



CloudCherry – Dynamics
Integration Use case Document

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About CloudCherry

CloudCherry is a Real-time, Omni-channel End-To-End Customer Experience Management platform that lets brands track, measure & improve Customer Delight - thereby increasing profitability, reducing customer churn and improving loyalty.

The SaaS product is the perfect tool for Feedback collection, Customer Experience Management and Customer Experience Measurement for SMBs and enterprises. One of the key aspects to improving Customer Experience is closing the Loop with Customers when they face an issue. Through the integration between Dynamics ticketing module and CloudCherry, every customer issue provided in the form of feedback can be automatically raised as a ticket in Salesforce and can be tracked, managed and closed effectively.

The app handles the following:

- Set up notifications in CloudCherry and Create and maintain the relation with Dynamics
- Update data on your CloudCherry (CEM) platform whenever any action is taken

Use Cases

1. CloudCherry survey responses create tickets in Dynamics

As a brand, we want to move from a reactive contact centre approach to a proactive one where we listen to our customers, collect feedback before they must call your contact centre, and proactively reach out to assist them.

This feature provides the ability to create tickets/cases in MS Dynamics Case Management Module based on experiential feedback collected via CloudCherry. So that your contact centre team can proactively close the loop and reduce churn.

Scenario: When a response comes into CloudCherry that meets certain notification rule settings, a ticket is created in MS Dynamics

2. Auto reopen tickets

As a brand, we want to improve experience of customers by collecting feedback about service remediation and promptly addressing gaps. This feature provides the ability to reopen tickets if previous issues were not addressed well, so that we can quickly turn around any gaps in experience



Scenario: Reopen the ticket if post closure survey rating is below a configurable value

3. Updates to tickets in Dynamics, update responses in CloudCherry

As a brand, we want to gain insights about systemic issues from various tickets that our contact centre addresses, so this feature provides the ability to update CloudCherry responses with qualitative and quantitative information about what was done to address tickets, and what the cause of the problem was.

This can be used to analyse CX data in CloudCherry and find systemic issues that need strategic intervention.

Scenario: When a ticket in dynamics system has updates in status, comments, or other fields, the matching updates will be updated back to the response in CloudCherry.

4. Trigger surveys based on change in status of any standard entity in Dynamics

As a brand, the micro-journey a user goes through during a ticket lifecycle is important, we want the ability to trigger surveys at different points when ticket status changes, so that we can identify low and high points during the ticket lifecycle.

As the sales process progresses, a Lead is ideally converted to a Contact, Account, and/or Opportunity. Brand can decide to send a CloudCherry survey to their customers to capture the experience they had received and work on any pain points they had gone through.

Scenario 1: Change in ticket status in dynamics system triggers a CloudCherry survey about agent performance

Scenario 2: Change in any standard entity status can be used to trigger a CloudCherry survey to customers

5. CloudCherry Survey responses create or update marketing list in Dynamics

As a brand, we want to amplify the effect of promoters to spread the word and help drive more leads. We want responses in CloudCherry to update leads in Dynamics, so that we can run campaigns with promoters to get testimonials, invite referrals, and get PR.

CloudCherry's users can create customer cohorts and import them into the Dynamics as marketing list to combine sentiment data, transactional data, and demographic data to craft campaigns that appeal to specified segments. Rather than sending the



same blanket message to its entire customer base, companies can reach out to select groups with offers or promotions, thus increasing the likelihood of conversion while creating new upsell opportunities.

Scenario 1: Cohort selected from within CloudCherry can be used to create or update a marketing list of leads for a campaign in Dynamics

Scenario 2: User contact details collected through survey responses can be used to periodically populate a list of leads in Dynamics

6. Exchange of data between CloudCherry and Dynamics

As a brand, we want the ability to not only push the detractor data to Dynamics but also the promoter and passives data to ensure CRM is updated with experiential data as well.

Scenario 1: Business users have access to canned reports in the Dynamics system using the CX+CRM data

As an agent, I have limited time between different tickets that I work on since I am measured on the number of tickets, I close along with CX metrics, I want the ability to quickly look at user's past interactions so that I know the context of the customer and can respond to them effectively.

Scenario 2: Every entity in Dynamics i.e. Case, Accounts, Leads, Opportunities, Contacts would store past interactions, showing key metrics and feedback.