Customer Relat onship Management

EXECUTIVE SUMMARY

Integrated, centralised, team based customer relat onship management process that allows everyone to see a detailed history of customer act vit es

Contact informat on including addresses, phone numbers, email addresses, family, personal, business and user analysis demographic informat on to support your customers and prospect purchasing, service, support and warranty needs.

Task Management to proact vity engage and monitor and escalate interact ons between the organisat ons teams and customer contacts.

Act vity and Case Management to track and trace customer needs.

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

Integrat on to Email, CRM Dashboard and other de fned devices for quick access to alerts and escalat ons.

Boost results and sat sfact on by managing and maximising Customer Relat onships

The evolut on in consumer sales from product driven sales to consumer required support and service has brought about the need for closer t es with customers. People buy from other people when they have a solid, trust based relat onship. This has brought about the need for more informat on relat ng to the customers and prospects, as well as the relevant contact persons within the organisat ons. It is this personal contact that drives the e fect ve sales in the modern markets.

The use of technology provides for maximised returns from the customers.

Embrace CRM will enable :
E fect ve Contact Management keeps track of the relevant contact informat on and includes Status, Family, Personal, Business and User Analysis data. This creates and enhances the opportunit es required for the crit cal personal contact.

Customer Hierarchy enables the creat on of tailored customer and prospect organisat onal structures illustrat ng your interact ons with them and providing consolidated sales and service informat on according to their business hierarchy.

Unlimited number of organisat ons, customers, prospects and the relevant contact persons can be maintained. Inter-Organisat onal relat onships between contacts can also be mapped in this solut on.

Full integrat on between Embrace ERP and Embrace CRM enables any customer transact on to be available immediately on the dashboard. Source documents can be interrogated directly, enabling easy access of informat on.

Act vit es and Case Management ensure tracking and tracing of important customer interact ons. Unique case numbers can be assigned to specif ed act vit es with t melines allowing for automated follow-up on reminders and tasks. This ensures t meous complet on of an act vity or it will be automat cally escalated. Act vit es can be system generated based on workf ow processes or manually created.

Tasks Management is a vital feature managing deadlines, meet ngs and reminders of important personal events relat ng to contacts. It will escalate tasks to a relevant manager when required. All alerts and escalat ons are sent to the dashboard, designated email addresses and/ or other electronic media.

Calendar allows for management of appointments, both one of f and recurring, reminders and meet ng request scheduling.

Customer Equipment Database links items that have been sold, serviced or supported by the organisat on to all relevant contacts. The equipment is assigned to a customer and/or contacts for full traceability and support.

Mult-level Team Management allows for the structuring of roles and ent tlements for individual team members in the organisat on.

Security rules ensure that only individuals ent tled to the informat on have access.

Embrace Customers use CRM for :

- Pre-Sales and Market ng Contact details
- Sales and Service Quotes and Escalat ons
- Sales Interact ons
- Rental and Maintenance Contracts
- Act vit es and Escalat ons

Customer Relationship Management

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.

For more information on any of our products or services please visit us on the web at

www.embrace.co.za

or contact your Embrace Account Manager or Sales Representative.

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Customer Rela t onship Management Highlights

PRODUCT

CRM

RELATED PRODUCTS

Sales

Service

Debtors

Service Contracts

Maintenance Contracts

Deals

Work f ow

Overview

CRM enables an organisa t on to manage the interac t ons between prospects, customers and contacts. CRM uses technology to organise, automate and synchronise business processes for sales, marke t ng, customer service and support teams. Collabora t on between colleagues is key to success. CRM assists in f nding and a t rac t ng new customers, nurture exis t ng customers, reduce cost of sales, marke t ng and customer service ac t vi t es.

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

Single CRM interface allows users to capture addi t onal customer interac t ons and is fully integrated to other modules, including Sales, Service and Debtors, linking into real-t me, on-line enquiries. Monitoring and assessing customer interac t ons together with users within the organisa t on enhance the customer experience.

Who are my Customers?

