EMIR
Electro-Mechanical Information Resource

CRM

The Customer Relationship Management extension, or CRM for short, is designed to give you a total picture of all activity related to improving your customer service and sales and marketing efforts.

The CRM extension has many useful features to help deliver real benefits to your business:

Ultimate Sales Management Tool – Anywhere!

The CRM extension is the ultimate sales management tool and is great for both salespeople and business owners alike, allowing you to manage and measure all aspects of sales activity within your company. Also, as it is web-based, it is available from any device with an Internet connection, so can be used on the run, from home, in the office or just about anywhere! What's more CRM has unrestricted licences and receives and updates EMIR totally live, so there is no duplication of data or effort.

Budgets

You can set annual budgets for Salesman by Customer and even have several sales people with budgets for the same client [if they are selling different products/services to the same client]. Sales revenue and forecast sales can then be seen against budget to measure sales performance via customer, site, department and salesperson. Not only that, you can set budgets for the following year simply by applying a percentage increase on this year's budget – so no need to type it all in again!

Sales Pipeline

Not only are orders and revenue tracked, but all aspects of outstanding quotes and opportunities are too. Such future sales are measured by time-scale and a percentage of probability that they will turn into orders, so the sales person can forecast likely sales and track all opportunities from within the CRM system – giving you a view of the pipeline for your entire organisation.

State of Play

Each salesperson is able to see an instant picture of how they are doing and all the tasks they need to do whether it is producing quotes, following-up existing quotes, arranging meetings, developing opportunities, etc. They can instantly see which order numbers need chasing, which customers are on stop, or how a customer is performing against budget or their credit limit.

Total Management Control

As a manager you will not only be able to see an individual salesperson's progress, but you can also see an overview of how the business is performing by Site, Department and Customer – giving you a 360-degree view of the sales activity of your company. In addition to measuring sales performance in both revenue and order terms, you can also see what activities each salesperson has undertaken – who they have seen, called and emailed, to give you a total picture of completed and required sales activity within your company.

Contact Activity Management

CRM will tell you which customers, or potential customers, need to be contacted and you can add follow-up dates, times and reasons for such activity to ensure every lead is followed-up. You have instant access to search contacts that need to be contacted today or in the near future and you are able to book meetings and send emails via the CRM that are posted automatically into your Outlook or Exchange 'Sent Box' and Calendar. In short, everything a salesperson needs to do can be tracked via the CRM system and can be analysed and reported on!

"The CRM installation was straight forward and the training and support we have received was excellent. [...] I have no doubt that this is going to help us improve our account management process and ultimately have a positive impact on the bottom line. It's also assuring to know that Solutions In I.T. are always on hand to provide support where we need it. They could not have been more accommodating in terms of tailoring their service and product to our particular needs. We really appreciate it."

Mr Dave Marr, Operations Director, Deebridge Electrical Engineers, Aberdeenshire

- The "Key Stats" graphical home page informs your sales staff instantly on how they are performing, both in terms of revenue and order pipeline versus budgets, and summarising the activity needed currently.
- Manage your customer contacts closely and keep track of all activity related to them, ensuring you know exactly how each contact is being managed.
- Track all your quoting activity and ensure you know what stage of the process each quote is at. Measure the effectiveness and productivity of each salesperson in turn and analyse the effectiveness of their efforts.
- Track all key activity by customer and measure your performance in all areas of your business activity relating to customer service. Identify jobs that have stalled, quotes that need to be chased, identify further opportunities for quoting, and follow-up on any comments or complaints that have been made.
- Track revenue generation by salesperson, site, customer and department and ensure you know the depth of your pipeline and conversion rates of opportunities.
- Identify those clients who need attention with an automatic reminder for sales staff when a customer has been inactive for longer than a set pre-defined period or set a period of how frequently you want each customer contacted, regardless of their account activity, and the appropriate salesperson will be prompted to contact them accordingly.
- In short, ensure you are on top of all customer service related issues, keep your customers happy and measure the performance of your sales activity – all in one easy application!