

Six Sigma CRM Product Features

Account Records

- Ability to assign leads to channel partners
- Can create associations between opportunities, support incidents, companies and contacts
- User can link competitors to accounts
- Specific features to support companies using indirect sales channels
- Allows channel partners restricted access to the application

Contact Records

- Ability to have contacts exist, independently or attached to accounts, within an overall account structure
- Ability to display multiple users' information simultaneously
- Can link a contact to a meeting or activity

Opportunities

- Ability to view opportunities by customer, geography, etc.
- Information about competitors can be collected, tracked, aggregated and made available in a discrete area of the application
- Ability to create a quotation attached to an opportunity
- Ability to convert a quote to a sales order within the opportunity
- Built-in ability to track lead source
- User can link competitors to opportunities
- Ability to create and manage opportunities independently of accounts and contacts
- Specific capabilities to track wins and losses
- Supports creation of separate pricing per customer
- Probabilities can be user-defined according to an organization's definitions
- Probabilities can be assigned at each step of the sale
- User can input competitor strengths and weaknesses
- User can record win/losses to competitors

Tasks/Activities

- Ability to schedule a meeting for another person
- Group scheduling
- Automatically identifies conflicts
- User can filter which activity types are displayed
- Can assign a task to another group member
- Can automatically allocate calls to telemarketers by rules such as "round robin" and queuing
- User can enter a calendar meeting, activity or task
- Ability to assign priority to activity, such as high, medium or low
- Ability to maintain the status of an opportunity via predefined coding such as in-progress, cancelled, scheduled, etc. (Activity Tracking Status)
- Ability to display completed activities on the calendar, as well as scheduled activities
- Can link an opportunity to a meeting or activity
- Calendar is available for input into date fields
- Can include non-CRM users for meetings

Notes & Attachments

- Files of any type can be attached to contacts, accounts, opportunities, and service incidents
- Ability to view customer's document history, credit notes, payments, aging, etc., from within CRM system
- Word-processing documents are saved within activity records, or drill-down link
- Spreadsheets are saved within activity records, or drill-down link



- Can store and view organizational charts created in Microsoft PowerPoint or Visio
- Can create and store organizational charts from within the application
- Attachments can be performed via drag-and-drop
- Maintains multiple versions of proposal or multiple proposals for an opportunity

Knowledge Base & Library

- Built-in knowledge base for first-line problem resolution
- Can review workflow for articles prior to publication
- Ability to fulfill literature requests by delegating within the application to internal fulfillment person or department

Reporting

- Contains reports that are ready to run
- Ability to code contacts and activities as personal to exclude them from sales reporting

Forecasting

- Can create and maintain forecasts based on opportunities
- Ability to compare forecast to actual sales figures from back-office system
- Forecasts can include user-definable product lines
- Forecasts can include additional items as defined by user in opportunity management
- Ability of channel partners to forecast opportunities
- Ability of management to roll up sales-forecast data into summary-level data according to user-definable criteria such as team, region, etc. (Forecasting Aggregation)
- Manager can override the forecast at the opportunity level (dollars and probabilities) without changing the original

Campaigns

- Ability to measure campaign effectiveness
- Ability to measure campaign cost
- Marketing-campaign management
- Can create and manage campaign letters, envelopes and labels
- Can create and manage e-mail campaigns
- Can create and manage fax-blast campaigns
- Can create scripts and manage telemarketing campaigns
- Ability to export marketing lists in text and Excel formats to support third parties, such as mail-fulfillment houses

Territory Management

- Ability to create sales territories
- Territories can be reassigned with contacts, accounts and opportunities automatically reassigned
- Territories roll up according to organizational structure
- Territories are user-defined based on geography, product line, or other criteria
- Territories can overlap; the same rep can appear in different distribution channels
- Sales quotas can be assigned by individual sales managers
- Sales quotas can be assigned by territory, region, and division
- Provides graphical analysis of data for marketing, sales, and customer-service info

Product

- Ability to access and view product and service information
- Ability to store product and service information (literature, brochures, etc.) and documentation
- Ability to organize product and service information in a multi-level hierarchy
- Ability to view status of inventory items due to arrive on PO
- Can check inventory availability
- Can support multiple inventory locations per quote or sales order
- Can suggest substitutes for items that are out of stock

- Can generate an RMA (Returned Merchandise Authorization)
- Specifies warehouse to fill order
- Specifies freight carrier
- Generates acknowledgements

Order & Case Management

- Ability to generate and submit a sales order without switching applications
- Automatically routes incidents to users via user-defined criteria
- Can automatically assign and notify a rep of a new incident
- Ability to manage service contracts, including effective dates, terms, etc.
- Ability to automatically escalate service issues based on predefined rules
- Has a configurator to create complex quotations/orders for interdependent items
- Ability to convert proposal to order
- Can check on the status of a sales order
- Ability to calculate sales taxes for quotes and orders
- Can provide estimated product-delivery date

