



8thManage Client Information:

- Accessible anywhere anytime
- Breadth of coverage
- Depth of coverage
- Customer segmentation & behavioral trending

In today' s climate of economic uncertainty, business opportunities are hard to come by. You need to fully leverage every one. When they come, you want to turn them into revenue. A good client information and contact management system is the first step you can take to make this happen.

8thManage CRM

What is a good "client information and contact management system" , and why it would help?

A good client and contract management system will allow you to confidently and quickly find up-to-date, reliable and useful customer information that will help you identify, track and pursue opportunities, and to efficiently close the deals.

When you uncover a new opportunity, you want to know everything about this prospect; whether they are qualified as a potential client in terms of legal, financial/credit standing, and if they have purchased similar products or services before. If you have won similar deals from this account, why have you won and can you repeat that success; if you had lost, what do you have to do to win this time?

The information must have the breadth to cover the client's organization structure and the roles of their individual employees; the company' s buying behavior; financial/credit information and transaction records. With access to such information, you will understand the benefits, liabilities, obligations and risks involved with the opportunity and you will be in a better position to devise strategies and a game plan to pursue it.

The information must have depth. It should contain contact personal information such as academic qualifications, affiliations, awards, preferences in sports, marital status, birthday, even the number of children and their birthdays in addition to the traditional contact detail. By leveraging such information, the user may launch special personalized email campaigns to target specific audiences. For example, a marketing specialist responsible for launching a new type of computer in the UK may wish to invite C-level managers to attend the event. She could package the launch event with a chance to win 2 tickets to Wimbledon.



Breadth of Coverage:

- Contact Information
- Personal Information
- Client Behavioral Information
- Special Information

With 8thManage CRM embedded BI capability, she can easily search of the contact database using search criteria: Country=UK, Title=CXO, Interest=Tennis. Using this approach, the marketing specialist would motivate UK CXO' s who have an interest in tennis to register for the event.

Breadth of Information Coverage

8thManage CRM provides a very comprehensive repository and retrieval system of client information including:

- General information such as company name, company contact information, interest, account team member(s) assigned to serve the client
- Company organization structure including parent companies and subsidiaries
- Company legal standing and their value as a customer relative to pre-defined valuation parameters
- Company financial and credit status, buying behavior and transaction records such as how quickly a client pays its bills

You can capture, store and retrieve online detailed information of your contacts within client companies including:

- Contact information such as name, address, phone number and email address
- Personal information such as the contact' s skills, academic qualifications, affiliations and awards; family information including spouse' s name, profession, names and ages the children and family members' birthdays
- Personal interests and behavioral information that can be captured, such as seminar topic preferences, magazine preferences, sports preferences, for example. Additional fields can be set up at your discretion
- 8thManage CRM offers the ultimate convenience in client and contact data collection and retrieval, flexibility and ease of use; but - of equal importance - the information is stored securely and access privilege is defined and enforced down to the user level.

Depth of Information Coverage

In additional to client and contact profile information, 8thManage CRM maintains client performance and transaction information automatically. This information is crucial in accessing and understanding the client' s business behavior as well as to formulate strategies to manage the business opportunities on hand. With 8thManage CRM, authorized people can access a specific client' s performance information including:



Depth of Coverage:

- Client Interactions
- Client Opportunities
- Client Contract & Orders
- Revenue Performance
- Client Service Tickets

- Interactions records and action items
- Revenue performance consisting of a complete historical list of invoices and their payment status for individual order or contract
- Opportunities (listing with links to access detail information of current opportunities offered by the respective clients)
- Contract and orders (historical listing and links for contracts and purchase orders from the client)
- Service tickets (listing of historical and current service tickets and their status requested by the client)

Exploring New Opportunities using 8thManage BI

8thManage CRM offers embedded BI technology to easily capture, disseminate and analyze client and contact information. Using 8thManage CRM' s Admin set-up facilities, the user first develops a set of behavioral data fields with an attending list of survey questions. By answering multiple choice questions, survey participants save the information into 8thManage CRM' s behavioral database. Using 8thManage CRM eSurvey capability, the user can then readily set up a website containing easy to use, multi-checkbox web-form that feeds collected data to the behavioral database directly. Using 8thManage CRM' s email campaign capability, the user sends email to a large target audience inviting them to click on a link to access the website and do the survey online. In this way, a custom data acquisition system can be implemented without any software development and the user can start to capture valuable client behavioral data online within hours.

The captured client behavioral data can then be used to general standard analytical reports or queried by the 8thManage CRM search engine to yield custom segmentation reports.

The value of such capability is evident. Using the 8thManage CRM BI system, a user can without fuss and at minimal sales and marketing expense be able to:

- Identify customers for a given product or services
- Identify products or services for a given set of customers
- Identify product or service attributes that are preferred by your customers so that you can optimally build products and services around such attributes

We already have illustrated the use of 8thManage CRM embedded BI capability to identify C-level managers in the UK who are tennis fans as potential product launch attendees; and to generate an email campaign to this specific audience group inviting them to a product launch product and including a chance to win two tickets to Wimbledon.

The concept is simple. Its delivery is automated collectively by technologies within 8thManage CRM. Having the behavioral database in-house and being able to leverage it at your discretion, the potency of your email campaigns will only be limited by your imagination. Better still, the database and the tools are completely under your control; unlike having to entrust your customer contact list to a mail service vendor, you can do your magic in complete privacy at practically no incremental cost.

Summing-up

8thManage Client Information and Contact Management model has the breadth and depth to allow a company to store all its client information in one place. The model is future proof since more fields can be added without coding by the user to cater for the increase in breadth and depth of the business as it grows.

8thManage uses a real-time transaction information model and provides secured access based on roles to ensure that designated people can access up-to-date information securely and quickly.

8thManage BI Value:

- Identify customers for new product
- Identify new offerings for old customers
- Identify new product attributes for different markets

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