

## Proactive sales environment

Don't wait for customers to come to you, create your own sales opportunities in the marketplace. The prof.ITplus CRM module helps you manage new leads, encourages cross-selling of product ranges to existing customers and enables you to respond quickly to competitor activity.

The ability to forecast future sales means that management can monitor sales pipelines to ensure the future growth of the business. Recurring events can be scheduled such as a courtesy telephone call every six months to ensure customer satisfaction and ultimately repeat purchase.

## Forward thinking, future planning

CRM from prof.ITplus is an invaluable management device for helping create strategic business plans. Sales territories, key accounts and team structures are all areas of management that this software can assist with.

Strengths and weaknesses within the organisation can be acted on quickly and could even help identify the need for more training or even adjustments to staffing levels as workloads and activity levels are far more visible.

## Building customer loyalty

Loyal, longstanding relationships with customers form the backbone of a stable, successful business. Customer relationships are reinforced with prof.ITplus CRM through specifically tailored marketing activities. Your customers can be profiled, categorised, segmented and targeted through analysing customer attributes.

It's the small things that make a big difference in the business world, whether you want to send your key customers a newsletter, send a promotional mailer to customers that you've lost or simply post a Christmas card to all your customer base.

## Strategic market intelligence

By having all your customer information in one place you can quickly obtain an insight into your marketplace. Sound business decisions are always based on the facts; Which niche has the most potential for growth? Where are your geographical hotspots? What and how much will be sold in the next three months? What are your competitor's strengths? Only through careful analysis of past and present trends can well informed business decisions be made about the future.

The prof.ITplus CRM module provides clear direction at all levels of the business from counter sales to senior management.



## Integrated central information store

The CRM (Customer Relationship Management) module for prof.ITplus helps you win and retain customers through efficient and coordinated sales and marketing activities. By bringing all your customer information together regarding correspondence, telephone calls, appointments and specific profiling data, you will have everything you need to build strong business relationships.

The CRM module also draws information from prof.ITplus' sales order history and financial ledgers to provide you with a unique and powerful business tool which completes the sales communication loop. As a Windows based package prof.ITplus CRM provides seamless software integration with guaranteed quality and compatibility.

## Communication, coordination, organisation

Successful businesses are built on teamwork through knowing what has been done, what needs to be done next and by whom. Full transparency in sales and marketing activities through prof.ITplus CRM aids clear and professional communication between internal teams and externally with customers. With prof.ITplus CRM any member of staff will know exactly what has happened with any customer; when they were last telephoned, when they are expected to win an order and when the salesperson plans to visit them next.

The diary system within prof.ITplus CRM orchestrates the sales operation where frontline support teams can even help with time management of more senior members of staff. The time saved in not dealing with problems from communication errors can then be put to good use improving customer service and selling even more!



## Customers and Contacts

- ▶ Unlimited number of contacts per customer, plus multiple addresses, with fast string search facility to quickly find the required contact.
- ▶ User-defined account status field to identify prospects and live accounts.
- ▶ Up to ten user-defined fields can be recorded against contacts and customers to customise the CRM display. Mailshots and reports can be generated and filtered according to these fields for targeted marketing activities.
- ▶ Attach customers to purchase groups and identify which product ranges to sell to specific customers and in-turn highlight opportunities to increase sales.

## Events and Actions

- ▶ Automatically record events for all sales orders, quotes and returns orders ensuring detailed customer trading patterns and prompt progression of quotations.
- ▶ Create events to follow-up mailshots, carry out regular visits or record telephone calls.
- ▶ Record personal events to show when individuals are out of the office.
- ▶ Set alarms for timely reminders before quotations become overdue or a new customer's order is due for delivery.
- ▶ Set recurring events for repeat customer contact and roll-over events to ensure all activities are followed up.
- ▶ Record free-form text memos against events and pass events between team members.
- ▶ Analyse closed events – for example to see how many quotes were converted to orders.
- ▶ Colour code events to express high and low priority.

## Diary

- ▶ Daily, weekly and monthly views of either individual or team activities.
- ▶ Drag and drop to reschedule events for a different date or time, or to change the duration.
- ▶ User-specific colour schemes, start and end times and diary slots.

## Quotations

- ▶ Quotation generation for live accounts and prospects, converting prospects to the Sales Ledger account to retain all event history.
- ▶ Schedule events to prompt the follow-up of quotations.
- ▶ Order probability can be recorded to generate accurate sales forecasts.
- ▶ Copies of quotations can be attached to the customer record for future reference.

## Sales Orders

- ▶ Events can be created to prompt the account handler to monitor the careful despatch of orders.

- ▶ Customer spend figures are updated automatically on creation of an invoice.
- ▶ Schedule an event when a customer orders a particular stock code, product group, or product type for the first time. Prompt the sales team to follow-up trial orders to generate further sales.

## Return Orders

- ▶ Events can be created to prompt the account handler to monitor orders that have been returned.
- ▶ Customer spend figures are updated automatically when a credit note is generated.

## Attachments

- ▶ Store documents such as correspondence, drawings and images against customers and events.
- ▶ Attachments are stored and backed up on the prof.IT plus server.

## Sales Analysis

- ▶ Customer spend figures are kept for each year.
- ▶ Drill down to product group, type or stock code level.
- ▶ Compare with previous years and identify sales trends, risks and opportunities.
- ▶ Display graphical reports to quickly identify changes in spend patterns.
- ▶ Highlight products that a customer should be buying to focus sales efforts.

## Mailshots

- ▶ Powerful selection criteria enable mailshots and marketing to be targeted precisely and coordinate the follow-ups by telesales.
- ▶ Report on the success of mailshots and exhibitions using comprehensive spend report filters which also help provide feedback on return on investment.
- ▶ Automatic event generation to prompt users to follow-up mailshot leads.

## User Settings

- ▶ Define customers for each account handler and set whether users can view only their accounts.
- ▶ Secure sensitive company information by preventing certain users seeing cost information.
- ▶ User defined colour schemes and alarm preferences.

## Integration

- ▶ Fully integrated with the prof.IT plus application, ensuring data integrity and removing the need to re-key any information.

