

# Marketing and Sales

With CRM you can manage and analyze the effectiveness of marketing campaigns and events. Your marketers can pinpoint their targets, capture highly qualified leads and perform cost/benefit and return on investment (ROI) analysis on promotional activities. You can use the campaign manager to track the number of leads, opportunities, orders, and costs per campaign. Once you have the lead, the CRM functionality helps manage the entire sales process more effectively, with features such as workflow and forecasting.

Outfitting your sales team with advanced, easy-to-use software is not just smart; it's a matter of survival. CRM is equipped with the tools you need to find more prospects and quickly convert them to satisfied customers. Your sales people can manage the complete prospect-to-customer lifecycle, give accurate revenue forecasts to management and automate many administrative tasks.

The bottom line? Better qualified prospects, shorter sales cycles, reduced lead-time, and more revenue.

## SALES WORKBENCH

Give office-based sales representatives and management a single view of all customer and prospect related information. This view helps you manage your pipeline, marketing, telemarketing, opportunities, orders, returns, service orders, contracts, jobs, calls, and tasks, as well as see all related information on a customer — from one place. A work to-do list also ensures that the sales person is working on the right task at the right time.

## DATA MANAGEMENT

Extract marketing lists based on any criteria such as customer type (i.e., suspect, prospect, customer) and other attributes including standard industrial classification (SIC) code, location, contact type, territory, etc. Automatically create telemarketing or sales follow ups. Automatically log an entry for customers when they are included in a marketing list. Marketing list import allows customer and contact information to be imported from external sources. De-duping capabilities allow the management of imported lists and the tidying up of the marketing database.

## CAMPAIGN MANAGEMENT

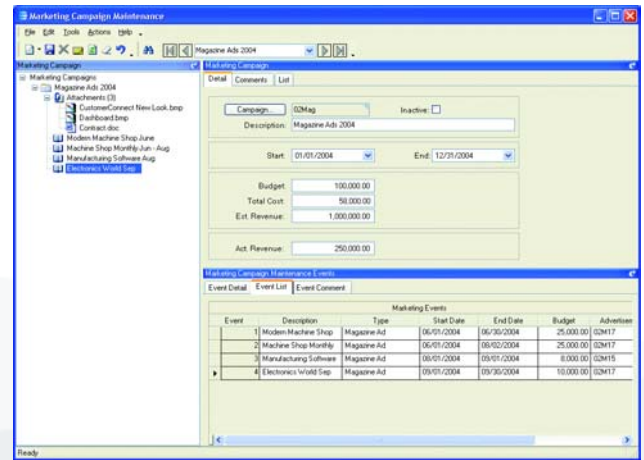
Generate and manage a marketing campaign for tracking effectiveness and ROI of marketing programs or individual events.

## LEAD MANAGEMENT

Manage incoming leads and assign to territory sales representatives. Track lead sources to identify successful advertising, events or other campaign tactics. Analyze return on investment of lead generation activities. Easily convert a lead into a quote/opportunity with Quote Management.

## SALES MANAGEMENT

Manage the sales team through a user-defined sales structure, pipeline management and quota management. Automate key



Track and measure the return on investment of marketing programs.

sales management functions such as territory management and region assignment of individual prospects.

## OPPORTUNITY DEVELOPMENT

Improve sales efficiency with structured sales processes, freeing up sales staff from administrative tasks. From account executive to engineer, identify all roles within the sales process and establish an action plan for each.

## QUOTATIONS

Create real-time quotations using engineering cost structures from existing products, same-as-except products and new products. Manage quotation changes and re-quote opportunities within the same opportunity.

## FORECASTING

Manage forecasts by opportunity probability, category and territory. Analyze sales quota and forecast at each level of the sales team.

## PERFORMANCE ANALYSIS

Manage sales teams by analyzing performance at each level of the sales structure, from the region level down to the representative level.

## SALES WORKFLOW

Monitor every stage of the sales process, including parallel processes. Built-in workflow facilities ensure nothing is overlooked.

## CONVERT QUOTES TO ORDERS

Easily convert an entire quotation to a sales order in one step.

## WIN/LOSS

Analyze win/loss information by sales region, representative, opportunity category, or other criteria.