dialsource

We help customer-facing teams **have better conversations**

DialSource CTI for Microsoft Dynamics 365 optimizes the time and energy you spend on calls with prospects and customers because that is where the real work of sales & service gets done.

Best Support WINTER 2020

Silver Microsoft Partner

SALES LEADERS
Increase revenue and enable your team to have better conversations

SALES OPERATIONS
Eliminate complex integrations and increase efficiency

ACCOUNT EXECUTIVES
Automate the busywork and get back to what you do best

SALES DEVELOPMENT REPRESENTATIVES
Book more meetings in less time.

CUSTOMER SUCCESS LEADERS
A connected customer experience the minute they pick up the phone

CUSTOMER SUCCESS MANAGERS
Conversations create relationships & relationships lead to lifelong customers

CUSTOMER SUPPORT LEADERS
Transform tough conversations into new opportunities

CALL CENTER MANAGERS
Reduce wait times & enable agents to have better conversations
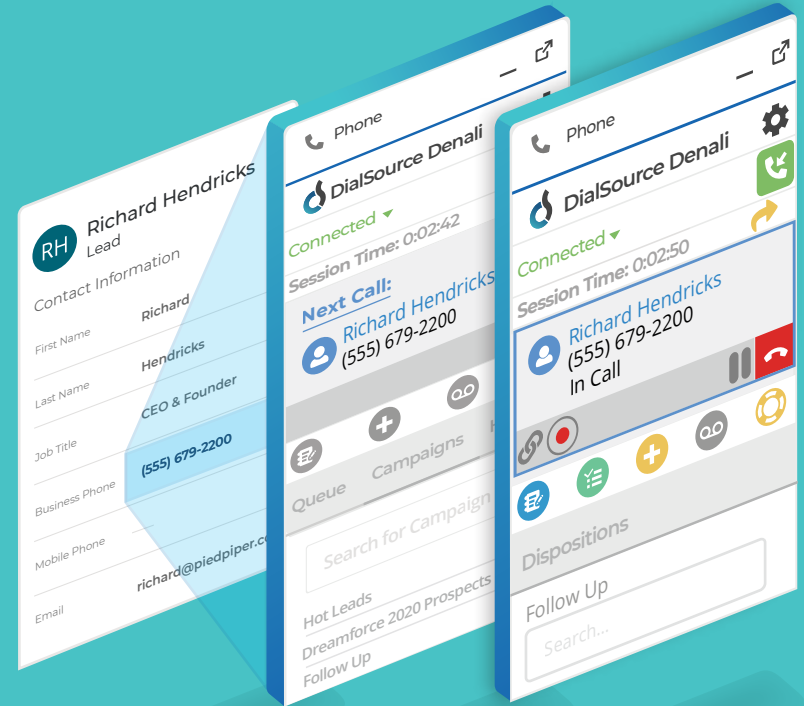
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Outbound Calling

Increase your team's speed to lead from hours to seconds. Use pre-recorded voicemails to gain back days of wasted time and leverage call recording and compliance features to coach your team and promote best practices.

‣ **Dynamic Call Campaigns**

‣ **Dynamic Lead Distribution**

‣ **Automatic Voicemail Delivery**

‣ **Click-To-Dial**

‣ **Do Not Call**

‣ **Outbound Call Recording**

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Inbound Calling

Route incoming calls to the right agent every time with Automatic Call Distributor (ACD). Ensure your teams never miss a call or voicemail, no matter where they are.

