The importance of CRM
# in the current business climate

What is CRM and what are the benefits?

CRM stands for Customer Relationship Management, the concept being that all departments within an organisation log their activities through one common data base ensuring that everyone involved in the business cycle has visibility of all of the activities relating to that customer, ensuring that necessary actions can be taken quicker and more effectively, thereby providing a more efficient service.
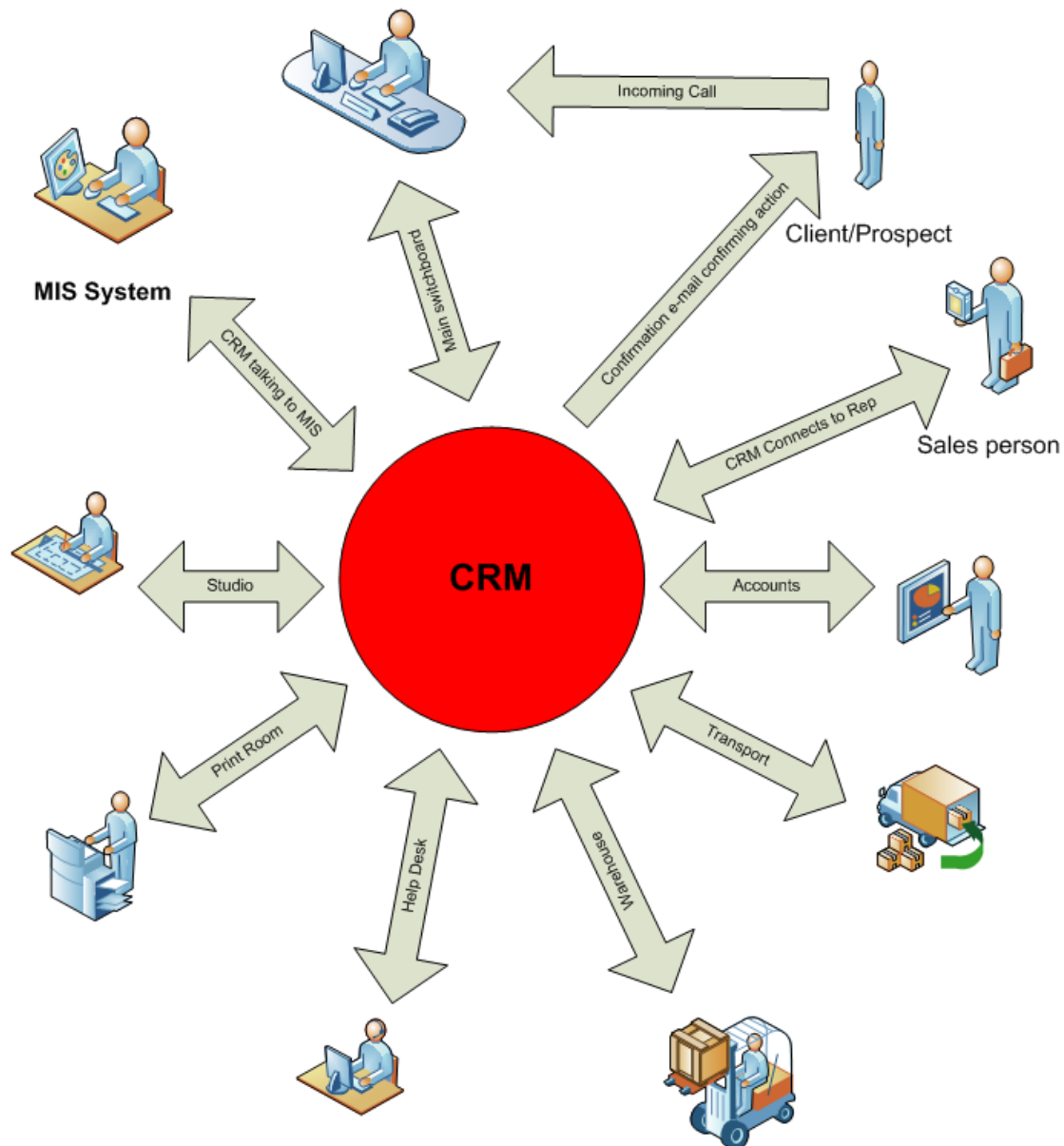
The above example shows the most common need within a business, to provide a communication link between Sales, Accounts, Production, and all of the other logistical departments such as service, training, warehousing and delivery.

