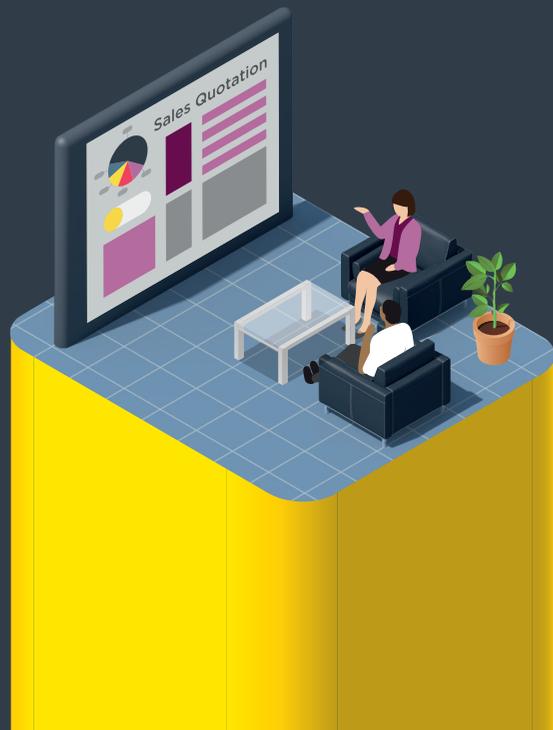


Intact iQ: Module

CRM



The Intact iQ CRM module will become your integrated customer hub helping you shorten sales cycles, improve the flow and quality of information and offer superior service to your customers.



Your Complete CRM and Marketing Tool

As an integrated feature of Intact iQ, our Customer Relationship Management module is not simply a contact management system but a complete marketing and CRM tool for your business. CRM systems enable you to better serve your customers by opening up vital channels of communication, building value and sharing client-specific knowledge across the organisation.

If you have a CRM strategy, Intact iQ can facilitate it. Whether you simply want to start recording interactions against customers and suppliers, or should you require a system to manage your leads, prospects, customers and/or suppliers and related marketing campaigns, the Intact iQ CRM tool can facilitate your requirements.



What does CRM mean to you?

No single company has written the book on CRM. It means different things to different organisations and this shouldn't come as a surprise. Target audiences, marketplaces and industries differ, therefore an off the shelf CRM solution will be of limited use.

Your CRM system must support those attributes and processes that are important to both your customer and your company otherwise you run the risk of a) your team not using it or b) the outputs simply not adding the value you envisaged.

With Intact iQ CRM we configure your system to work for you.

We will work with you to customise your CRM data entry screens to support your CRM strategy ensuring information is collected & maintained in a professional and usable manner. This will result in more effective customer engagement and sales/marketing campaigns.

The Big Picture

The Intact iQ CRM tool allows you and your team to record and track all correspondence with your current or prospective customers, whether that be via email, telephone, SMS or via face to face meetings.

As this module fully integrates with your Intact iQ system you and your staff will then have a complete and fully up to date view of your customers/leads/prospects interactions, transaction history, contact details etc.

Marketing Campaign Management

The Campaign Management facility within our CRM tool will allow you to track, manage, and monitor all marketing efforts for direct mail, telemarketing, print publications, customer service, point of sale, email, and the Web.

You will easily be able to set up and manage multichannel campaigns for leads, prospects and customers, while providing feedback statistics to measure performance and to pinpoint problems or spot new opportunities.

Effective Sales Pipeline Management

The Intact iQ CRM module facilitates management of your customers, leads (an unqualified contact or company that may be a prospect for your products and/or services) and finally your prospects (a qualified lead who is a potential customer and meets your specified criteria).

Looking at your sales pipeline in this way enables you and your sales/marketing team to get a comprehensive view of your current pipeline, orders, potential revenue and other KPIs (such as lead status, quotations sent etc.).

