

CRM

CUSTOMER RELATIONSHIP MANAGEMENT SOFTWARE

Client

Sales and Marketing Services business lead

Business Overview

- Contains a single database that describes our customers and the relationship they hold with our company. This includes their information, contacts, requirements and the communication history.
- CRM application had enough details about the Leads, Data Collection, Delivery information, Payment collection and pending cases that alarms the coordinators and the managers to take actions.
- Maintains the FOS information of daily Status about attendance, payment, forms, field activity.

Business Challenge

- Data Management complexity
- Low Quality for Service
- Communication-Delivery inconsistencies
- Inadequate Enquiry System
- Uncoordinated communications from coordinators, managers
- Tracking and Managing FOS
- Aligning sales and service processes to meet corporate goals

Approach / Solution

- Deployment of online automation process from customer registration till the renewal of contract.
- Single Source of information to allow business users to rapidly find answers to questions critical to understanding customers and business performance
- Solution to cover end-to-end marketing and sales team's performance, includes activity tracking, achievements, performance based commissions and skill developments
- Territory Management organize our customers and sales teams across different geographies
- Various reports to track the progress activity, FOS activity and customer's relationship
- Supports integrated email, call track and online support for marketing communications

Benefits

- **Improved Efficiency.** Has enabled significant improvements in resource efficiency, timeliness to execute, end-to-end marketing processes, faster response to changing business

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and customer conditions, and automation of standard communications.

- **Reduced Marketing Costs.** In addition to the cost savings achieved through the efficiency improvements, marketing costs have also been significantly reduced. This is in part due to a strategic shift from off-line to on-line communications and field tracking activities of FOS.
- **Increase in performance analytics.** Trend analysis and sales performance metrics helped us to have the information handy and provided the insights to make smarter decisions based on customer behavior. Increase in sales resulted due to various categorized analytical report.
- **It is highly automated** Automation do not need to set up a separate team to handle updates, approvals, and analysis and customer engagements. Automation is one of the biggest attractions of this solution.
- **Reliable and Integrated Data.** Users can access the information from anywhere. Increased data accuracy and consistency. No redundancy is allowed
- **Increased application security.** Roles and Access Management implemented increases the application security level. Audit log helps to keep track of the changes made in different levels to the system.

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