



meeting notes accelerator

Organise and structure your notes of all relevant client interactions in your Dynamics system.



If you are responsible for client liaison whether you are in a service, project or sales role ; you will recognise these issues and the need to professionalise your customer experience further:

"Too often we have situations where several teams visit the same client without knowing about the other one."

"Client information can be lost leading to a frustrating customer experience."

"We need to maximise the time spent with our clients in meetings, so we need to quickly capture, share and act on the outcomes and decisions made in order to move on to the next action."

Why choose Prodware to support your client meeting needs in Dynamics 365 Customer Engagement?

As a Microsoft partner, Prodware has developed and implemented Dynamics CRM projects across Europe.

Our experienced R&D team work closely with our clients to develop additional functionalities that suit their own client engagement needs.



The CEM Meeting Notes accelerator extends the CRM functionality of your Microsoft Dynamics system:

- The Meeting Note is used to reflect the first interaction with the client within the commercial activity process.
- Talk to your phone to record the summary of your meeting. Users can speak to their mobile and the summary of the meeting will be recorded in the meeting note.
- Fully integrated with Outlook. Allows you to create a Meeting Note directly from an appointment.
- Accessible anywhere – use the Meeting Notes app whilst off-line so you can capture your actions on the road



Improve client engagement

Sales teams spend more than 67% of their time on non-selling activities and lose productivity when switching tasks – Meeting Notes makes it easier to move the sales process along without additional admin.



Improve your Dynamics 365 CE adoption

Simplify your administrative processes and meeting follow up. Meeting Notes is fully integrated into Dynamics 365 CEM and often provides an easy entry point for new users.



Future proof

Certified for Microsoft AppSource, the solution is available for free trial or online purchasing.



Keep your commercial activity safe and secure

Built on a strong and customisable security model that gives your users the guidance they need and your IT team the assurance of compliance.

Easily, store, share and collaborate with colleagues and clients

Capture your Meeting Notes, then export, send via email to internal and external contacts. Meeting Notes can be found by colleagues in the Account form of the Client for self-service too.

The screenshot displays the 'Meeting Note: Information' form in Dynamics 365. The main content area shows a 'Discussion about new opportunities' with a 'Meeting notes summary' link highlighted in a red box. Below this, there are sections for 'General', 'Internal participants', 'Account participants', and 'Next steps'. The 'Internal participants' table lists Eytan HATTEM (Chief Innovation & Business...) and Marc LESTIENNE (Networks & Systems IT Manager). The 'Account participants' table lists Ashley Slater (Chief Executive Officer) and Brynn George (Administrative Manager). The 'Next steps' table shows tasks like 'Prepare a Proposal' and 'Contact Solution Specialist'. A detailed 'Discussion Notes' section provides a legal definition of a merger and acquisition. At the bottom, a 'Next Steps' table lists tasks with their scheduled end, priority, status, and assigned to.

Task	Scheduled end	Priority	Status	Assigned to
Prepare a Proposal		Normal	Not Started	Ana RODRIGUEZ
Contact Solution Specialist		Normal	Not Started	Ana RODRIGUEZ

Speak to Prodware about getting your CRM system fully aligned with your own client engagement needs.



Van Voordenpark 1a, 5301 KP Zaltbommel
+31 (0) 418 68 35 00 | www.prodware.nl | info@prodware.nl

FRANCE | GERMANY | AUSTRIA | UK | BELGIUM | LUXEMBOURG | NETHERLANDS | SPAIN | ISRAEL | MOROCCO | GEORGIA | CZECH REPUBLIC | US

