



Ignia

Microsoft
GOLD CERTIFIED
Partner

Business Guide Series

CRM Business Guide

The business guide series covers solutions commonly used in Perth to increase business efficiency, maximize profits and to take complete control of information and processes.

Ignia supports Perth business people by explaining technology in clear non-technical language. Additionally, we seek to establish the business value of any technology that is of interest to many business people.

Our business guide series covers:

- **Microsoft CRM**
 - Managing Sales & Marketing
 - Reporting on sales activity
 - Gaining control of the client relationship
- **Microsoft SharePoint**
 - Creating Intranet solutions
 - Managing Documents
 - Version Control
 - Workflow for Approval/Feedback
 - Managing Policy & Procedure
- **Sitecore Web Content Management**
 - Creating dynamic engaging websites
 - Creating Customer Portals
 - eCommerce systems
 - Easily edit and update websites
- **K2 Business Process Engine**
 - Using workflow to automate business
 - Capturing business processes
 - Supporting busy staff
 - Increasing work capacity

Please feel free to contact us for further information and to discuss any specific questions or requirements that you may have.

Microsoft CRM 4.0

Introduction

There are a number of commonly asked questions regarding Microsoft Customer Relationship Manager Version 4.0.

The first question is typically, “What is it?” and the answer is very simple. Microsoft CRM empowers sales teams with a quality business system that supports the sales and marketing process, also supporting management with detailed reports on sales performance.

The business also gains ownership of the customer relationship rather than this being controlled and owned by specific sales individuals.

Microsoft CRM facilitates information sharing and increases visibility, enabling the sales manager and their sales team to support each other with quality information in the form of emails, notes, appointments and scheduled tasks. All of these powerful features bring structured to otherwise unstructured and unformatted communications.

One of the strongest features of Microsoft CRM is that it integrates with Microsoft Outlook, so users work in a familiar environment cutting down on training.

With Microsoft CRM the company takes control of the customer relationship and sales process, ensuring that customers receive first class service, driving business success to new heights.



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End to End Scenario

Background

In order to understand the use of CRM within your company it will be easiest to relate to some real world examples.

We begin with creating a marketing campaign, then tracking how effective it was by monitoring the number of leads generated. After this we look at conversion of leads to actual opportunities to supply products and services and finally track win/loss ratios.

Here we see the full lifecycle from marketing through quoting and ultimately to invoicing for products and services.

Let there be leads!

In order to stimulate interest in products and services businesses engage in marketing. But they need to know how effective their marketing dollars are to ensure they are well spent.

Which campaign approaches work best? For each campaign, how many leads did it generate? Are these being followed up effectively by the sales team?

With CRM's campaign management it is a simple process to create accounts and target these with marketing activities, such as mail-outs or telemarketing calls.

Quick campaigns enable you to create a marketing campaign in less than one minute. Simply search for accounts to target, then create a Quick Campaign and you're underway.

Spotting an opportunity

Once a customer who has been contacted through a campaign calls your company they are identified as an opportunity.

The sales team works best when it has quality information coming in from lead generation processes. The more qualified a lead is, the more likely your sales team are to successfully convert it to win business.

Quotations and Orders

Opportunities feed into quotes and CRM uses all the information already entered into the system to automatically create quotes for products and services. This greatly reduces the amount of data input that is required from your operators.

Once quotations have been provided to customers, if all goes well then orders will begin to flow in. Again, CRM can automatically convert a quote into an order, saving time on keying in data.

But what if your company is being undercut by the competition? When sales people follow-up and find that a competitor won the business they can record this information. Now with powerful CRM reports you are able to start forming intelligence about the business your competitors are winning and then fine tune your own approach to increase success.

Invoicing

Microsoft CRM does provide invoicing, but Ignia advises clients to utilise our System Integration capabilities as we are likely to be able to connect CRM with your existing accounts system.



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Where are we?

We've read how Microsoft CRM empowers the sales team with end-to-end support from marketing, through lead tracking and quotation into actual orders and won business.

Furthermore, we have discovered that CRM can help us to track the activity of our competitors, tracking business that they win, allowing us to fine tune our approach.

It also becomes clear that Microsoft CRM has many powerful features, which can be switched off as required to make the system as simple as possible.

Microsoft CRM 101

During our recent market survey, of 180 sales managers contacted less than half understood what Customer Relationship Management systems do. The aim of our CRM Seminars therefore, is to increase understanding, not of the technology, but rather of the business benefits.

We're not interested in how clever the technology is or how it's built, just what it does for management and the sales team, in other words what the business benefits are.

After attending our Microsoft CRM seminar you will understand how CRM is used, how it is designed to empower your business and create greater sales success and how it can help you provide a first-class service to your customers.

We provide an actual Business Case document, which describes to key decision makers what the costs are versus the paybacks.

Ignia's Capabilities

Installation & Training

Ignia were amongst the first companies to provide Microsoft CRM 4.0 for Australian businesses.

Ignia's installation and training services get you up and running within hours of delivery.

Customisation

Most businesses are able to use Microsoft CRM off-the-shelf. But over time as companies become more familiar with the product they often realise that there is great benefit in shaping the product, making it fit their sales process and business model more precisely.

There are occasions where companies decide to shape the product first, and then launch CRM and train staff in one push. The choice is really yours and Ignia will support you in this decision making process.

Ignia is Perth's leading supplier of CRM 4.0 customisation services. Our reference sites can attest to our capabilities whether you need a 5 user Workgroup edition or 100+ user Professional Edition, or somewhere in between.

Integration

CRM systems shouldn't exist in isolation from other business systems such as accountancy packages. Ignia can connect your CRM system to ensure information is exchanged between your accounts system and Microsoft CRM.

Perth Information Seminars

Our CRM Seminars are **free of charge** and run weekly, taking approximately one hour, depending on questions and any specific scenarios that need to be covered.

The agenda for the seminar is as follows:

- 10 minute drinks and nibbles networking and introductions, getting to know delegates and identifying specific needs.
- Discussing CRM, the Business Case. What is the business value of Microsoft CRM? How does the team benefit?
- Licensing models. Workgroup edition for small installations, Professional edition for larger installations, Enterprise edition for large corporations with many integral businesses.
- Microsoft CRM high level demonstration.
- Question and Answer Session.

The seminars are carefully shaped to have general appeal to a wide audience of people interested or involved in the management and operation of sales and marketing processes.

Specific questions can be answered but where necessary preference is given to engaging with delegates in a follow-up meeting to discuss specific needs.

Please contact us directly to reserve your place at the next convenient session.

How to Contact Us

Ignia's Perth Office

The seminars are held at our Perth CBD offices located at:

Ignia Pty Ltd

Level 3, 191 St Georges Terrace
(Parmelia House)
Perth, WA 6000

T: (08) 9365 8400

F: (08) 9322 2003

www.ignia.com.au

Reserving your place

Please contact Chris Nurse, Director and Microsoft CRM presenter by calling our switchboard.

Places are filling fast, so please avoid disappointment by registering as early as possible.

Group bookings

We are accepting group bookings where companies wish to send a number of delegates, however, to increase the convenience for our clients Ignia will also present the seminar at your premises where requested.



