

Enterprise SalesMaker

Customer Relationship Management Solutions for the Progressive Enterprise

Software Innovation offers a full suite of customer relationship management applications. Our CRM solutions enable enterprises to leverage the power inherent in their business channels to create an environment for effective and productive customer relations.

What is Customer Relationship Management? Customer Relationship Management or 'CRM' is the integration of people, business processes and relevant technology to enhance relationships with customers across the enterprise. CRM represents an opportunity to radically improve the way an enterprise interacts with its customers, partners and other organizations in its extended value chain. The net result is improved corporate performance through increased efficiency, effectiveness and communication. A CRM-enabled enterprise is better prepared to cope with competition, can deliver superior service levels to its customers and can adapt to changing market conditions with increased agility.

How can an Enterprise SalesMaker empower an organization?

An integrated CRM solution like Enterprise SalesMaker enables customer-facing staff to realize increased productivity and profitability. The solution accomplishes this through the acceleration of business processes and through improvements to the speed and quality of information exchanges. ESM connects everyone in the enterprise value chain so that the right people are talking to the right customers at the right time.

What differentiates Enterprise SalesMaker from other CRM solutions?

Configuration without Customization
The unique system design of ESM allows every customer to embed distinctive business processes and best practices in the solution. Rather than requiring time-consuming and expensive customization and custom programming, ESM can simply be configured to meet most requirements. This translates into a lower total cost of ownership and a more rapid implementation for the customer.

A truly open architecture

When it comes to integration, ESM's open architecture makes it easy for Software Innovation to help you exchange your information with other systems. One SI client

Enterprise SalesMaker provides flexible and powerful CRM functionality so you can manage customer information & relationships across the enterprise

has their CRM system integrated to over 40 other production systems, including 'legacy' and mainframe systems, across the enterprise. ESM's data model and solution architecture are designed from the ground up to be flexible and integration-friendly.

Flexible and modular design

Rather than forcing customers to select different types of 'seats' for each user or department, ESM provides all core functionality to all users, allowing system administrators to define the module access and permission levels available to each user group. Importantly, each functional category links directly into another so that your users may quickly search for information by topic, account, or category, examining the data in ESM (and then saving the examination process as a "favorite") in the way that makes the most sense for each user. The unique Project Module functionality in ESM is of particular use in grouping information, processes people across multiple departments of geographies.

A stable and mature product suite

Enterprise SalesMaker is a stable and mature product, in its sixth release since the early 1990s. This level of product maturity translates into a reliable and consistent platform that can meet the needs of the modern enterprise. Nearly a decade of

research and development has helped make ESM the world-class solution it is today.

Native Security Functionality

Software Innovation's powerful access control functionality provides a secure foundation from which to base your CRM data security. Within this functionality, an activity or project can be given a level of confidentiality that limits the access to this information according to defined business rules and access levels. Especially in larger organizations where there is a requirement to maintain 'arms length' limits between departments or divisions, this security functionality helps an enterprise to meet regulatory requirements.

Who uses Enterprise SalesMaker?

Salespeople, telesales representatives, sales management, marketing communications staff, marketing communications personnel, product managers, PR representatives, marketing management, customer service representatives, field service staff, service management, partner management personnel, channel partners, alliance partners, resellers, and any other personnel across an enterprise that interact with customers and customer-facing processes.

SOLUTION OVERVIEW

Account Module: stores and organizes company-centric and people-customer-centric data; show origin/growth/parent-child relationships within and among any of them. There are unlimited additional fields, and easy search and reporting tools are built in.

Activity Module: allows your users to register all actions taken on behalf of ESM-Accounts (e.g. conversations, visits, demos, etc.); present new sales leads; register all associated documents (emails, letters, faxes, diagrams, photos, etc.); identify team members to ensure an accurate reference database for implementations, or for marketing campaigns.

Document/Archive Module: "knowledge management" functionality (e.g. letters, invoices, faxes, presentations, contracts, requests for quotations, etc.); you can also standardize documents across your enterprise, or create a "marketing encyclopedia".

Scheduler Module: standalone or integrated with existing email system (MS Outlook and IBM Lotus Notes) allows users to manage tasks, meetings, email and other communication, and link relevant information to accounts or projects in ESM

Segment Module: users can logically separate or segment your database, compile lists for marketing campaigns, perform advanced subject or relationship searches, generate direct mail, email, etc.

