

This document was designed to help identify the business areas where you can achieve the highest return on your investment (ROI) in ACCPAC CRM® and demonstrates how the features of CRM can add value to the customer-facing areas of your business.

Customer Care ROI

Central Repository of Information	
Enterprise-Wide Access	<ul style="list-style-type: none"> ▪ Increase accuracy and consistency of information by having all employees access the same data
Consistent Information	<ul style="list-style-type: none"> ▪ Create customer loyalty by providing reliable service
Accurate Information	<ul style="list-style-type: none"> ▪ Provide the correct answer the first time, thereby reducing redundant phone calls and e-mails
Shared Resources	<ul style="list-style-type: none"> ▪ Create internal confidence and positive attitude in the workplace ▪ Resources are available and within reach
Document Library	
Knowledge Management	<ul style="list-style-type: none"> ▪ Give employees/customers access to the same information, including white papers, quotes, manuals, collateral, etc.
Easy-to-Use Features	
Search Engines, Hyperlinks, Scheduling, Team Collaboration, Quick Access to Multiple Addresses and Contacts	<ul style="list-style-type: none"> ▪ Reduce employees' interaction time with customers ▪ Allow more time for improving customer satisfaction, building loyalty and good internal morale ▪ Speed up responses to customer issues ▪ Ensure customer issues are handled by the right people
QuickLook Tab	<ul style="list-style-type: none"> ▪ View communications, cases and opportunities with contact and company information ▪ Enable employees to act on issues and resolve problems themselves
Call Center Efficiency	
Improved Customer Service	<ul style="list-style-type: none"> ▪ CRM provides all the resources necessary to handle customer issues quickly and correctly the first time <p>CRM helps increase:</p> <ul style="list-style-type: none"> ▪ Percentage of calls resolved the first time ▪ Phone calls per employee ▪ Automated Call Distribution (ACD) calls answered ▪ Customer loyalty ▪ Staff attendance <p>CRM helps reduce:</p> <ul style="list-style-type: none"> ▪ Total ACD calls ▪ Redundant calls ▪ Interaction times ▪ Escalations ▪ Hold times ▪ Abandon rates ▪ Average time-to-answer ▪ Orders entered incorrectly
Other Improvements	
Increased Efficiency	<ul style="list-style-type: none"> ▪ CRM frees up more time to invest in proactive "outbound" calling, assure follow-through of customer care issues and learn through staff interaction

Marketing ROI

Structured Campaign Management	
Real-Time Analysis Tools	<ul style="list-style-type: none"> ▪ Identify outstanding issues quickly with real-time reporting features ▪ Cancel or accelerate campaigns according to their performance ▪ Save lists and campaigns for future use ▪ Automate cancellation of poor-performing campaigns
Campaign Detail Retention	<ul style="list-style-type: none"> ▪ Mirror successful campaigns without redundant data entry
Easy-To-Use Features	<ul style="list-style-type: none"> ▪ Allow anyone to design and evaluate campaigns effectively ▪ No additional staff or training required
Lead Generation and Distribution	
Automated Processes	<ul style="list-style-type: none"> ▪ Reduce human errors ▪ Make sure the right people get the information they need immediately
Tracking and Status/Stage Reports	<ul style="list-style-type: none"> ▪ Evaluate lead status ▪ Ensure company invests in opportunities most likely to close
Rapid Response by Organization	<ul style="list-style-type: none"> ▪ Create customer loyalty by addressing customer needs instantly
Consistency Throughout Organization	
Enterprise-Wide Access	<ul style="list-style-type: none"> ▪ Everyone has access to the documents in the central library
Date and Time Stamp	<ul style="list-style-type: none"> ▪ Track communications in customer files by campaign
Authorized Access	<ul style="list-style-type: none"> ▪ Allow approved customers access to documents
Reducing Collateral Time to Approval, Print and Web Posting	
Central Repository for Collateral	<ul style="list-style-type: none"> ▪ Prevent collateral loss ▪ Avoid using e-mail to transfer documents for approval ▪ Prevent document transfer delays and lost e-mails
Authorized Access	<ul style="list-style-type: none"> ▪ Allow approved outsource companies access to documents and use of the central library
Alerts and Reminders	<ul style="list-style-type: none"> ▪ Alert users when approval is required ▪ Remind users about project due dates
Web Self-Service	<ul style="list-style-type: none"> ▪ Enable internal and external users to finish projects in a timely fashion ▪ Avoid additional costs for last-minute print runs ▪ Guarantee consistency and accuracy by working off the original document ▪ Reduce time to approve collateral and other documents

Sales Force Automation ROI

Lead Distribution	
Automated Distribution	<ul style="list-style-type: none"> ▪ Fast response times regardless of the channel that initially acquired the lead
Alerts and Reminders	<ul style="list-style-type: none"> ▪ Ensure leads do not fall through the cracks
Real-time Analysis Tools	<ul style="list-style-type: none"> ▪ Produce up-to-date sales status and stage information
Information Acquisition at Lead Status	<ul style="list-style-type: none"> ▪ Acquire detailed customer, product and competitive information ▪ Make sure the right people handle the right leads
Organized Sales Cycle	
Escalation Management	<ul style="list-style-type: none"> ▪ Ensure sales prospects are dealing with the appropriate person at each stage of the sales cycle
Opportunity Tracking	<ul style="list-style-type: none"> ▪ Enable employees to address new issues as they arise ▪ Access to details at every stage ▪ Reduce requests for redundant customer information
Client Ownership	<ul style="list-style-type: none"> ▪ Follow leads all the way from prospect to after-sales care ▪ Ensure clients always feel their needs are looked after, every step of the way
Real-time Graphical Analysis and Reporting	<ul style="list-style-type: none"> ▪ Access real-time data for strategic analysis and decision-making ▪ Create customized reports based on user-selected data for better, more relevant evaluations
Reduced Administration and Redundancy	<ul style="list-style-type: none"> ▪ Shorten sales cycles ▪ Allow more time to focus on the deals most likely to close
Internal Evaluation and Training Needs Assessment	
Sales Cycle Analysis Tools	<ul style="list-style-type: none"> ▪ Analyze leads generated by territory ▪ Evaluate the percentage of deals closing at each stage of the sales cycle ▪ Identify employee strengths and weaknesses ▪ Evaluate sales follow-through effectiveness