The implementation of a CRM system will improve the efficiency and productivity of a business by ensuring that all customer facing employees have up to date status and activity information relating to that specific customer ie. If a sales person is attempting to develop business within an account, he needs to know if there are any issues with the customer relating to service, finance etc. that could have a negative effect on the process. The CRM programme would ensure that this information is readily available, and is updated in real time.

In the current economic climate, it is becoming more difficult to develop new business and it is even more important than ever for a business manager to ensure that he retains and develops business with the existing client base.

The important factor to remember is that all of the existing clients are being targeted as new prospects by the competitors

What can the Accura CRM module offer ?

There are a number of CRM products on the market, why choose Accura? First and foremost it *fully integrates with the MIS programme* providing bi-directional communication, in real time.

The prime function of a CRM system is to help a business not only bring new business into the company, but very importantly help retain and develop more business with the existing client base.

The system produces full contact management information including "To Do" lists for each person.

The user can select from a drop down list to view by type of activity ie telephone calls, appointments etc

The system also enables the user to view a complete prospect profile of quotes, orders, sales opportunities, invoices, client service tickets and any special notes.
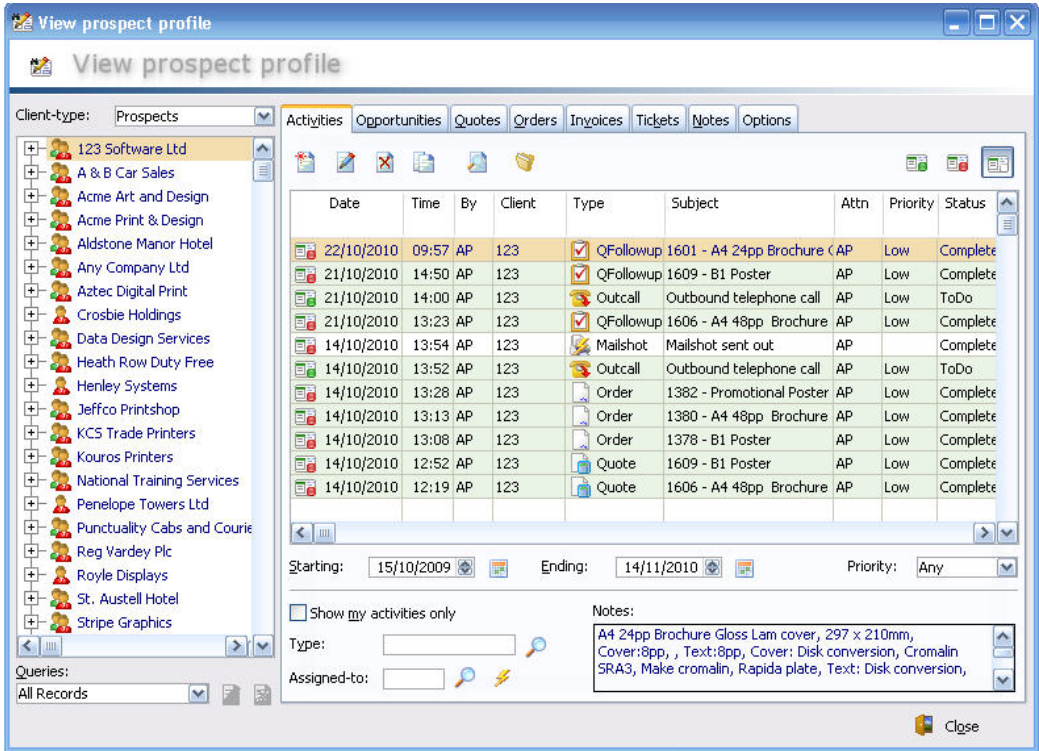
As well as storing contact details, the system also provides powerful sales performance analysis. Within Accura when a customer requests a quotation, it is treated as a sales "Opportunity" which can be linked to a Sales person and linked to a campaign, such as a mail shot, tele marketing campaign etc.

Reports can be produced to show the status of these "Opportunities" in order to monitor performance and track sales person's figures. It can be used also to monitor which types of work are being won, and what type of work is being lost.

