

Tutorcare unifies its phone system and Dynamics 365

Tutorcare Ltd is the a largest vocational training provider in the United Kingdom. It operates more than 300 UK-based centers and provides an additional 1,000-plus training instructors ready to deliver in-house courses. Tutorcare generates leads in the marketplace mainly through a specialized outbound sales team, coupled with extensive advertising campaigns.

Valuable time wasted on manual process

Tutorcare's management realized that a significant amount of its inbound agents' time was spent looking up customer details in Microsoft Dynamics 365 after answering a call. More time was wasted after calls, as agents manually recorded call details in Dynamics 365. Furthermore, the company's outbound teams were manually dialing from daily lists with no management reporting tools or control over callback requests. Follow-up emails were done on an ad-hoc basis if time allowed, and they were often forgotten. Time was also spent leaving voicemails for busy and no-answer numbers with no process in place for follow-up. Tutorcare first implemented Dynamics Telephony to integrate Dynamics 365 with its old telephony system, but the company quickly realized that the integration features were limited to screen pop and click-to-dial. By upgrading to the Dynamics Telephony Phone System platform, Tutorcare easily added features such as call recording pause/resume controls, call recording links in the customer relationship management (CRM) system, and integration with conversation analytics in Dynamics 365.

Challenge

Tutorcare's previous telephone system wasn't integrated with Dynamics 365, so its agents manually dialed prospects from lists created in Dynamics 365. The true value of Dynamics 365 as a tool to help generate sales wasn't being realized, so a lot of time was wasted on post-call activity and sales agents were spending less time actively selling.

Solution

The Dynamics Telephony Phone System provides a single unified desktop application for Dynamics 365 and telephone interaction, including screen pop features, click-to-dial, progressive dialer, call recording, split-screen view of CRM forms, optimized CRM search, and an API for custom control.

Results

Tutorcare now saves 10 percent on every call via streamlined and consistent call-handling processes. The progressive dialer integrated at the heart of Dynamics 365 increases outbound call throughput so agents have more opportunities to engage with prospects.

“Dynamics Telephony is a great team to work with, bringing huge experience and expertise to solve our specific problems.”

John Turnbull, Director, Tutorcare



Providing a powerful, flexible interface

The Phone System platform from Dynamics Telephony is a hosted telephone system designed to provide control over business communications with immense flexibility and scalability.

Phone System seamlessly integrates with Dynamics 365, providing customers with a single interface for Dynamics 365 users and all telephony-related actions—without large capital expenditures or hardware outlays and a simple per-user-per-month payment model. Phone System simply makes communication and collaboration easy:

- Call recordings are stored in Microsoft Azure with a link in Dynamics 365 and conversation transcripts are stored within the phone call in the relevant Dynamics 365 activity.
- Interactive voice response (IVR) is personalized based on the caller's status in Dynamics 365, and incoming callers can be routed based on their status in Dynamics 365 or on the last agent who dealt with them. Further, conversation intelligence enables easy review.
- Callers can be offered a call back, and with one click in Dynamics 365, CRM records and voice calls can be transferred internally.
- Agents can select a prerecorded message to leave in prospect's voicemail to save time, and the voice drop feature allows prerecorded messages to be left when voicemail is encountered.

The integrated progressive dialer designed to use Dynamics 365 queues increases outbound calling by up to 30 percent.

- Management maintains full control through Microsoft Power BI dashboards and reports.

Creating new efficiencies

The Dynamics Telephony Phone System platform is now used to manage the whole lifecycle of customer account—from sales through account opening to customer care. Tutorcare has replaced manual campaign dialing with a progressive dialer, which has improved the contact rate by 30 percent. Callbacks from busy and no-answer numbers are automated, ensuring that no opportunity is forgotten. Call outcome buttons trigger workflows in Dynamics 365 to automate post-call activities such as sending email, creating a callback, and moving the opportunity along the sales cycle.

All telephony statistics are stored in Dynamics 365 and can be easily reviewed via a predefined suite of dashboards and reports. Also, by using Power BI to create custom reports, managers get a true picture of how the business is performing, the revenue being generated, and staff efficiency.



“Call recordings linked to Dynamics 365 will be a massive plus. The organizing of the call recordings will make searching for call recordings simpler than ever before.”

— Jonathan Engledow, Director, Tutorcare