



Customer Management System



Overview

Pull all your data into one place to organise your business and get efficient.

You'll gain a 360° view of all customer activities to meet and exceed expectations and empower your clients with online access to incidents, invoices, emails and more. Go from assumptions to fact-based decision making, with accurate reporting on key performance areas. And have it all accessible on your smartphone while on the go.



If you can't easily measure business performance and track the metrics that matter, you're flying blind. Not good. Get customised dashboards loaded with the operational benchmarks and key performance indicators you need to bring clarity and actionable intelligence to your operations.

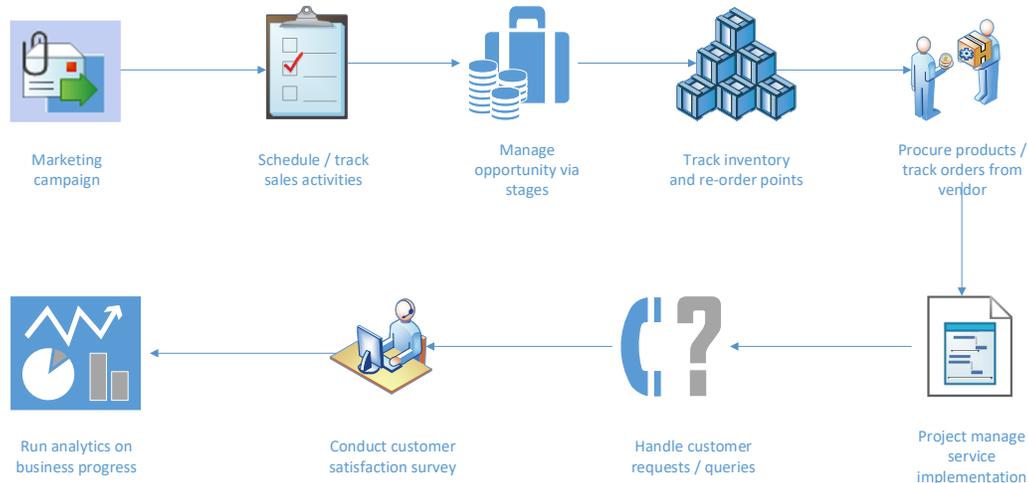
Quote, sell, manage your contracts and track time & expenses seamlessly. All in one completely integrated system with one-step approve and post output to accounting.

Put your operations on track, get projects queued up and completed on time and manage resources effectively. With a Customer Management System you'll lose redundancy and inefficiency and gain employee accountability, and increase revenue. Don't miss a billing opportunity ever again!



Customer Management System

Manage all Customer Interactions



MARKETING

Capture potential new customers from your website or from marketing events and run email campaigns to generate appeal. Filter leads by interest and convert to contacts for potential opportunities. Continue marketing to leads still undecided.

SALES / OPORTUNITY MANAGEMENT

Track sales activities by creating to-do lists and schedule appointments and follow ups. Identify opportunities, forecast potential revenue and monitor progress through the sales stages. Send quotes to clients for approval and generate Sales order / invoices when are deals won. Gain valuable sales insight on where best to invest your time and energy.

INVENTORY MANAGEMENT / PROCUREMENT

As sales orders are generated, monitor inventory levels of stock and establish re-order points. Create Purchase Orders to purchase new stock from vendors and track shipping progress and customs clearance as required.

SERVICE DELIVERY

Project manage service implementation by identifying and assigning specific task with set timeframes and milestones for deliverables. Monitor task to completion.

Ensure customer satisfaction by following up with clients in a timely manner. Speed up resolution by creating a knowledge based of frequently arising issues and queries. Periodically run customer surveys to establish satisfaction and uncover any underlying grievances or potential opportunities.

RUN ANALYTICS

Run reports on each business segment for an overview of customer related activities and to draw conclusions on how to improve or expand your business offering. You can also generate reports based on desired criteria by using filters to examine performance of teams, individuals or products.

EXECUTIVE DASHBOARDS

Use executive dashboards to monitor key performance areas for real time information at your fingertips. Drill down to problems areas to get the facts and turn things around.