This is particularly relevant when analysis existing accounts to maximise the sales potential, and also to identify weak areas in the business, where certain work or job types are being lost to the competition.
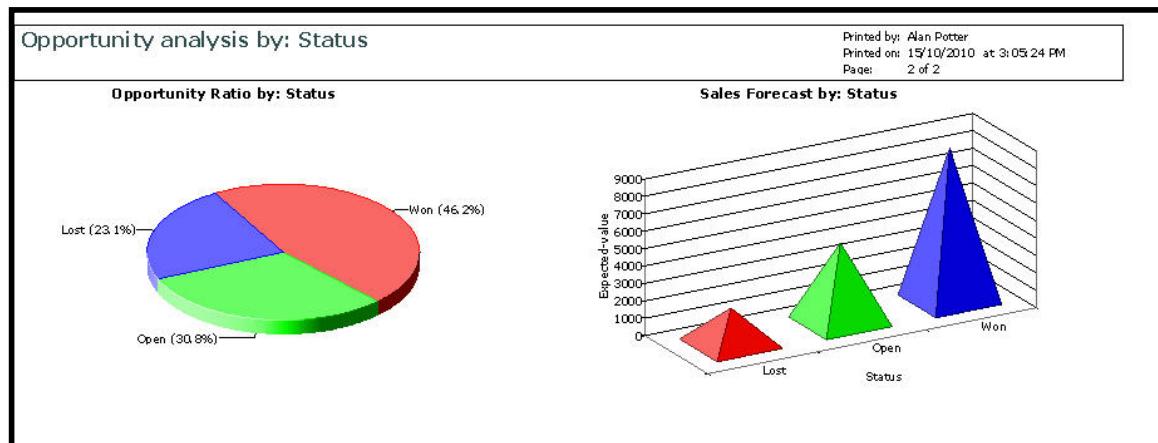
The report can be produced in two forms, both as a printed document and a graphic.

The report can be printed from the system as a form or shown in a graphic format

Description	Client	Campaign	By	Opened	Rep	Interest	Prob.	Profile	Started	Closed	Status	Act-Value	Expected	Exp-Value
Lost														
New design brochure	123	ROAD SHOW		03/03/2005	TAC	High	50%		03/03/2005	14/10/2010	Lost	£0.00	17/12/2010	£1,000.00
Promotional material	AZT	ROAD SHOW	AP	21/01/2009	AP	Normal	70%	Trade	21/01/2009	14/10/2010	Lost	£0.00	21/11/2010	£252.00
Corporate Brochure	123	ROAD SHOW	AP	14/10/2010	JFB	None	50%	Retail	14/10/2010	14/10/2010	Lost	£0.00	21/10/2010	£785.00
Subtotal: 3												£0.00		£2,037.00
Open														
Summer campaign brochure	123	ROAD SHOW		13/04/2005	JFB	High	55%		21/10/2010		Open	£0.00	26/11/2010	£4,000.00
Menu Covers	001030	ROAD SHOW	AP	14/10/2010	AP		0%	Food	14/10/2010		Open	£0.00	24/10/2010	£235.00
Promotional Leaflet	A&BCAR	ROAD SHOW	AP	14/10/2010	TAC	Very High	70%	Retail	14/10/2010		Open	£0.00	24/10/2010	£235.00
Poster	AZT	ROAD SHOW	AP	15/10/2010	AP	Normal	60%		15/10/2010		Open	£0.00	22/10/2010	£59.00
Subtotal: 4												£0.00		£4,529.00
Won														
Brochures	123	ROAD SHOW		03/03/2005	AP	Normal	60%			14/10/2010	Won	£0.00	09/12/2010	£5,000.00
Sales Leaflet	DDS195	ROAD SHOW	AP	14/10/2010	SI	High	0%		14/10/2010	14/10/2010	Won	£109.00	21/10/2010	£109.00
Promotional Poster	123	ROAD SHOW	AP	14/10/2010	JFB	Normal	75%		14/10/2010	14/10/2010	Won	£1,283.00	08/10/2010	£1,283.00
Summer Promotion	ANY	ROAD SHOW	AP	14/10/2010	TAC	Normal	50%	General	14/10/2010	14/10/2010	Won	£0.00	24/10/2010	£1,175.00
Health & Safety Poster	123	ROAD SHOW	AP	14/10/2010	JFB	High	60%		14/10/2010	14/10/2010	Won	£2,655.00	21/10/2010	£908.00
Brochure quote	ACME	ROAD SHOW	AP	14/10/2010	AP	High	70%	General	14/10/2010	14/10/2010	Won	£0.00	21/10/2010	£235.00
Subtotal: 6												£4,047.00		£8,710.00
Total records: 13												£4,047.00		£15,276.00

Opportunity Ratio by: Status

Won (46.2%)
Lost (23.1%)
Open (30.8%)

Sales Forecast by: Status

Expected-value: 1000 – 9000

Lost Open Won

Status

The use of Sales "Opportunities" in the system enables a Sales Forecast to be generated.

