# Intuitive CRM



## The Information to Grow and Maintain Healthy Customer Relationships

Managing your customer base with an integrated CRM solution will help your company improve your marketing, sales and support processes while increasing customer responsiveness and loyalty.

Intuitive CRM enables your company to maintain and track all facets of relationships with all business partners. Contacts, follow-up information, historical interactions, details of potential opportunities, marketing campaigns and more are immediately accessible with Intuitive CRM. The marketing and opportunity management features help your marketing and sales force find and capture sales, while the relationship management features help your entire organization maintain and support your customer, vendor and partner relationships.

Intuitive CRM comes with easy-to-read screens, usermanaged screen layouts, and drill-down capability into every detail. As part of the Intuitive ERP system, quotes, sales orders, shipments, collections issues and returns are all completely integrated with the Intuitive CRM solution.

#### **RELATIONSHIP MANAGEMENT**

The Relationship Management functionality provides the tools necessary to manage important business information not only about your prospects and customers, but also about vendors, business partners, and other third parties your company deals with.

Intuitive CRM's comprehensive relationship management features allow you to:

- Store an unlimited number of customers, prospects and companies, and unlimited contacts within each company.
- Record all interactions associated with a customer or prospect, including conversations, meetings, letters, faxes, e-mail messages, file attachments, and more.
- Access a complete history of a customer or prospect account, including quotes, orders, collections status, warranty status, and more.
- Schedule future interactions into your existing Microsoft Outlook calendar.

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Parker Culvert Co		Parker Culvert		¥	1350 King	shighway Blvd	Lawrence		50112	KS				
Peak Plastics Corporation		Peak Plastics Corporation		¥	90 Ceram	ic Tile Drive	Lexington	USA	28655	SC				
Peak Plastics Co	poration	Peak Plastics Corporation		¥	630 South	west Street	Bristol	USA	25980	AZ	Corp@Peak	Plastics.com		
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- Work in a team environment with multiple members on an account.
- Create document distributions based on Mail Merge features of Microsoft Office.
- Attach documents and emails to contacts or companies.
- Automatically create Microsoft Outlook To-Do lists.
- Assign activities to other team members and notify them by email.
- ✓ Output any data to Excel with one click.
- Record an unlimited number of notes per contact.

### **OPPORTUNITY MANAGEMENT**

The Opportunity Management functionality maximizes the efficiency of your sales force by helping to manage and identify the best strategy for moving to close the deal. By providing a tool to effectively manage every component of an opportunity, Opportunity Management helps your sales professionals focus on the opportunities that exist in your sales funnel and capitalize on that sales potential with prospects and increased business from existing customers.

Intuitive CRM's complete opportunity management features allow you to:

- Manage sales opportunities by creating and linking opportunity records to specific accounts.
- Track opportunities, including percent chance of close, opportunity value, and all associated data.
- Add user-defined fields to each opportunity record.

lasks	(a) << Security	General I	nformation		Product Information			
Inactivate Opportunity	Opportunity ID	1024						
Do Note Do Incoming Call	Short Description	New engineering project						
Do Incoming Call Do Outgoing Call Do Document Do Letter Do Fax	Long Description	Project for new electronics cabin system for the new 76.7 program.						
Do E-mail	Status	Open *	Intuitive Quote ID					
Schedule Task	Sales Funnel	3 · Information ¥	Next Action Plan Date	8/21/2004				
Schedule Meeting	Currency Type	USD - English/United States	Lead Source	Referral				
Link E-mail Link Document	Misc. Dollar Value	\$421.00	Estimated Close Date	4/10/2004				
	Product Dollar Value	\$924.00	Close Confidence	99 %				
	Total Dollar Value	\$1,345.00						
	Action Plan Comment	Customer wants to set up a kick off meeting	ig with Engineering to discuss proje	ct plan.				
General Information								
Product Information								
	Sales Mgr Comment	Schedule the meeting for next Friday and	rivite Bob and Sue as well.					
Related Companies								
User Defined Fields								
Administrative Information								

- Schedule interactions, such as follow-up phone calls and onsite meetings, into your existing Microsoft Outlook calendar.
- Maintain a complete history of activities with specific notes about each opportunity.
- Create and link appointments, tasks, notes, documents, emails and activities to specific sales opportunities.
- Report on sales funnel and opportunity progress.

#### MARKETING MANAGEMENT

The Intuitive CRM marketing management features provides a single location to create and track the details—and results—of your company's targeted marketing campaigns. You can create targeted mailing lists of potential and/or current customers with the Search Manager and select the search to be associated with the marketing campaign. Deploy a campaign by automatically creating a mass-email or mass mail-merge document to all campaign participants. You can easily keep track of participants pre- and post-launch.

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		Plasti-Coat Corp.	Plasti Coat Co	ф.	James Valley	Г	
		Automated Design Systems	Winnipeg		Roy Drenker	Г	
		Ace Hardware	Ace Hardware		Bob Bigelow	<b>F</b>	
		Eaton Corporation	Eaton Corpora	ation	Nancy Hom	V	
		Office Supply Inc.	Office Supply	-N0	Sally Huff	Г	
		Anvil International	Anvil Internati	onal	Scott Sanchez	Г	
		Automated Design Systems	Edmonton		Hans Berger	Г	
		OppCo Limited	Head Quarter	\$	Jack Fraser	<b>V</b>	
		Advantage Controls Inc	Advantage Co	antrols Inc	Rick Larson	<b>V</b>	
		Alpha Business Works	Alpha Busine:			<b>—</b>	
		LaBarge Technologies	LaBarge Tech		James Wright		
		Equipment Development Co.		welopment Co.	John Sturch	<b>—</b>	
Participants		Advantage Controls Inc	Advantage Co		Kim Vaughn	<b>v</b>	
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		Office Supply Inc.	Office Supply		Jack Stephano	Г.	
Administrative Information		Eviro Systems Co	Enviro System		Bob Stanley	<b>V</b>	
Administrative infolination	<u>S</u>	Parker Culvert Co	Parker Culver		Roger Wheeler	<b>V</b>	
		Advantage Controls Inc	Advantage Co	antrols Inc	Kevin Bennett	V.	
		Add Participant Re	move Participant	New Response	1		

After launching a campaign, Intuitive CRM allows you to manage responses and associate opportunities to campaigns. A Marketing Response wizard is incorporated directly into the pane system, allowing users to quickly enter response information. You can compare actual responses with forecasted response rates to determine campaign ROI.

Intuitive CRM also complies with 'Do Not Solicit" regulations, ensuring that companies / individuals who request to be removed from future campaigns are automatically excluded from future campaigns.