Workflow & Processes

- Automatically notifies user based on user-defined parameters
- Ability to evaluate customer service for effectiveness and product trends
- Ability to enter and maintain specific sales plans with many criteria linked to company sales objectives
- Automatically rates leads according to user-defined criteria for qualification and/or risk analysis
- Automatically assigns and notifies a rep of a new lead tracking (Auto-Assignment)
- Ability to create and adhere to a sales methodology
- Ability to select appropriate methodology based on opportunity
- "Guides" the user according to customer-specific business processes that can vary based on type of opportunity, etc., and can be specified from within the application
- Can create and maintain quotations from within the application, or integrate to the back-office system for this purpose
- Can develop and maintain telemarketing call-scripts within the application
- Ability to auto-generate proposals based on templates
- Supports proposal-approval process via user-definable workflow
- Supports simultaneous creation of proposal components
- Can be adapted to company's specific business processes
- Workflow development tool is graphical
- Data delivered on a user-defined schedule

Expense Tracking

- Can create expense reports within the application

Accounting

- Ability to view accounts receivable aging from accounting system in real time or near-real time without customization
- Ability to validate credit-limit/credit-hold status from back-office system in real time or near-real time
- Ability to define fiscal periods for reporting purposes
- Can generate a credit invoice, including the refund entry for accounts payable

E-mail/Fax/Web Support

- Supports browser-based access
- Can utilize templates for letters, fax, etc.
- Can fulfill requests by e-mail or fax
- Can create and manage e-mail within application
- Outgoing e-mail messages are saved as activities for recipient

- Can set up rules for outgoing and incoming e-mails
- Can attach incoming e-mail to contacts or accounts
- Supports easy integration of inquiries via the Web without user intervention
- Allows direct import from Web site form
- E-commerce functionality is available

Data Integrity

- Ability to identify duplicate accounts
- Prevents addition of duplicate account records prior to entry into the application
- Ability to import lists from third-party sources
- Can merge two records together

Synchronization

- Synchronization occurs in the background so that the user has full use of the application during synchronization
- Supports synchronization of a subset of the database
- Supports synchronization over LAN, WAN, and FTP
- Synchronizes documents from the document library, such as literature
- Synchronizes with Palm and Windows CE handhelds
- Upgrades can be automatically synchronized to remote users
- Customizations can be automatically synchronized to remote users
- Ability to work offline and to update and receive updates from master database
- Supports synchronization via dial-up connection

Integration

- Can import data from a text file
- Can export data to a text file
- Can export data to Microsoft Office applications
- Can use Microsoft Word
- Can link to Microsoft Excel
- Pre-built integration to Microsoft Excel for further analysis
- Can create and manage individual and group calendars or integrate to Outlook
- Can integrate to other applications, such as accounting programs, on a batch basis and real-time basis
- Integrates to one or more ERP (back-office accounting) applications
- Ability to "promote" prospect to customer so that back-office accounting system is automatically populated with customer information
- Supports computer telephony integration for automated dialing and analytics
- Supports wireless PDA access
- Supports Web-phone access
- Supports Short Message Service (SMS)
- CTI (Computer Telephony Integration) software automatically pops up the contact record when call is received or transferred

Database Architecture

- Tables can be added to standard database model and can be accessed by the client software without disrupting functionality or deterring performance
- Fields can be added to existing tables and can be accessed by the client software without disrupting functionality or deterring performance
- Software runs on a relational database such as SQL or Oracle

Functionality

- Flexible word- and phrase-search capability
- User-defined fields can validate data according to user criteria (e.g., numeric, phone number, date)
- Can provide customized views of information to meet the needs of different classes of users

- Ability to create calculated fields based on input responses from contact
- Ability to keep unqualified imported lists separate from qualified prospects and customers
- Embedded word processor
- Can utilize Microsoft Outlook
- Ability for user to create and manage templates for word processing
- Ability to analyze sales by product, rep, region, customer, or other user-definable criteria
- Ability to support multiple languages and currencies simultaneously
- Ability to customize auto-generated proposals
- Spell-checker for document-related activities
- Ease of use
- Multi-field lookup
- Partial lookup
- Security can be controlled at the field and record levels
- Tab order can be modified to facilitate data entry
- User can define the information available via the portal
- Screens can be modified without coding
- Ability to autodial
- Can control access/edit/delete by record type
- User password is encrypted
- Personal and team productivity

Help

- Online tutorial is available for new-user orientation
- Online help is modifiable to handle user-defined fields, etc.
- Online help is context sensitive