▸ **Call Routing**

▸ **Screen-Pop**

▸ **Inbound Call Recording**

▸ **Call Linking**

▸ **Get All Your Calls**

▸ **Voicemail With Transcription**
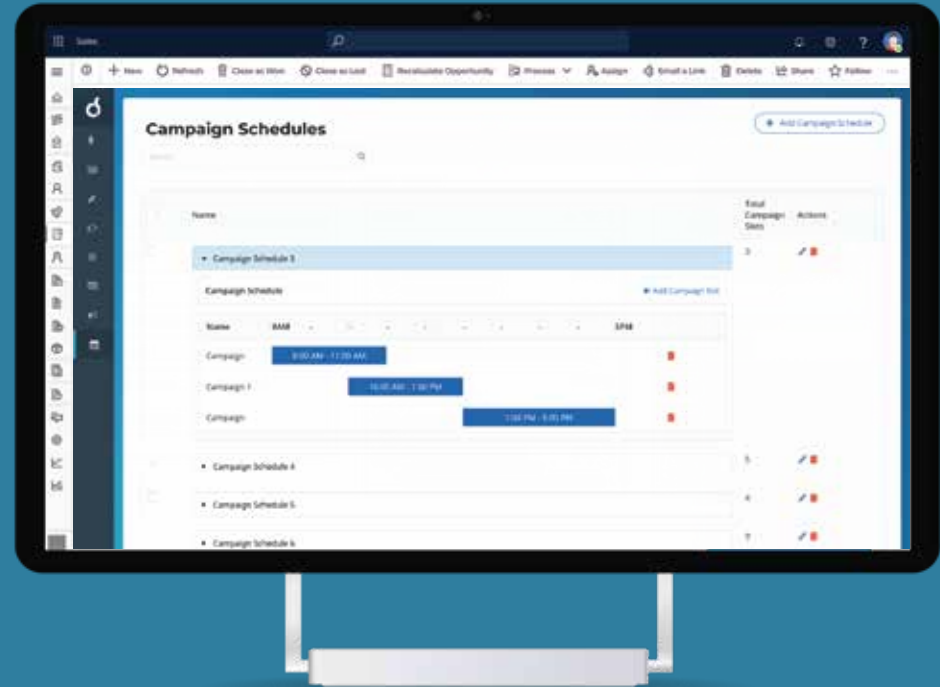

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Workflow Management

Eliminate the noise from your team's day with Workflow Management. Keep them on track by giving them the right leads at the right time, prompting the right questions during their calls, and eliminating manual activities and reminders.

▸ **Campaign Schedules**

▸ **Disposition Fields**

▸ **Call Back Tasks**

CRM Automation

Leverage the full power of Salesforce by connecting into your existing automation. Drive custom workflow automation through a simplified interface and display different dispositions based on the user role, team, or stage of engagement.

▸ **Custom Dispositions**

▸ **CRM Automation Triggers**

▸ **Process Standardization**

▸ **Limitless Integrations**

Coaching & Management

Monitor inbound call flow, routing, and agent availability in real-time. Manage agents and call queues across call centers and inbound teams from a single dashboard. Increase coaching capacity by leveraging call data and stereo recordings with third-party applications to track and analyze performance.

▸ **Call Monitoring**

▸ **Agent Management**

▸ **Real-time Inbound Queue Monitoring**

▸ **Campaign Builder**

▸ **Queue Builder**

▸ **Third Party Integrations**

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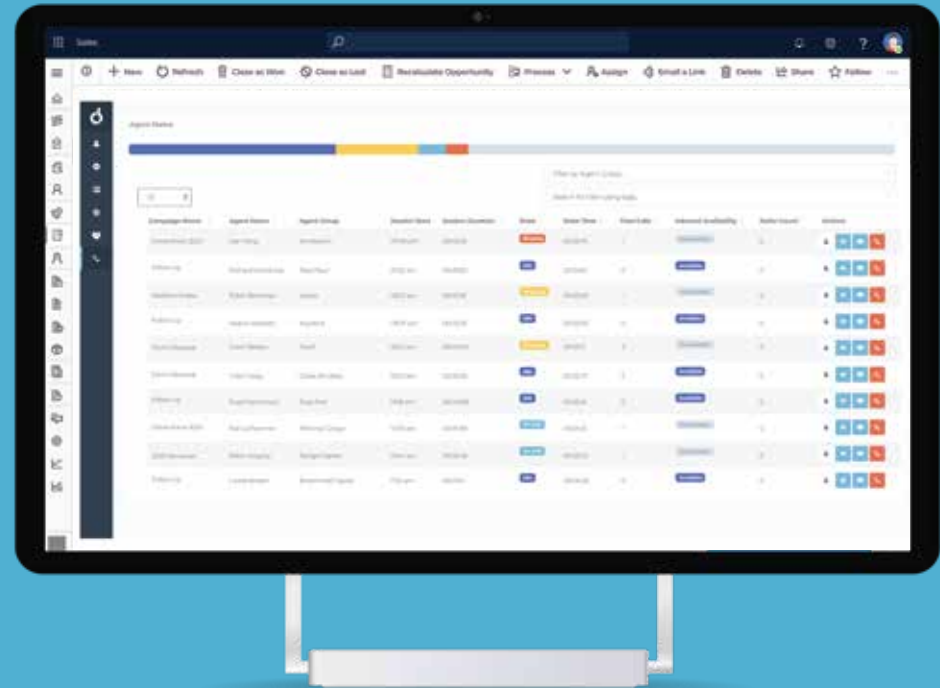
Data & Analytics

