EXECUTIVE SUMMARY

Customer Relationship Management

Boost results and satisfaction by managing and maximising Customer Relationships

The evolution in consumer sales from product driven sales to consumer required support and service has brought about the need for closer ties with customers. People buy from other people when they have a solid, trust based relationship. This has brought about the need for more information relating to the customers and prospects, as well as the relevant contact persons within the organisations. It is this personal contact that drives the effective sales in the modern markets.

The use of technology provides for maximised returns from the customers. Embrace CRM will enable:

- **Effective Contact Management** keeps track of the relevant contact information and includes Status, Family, Personal, Business and User Analysis data. This creates and enhances the opportunities required for the critical personal contact.
- **Customer Hierarchy** enables the creation of tailored customer and prospect organisational structures illustrating your interactions with them and providing consolidated sales and service information according to their business hierarchy.
- **Unlimited number of organisations, customers, prospects and the relevant contact persons** can be maintained. Inter-Organisational relationships between contacts can also be mapped in this solution.
- Full integration between Embrace ERP and Embrace CRM enables any customer transaction to be available immediately on the dashboard. Source documents can be interrogated directly, enabling easy access of information.
- **Activities and Case Management** ensure tracking and tracing of important customer interactions. Unique case numbers can be assigned to specified activities with timelines allowing for automated follow-up on reminders and tasks. This ensures timeous completion of an activity or it will be automatically escalated. Activities can be system generated based on workflow processes or manually created.
- **Tasks Management** is a vital feature managing deadlines, meetings and reminders of important personal events relating to contacts. It will escalate tasks to a relevant manager when required. All alerts and escalations are sent to the dashboard, designated email addresses and/or other electronic media.
- **Calendar** allows for management of appointments, both one off and recurring, reminders and meeting request scheduling.
- **Customer Equipment Database** links items that have been sold, serviced or supported by the organisation to all relevant contacts. The equipment is assigned to a customer and/or contacts for full traceability and support.
- **Multi-level Team Management** allows for the structuring of roles and entitlements for individual team members in the organisation. Security rules ensure that only individuals entitled to the information have access.

Embrace Customers use CRM for:

- Pre-Sales and Marketing Contact details
- Sales and Service Quotes and Escalations
- Sales Interactions
- Rental and Maintenance Contracts
- Activities and Escalations

Integrating, centralised, team based customer relationship management that allows everyone to see a detailed history of customer activities. Contact information including addresses, phone numbers, email addresses, family, personal, business and user analysis demographic information to support your customers and prospects purchasing, service, support and warranty needs.

Task Management to participate and monitor and escalate interactions between the organisations teams and customer contacts.

Activity and Case Management to track and trace customer needs.

Full integration to Sales, Service, Debtors, Contracts and many other Embrace ERP modules, allowing immediate and direct access of source documentation.

Integration to Email, CRM Dashboard and other defined devices for quick access to alerts and escalations.
Features

Benefits

Contact Management
- Create and maintain customer contacts, prospect contacts
- Ability to configure to the specific needs of the business. Decide on the type of information that is most pertinent to growth and profitability.
- Include addresses, phone numbers, email, family, size, location and other demographic details to support purchase, service, support and warranty needs.
- Use of the data collection is limited to your imagination.
- Empower sales and marketing teams and enhance corporate spend.

Customer Hierarchies
- Get Closer to Customers, Prospects and Contacts with the ability to interrogate customers organisational purchasing trends, staff hierarchies and roles within the organisation

CRM Dashboard
- Accessed from one place
- Dashboard is easy to use
- Get Closer to Customers, Prospects, Contacts
- Track and Trace Customer Interactions
- Easily create queries to identify specific facts. These queries can be saved for future use.

Task Management
- Create and manage tasks from one integrated dashboard against customer contacts and team members. Link multiple tasks together to ensure correct results

Team Management
- Dashboard shows activities, tasks, appointments, journals against defined teams, roles and users.

Embrace ERP Integration
- Direct access to related Embrace transactions and enquiries
- Drill Down / Access ERP Transactions immediately
- Visibility and accountability
- Collaboration e.g. quote created in telesales, appears on sales dashboard, sales can drill down into detail.

Activities and Case Management
- Track and trace customer activities e.g. customer complaints
- Assign case number, task sales to follow up, task phone customer, manager to monitor.

Calendar
- Create on/off or recurring appointments, meeting request scheduling.

Journals
- Full audit of all interactions.

Workflow and Escalations
- Escalations and alerts to ensure timely action with notifications sent via email, fax or SMS with online reminders.

Customer and Contact Equipment
- Database
- Visibility of equipment sold, serviced or supported. Warranty details.
- Drill down into service module showing all jobs against item. Drill into Rental module showing revenue against item.
- Contract Enquiry will show all equipment deemed to be assigned to the customer contact.

Security and Accessibility
- Sensitive information visible to authorised users.

Customer Relationship Management
**Customer Relationship Management Highlights**

**Related Products**
- Sales
- Service
- Debtors
- Service Contracts
- Maintenance Contracts
- Deals
- Workflows

**CRM Contacts Database**
An extensive repository of information can be stored for each contact including family, personal, business, user analysis and email addresses. You determine what demographic information is important for you and make use of the available features provided. Contact Management also allows for the mapping of the hierarchy of superiors, peers and roles for each contact within the customer organisation, providing a detailed electronic Rolodex of your customer base.