Never Miss an Opportunity Again

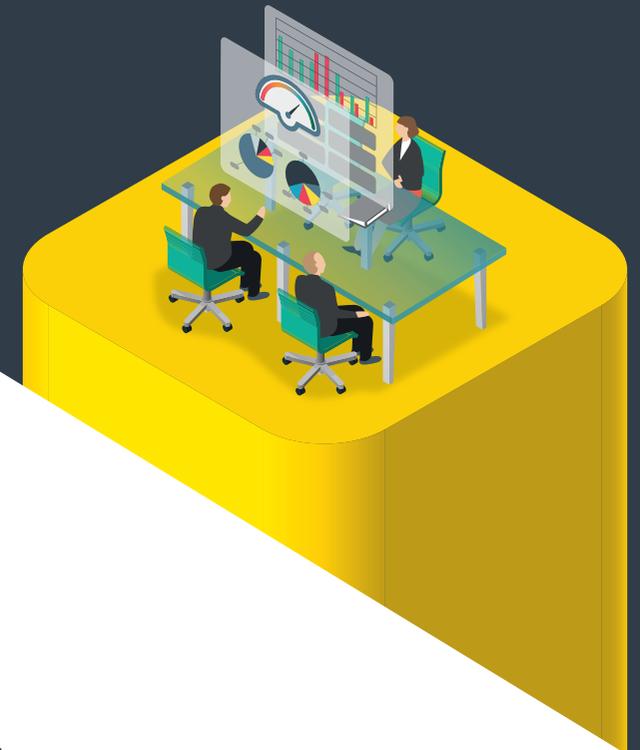
Ensure valuable sales leads are always followed up. You can set up customised workflows to ensure leads are nurtured according to the criteria set by you.

The system can automatically notify sales reps or management with key details and provide a detailed workflow to ensure that no more leads fall through the cracks.

Research and Analysis Tool

Exceed customer expectations with a true insight into what really matters to them. A deeper understanding of customers' needs enables you to maximise all opportunities to up-sell and cross-sell. Your Intact iQ CRM system will allow your staff to quickly access a customer's historical transactions, identify their needs and recommend additional products or services to match their profile.

It will also help you build effective marketing communications specifically aimed at customers' needs, as well as providing you with the insights to adapt your products/ services to drive increased customer satisfaction.



Key Features

1. Outlook Integration

Continue to run your e-mail and contacts through Outlook with auto-sync recording all outbound and inbound Outlook interactions in your Intact iQ CRM hub. Intact iQ interactions against that customer can also be displayed in your Outlook panel; configured to your bespoke requirements.

2. Workflows

Configure user workflows to set up alerts & reminders to trigger literature fulfilment, follow-up appointments, call-backs, daily tasks etc. bespoke to your customer interactions.

3. Targeted Marketing Campaigns

Facilitate instant communication to customers using templates that can be edited for each specific interaction and integrated with third party providers such as MailChimp. Campaign results sync back to Intact iQ on a contact by contact basis to provide a consistent 360 degree view of your customers.

Set up and manage static or dynamic marketing lists based on your pre-defined conditions to help initiate marketing campaigns in a swift, efficient manner.

4. Sales Rep Management

Who is doing what? Easily analyse your sales team to determine the benchmarks required for success. Use the interaction report at a macro level to view trends; then filter down to the degree you wish to compare periods, orders, activity type, frequency etc.

5. Sales Pipeline Management

Easily convert your leads to prospects. At prospect level issue quotes and assign ranking status to your prospects in line with your specified criteria. This will help you define and manage your sales funnel.

6. Lead Nurturing

Track leads from first contact to ultimate sale. Customise your

lead entry and management system according to your business processes to enable you to make certain entry fields mandatory, initiate marketing campaigns assigned to lead stages, capture bespoke information etc.

7. Reporting

As the Intact iQ CRM module is fully integrated it provides a powerful analytic and reporting tool that is hard to replicate in stand-alone systems. Access a range of reports that will help you to forecast future trends and opportunities, plan campaigns and monitor their effectiveness.

8. Centralised Interactions

Capture & track every interaction with every customer, lead, prospect or supplier regardless of the touch point or channel of communication.

Use the power of Intact iQ CRM to achieve the maximum ROI on your marketing efforts, capitalise fully on sales lead and prospect opportunities and cultivate on-going, lifetime relationships with your established customers.

For more information, please contact us at
info@intactsoftware.com

intactsoftware.com

