

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.

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 General 						~								
Summary			Discussion Notes											
Account Met	Chamaeleon company				two entities into one entity, whereas an acquisition occurs when one entity takes ownership of another									
Meeting Date	11,0/2019		entity's stock, equity interest Exhibition under one entity	ts or assets. From a commercial a and the distinction between a "me	Account met: Chamaeleon company									
Location Test	Chamaeleon company central office		placing one party's busines	s under the indirect ownership of										
Subject	Discussion about new opportunities			hip and control of the combined - h of their companies, while when			Meeting D	te: 11/	2/2019					
Owner	A AND ROOM GUEZ		regarded as an "acquisition				Location:		maeleon company tral offices					
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Internal participants			Account participants		internal participants	Account participants								
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ful Network	1784	+ =	Full Name +	Jub Title	Marc LESTIENNE - Networks & Systems IT Manager	Brynn George - Adm	inistrative Manag	er						
Exten HATTEM	Chief imposition & Business.		Advely Sater	Chief Decutive Officer	Discussion Notes									
					From a legal point of view, a merger is a legal consolidation of two e									
Marc LESTIENNE	Networks & Systems IT Man.	L	Brynn George	Administrative Manager	takes ownership of another entity's stock, equity interests or assets. From a commercial and economic point of view, both types of transactions generally result in the consolidation of assets and liabilities under one entity, and the distinction between a "merger" and an									
					"acquisition" is less clear. A transaction legally structured as an acqu indirect ownership of the other party's shareholder, while a transa partial ownership and control of the combined enterprise. A deal m joining together is in the best interest of both of their companies, w target company opposes the deal] It may be regarded as an "acquisi	transaction legally structured as a merger may give each party's sl deal may be euphemistically called a "merger of equals" if both CE nies, while when the deal is unfriendly (that is, when the manager								
					Next Steps									
					Task	Scheduled end		atus	Assigned to					
					Prepare a Proposal		Normal N	ot Started	Ana RODRIGUEZ					
					Contact Solution Specialist		Normal N	ot started	Ana RODRIGUEZ					
					4/3/2018 2117 PM Prepared	ly Ana RODRIGUEZ			Page 1 c					

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.

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

Contact appsource@prodwaregroup.com to discover more.

