

PRODUCT OVERVIEW

# OpenText™ Extended ECM for Microsoft® Dynamics 365™ Customer Engagement

Integrate content and realtime data to streamline sales, marketing and services business processes



**Accelerate** sales cycles by bringing realtime data and siloed content directly into Microsoft® Dynamics 365™



**Drive improved productivity, collaboration and customer service** with enhanced sales and service workflows



**Maximize value** and insight from both unstructured and structured content



**Maintain control** over enterprise information

**Many companies using Microsoft® Dynamics 365™ produce volumes of documents, content and data required to manage their sales opportunities, marketing projects, service requests and client-centric cases. These companies struggle to manage their customer business workflows due to legacy systems, restricted user access and inefficient internal processes. Users working in multiple business systems often lack realtime access to the information they need to make informed decisions, resulting in delays, errors and other friction.**

To enable better collaboration, workplace productivity and provide a single source of truth for customer-facing content, organizations must connect their client data, sales, marketing, customer service and field services business processes.

OpenText™ Extended ECM for Microsoft® Dynamics 365™ Customer Engagement provides the critical connection between an organization's business processes and Microsoft Dynamics 365.

The solution delivers a complete set of content services to enrich sales, marketing, customer service and field services business processes. Customer-facing teams always have access to realtime data and content to make informed decisions and deliver outstanding service to their valued clients. This helps increase sales close rates, grow customer share of wallet and remove friction across business processes.

### **Accelerate sales cycles**

Users benefit from tight, transparent integration with Microsoft Dynamics 365, connecting people, content and tools to keep teams engaged and productive. Organizations augment the repeatable, consistent collaboration of Business Workspaces with related business content.

### **Drive productivity, collaboration and customer service**

At the center of the integration is the OpenText Extended ECM Business Workspace, connecting content to Microsoft Dynamics 365 business process flows. The solution allows pursuit teams, customer service and other client-centric users, such as bid teams, call-center agents, dispatchers and field-service agents, to remain within Microsoft Dynamics 365 with access to all client content within OpenText™ Extended ECM and across the organization.

### **Maximize the value and insight from both unstructured and structured content**

All content updates automatically populate relevant information to all connected systems and ensure improved data quality. Internal and external users, from pursuit teams to marketing groups to customer and field services teams, benefit from a central engagement portal to share, edit, manage and publish content that updates information in realtime across all business workloads.

### **Authorize rights-based user access to information to ensure data security and integrity for critical customer information**

Rights-based access and pre-defined business rules enable content stakeholders to view, edit and manage the information they need without navigating multiple systems to locate content in potentially restricted systems or areas. Extended ECM for Microsoft Dynamics 365 Customer Engagement brings content directly to the Microsoft Dynamics 365 interface so users don't need to leave their workspace. Administrators can keep systems restricted to select users instead of authorizing widespread access to sensitive company information.

### **Surface realtime data and siloed content to enable 360-degree insight and facilitate better decision-making**

Dynamic, realtime content ensures client teams always have a "single point of truth" as a reference. This is especially valuable for supporting interactions with clients when a customer relationship is transitioned to a new account manager or customer service representative. Armed with the right information, data and insight, employees can provide a more personalized experience to customers, helping organizations drive revenue, loyalty and success.

### **Maintain control over enterprise information**

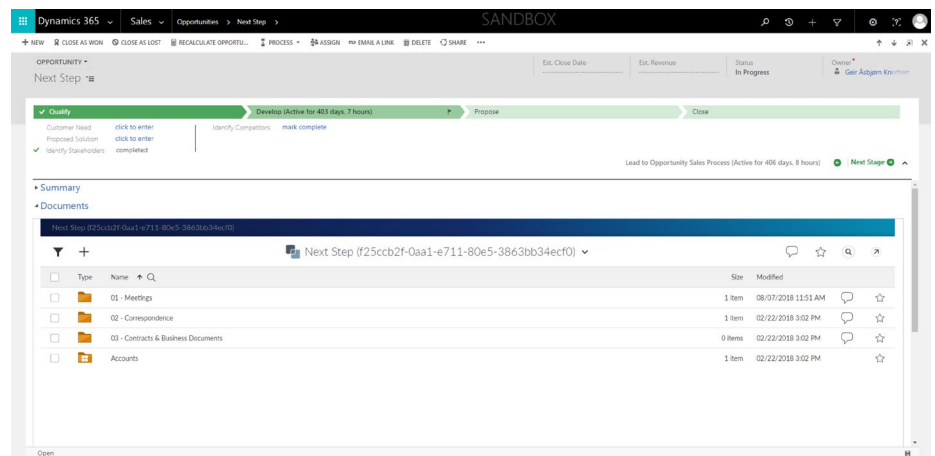
The exponential growth of unmanaged, unstructured content is a rising regulatory and legal risk for many organizations. Extended ECM for Microsoft Dynamics 365 Customer Engagement mitigates these risks by applying records management classifications to all unstructured content, whether it is created by users in Microsoft® Office 365® or business applications, to control its entire lifecycle from creation through archiving and destruction.