Connect calls to outcomes and improve your data. Our custom reports are native to the CRM, so call analytics, and agent performance are all available in the reporting tools you already know. Never miss a sales activity.

▸ **Connect Calls to Outcomes**

▸ **Native Reports**

▸ **Log Every Call**

▸ **Improve Your Data**

▸ **Call Recordings + Integrations**

▸ **Standardized Call Outcomes**

Reliable Call Quality

Our network of tier one carriers ensures that you will have reliable call quality across every agent. Maintain your current dial tone provider and avoid the upheaval of changing business phone systems. Our team of telephony engineers control our carrier network and can optimize call routing to remove latency and reroute calls if any carrier is experiencing an outage. We give your team a CTI solution they can trust.
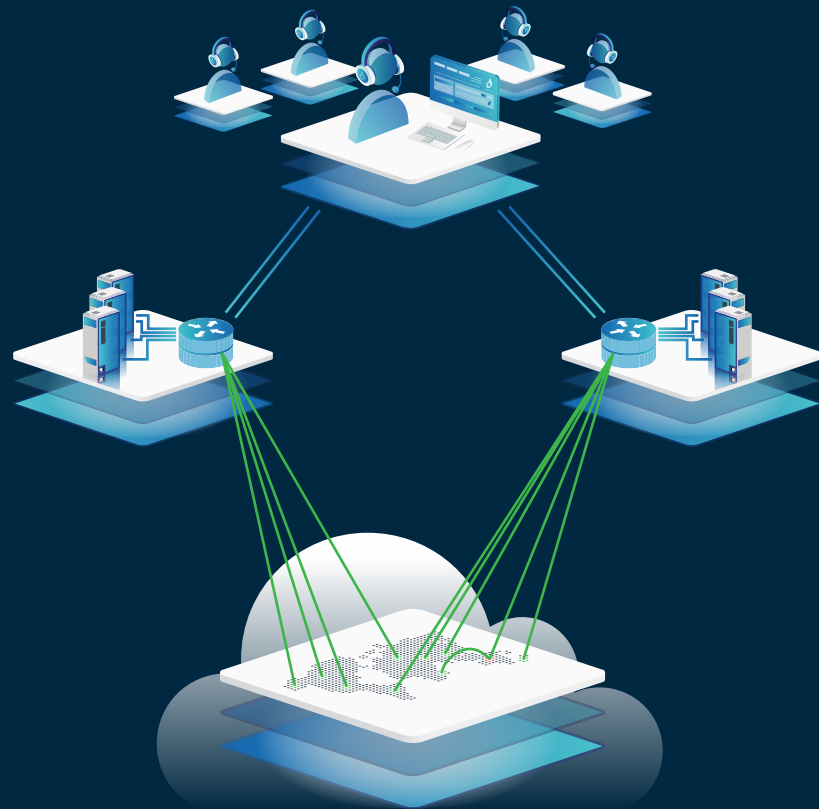
Our Own Carrier-Grade Telephony

Global Media Network

Works with Existing Dial Tone

Tier 1 Carriers

Dedicated Telephony Support

**Supports Any Desktop or Mobile Device**

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CRM Native

Unlike other products that loosely integrate with CRM and tie up your CRM's limited field quota, being native means that DialSource Denali can use as little as a single CRM field and still track, link, and report on all your data. As a native product, DialSource Denali also talks to your CRM in real-time and doesn't use unreliable bi-directional data syncs that can quickly get out of date.

