

Microsoft® Customer Relationship Management

Overview

Microsoft Customer Relationship Management

With Microsoft® CRM, small and medium-sized businesses can make well-informed decisions, improve sales effectiveness, and provide superior customer service, resulting in more profitable customer relationships. Easy to maintain and use, Microsoft CRM is accessible from Microsoft Outlook® and the Web, integrates with other business management systems, and scales as your business grows.



Make informed, agile decisions

Comprehensive reporting tools let you forecast sales, measure business activity and performance, track service success, and identify trends and problems.

Increase sales success

Shorten the sales cycle and improve customer acquisition and retention with workflow rules and opportunity and order management.

Ensure efficient, consistent customer service

A shared knowledgebase and automated routing and queuing make it easy to serve customers efficiently. The Customer Portal ensures 24-hour self service.

Work from Outlook or the Web

Access full sales functionality online or offline through Microsoft Outlook, or work online from any location using a Web Browser.

Use easily

Familiar, intuitive UI and work tools make it easy for your sales team to get started fast, with little training.

Customize and scale easily

Configure forms and interfaces, customize to fit your business, and scale the installation as your business grows.

Integrate powerfully

Integrate with Microsoft Office, Microsoft Great Plains® Business Solutions, and other business and customer-facing systems.

Microsoft CRM is **built from the ground up on Microsoft.NET architecture**, delivering tremendous business value through easy integration with third party applications and Web services.

View and update critical information about activities, workload, and internal news.

Access Microsoft CRM online or offline within Microsoft Outlook.

Manage tasks, appointments, and communications from one location and synchronize with Outlook.

Title	Type	Due Date
Past Due Activities:		
Discuss proposal	Phone Call	5/17/2002
Printer warranty inquiry	Phone Call	5/17/2002
Southwest District Partner Meeting	Appointment	5/17/2002
Activities Due Today:		
Meet with IT Manager	Appointment	5/20/2002
Provide quotes	Task	5/20/2002
Call regarding budget	Phone Call	5/20/2002
Activities Due Tomorrow:		
Onsite meeting with Executive Board	Appointment	5/21/2002
Send brochures	Email	5/21/2002
Faxed image to manufacturer	Fax	5/21/2002

Your Workload:
6 New Cases
4 Cases in progress

Useful Information:
Sales, Marketing and also Technical Training on New Products
Attend sales training this month to learn about our new line of Notebooks, Camcorders, and TVs. Learn selling tips, obtain templates and scripts. Training will be held in Atlanta and NYC offices. To learn more and sign up, click on the link!
More Info: <http://www.sales3training.com>
Quarterly Sales and Marketing Event (QMS)
Mark your calendars to attend the QMS Event coming to your area. The locations and

Quickly access reports, work items, and Sales and Customer Service Modules.

The CRM solution that grows alongside your business

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Microsoft CRM makes it easy for employees to share information across teams and departments, eliminates redundant data entry, and ensures superior sales and customer service support.

Microsoft CRM Features List

Features	Description
Sales	✓ View all contact and account information and history.
• Complete customer view	✓ Forecast sales, identify strong customers, and measure sales performance against employee quotas with customizable reports.
• Reports	✓ Track and manage e-mails, phone conversations, meetings, appointments in one place.
• Activity management	✓ Qualify leads and track opportunities through the sales cycle.
• Opportunity management	✓ Use customizable workflow to automate leads routing, notification, escalation and pipeline management.
• Workflow rules	✓ Manage and update orders with product catalogs, quotes, and invoices.
• Order management	✓ Access full sales functionality online and offline from Outlook.
• Microsoft Outlook synchronization	
Customer Service	✓ Create, update, and manage case histories for support incidents.
• Case management	✓ Track and manage e-mails, follow-up activities, and chat sessions.
• Activity management	✓ Automate routing, queuing and escalation of service requests.
• Workflow	✓ Create and access searchable library of FAQs and KB articles.
• Searchable knowledgebase	✓ Run reports for knowledgebase, performance tracking, and more.
• Reports	✓ Create and automatically update contracts and service level agreements.
• Contracts	✓ Let customers enter service requests, check orders, chat, and search for support articles 24 hours a day via the Web.
• Customer Portal	
Integration	✓ Synchronize with Microsoft Outlook, online and offline.
• Microsoft Office	✓ Use with Microsoft Word and Microsoft Excel: E-mail templates, Mail Merge, and data export.
• Microsoft Great Plains Business Solutions	✓ Integrate with Dynamics™ 7.0, Solomon IV® 5.0, and eEnterprise™ key data: accounts, contacts, products, price lists, orders, contracts, and more.
• Existing business management systems	✓ Integrate with existing business and financial management systems.
• Customer-facing systems	✓ Customer Portal integrates with a customer-facing Web site.
	✓ Microsoft CRM Sales and Customer Service modules integrate.

Microsoft Customer Relationship Management is designed to meet budget and support needs for small and medium-sized businesses. Delivery and implementation through highly-trained Microsoft QIEM Partners include hands-on assistance with the setup and maintenance process, as well as 24-hour access to Microsoft Technical Support Services.

For more information about Microsoft Customer Relationship Management, go to:

www.qiem.com