## Deployments in on-premises, cloud and hybrid environments

The Extended ECM for Microsoft Dynamics 365 integration Plugin is deployed in Dynamics (on-premises or cloud) and the Extended ECM Platform can be deployed either in the cloud or on-premises.

### OpenText offers Consulting and Managed Services

- To learn more, please visit [opentext.com/contact](http://opentext.com/contact)



Drive sales and deliver better customer engagement and services by connecting client content to business processes.

### OpenText Extended ECM for Microsoft Dynamics 365 Customer Engagement features

<b>Extended ECM</b>	Improve process productivity by integrating enterprise content management with lead applications to bridge silos and enhance information flow
<b>Robust, enterprise-class content enabler</b>	<p>Optimize workloads and customer-centric business processes flows by:</p> <ul style="list-style-type: none"> <li>• Providing executives with realtime, accurate data to make informed decisions for revenue and resource planning.</li> <li>• Managing marketing lead-to-opportunity workflows, tracking ROI for marketing programs, coordinating events and creating collateral for customer journeys.</li> <li>• Enabling sales teams who work at the office or on the road to create presentations and proposals, update forecasts, manage opportunity pipelines and track client interactions.</li> <li>• Empowering client pursuit teams, such as bid and contract managers, with up-to-date information to create client-facing content, share realtime data for bids and support a pursuit team's response to RFIs, RFPs and tenders.</li> <li>• Managing client cases from problem to resolution by giving customer service teams realtime data, orders and support agreements.</li> <li>• Responding, managing and resolving field service requests by giving field services teams access to service contracts, designs, product data and warranties.</li> </ul>
<b>Pre-configured templates</b>	Enable event-based workspace generation and data sync
<b>Integration widget</b>	Access and navigate content from Microsoft Dynamics 365, mobile devices, email and other Microsoft applications

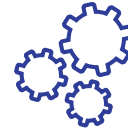
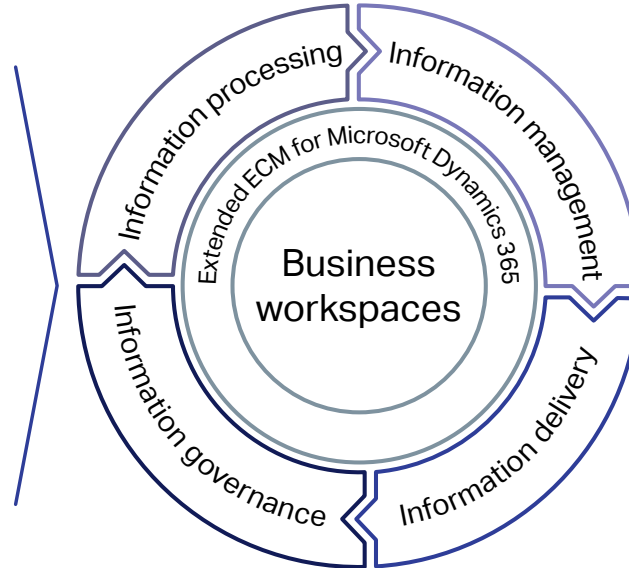
## OpenText Extended ECM for Microsoft Dynamics 365 Customer Engagement



### Digital workplace

Personal and team productivity

- Content creation
- Communication
- Ad-hoc collaboration



### Digital business

Process productivity and compliance

- Extend content services into lead applications
- Transactional content services
- Repeatable collaboration

Connect Microsoft Dynamics 365 content to key sales, marketing and services business processes with OpenText Business Workspaces to streamline business and boost the bottom line

With enterprise-strength content management, OpenText offers comprehensive capabilities to manage all enterprise content and connect client data in Microsoft Dynamics 365.

### About OpenText

OpenText, The Information Company, enables organizations to gain insight through market leading information management solutions, on-premises or in the cloud. For more information about OpenText (NASDAQ: OTEX, TSX: OTEX) visit: [opentext.com](https://www.opentext.com).

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