



Contact Management

Valuing Your Crown Jewels



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Thank you. Please enjoy the show

Customer Contact Management (CCM)

Managing and leveraging your crown jewels



Customers are your crown jewels. You spent tons of time and money winning them. Are you leveraging the investment?

If your customers are only stored on business cards, recorded in a note book, on scraps of paper, or worse still, exist only in your head, then you do not have a real CCM base.

If you have a customer database, but have not shared it with, and trained your people to use it effectively, then you do not have a CCM system.

If you're not conducting regular aggressive e-marketing, centrally and locally, you're not maximizing the effectiveness of CCM.

Customer Contact Management (CCM)

First we need to established the CCM status of your business:



- Which business management software (if any) do you use? Examples are SAP, Oracle etc
- Are you using, or do you intend to distribute the CCM module of your business software to sales/service personnel?
- Do you have or intend to buy CCM software such as: ACT, Goldmine, MS Outlook etc.
- What are your goals related to CCM?
 - Decide which CCM software to buy?
 - Focus on who should use CCM software?
 - Focus on how your teams use CCM software?
 - Focus on data (contact) gathering?
 - Focus on data-mining* (electronic marketing)
 - Your goals and objectives are...

Software Options for CCM

A few of the many packages out there



Goldmine is a market leader offering multiple, integrated software packages. If you do not have business software in place (such as SAP, Oracle etc.) Goldmine is a worthy consideration. The CCM module is complicated and we think not too user friendly, but works very well.



ACT! is a powerful, easy to use, stand alone CCM package. It stores data for thousands of contacts. Provides fields and sophisticated tools that enable you to sort contacts into groups for easy, fast retrieval. Virtually unlimited opportunity to store personal data, notes, tasks, reminders and action items.



MS Outlook

Outlook™ is part of Microsoft™ Office Suite. You might be using it, or the express version for e-mail. Doesn't offer some of the more sophisticated features of the above programs, but works well for CCM. An advantage is, if you are using MS Office. Outlook is 'free' and 'talks' seamlessly to other Microsoft products.

We studied multiple software packages and decided to use ACT! You have to decide what is right for you. There are many options. All do the job, the above do the job very well.

CCM software...

Multi-tasking



- ❖ **Contact data** - Instantly access thousands of names, phone, fax and e-mail addresses
- ❖ **Time management** - Reminders, alerts and a complete view of past, present and future schedules
- ❖ **E-Marketing** - Automate single or mass mailings by easily generating targeted, email, letters and faxes from a central location or locally - And track results!
- ❖ **Prospect tracking** - Immediate access to all potential business. Track products, prospects, revenue potential, and closing dates in real time
- ❖ **Team-based collaboration** - Product, pricing, trends, competitor or customer information networked and shared with the whole team

CCM software...

Multi-tasking (continued)



- ❖ **Reporting** - Instant reporting and sharing of group or individual actions and results in real time
- ❖ **Forecasting** - Analyze and sort prospects by product or probability. See and graph weekly, monthly, quarterly and yearly quotas. Compare to actual results
- ❖ **Synchronize** - Share individual situations up or down stream. Synchronize Individual CCM databases to become a master, centralized database
- ❖ **Strategy** – Advise all team members with latest leads, delivery situations, competitive news, marketing initiatives etc. Share strategic actions that are delivering the results you need

CCM software

The Power ...



- ❖ **Need to know** - You simply cannot know too much about customers. Name, address and phone number is NOT enough. **Your competitors probably know that also**
- ❖ **Capture everything** - You need to know about customers and vendors in one place. Record not just contact data, but other vitally important information that will enable you sell more, and delight your customers
- ❖ **Track** – What you did or said and when you said it. Record actions and to do's by contact and by date/time
- ❖ **Automatically** - Dial your phone. Send fax and e-mail marketing pieces to one or thousands of potential customers for free. Search functions allow you to instantly find a single contact or group of contacts

CCM software

The Power (continued)



- ❖ **Know** - What they purchased last, what they paid and how. Know what they are likely to buy next and when
- ❖ **Selling** - Is the numbers game. The more you spin the more you win. A powerful, well managed CCM system put's you in control. You will become proactive rather than reactive
- ❖ **Serve customers** – Better. Not just please them, delight them and you will make more money in the process
- ❖ **Bottom line learn** – How to gather, store, manage and leverage customer information that will give you an edge

CCM data...

Keep it safe



- ❖ **Valuable asset** – Never roll the dice on this one. We reiterate customers are your “crown jewels.” Customer databases are frequently considered to be a business's largest single asset
- ❖ **Amazon.com** - Sell books (and lots of other stuff) They own/lease bricks and mortar, desks, computers, filing cabinets and other business ticky tacky. They have substantial inventories and other hard assets
- ❖ **What values** - Amazon in the \$billions?
- ❖ **Customer information** - Not just names and numbers but history, preferences and look-ahead buying habits

CCM data...

Keep it safe (continued)



- ❖ **Nobody gets it all** - Accept maybe your chairperson, CEO or executive that we know, trust and is here for the long term
- ❖ **All need to know something** - Everybody doesn't need to know everything
- ❖ **Decide who** - Contributes information, when and how they do it
- ❖ **Figure out** - Who needs to know what, and when/how they get that information
- ❖ **Protect** – Your crown jewels. We will show you how