Description	Client	Campaign	By	Opened	Rep	Interest	Prob.	Profile	Started	Closed	Status	Act-Value	Expected	Exp-Value
October, 2010														
Promotional Poster	123	ROAD SHOW	AP	14/10/2010	JFB	Normal	75%		14/10/2010	14/10/2010	Won	£1,283.00	08/10/2010	£1,283.00
Corporate Brochure	123	ROAD SHOW	AP	14/10/2010	JFB	None	50%	Retail	14/10/2010	14/10/2010	Lost	£0.00	21/10/2010	£785.00
Health & Safety Poster	123	ROAD SHOW	AP	14/10/2010	JFB	High	60%		14/10/2010	14/10/2010	Won	£2,655.00	21/10/2010	£908.00
Brochure quote	ACME	ROAD SHOW	AP	14/10/2010	AP	High	70%	General	14/10/2010	14/10/2010	Won	£0.00	21/10/2010	£235.00
Sales Leaflet	DDS195	ROAD SHOW	AP	14/10/2010	SI	High	0%		14/10/2010	14/10/2010	Won	£109.00	21/10/2010	£109.00
Poster	AZT	ROAD SHOW	AP	15/10/2010	AP	Normal	60%		15/10/2010		Open	£0.00	22/10/2010	£59.00
Promotional Leaflet	A&BCAR	ROAD SHOW	AP	14/10/2010	TAC	Very High	70%	Retail	14/10/2010		Open	£0.00	24/10/2010	£235.00
Menu Covers	001030	ROAD SHOW	AP	14/10/2010	AP		0%	Food	14/10/2010		Open	£0.00	24/10/2010	£235.00
Summer Promotion	ANY	ROAD SHOW	AP	14/10/2010	TAC	Normal	50%	General	14/10/2010	14/10/2010	Won	£0.00	24/10/2010	£1,175.00
Subtotal: 9												£4,047.00		£5,024.00
November, 2010														
Promotional material	AZT	ROAD SHOW	AP	21/01/2009	AP	Normal	70%	Trade	21/01/2009	14/10/2010	Lost	£0.00	21/11/2010	£252.00
Summer campaign brochure	123	ROAD SHOW		13/04/2005	JFB	High	55%		21/10/2010		Open	£0.00	26/11/2010	£4,000.00
Subtotal: 2												£0.00		£4,252.00
December, 2010														
Brochures	123	ROAD SHOW		03/03/2005	AP	Normal	60%			14/10/2010	Won	£0.00	09/12/2010	£5,000.00
New design brochure	123	ROAD SHOW		03/03/2005	TAC	High	50%		03/03/2005	14/10/2010	Lost	£0.00	17/12/2010	£1,000.00
Subtotal: 2												£0.00		£6,000.00
Total records: 13												£4,047.00		£15,276.00