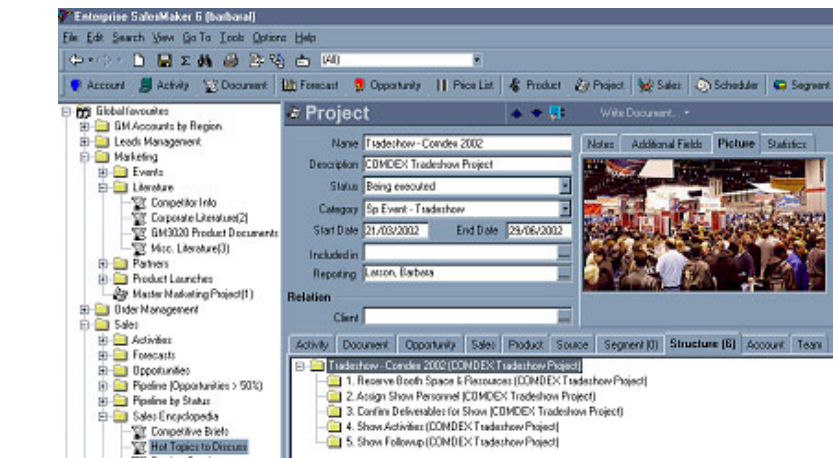
Project/Campaign Module: gives you the power to track every project and link each to the appropriate client, along with documents, contracts, emails, billable resources, phone calls and every other activity or entity that is related to that project. Anything from a basic marketing campaign up to a complex implementation may be easily and accurately recorded while in progress, and analyzed later. All details are fully retrievable. Management users commonly access this module as they structure and refine the strategic direction of their organization.

Opportunity Module: allows users to maintain and manage all commercial offers (proposals) that have been provided to a prospect/client. The functionality here allows for generation of customized quotations and proposals.

Sales Module: users can register new sales details, review the expected-sales "pipeline", report on various time-frame (MTD, QTD, YTD, etc.) revenue totals, and consider profitability details based on user-defined groupings of your customers, of your sales representatives, or of your projects.

Forecast Module: generate and update budgets by looking closely at your customers, at your sales personnel, or at your product/service offerings, enabling you to compare present results to long-term plan expectations, and to generate reports of this information at several levels.

Product Module: stores product descriptions, configurations etc. and links each product to



ESM's unique project module allows you to manage complex product development, marketing, sales, service and other projects

prices, profit estimates, .pdf files, order entry, and related delivery times.

Price List Module: allows your product marketing and other users to keep a current listing of all product or service pricing. The opportunity and sales modules can have automated quotes/pricing driven directly from the price list, allowing users to create accurate quotes quickly and easily.

System Administrator Module: Gives the administrator the power to add users, change security levels, add new fields and perform other functions related to the configuration, and maintenance of the solution.

Synchro Module: your remote/mobile users have speedy and complete updates by synchronizing with the ESM database at the home office, most commonly via email zipped-file transfer, but also via dial-up, or equivalent web access.

ESM Enhanced Modules Available

Product Plus Module: has the functionality to establish an infinite number of relationships between your available products. These relationships might be called "variants", "substitute products", or "kitted/grouped" products (for example, an exploded Bill of Materials from your integrated ERP solution).

Service Module: for those companies that offer Service Level Agreements (warranties, guaranteed response times, etc.) the service module accurately tracks all details about SLA's and may be used to drive automated alerts and escalations. These details are then captured to give other users the benefit of previous service experiences.

Support Module: users can accept (register), categorize, and/or escalate customer difficulties, problems, or suggestions. A typical application is a "Help Desk" function.

Additional Modules Available

ESM Plug In: allows the end user to design and add modules to ESM, which meets unique functional needs for their enterprise that cannot be otherwise addressed.

Functional and data connectivity into ESM means that plugins can function seamlessly as part of the ESM interface.

Timesheet Module: allows users to track their time on ESM projects, and different activities related to these projects. The hours are entered on a per-day per project per activity basis. Especially for service-oriented organizations, this is a fast and easy way to ensure that billing information is logged and integrated to your sales system.

Web or Client/Server Access

ESM gives you the choice of 'thick' windows clients, 'thin' web clients or both to provide access to your contacts, opportunities, appointments, email, documents and other core information from virtually anywhere.

Web Portal Integration

ESM also integrates easily with Software Innovation's web portal technology offerings. Through the web portal, CRM can be extended to leverage the power of the Internet in communication and interaction amongst your customers, campaign respondents, business partners, vendors, VARs, etc.

System Requirements

The system requirements for ESM are minimal. ESM client software will easily run on any Windows computer that can operate with a current-generation web browser. The application server for ESM can run on most standard operating systems with a modest footprint. ESM Web Edition requires IIS (Internet Information Server) / MTS (Microsoft Transaction Server) for the server to properly function on the web.

DBMS support

ESM can use any of the industry-leading DBMS as the database, including Microsoft, Oracle, Sybase and IBM DB/2.

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