Clozd ⇌ Microsoft Dynamics® 365

Clozd Platform | Dynamics Integration Benefits

The Microsoft Dynamics CRM integration automates the collection of win-loss feedback by enabling a direct feed of opportunities into the Clozd Platform. The integration also streamlines the feedback collection process for win-loss interviews and surveys by reducing the amount of time required to gather and share contact information.

Why integrate Microsoft Dynamics with the Clozd Platform?

Reduced administrative time

Clozd admins can spend hours each quarter manually pulling a list of names for Clozd to interview, and in some cases it can take a month or longer to complete this process. Connecting Microsoft Dynamics with the Clozd Platform eliminates that need, which enables you to spend less time managing win-loss logistics and **more time uncovering win-loss insights.**

Win-rate monitoring

Analyze data from ALL past and current opportunities (won and lost) to view your accurate win rate and track how it changes over time. This allows you to answer questions such as:

- What is our organization's overall win rate?
- How do we fare when going up against our top competitors?
- What industry is our organization most successful in?

Continuous, real-time feedback

The Microsoft Dynamics integration enables a continuous stream of win-loss insights to flow back to all relevant stakeholders.

- The integration reduces the amount of time between a closed opportunity and when feedback is gathered and delivered.
- Clozd is able to speak with buyers while their experiences are still fresh in their minds.
- Feedback is delivered more quickly, which empowers teams to take action sooner.

Enhanced security

No more sending lists via email or uploading them to a shared drive. Clozd is SOC 2 compliant, so you can feel confident knowing that your data is flowing to a safe and secure location.

Please contact your Clozd consultant to start setting up your Microsoft Dynamics integration or if you have any questions.