The same report in a graphical format
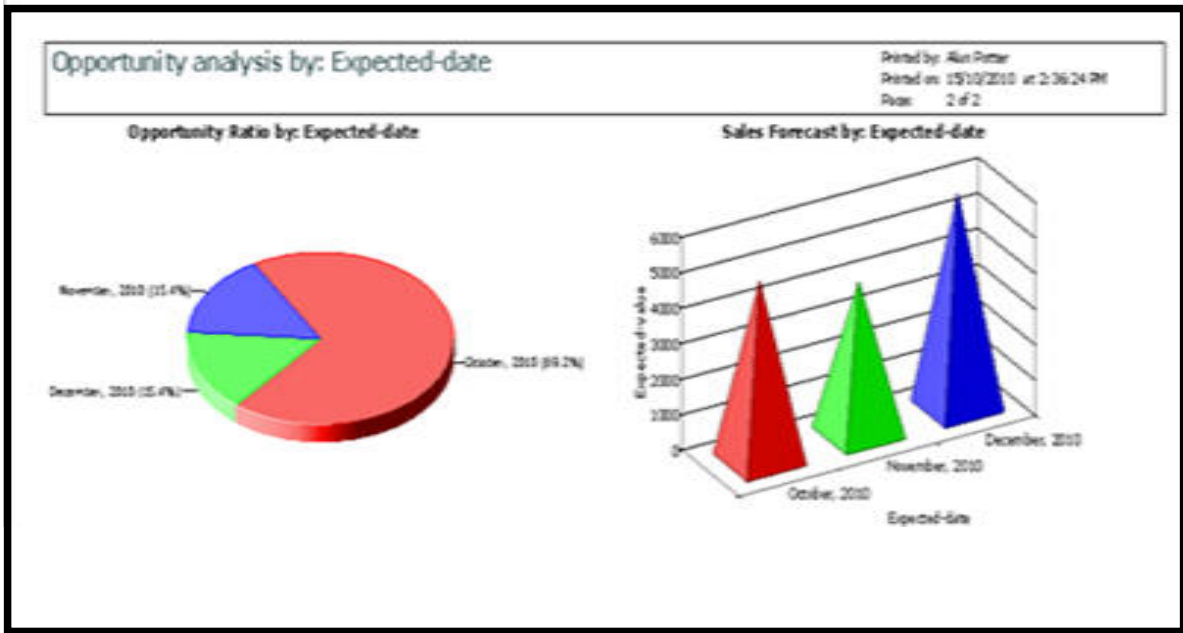
When a Sales "Opportunity" is created, the user is prompted to enter a date when the "Opportunity" is expected to close. This end date is used to produce a monthly/quarterly sales forecast based on the predicted close dates. The information can be in a report or graphical format.

Cost Savings

A problem facing many companies today, is management of costs for the sales and marketing budget, ie. Is the media advertising bringing in the right return ? Is direct mail and e-shot marketing cost effective for the business? What return are we getting from our presence at trade shows? All of these can be monitored from within the CRM programme.

Accura CRM allows the user to set up Campaigns, a campaign can be user defined and can be a magazine advertisement, a mail shot, Road Show, Open House event etc. Once set up as a campaign, all of the direct costs can be allocated against it, Hotels, exhibition space, media costs etc.Once these costs have been allocated the system produces a complete analysis, covering such areas as cost per lead, number of responces, Opportunities created and business turnover generated showing a true ROI by campaign.

As many campaigns as required can be set up and the system gives a visual indication if the campaign is still active

When an incoming enquiry is received, it can be qualified and logged against a specific campaign, in the same way that "Opportunities" are logged, thereby building a history.

From the main campaign details window, a full analysis is available:

- Number of responses
- Number of opportunities created
- The campaign costs
- A complete summary

This facility provides a full insight into the true value of individual marketing activities enabling the sales and marketing team asses what type of marketing campaign provides the most cost effective method for the company and which activity type produces the best ROI.

As Accura has a multitude of search fields and key words it is possible to analyse results both by type and geographically

As with all of the information within the system it is available to print in report form and in a graphical format.

Campaign analysis by: Campaign code

| Campaign	Description	Org.	Type	Target	Starting	Ending	Responses	Opps-total	Opps-won	Opps-lost	Closed	Value	Cost	Cost/resp
E-SHOT														
E-SHOT	Promoting the new Digital facility	AP	Eshot	3,000	21/01/2009	19/01/2019	1	0	0	0		£0.00	£0.00	£0.00
Subtotal: 1												£0.00	£0.00	£0.00
FAX020205														
FAX020205	Faxshot sent out 02-02-2005	TAC	Faxshot	5,000	03/03/2005	01/03/2015	0	0	0	0		£0.00	£2.00	£0.00
Subtotal: 1												£0.00	£2.00	£0.00
MAIL0205														
MAIL0205	Mailshot for Feb 2005	AP	Mailshot	500	13/04/2005	11/04/2015	0	0	0	0		£0.00	£2.00	£0.00
Subtotal: 1												£0.00	£2.00	£0.00
ROAD SHOW														
ROAD SHOW	Road Show to present the product range. Location at Holiday Inn chain	AP	Exhibition	150	14/10/2009	21/10/2010	13	13	6	3		£4,047.00	£125.70	£9.67
Subtotal: 1												£4,047.00	£125.70	£2.42
Total: 4												£4,047.00	£129.70	£2.42

