



# ***Systems Implementation, Inc.***

## Customer Relationship Management

### Core Component

*"CRM helped us reduce our "over 90 days" past dues from 6-10% of Accounts Receivable to less than 2%."*

*Brent Hathhorn – Commenco*

#### **DEFINE TASKS**

- On the fly
- Cycle Calls
- Pre-defined

#### **ENTER TASK NOTES**

- Select pre-defined actions
- Provide specific instructions and supporting information
- Set task priority codes & deadlines
- Flag accounts with pending tasks and / or notes

#### **MANAGE TASKS**

- View task list online
- Access detailed info with one key-stroke
- Review task status
- Schedule new tasks

#### **AUTOMATE FOLLOW-UP**

- Assign default users to tasks
- Auto-notify assignments by email or message
- Auto-generate tasks based on pre-defined criteria
  - Customer Touch
    - Campaign
    - Service
    - Sales
  - Account Review
  - Preventative Maint.
  - A/R past due
  - A/R over limit
  - Contract Expiration
  - Warranty Expiration

#### **Situation**

Sharing pertinent information about customers and prospects within organizations, and ensuring that assigned tasks are completed is very difficult in today's busy work environment.

The CRM module provides immediate access to information from all areas of the business to ensure that customers receive the right information, at the right time, regardless of their point of contact within the organization. CRM is designed to keep everyone in the loop regarding customer and prospect situations, prevent important details and follow-up actions from falling through the cracks, and can automatically assign tasks designed to save employees time and generate new revenues!

#### **CRM Highlights**

- Integrates seamlessly with other modules
- Provides company-wide customer recognition and access to information
- Improves customer service, satisfaction, and retention
- Increases operational efficiency
- Allows tasks to be created and assigned
  - User-defined task lists / action codes
  - User-defined priority codes
  - Notification to management of tasks not completed by specified date
  - Assign default users to tasks by task type
  - Auto-notify users of assigned tasks by email or message
- Increases revenues and improves control through multiple task types
  - Pre-defined tasks (user-defined)
    - Established by customer then auto-generated by days specified
    - Preventative Maintenance, Account Review, etc.
  - Cycle calls / tasks (auto-generated)
    - A/R past due or over credit limit
    - Customer follow-up (after Service, Sale, etc.)
  - Dynamic tasks / calls created instantly

#### **Contact Us Today!**

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