FullCircl

Take Customer Relationship Management **to the next level** with FullCircl

Microsoft
Dynamics®365

Maximise the Value of your Microsoft Dynamics Solution

CRM solutions have become an indispensable part of the sales and marketing technology stack. The ability to store and quickly retrieve vast amounts of data, coupled with advanced reporting, campaign tools and countless other features provided by complementary applications, has improved sales and marketing efficiency, and transformed customer service.

CRM solutions are static environments but your customers' worlds are changing every day. By augmenting your CRM solution with a dynamic stream of business intelligence, you'll see an improvement in sales forecasting accuracy, create meaningful engagements and accelerate pipeline deals.
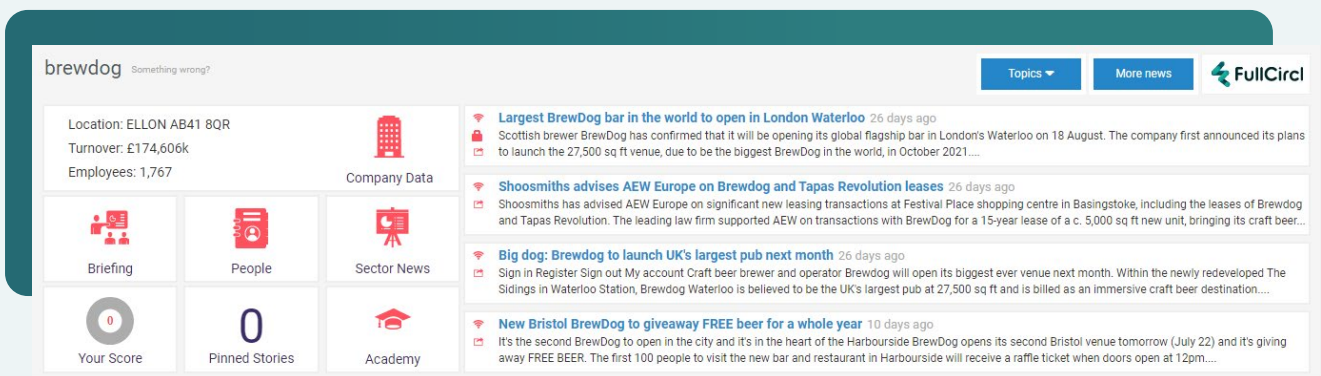
FullCircl

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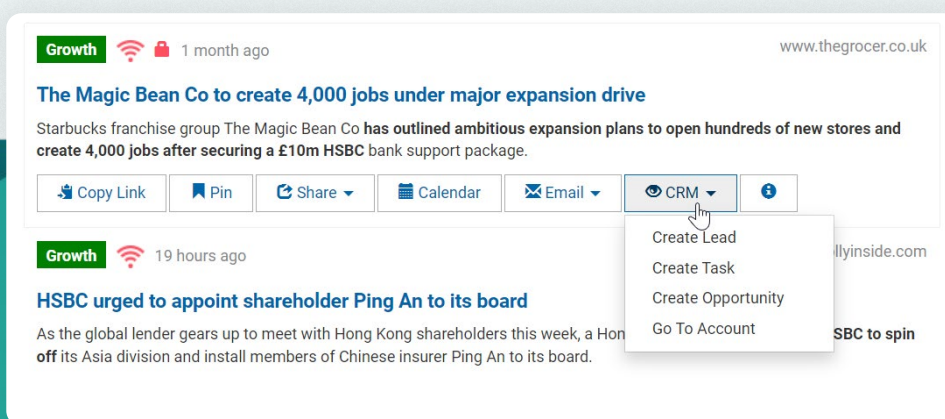
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How do we help

When FullCircl integrates with Microsoft Dynamics, we provide an information panel against your Accounts and Opportunities within your CRM.

The panel provides some high-level information on the associated account and also allows the user to click through to more news, people and company information, hosted on the FullCircl interface.

CRM is an integral part of a customer-facing professional's day; integrating FullCircl into your CRM allows your team to access valuable insight about their prospects and customers exactly where they need it.

The CRM integration also opens up additional methods for interacting with the insight that FullCircl provides. Users can create leads or opportunities directly from the FullCircl panel.

Create meaningful ==engagements.==

Dive into the full functionality of FullCircl from the FullCircl panel within Dynamics.

