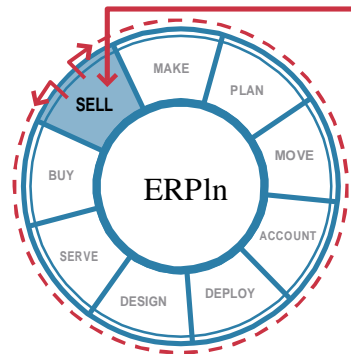
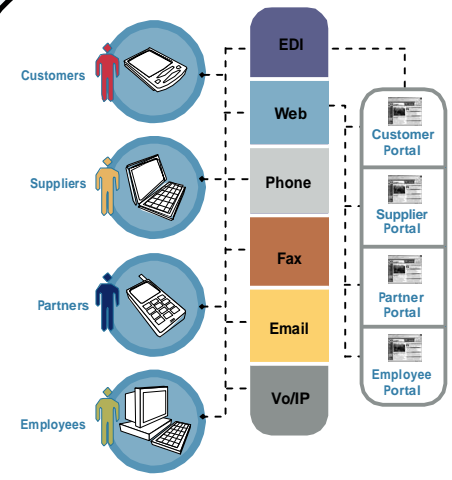
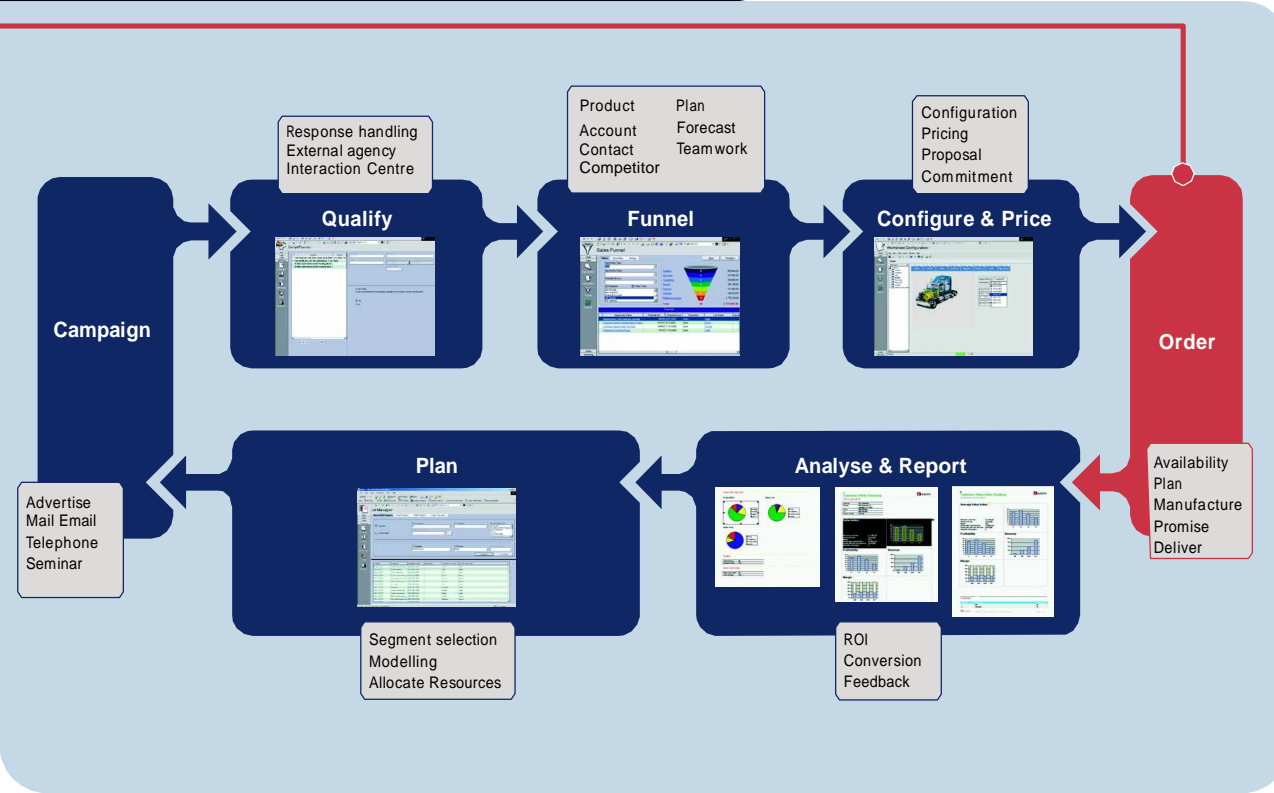


# ERPIn for CRM: Closed Loop Direct Sales and Marketing



## Closed-loop Direct Sales and Marketing Process



### Enterprise Integration

ERP integration with Sales and Marketing systems extends the value of all systems by focusing on further cost reduction in order processing and validation processes.