▸ **No Field Limits**

▸ **Single Workspace**

▸ **No Sync**

▸ **One Ecosystem**

▸ **Unified Across Every Team**

▸ **Single Sign-on (SSO)**

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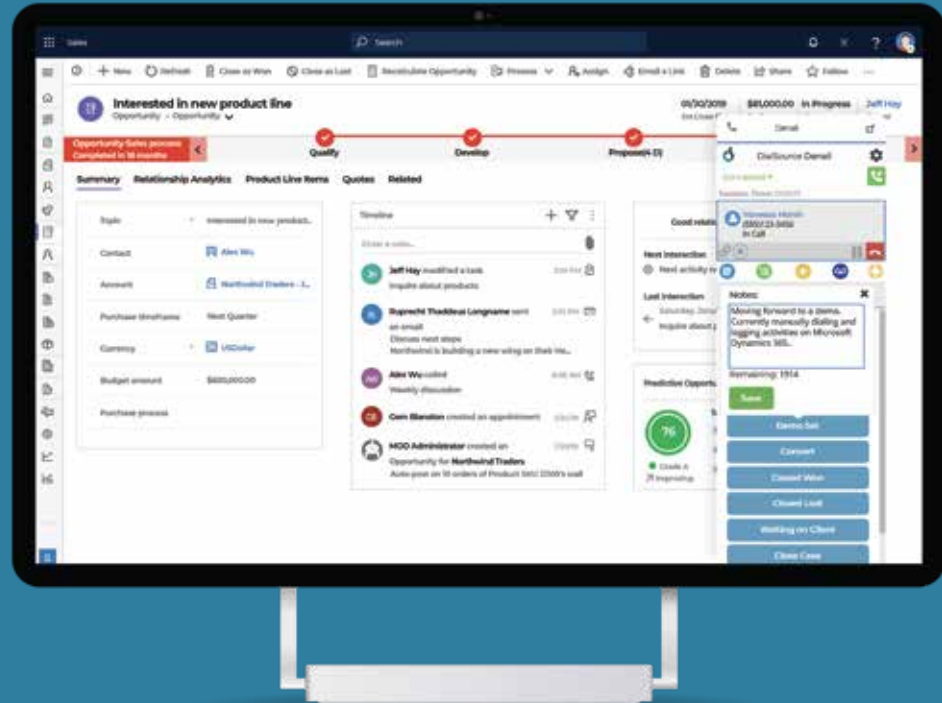
Security + Compliance

Very simply, your data stays in your CRM where it belongs. Data updates in real-time between Denali and your CRM. Collect the required information in the right fields on every call. Comply with Do Not Call regulations and policies effortlessly.

- **Keep Your Data In Your CRM**

- **Data Validation**

- **Track Every Call**

- **Secure Call Recording**

- **Process Enforcement**

- **Control Your Calls**

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DialSource Denali

Toggle from **Connected** or Disconnected to connect to your telephony agent leg.

Link the call to associate your call to a record in your CRM.

Record the call allows you to revisit calls once they are over to gain insight on your conversation.

Add **Notes** to keep things clear during the sales process. Notes are saved to the record in your CRM.