**Detailed Transactional Information**
Detailed transactional information is available across the system, with ease of access across functional areas, to historical information, chronological activities and a to-do list, which all combine into a comprehensive view of our organisation’s interactions with your customers.

**Overview**
CRM enables an organisation to manage the interactions between prospects, customers and contacts. CRM uses technology to organise, automate and synchronise business processes for sales, marketing, customer service and support teams. Collaboration between colleagues is key to success. CRM assists in finding and attracting new customers, nurture existing customers, reduce cost of sales, marketing and customer service activities.

The Embrace CRM system allows all prospects, customer and contact information to be stored centrally and accessible to all approved users.

**Single CRM Interface**
A single CRM interface allows users to capture additional customer interactions and is fully integrated to other modules, including Sales, Service and Debtors, linking into real-time, on-line enquiries. Monitoring and assessing customer interactions together with users within the organisation enhance the customer experience.

**Who are my Customers?**
Information relating to each type of business relationship can be captured and maintained in Embrace CRM, including new Prospects, existing Customer Contacts, Casual Non-account holders and allows tracking of potential marketing targets. Extensive information can be captured and tracked, including unlimited activities and tasks and no limit to the number of entities that can be recorded.

**CRM Dashboard**
- **My QuickView**
  The CRM Dashboard provides a central point from which all CRM activities are available. A user can access all items that are relevant to him or alternatively a manager and or team can access items that have been assigned and actioned across the enterprise. Overdue tasks and follow-ups are highlighted with reminders available via email, SMS and online. Using flexible queries, filters and selections, users can target specific information and focus on what they need to see.

**CRM**

\[ x_{102} e^{5/2} x_{0} \frac{2}{44} x_{0} e^{2/3} x_{0}^2 A \]
Customer Relationship Management Highlights

RELATED PRODUCTS

Sales
Service
Debtors
Service Contracts
Maintenance Contracts
Deals
Workflow

CRM Activities and Activity Timeline

Activities and Case Management ensure track and trace of important customer interactions. Assign unique case numbers to specified types of activities, with a timeline which allows for an automated follow-up in the event that the activity is not executed timeously. Activities can be system generated, based on workflow processes, or created manually. Pre-defined activities, linked to customer, prospect, contact, with multiple tasks, escalations to manage activities on behalf of a customer can be composed.

Task Management

Never forget important deadlines or meetings with customers or prospects. Initiate multiple linked tasks to multiple team members ensuring that actions taken on behalf of contacts and customers are visible. Each task can be linked to a customer, contact, reference with status, dates and escalation rules. Reminders, escalations can be automatically generated ensuring timely completion. Follow up tasks can be linked together with different actions creating a defined process.

Calendar / Appointments

Recurrence can be set on a daily, weekly, monthly, annual basis with rule-based reminders and rule-based follow-ups.

Customer Equipment Database

Customer equipment database listing customer's equipment, linked to designated customer contacts. The equipment can be linked to serial numbers and assigned to a contact in Embrace ERP, giving visibility. E.g. Sales order will have a contact name, at creation of a service job contact can be accessed in order to better service the customer.

Full drill down into the Embrace solution is available from the Contact / Equipment dashboard.
Notifications, Escalations and Reminders

Pro-active, automatic notifications keeping your staff and your customers informed of call progress, follow-ups status, completion of service jobs and despatch of sales orders are available. Workflow within CRM tasks and activities can define triggers, notifications and internal user defined escalations process with all activities able to be flagged for follow-up and reminders.

Notifications can be sent to various parties e.g. sent to a user, a team, a superior within the company, the customer, the contact person, or a combination of the above.

Internal CRM Notifications can be sent via system notification, Internal Mail, Email, SMS or a combination, depending on urgency and availability of information. External CRM Notifications can be sent via Email, SMS, Fax or a combination of the above.

Customer Relationship Management Highlights

Hierarchical Structure

Hierarchical customer structures can be stored defining customer groups, consolidated debtors, marketing customers and multi-level contacts. This tailored customer organisation structure allows you to better understand your customers profile and structure and better understand their buying and servicing needs.

The Consolidated Sales and Service Enquiries across the customers hierarchy shows consolidated sales and service information, both current and historical.

CRM Team Features

Hierarchical CRM team structures allows a group view of CRM activities by individual, by team or by a selection of people. Flexible access control defines which team members have access to other information. Team calendars and task lists for team activity management are available. Escalation within the team to ensure proactive follow ups can be configured.

Journals

A detailed journal records each interaction and amendment and the audit trail provides detailed traceability of all CRM related activities.

Drill into source documents, customer history

Full integration between Embrace ERP and CRM enables any transaction that is processed in ERP to be available immediately in the CRM dashboard. Source documents can be accessed directly from the CRM dashboard enabling easy access of information. Quotes can be captured by telesales and are visible to sales immediately for follow up execution from the dashboard. In anticipation of a sales visit, sales statistics and credit details can be reviewed and service jobs details can be accessed.