The Sales Order defines the integration point between sales/marketing and the back office. A sales order identifies the products and services sold, but in order to fulfil a sales order, additional data like shipping and billing information needs to be added. This information may be collected by the sales system or added to the order as it is passed into the ERP system. The ERP system controls information regarding fulfilment of the order, for example whether the goods sold are currently in stock or when they are scheduled for production, when they can be delivered, etc. Often, it is important to obtain this information before the order is actually placed. Thus, the integrated approach delivers significant improvement in the order process.

- Standard integrations to ERPIn includes:
- Synchronization of Customer information
  - Synchronization of Sales Quotes
  - Sales Quote to Order Conversion
  - Sales Order Updates
  - Administration
  - Standard Item (Product) Downloads
  - Domain Table Downloads
  - ATP
  - Error Handling

### ERPIn for CRM: Direct Sales and Marketing

Direct sales teams carry the responsibility for achievement of sales objectives and enhancing customer relationships. Rising sales costs, growing business complexity, new sales channels, corporate restructuring and globalisation of markets can overwhelm and marginalise the field sales person's role, with disastrous consequences for sales performance and planning.

At the same time, marketing departments are charged with filling the sales funnel with highly qualified leads as well as meeting existing customer demands with personalised interaction experiences. This leads to a confusing mix of marketing programs, campaigns and events targeting a variety of clients and prospects. The overarching theme is that sales and marketing must work together to streamline operations, meet customer demands, and deliver feedback back into the process for improvement in the next interaction cycle.

The closed-loop direct sales and marketing cycle doesn't simply start with a marketing campaign and end with an order. In the closed-loop process, customer and order information is fed back into the loop for use in planning more successful campaigns. To be effective, this process requires information from many systems. For example, marketing, sales, order management, fulfilment, service, support, and financial systems all contain relevant information when analysing customers and their needs. Separate information systems that deliver web store-fronts, or automate contact management or direct marketing campaigns often fail to deliver measurable returns or support real improvements in customer relationships and fail to provide improved management information because they don't address the entire cycle. It is imperative that these systems actually work together throughout the process.

Ensuring that your customer facing organisations like sales and marketing work efficiently and effectively is as important for your business as it is your customers. Many of the benefits that the closed-loop sales and marketing process brings to your organisation also translate into benefits for your customers. With targeted marketing campaigns based on careful analysis of the customer profile, as well as their wants and needs, you can be sure that only those customers who are likely to be interested are included. That means your marketing money is well spent, and your customers aren't annoyed with unwanted or inappropriate offers. Arming your direct sales representatives with the tools and information they need to quickly address customer inquiries with accurate quotes and proposals translates to reductions in response time as well as rework. In the end, that means increased satisfaction for your sales and marketing teams as well as your customers.

## Products

### ERPIn for CRM Direct Sales & Marketing

ERPIn for CRM Direct Sales and Marketing applications provide overlapping functionality throughout the closed loop direct sales and marketing process, enabling sales organisations to maximise sales and marketing performance through multiple selling channels while enhancing customer relationships and reducing operational cost. ERPIn for CRM includes a variety of sales and marketing automation products that work together or on their own to meet your company's CRM needs.

This puts the right information in front of the right people at the right time is what really sets this solution apart from the competition. From marketing campaign design, lead generation, opportunity management, sales configuration and quote generation to finally closing the deal, and analysing the results, robust functionality that couples customer information with relevant product and pricing data ties together all aspects of the deal and supports the entire direct sales and marketing cycle.

### MarketingPlus

Maximise ROI by cutting down on labour intensive activities, effectively developing personalised relationships, turning qualified inquiries into sales leads and tracking and analysing campaigns.

**Applies to the steps in the above process:**

- Plan - identify campaign objectives and timeframes, identify program types, manage and maintain prospect lists
- Campaign - define campaigns and programs, prepare and execute scripts, identify and assign tasks
- Qualify - execute campaigns, identify prospect interest, pass qualified prospects to SalesPlus as opportunities
- Analyse and Report - define campaign metrics, review results, adjust campaigns for optimal performance

**MarketingPlus Features:**

- Prospect list management
- Campaign design, management and execution
- Event registration, planning and tracking
- Dynamic call script development and execution
- Organise marketing activity workflow
- Assign and manage teams marketing teams and track task completion
- Customise and track special offers & promotions
- Campaign budgeting, metric definitions and tracking

### SalesPlus

SalesPlus helps sales representatives manage every aspect of every sales opportunity. It automates the quoting and pricing process, streamlining the administrative details of preparing customised letters and proposals. It also manages key account relationships and provides easy access to product literature, fact sheets, presentations and competitive intelligence - essentially everything a sales rep needs to turn qualified marketing leads into real sales orders.