- Access market data and track industry news

- Segment, build and export prospecting lists

- Look up digital profiles of your contacts to prepare for calls and meeting

- Create watchlists to track your customers, prospects, partners and competitors

- Download detailed company reports

- Create a personalised newsfeed for your territory, sorted by relevancy

- Customise triggers to highlight mergers, management changes and other actionable insights
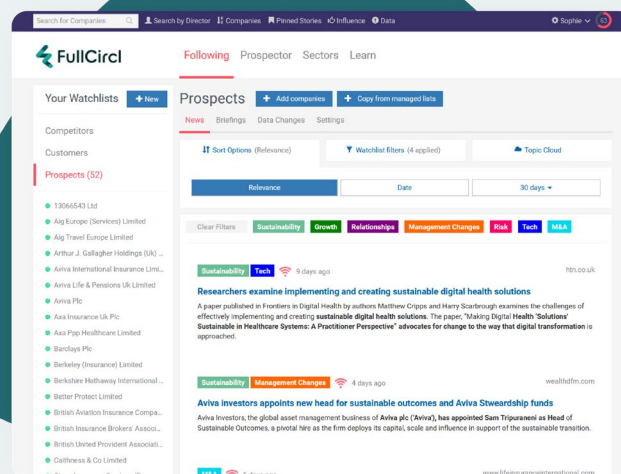
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A solution that benefits the whole team

Sales leaders

Management dashboards in FullCircl help you monitor engagement and foster customer curious behaviour in your team and driving CRM adoption. Use FullCircl to gain an in-depth understanding of your open pipeline, uncover risks and review your near and long-term revenue with your team for improved forecast accuracy.

Telemarketing teams

FullCircl provides data on key contacts, as well as actionable insights that help telemarketing teams build account intelligence and prioritise their day. Timely, relevant outreach improves credibility and competitiveness, leading to higher productivity and call conversion rates.

Enterprise sales and account management

FullCircl provides B2B teams with proactive company insights that save research time and help them keep up to date on their accounts. More timely and meaningful engagements that align to your client's agenda, increase account management effectiveness and contribute to a longer term, trusted relationship.

Account based marketing

FullCircl enables Marketing teams to segment their target audiences and track industries, customers, partners and competitors to stay abreast of hot topics and market developments. A deep understanding of the landscape guides relevant content development and timely communications that support sales, business development and customer initiatives. FullCircl also

FullCircl maximises your CRM investment by providing up to the minute insights on the accounts that really matter.

- ● Save research time and keep on top of changes in your customer's world

- ● Improve productivity by prioritising your day around actionable insights

- ● Align with your clients, build credibility and develop longer lasting relationships

- ● Identify new leads and opportunities

- ● Manage open pipeline more effectively and forecast more accurately

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FAQ

Which versions of Microsoft Dynamics are compatible?

FullCircl can integrate with either cloud or on-premise instances of Microsoft Dynamics 2015. We can also work within the Outlook extension for Dynamics and support Office365 integration.

How do we set up the integration?

You'll work with a member of the FullCircl Implementation Team to configure the integration but the process is quite simple.

Your Microsoft Dynamics administrator will be sent the FullCircl solution in a zip file along with installation instructions. We will collect from you your Dynamics org. ID and your user ID's, to enable us to support the integration (our solution can assist you in identifying these).

More information on this process is available upon request.

How long does it take?

Integrating with FullCircl is a simple process and the panel can be added quickly, but you may have some internal testing that needs to be carried out prior to go-live. Our Implementation team will speak with you to understand your internal processes and at that point will be able to advise further. Your existing FullCircl users will retain access to their non-integrated FullCircl profiles during this time.

What happens to my existing FullCircl data?

The FullCircl team will migrate across all existing user data including usage and social seller scores. However, due to a change in user journey, expect the usage data to change a little going forwards.

How much does it cost?

Your Account Manager will discuss with you the size of your implementation and provide you with a price plan for the integration.

FullCircl

What our customers are saying

25%
more productivity

36%
more business opportunities

33%
greater credibility

25%
increase in customer satisfaction

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About **FullCircl**

FullCircl is a Customer Lifecycle Intelligence (CLI) platform that helps B2B companies in financially regulated industries do better business, faster. Its solutions allow front and middle office teams to win the right customers, accelerate onboarding and keep them for life. Best-in-class data enrichment provides a comprehensive customer view and a powerful, low-code rules engine reduces the regulatory burden and drives greater automation. Through its web application and API, FullCircl drastically reduces the cost to acquire and serve the right business customers.

FullCircl was formed following the merger of Artesian Solutions and DueDil. Backed by top tier investors including Octopus Investments, Notion Capital, Augmentum Fintech and notable angel investors, FullCircl brings together decades of combined experience serving UK financial institutions. Today, it serves more than 600 customers and 15,000 users.

Learn more about how FullCircl can help you unlock the intelligence you need to engage with the right business customers, accelerate onboarding – and keep them for life.

fullcircl.com