CRM Customer Relationship Management

Meet your customers' needs!

The Proginov ERP CRM (Customer Relationship Management) supports every aspect of your relationship with your customers regardless of the channel. Your sales force or after-sales service can easily and effectively process incoming calls or emails.

// CRM, a key business strategy

Customer relationship management has become one of the main concerns of businesses. Whenever you want to manage, facilitate, streamline or analyse the relationship with your customers or prospects, the Proginov ERP CRM will help you provide a rapid and appropriate response to your customers, regardless of the channel used.

Manage marketing campaigns (targeted customer emailing, behavioural analysis), sales calls (take orders, customer satisfaction surveys, product presentations, etc.), hotlines (track complaints), telesales (call centre management), after-sales (track interventions on-site or in the workshop), for sales administration (track follow-ups) for the quality department (track internal or customer nonconformities). CRM can be used in many ways by office staff and field staff alike.

// From marketing to after-sales service

The Proginov ERP CRM handles incoming contacts whether by telephone, web or email. Thanks to telephony integration, the call can trigger different actions as needed, like opening an order form for the customer, or being automatically directed to a specific contact person.

Indispensable tool for telesales centres or after-sales services, it handles events, interventions and/or actions, from opening to closing. Event-driven messaging in the ERP improves the relationship process through its configurable alert system.

Access to all enterprise resources facilitates teamwork (calendars and meetings, room bookings, equipment reservations, etc.). Users (technicians, operators, sales representatives, etc.) can plan out and view their routes on a map.

The Proginov ERP CRM is the indispensable tool for field staff, who can use it both in the office and in the field to show products or catalogues, view outstanding receivables or enter visit reports.

Not only can the CRM manage incoming contacts, it can also create them. After defining a target based on customer data, sales history, etc., users can generate their own mailing campaigns (text message, mail, email).

CRM at the heart of Proginov ERP

For office staff and field staff

Telephony integration

Advanced customisation

Synchronisation with Outlook®

PROGINOV
business management software

// Much more than a CRM

The fully integrated Proginov ERP CRM is based on the principle of organisational effectiveness. It offers a personalised relationship: personalised emailing, compliance with commercial agreements, volume commitments. Analysis reports (Pareto, custom statistics, etc.) make it a real management tool. Fully configurable (charts, screens, reports, forms, analyses), it adapts to your business applications.

And for total efficiency, field staff can use it in synchronised or unsynchronised mode for continuous activity, regardless of the physical setting, on a tablet, smartphone or laptop.

Wheel diagram segments: Sales, Production, WMS, Retail, Jobs, Mobility, HR, Web, CRM, Finance

Center of wheel: EAI, ETL, BI, Telephony, Workflow, Requester, EDM, Ebics, EDI

TOP FEATURES OF THE CRM

MANAGE THE RELATIONSHIP
- Manage events
- Create, plan and track interventions with actions (single/multiple)
- Event, intervention and action histories
- Link to production management (PO sheets)
- Link to pool management (equipment sheets)
- Integration with job-based management
- Integration with purchases and sales

COMPUTER TELEPHONY INTEGRATION (CTI)

EVENT-DRIVEN MESSAGING (via ERP Workflow module)
- Configurable alert system (customer follow-ups, overdue tasks, etc.)

MOBILITY
- Send actions (customer visits, after-sales interventions) on mobile devices (laptop, smartphone or tablet)
- Enter data in the field (offline) and attach documents (photos/videos, signatures)
- Enter events (customer complaints) via a website (standard CMS)

MANAGE RESOURCES
- Operators, teams, rooms and equipment (customised sheets)
- Operator/team/equipment/room rights and schedules
- Calendars and meeting planning (search for optimum time slot and participant availability)
- Synchronise with Microsoft Outlook® (calendars, contacts)
- View personal calendar and access other calendars
- Export to Microsoft© Excel and print calendars
- List of operator activities by period
- Manage activity requests (resource booking according to availability and release of resources)

CUSTOM STATISTICS
- Call, intervention and action statistics

CUSTOMISABLE DASHBOARD TEMPLATES
AFTER-SALES SERVICE
- Manage customer pool providing statistics on the equipment sold
- Manage and track warranties and extended warranties: replacement or extension, equipment loans during repair, etc.
- Manage maintenance contract with short- and long-term monitoring
- Contract profitability
- Statistics

MANAGE COMMERCIAL AGREEMENTS
- Commercial cooperation and discounts, volume commitments, free item agreements, customer relationship information

COMMERCIAL OPERATIONS
- Customer offers: special offer, free item
- Consumer offers: New promotional tools, discount vouchers, free item agreements, sales drivers (discount, price, gift), etc.

ANALYSIS TOOLS:
- Analyse late deliveries
- Analyse account receivables
- Outstanding receivables
- Manage batches in anomaly (guaranteed time, return on date)

MONITOR THE COMPETITORS

MANAGE AND SEND CUSTOMISED EMAILING

IMPROVED CRM STATISTICAL TOOLS (Pareto / ABC analysis)

CONFIGURE SURVEY FORMS (input in Web mode, on a tablet or PC)

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