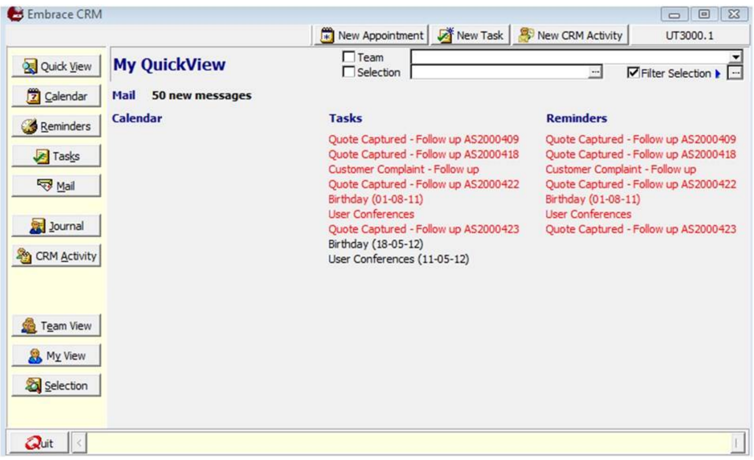
Informa t on rela t ng to each type of business rela t onship can be captured and maintained in Embrace CRM, including new Prospects, exis t ng Customer Contacts, Casual Non account holders and allows tracking of poten t al marke t ng targets. Extensive informa t on can be captured and tracked, including unlimited ac t vi t es and tasks and no limit to the number of en t t es that can be recorded.

Contacts Database

A extensive repository of informa t on can be stored for each contact including family, personal, business, user analysis and email addresses. You determine what demographic informa t on 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 organisa t on, providing a detailed electronic Rolodex of your customer base.

Detailed transac t onal informa t on is available across the system, with ease of access across func t onal areas, to historical informa t on, chronological ac t vi t es and a to-do list, which all combine into a comprehensive view of our organisa t ons interac t ons with your customers.

CRM Dashboard—My QuickView



The CRM Dashboard provides a central point from which all CRM ac t vi t es are available. A user can access all items that are relevant to him or alterna t vely a manager/ and or team can access items that have been assigned and ac t oned across the enterprise.

Overdue tasks and follow-ups are highlighted with reminders available via email, SMS and online. Using f exible queries, f lters and selec t ons, users can target speci f c informa t on and focus on what they need to see.

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Customer Rela t onship Management Highlights

PRODUCT

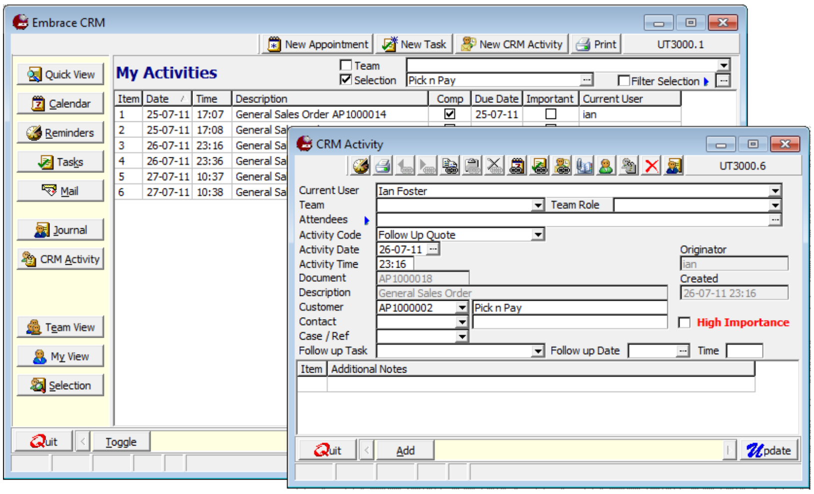
CRM

RELATED PRODUCTS

- Sales
- Service
- Debtors
- Service Contracts
- Maintenance Contracts
- Deals
- Work f ow

Ac t vi t es and Ac t vity Timeline

Ac t vi t es and Case Management ensure track and trace of important customer interac t ons. Assign unique case numbers to speci f ed types of ac t vi t es, with a t meline which allows for an automated follow-up in the event that the ac t vity is not executed t meously. Ac t vi t es can be system generat-ed, based on work f ow processes, or created manually. Pre-de f ned ac t vi t es, linked to customer, prospect, contact, with mul t ple tasks escala t ons to manage ac t vi t es on behalf of a customer can be composed.



Task Management

Never forget important deadlines or mee t ngs with customers or prospects. Ini t ate mul t ple linked tasks to mul t ple team members ensuring that ac t ons taken on behalf of contacts and customers are visible. Each task can be linked to a customer, contact, reference with status, dates and escala t on rules.

Reminders, escala t ons can be automa t cally generated ensuring t mely comple t on. Follow up tasks can be linked together with di f erent ac t ons crea t ng a de f ned process.

