CRM & Phone System Integration Basics

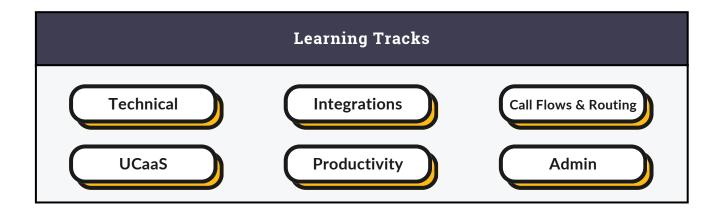


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Course Description

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.

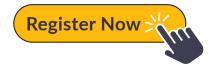




Why This Course Matters

- 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





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. Al & 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

- Integration Landscape & Methods
- Core Telephony-CRM
 Features
- 3 Data Model & Mapping
- Workflow Automation & Al Assists
- 5 Solution Evaluation

Register Now



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