



Define Measure Manage

Business Performance Management

Customer Relationship Management

CRM - Demo

Following are some of the areas of BI for CRM

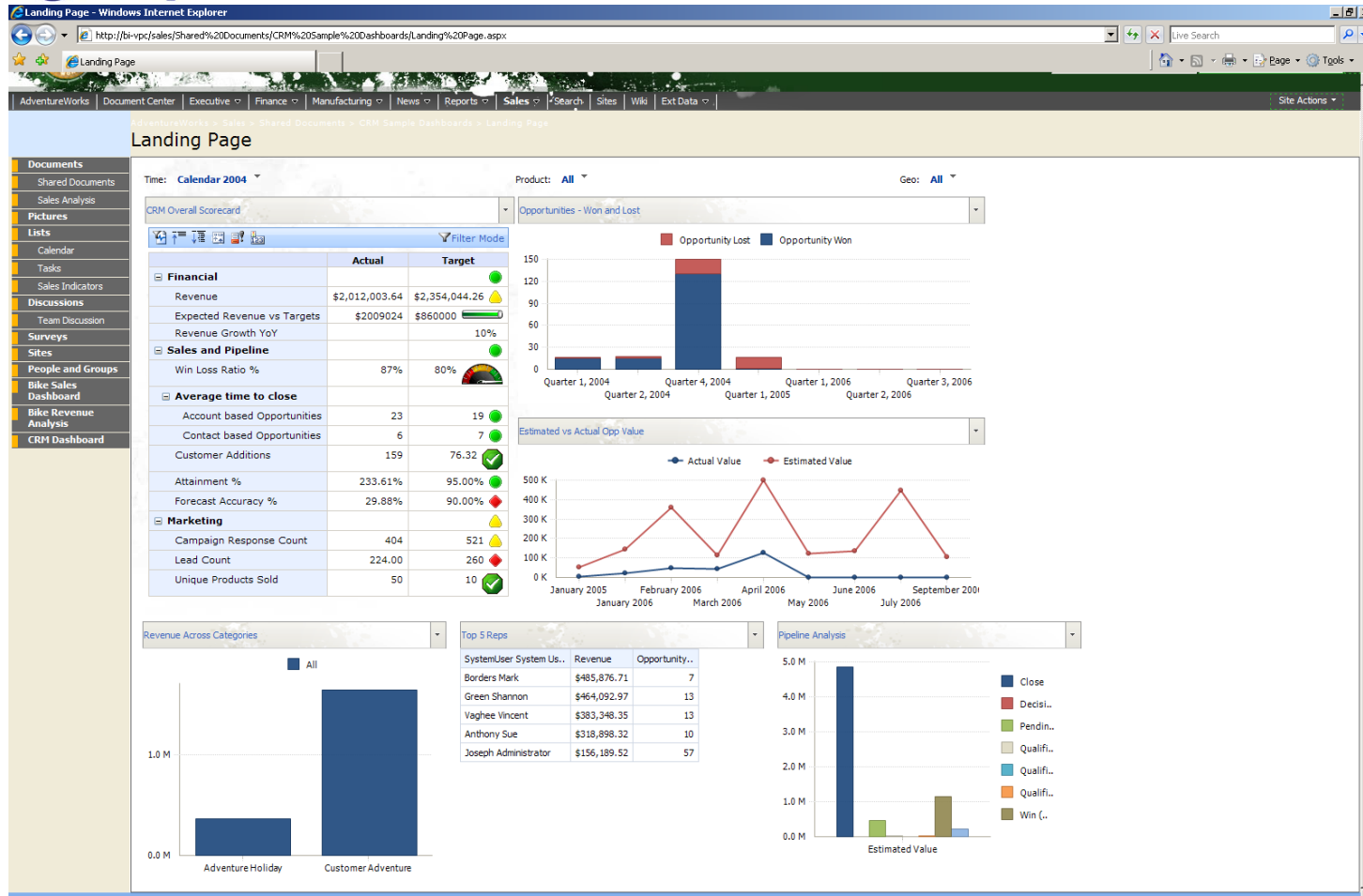
Identify the areas of improved CRM information integration: Reduce costs and gain flexibility by integrating all of the elements of your CRM infrastructure — both internal and external — into constellations of information that accurately reflect your business.

Discover the analysis opportunities of your existing CRM data. Use the knowledge you extract from CRM systems to align your business strategy more closely with market demands. BI on CRM solutions can make your company more responsive to customer needs, and help you provide support and services that are most useful to the right customers.

Bringing BI to your desktops. The Microsoft Business intelligence Solutions reduce the time required to collect relevant information and it empowers employees to conduct their own analysis — with minimal support from IT specialists.