Campaign analysis by: Campaign code
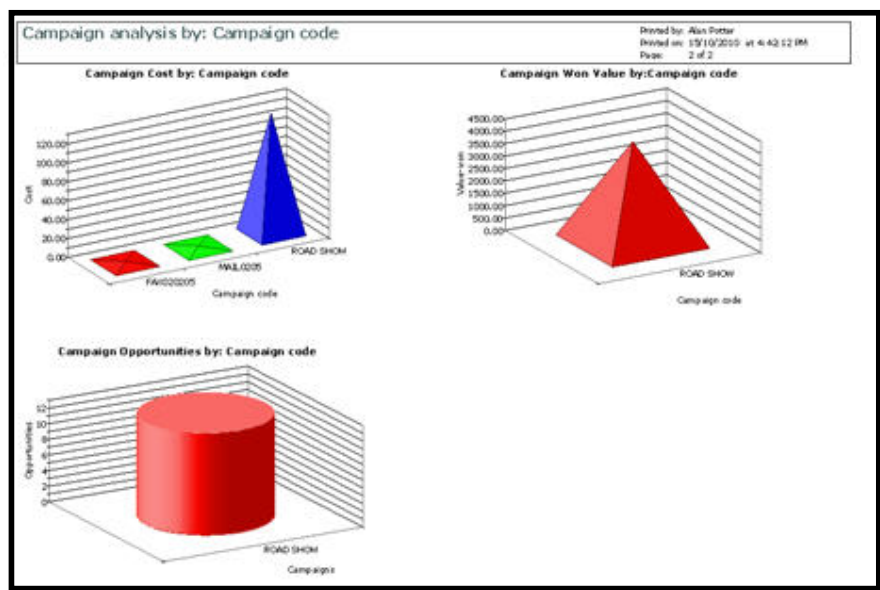
In summary, the product provides a comprehensive communication and information recording facility *which fully integrates with the MIS system* . It is a global fully expandable module which should be used by all employees having a customer contact role.

Accura MIS has its own integrated diary planner which integrates with Outlook Diary, and both appointments and activities can be viewed .

When an appointment has been made the system can be set to automatically send a confirmation e-mail and or an SMS text message