**Applies to the steps in the above process:**

- Qualify - define opportunity details, manage contact relationships
- Funnel - move opportunities through funnel phases based on actionable steps
- Configure and Price - identify products for opportunity, create quotes and proposals
- Order - closed deal becomes a sales order - integration with ERP for order processing
- Analyse and Report - identify opportunity metrics, review results, adjust sales teams & goals for optimal performance

**SalesPlus Features:**

- Opportunity Management
- Sales funnel & forecasting
- Automated quoting, including complex pricing
- Automated proposal generation
- Create, assign and track tasks and appointments
- Patented remote synchronisation technology keeps remote users up to date

### ConfigurationPlus

Sales people are constantly challenged to meet the prioritised needs of their customers, balanced against their own products' capabilities and options. With ConfigurationPlus, the sales representative is automatically guided to the products and options that best meet their customer's needs while only valid combinations are selected. The sales person doesn't have to face a "trial and error" approach to designing an optimal solution for even the most complex problem.

**Applies to the steps in the above process:**

- Configure and Price - automate dependency checking and price calculations for complex scenarios - ties to create quotes and proposals in SalesPlus
- Order - create list of order items - for complex products a single product may contain multiple sub-products on an order

**ConfigurationPlus Features:**

- Guaranteed 100% configuration accuracy
- Define "boundaries" of product options at any time based on any product characteristics (size, weight, speed, delivery time, price, etc)
- Optimise a solution based on product characteristics at the touch of a button
- Automatically prompt for alternatives when selection is not available
- Select standard options at the touch of a button - without invalidating with any pre-selected features
- Status of the solution at a glance

### DBSync

One of the issues facing field sales organisations is access to critical corporate information at the time of interaction with the customer. When your sales representatives are face to face with the customer, they don't always have access to the corporate server. Web based tools require the user to be tethered to the network, but DBSync enables field users to operate on a stand-alone basis with updated information. Patented ERPIn for CRM DBSync technology automatically downloads the newest leads, customer data, account updates, product and pricing information to a remote laptop when its connected to the network, so the information is still available to the user when they're working without a network connection.

With DBSync, field personnel know that the information they receive is the latest and not something that has been extracted and stored some time in advance. It gives your sales team the ability to do business anywhere, anytime and DBSync is the only solution of its kind that scales to thousands of users.

### SalesPoint

ERPIn SalesPoint is a web-based selling tool that automates the process of creating personalised and accurate quotes and proposals, including tools that ease the challenge of complex product pricing and configuration scenarios. It is designed to increase sales efficiency by automating administrative tasks for the sales representative. It also helps increase revenue through accurate product configuration and pricing, which eliminates errors and it helps to improve market penetration through generation of a uniform product message that can be used across multiple sales channels.

**Applies to the steps in the above process:**

- Configure and Price - search product catalogue, select and configure items, automatically generate a quote with personalised pricing
- Order - confirm a quote, move status to ordered

**SalesPoint Features:**

- Customer Account Management including relationships between companies, contacts, addresses and quotes
- Product Catalogue including detailed product information and hierarchical product groupings
- Automated quoting and pricing based on customer and product attributes
- Complex product configuration made easy
- Automated Document Generation for personalized proposals, product information, sales literature, company information, etc.

### E-Sales

Business customers want a fast, safe, professional experience when they buy. They can choose from numerous suppliers and multiple channels both online and offline. Their choice depends on how easy it is to get what they want, when they want it, at the price they want to pay. With E-Sales, your company's ability to meet those customer expectations can be a key differentiator.

E-Sales uses the Internet to help speed up the order-to-delivery process, improve customer service and reduce sales costs. Customers get 24x7 access to negotiated pricing, inventory availability, accurate order estimates, order placement and tracking. You get a 24x7 channel to your business customers and a dramatically improved order entry process.

**Applies to the steps in the above process:**

- Configure and Price - browse product catalogue, select and configure items
- Order - confirm order, make payment, check order status, track delivery
- Reporting & Analysis - purchase history, account balances, payment histories

**E-Sales Features:**

- Product Catalogue including pricing
- Shopping Basket
- Credit Card transactions
- Order status
- Delivery tracking



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