

# CRM & Phone System Integration Basics



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## Course Description

This course teaches teams how to plan, connect, and operate an integration between a CRM (e.g., Salesforce, HubSpot, Microsoft Dynamics 365, Zoho) and a unified communications business phone platform. Participants learn the benefits of integrating their CRM with their phone system and details on features like click-to-dial, screen pops, automatic call logging and recordings, voicemail-to-CRM, SMS logging, analytics, and governance.

### Learning Tracks

Technical

Integrations

Call Flows & Routing

UCaaS

Productivity

Admin



## Why This Course Matters

- A unified workspace for voice, video, chat, and CRM data improves workflows and shortens resolution times.
- Automatic caller information, click-to-call, and auto call logging can greatly reduce manual work hours and errors.
- Centralized interaction data enables better analytics for continuous business optimization.

## Who Should Attend

Register Now



IT  
administrators



Business  
operations  
leaders



Department  
managers

# COURSE SYLLABUS

## Course Overview

Applied fundamentals for connecting your CRM and business telephony to boost productivity and customer experience.

## Syllabus

1. CRM & Unified Communication Fundamentals
2. Integration Approaches
3. Core Features Deep-Dive
4. AI & Automation Capabilities
5. Data & Field Mapping
6. Configuration & Implementation Planning
7. User Enablement & Adoption
8. Security, Privacy & Compliance
9. Troubleshooting & Support

## What You'll Learn

- 1 Integration Landscape & Methods
- 2 Core Telephony-CRM Features
- 3 Data Model & Mapping
- 4 Workflow Automation & AI Assists
- 5 Solution Evaluation

**Register Now**



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