Appointments can be dragged across the appointment planner to a new date, this will automatically update the Out Look diary
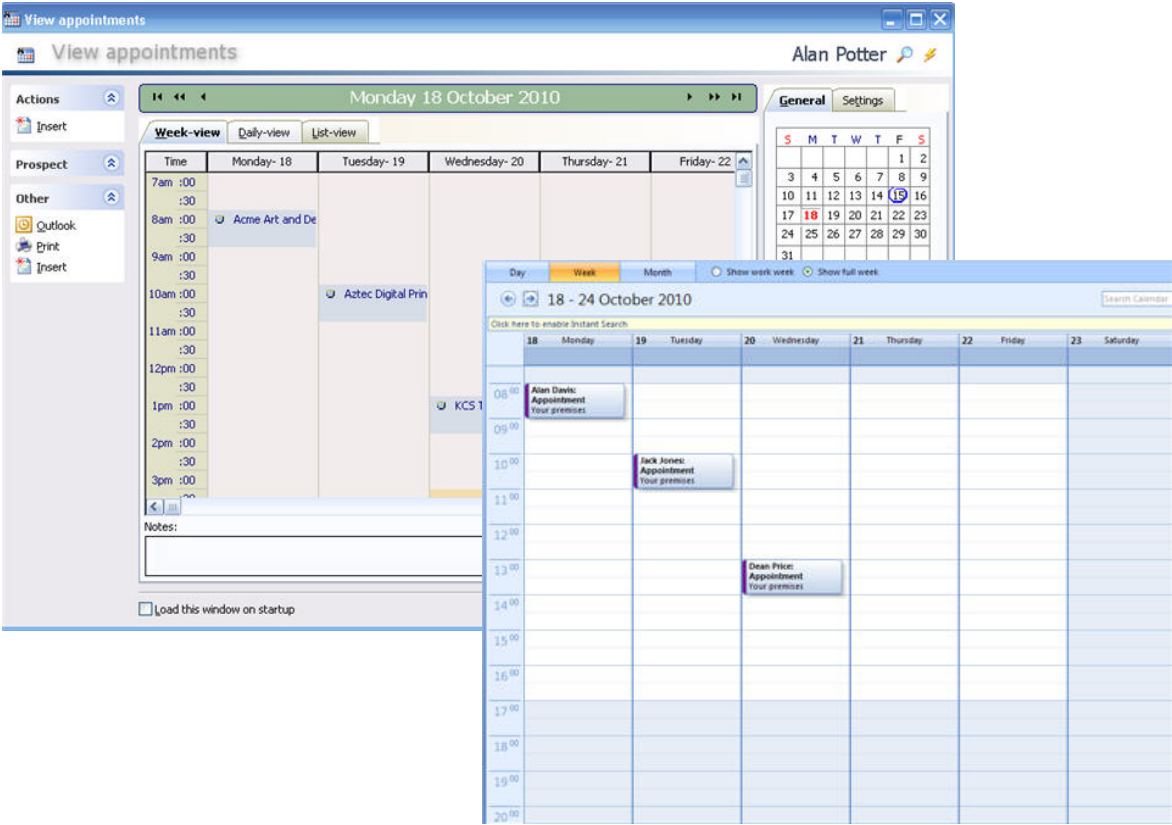
To complete the communication and planning tools, Accura MIS also links directly with Google Maps producing route planning instructions for visits.
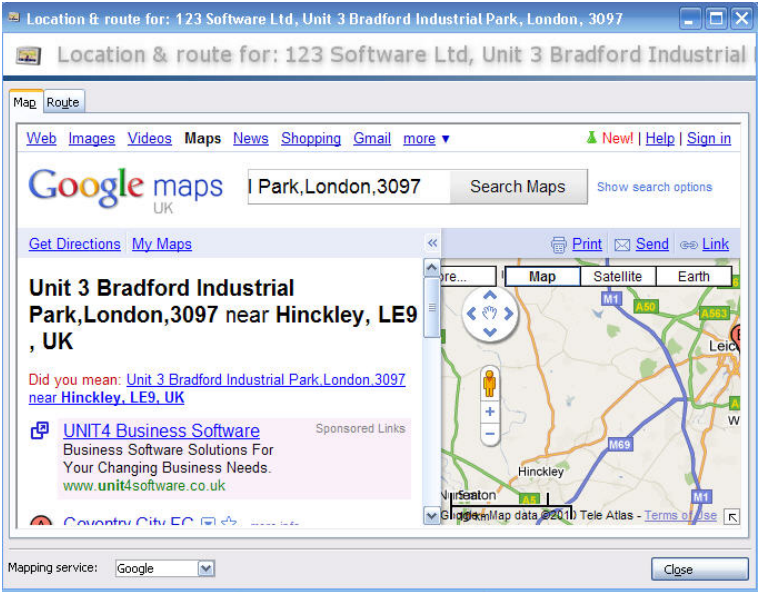
The Accura MIS system supports all of the modern communication technologies enabling remote users such as field sales people and technical and logistics personnel to have real time information at their finger tips via and i-phone or laptop

The diary facility within the CRM module links in real time to Outlook diary, enabling mobile users to view their diary, and To-Do list, receive e-mails and SMS text messages directly from the system in real time.

Additionally, any remote lap top user with a Wi-Fi connection can dial into the system using terminal services and update records, view their To-Do list, generate quotations and send e-mails, all in real time.

An additional benefit of linking using this method, is that security is improved, and there is no chance of losing vital personal inform if the lap top were to be lost or stolen, as the software resides on the office server, not on the lap top device.

The Accura CRM module is a "Must Have" for any company wishing to improve communication with their existing client base, develop new business more effectively and of course monitor sales and marketing costs.

Call to today to arrange an on-line presentation, or visit our web site at www.accuramis.com to download further information.
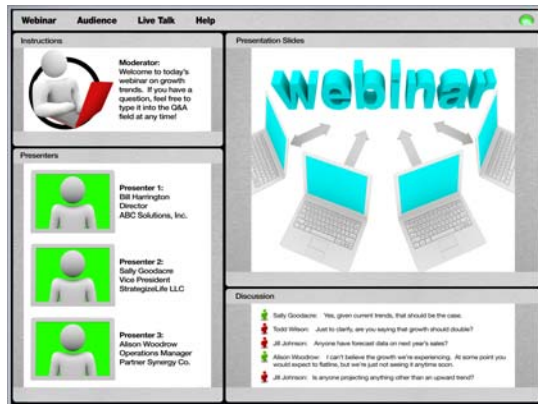
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