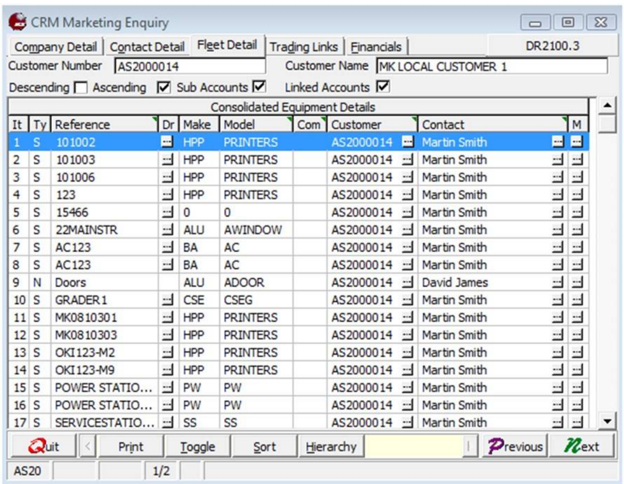
Calendar / Appointments

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

Customer Equipment Database

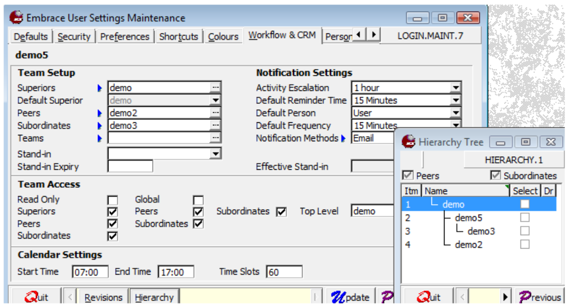
Customer equipment database lis t ng customer's equipment, linked to designated customer contacts. The equipment can be linked to the serial numbers and assigned to a contact in Embrace ERP, giving visibility. E.g. Sales order will have a contact name, at crea t on of a service job contact can be accessed in order to be t er service the customer.

Full drill down into the Embrace solu t on is available from the Contact / Equipment dashboard.



Customer Relat onship Management Highlights

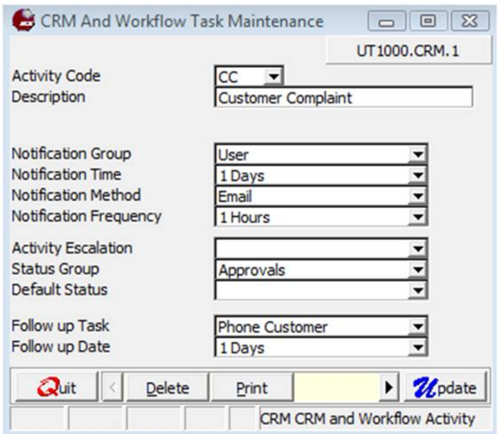
CRM Team Features



Hierarchical CRM team structures allows a group view of CRM actvites by individual, by team or by a select on of people. Flexible access control defnes which team members have access to other informat on. Team calendars and task lists for team actvity management are available. Escalat on within the team to ensure proactve follow ups can be confgured.

Not fcat ons, Escalat ons and Reminders

Pro-actve, automatc notfcatons keeping your staf and your customers informed of call progress, follow-ups status, complet on of service jobs and despatch of sales orders are available.



Workfow within CRM tasks and actvites can defne triggers, notfcatons and internal user defned escalat ons process with all actvites able to be fagged for follow-up and reminders.

Notfcatons can be sent to various partes e.g. sent to a user, a team, a superior within the company, the customer, the contact person, or a combinat on of the above.

Internal CRM Notfcatons can be sent via system notfcaton, Internal Mail, Email, SMS or a combinat on, depending on urgency and availability of informat on. External CRM Notfcatons can be sent via Email, SMS, Fax or a combinat on of the above.

Hierarchical Structure

Hierarchical customer structures can be stored defning customer groups, consolidated debtors, marketng customers and mult-level contacts. This tailored customer organisat on structure allows you to bet er understand your customers profle and structure and bet er understand their buying and servicing needs.

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

Journals

A detailed journal records each interact on and amendment and the audit trail provides detailed traceability of all CRM related actvites.

Drill into source documents, customer history

Full integrat on between Embrace ERP and CRM enables any transact on 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 informat on. Quotes can be captured by telesales and are visible to sales immediately for follow up execut on from the dashboard. In antcipat on of a sales visit, sales statstcs and credit details can be reviewed and service jobs details can be accessed.

RELATED SERVICES

Embrace Support Representatves can assist with designing solut ons and implementng addit onal requirements

Applicat on Support through the ACS Support Centre

Embrace Training

For more informat on on any of our products or services please visit us on the web at

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