Dispositions are clickable to have better data accuracy on call outcomes. These are customizable to suit your business needs.
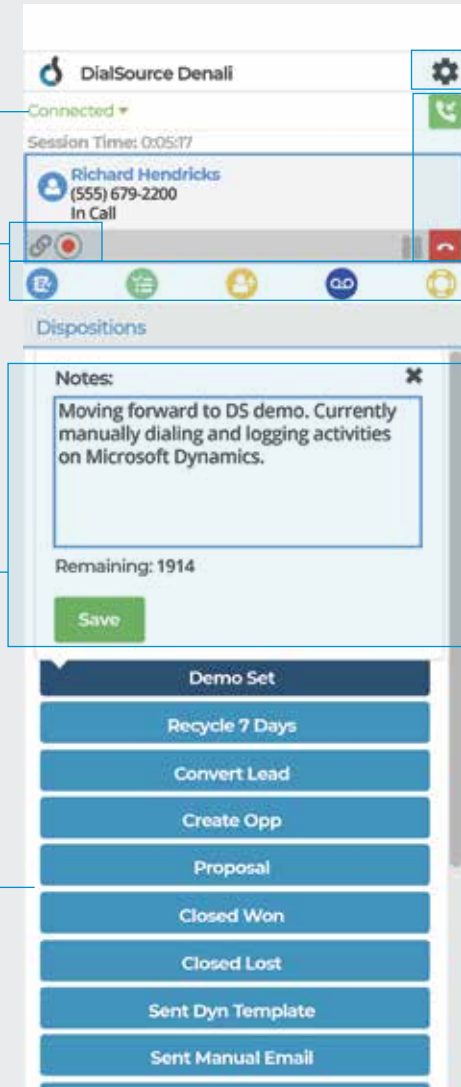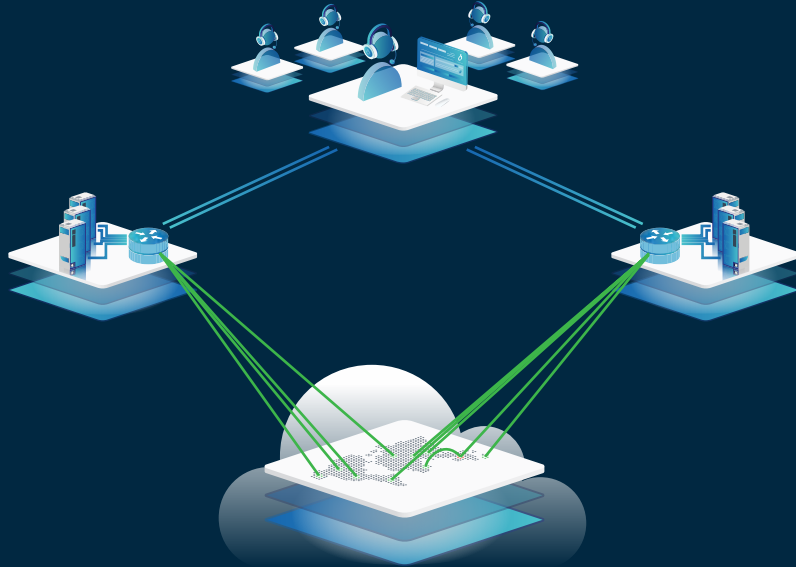
Access **User Settings** anytime to enable regional ID, phone number and playback music options.

Inbound Ready, Hang up, or Pause ready at your fingertips.

Action bar gives you quick access to take notes, create a task, add a call, leave a voicemail or open a support ticket.

DialSource Denali

Connected ▾
Session Time: 0:05:17

Richard Hendricks
(555) 679-2200
In Call

Dispositions

Notes:
Moving forward to DS demo. Currently manually dialing and logging activities on Microsoft Dynamics.

Remaining: 1914

Save

Demo Set
Recycle 7 Days
Convert Lead
Create Opp
Proposal
Closed Won
Closed Lost
Sent Dyn Template
Sent Manual Email

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Simplify Work

Manage user groups, call configurations, and agent performance directly within Dynamics 365. Trigger your existing Dynamics 365 automation rules and streamline workflows with the click of a button to increase efficiency. Maintain Dynamics 365 as your primary workspace for all customer-facing teams.

Ensure Reliability

Give your teams a tool they can trust. Our telephony infrastructure maintains reliable call quality across every agent no matter the scale of the deployment. Users connect to DialSource Denali through any device that has a dial tone and are able to immediately get to work making and receiving calls—serving customers, creating support tickets or closing deals.

Case Study

Expanding our reach with global deployments.
We support sales and service engagements for enterprise organizations around the world.

> These guys really **care about their customers** as much as they do their product. The Dialsource team has definitely gone **above and beyond my expectation!**

- Oscar Martinez
Sales Operations - Reporting Specialist, VSP

+28%
INCREASE IN
REP TALK TIME

MSG

+40%
INCREASE IN
DURATION OF
CONVERSATIONS

WM WASTE MANAGEMENT

98.3%
REDUCTION IN AVERAGE
WAIT TIME ACROSS
INBOUND CALLS

ADP Always Designing for People™

PAYCHEX   accenture   btis   SF   vsp   hibu   THE LOS ANGELES FILM SCHOOL   KINGS   TripSpark TECHNOLOGIES   SF   American Diabetes Association

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Ready to have more conversations?

DialSource CTI helps transform conversations into revenue and accelerate workflows for customer-facing teams

Visit www.dialsource.com & schedule a demo today