves interactions with leads by integrating with a mail server, phone system, chatbot, messengers, and social media. From a single CRM interface, your sales agents may communicate with potential clients via any channel.



Empowered Lead Tracking

Dynamics 365 enables you to create systematic and efficient workflows for organizing marketing opportunities, keeping track of leads in one place

Understanding your potential customers, where they originated from, how they interact with your reps and agents, and where they are in the journey is essential for effective lead generation. A process-driven CRM platform like Dynamics 365 enables you to create systematic and efficient workflows for organizing marketing opportunities, keeping track of leads in one place, and moving them through the sales funnel. You can acquire important insights and utilize them to guide your leads as AI makes CRM solutions even more powerful. CRM also allows you to set up automatic lead grading based on your preferences, so your reps may engage each lead at the appropriate time while still having access to all relevant data. You may also use Dynamics 365 CRM to track the prospects and their activities that are entering your funnel. You can identify the sources no matter where your leads first interact. Such information reveals which sorts of content work best and which channels are the most worthwhile to devote your time and effort to.



Maintain Visibility into Post-SQL

Dynamics 365 CRM can provide up-to-date or even real-time data on these post-SQL operations, allowing sales agents to respond accordingly based on lead behavior.

Just because a lead has transitioned from a marketing qualified lead (MQL) to a sales qualified lead (SQL), they won't cease connecting with your brand and digital properties (SQL). In addition, the activities customers do and the way they interact with you online, during webinars, or at live events will have an impact on how your sales team communicates with them. As a result, those same sales reps must have a clear view of those operations. Dynamics 365 CRM can provide up-to-date or even real-time data on these post-SQL operations, allowing sales agents to respond accordingly based on lead behavior. Reps should only receive highly relevant material once a lead has been delivered to sales. Set up triggers for notable actions, bottom-of-the-funnel activities like downloading a product-specific whitepaper to notify your sales team when it's time to change or accelerate their approach with the lead or customer.

DIGITAL TRANSFORMATION PARTNER

Applications | Automation | Analytics

Tech Falcon LLC is a digital transformation partner for enterprises as they embark on their digital transformation journey. We are headquartered in Dubai. We help clients in manufacturing, projects, distribution, public sector, real estate, and public sector to achieve business and operational goals with business applications, automation, and analytics services.

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