In order to respond quickly to business changes and make well-informed decisions, executives and managers need real-time access to the health of their business delivered in an easy to understand way that enable them to take action. Sales executives need to stay on top of the health of the pipeline to ensure that revenue targets are met. Service executives are committed to maintaining customer satisfaction while reducing service center costs. Marketing executives want to measure and monitor the ROI of current and past marketing campaigns. Some of the common questions that can be answered by using BI for CRM include

1. What is the health of our pipeline? Will we hit sales targets for the quarter?
2. What's our sales revenue forecast for the next quarter?
3. Have we added the number of new customers we expected for the quarter?
4. Are customers satisfied with our service? Are their issues being resolved as we promised?
5. What are the biggest problems customers are experiencing with our offerings?
6. How are the marketing campaigns doing against the ROI goals we've set?
7. Who are our most profitable customers?



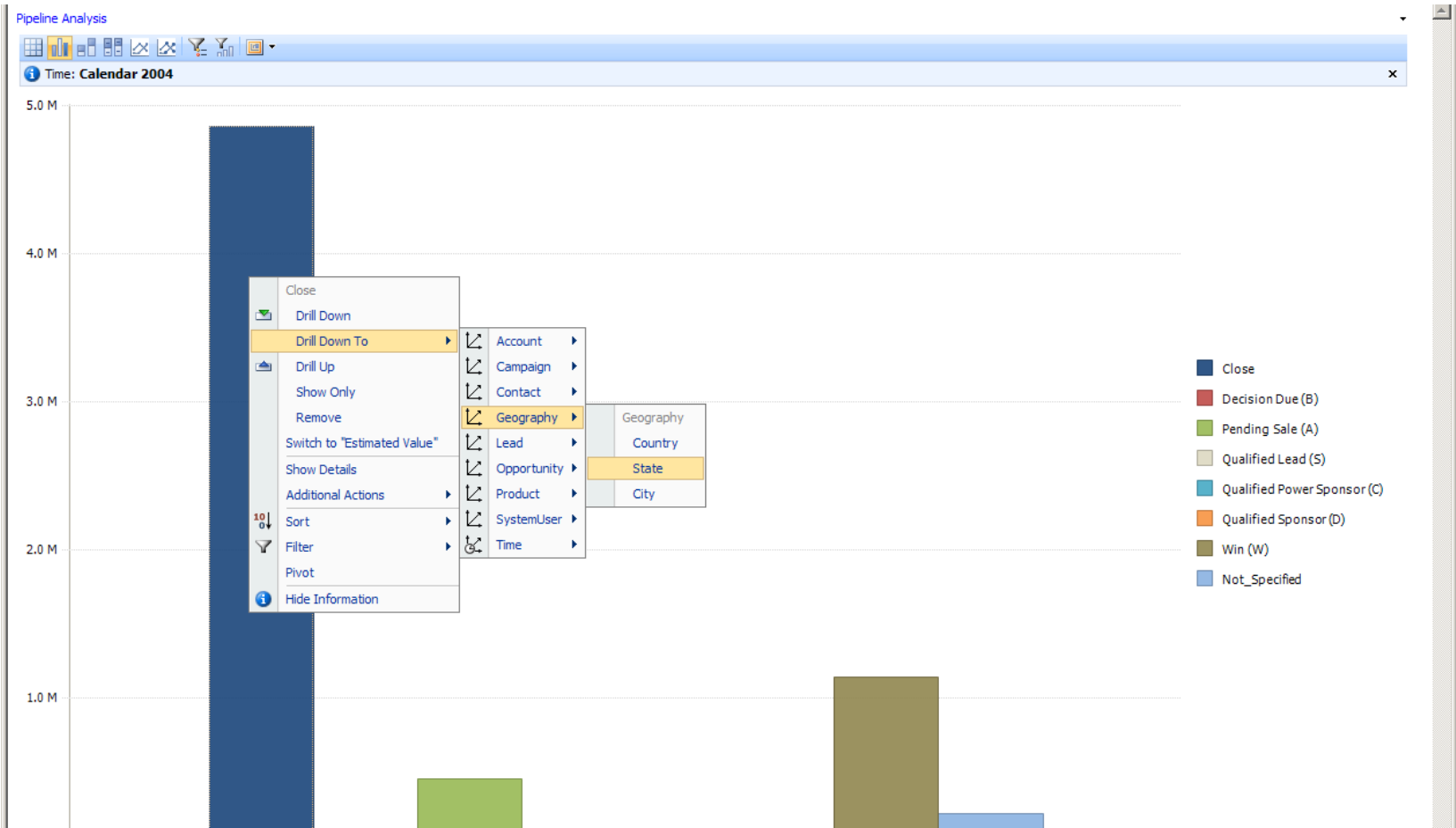
CRM Demo - Areas of Business Intelligence for CRM

This is the VP of sales dashboard where he has the ability to track some KPI's and look at associated reports.

For 2004, revenue growth has been 10% YOY, but they have fallen short of targets, so this issue needs further investigation.

He also looks at customer additions for 2004 and sees that they added more customers than the target.

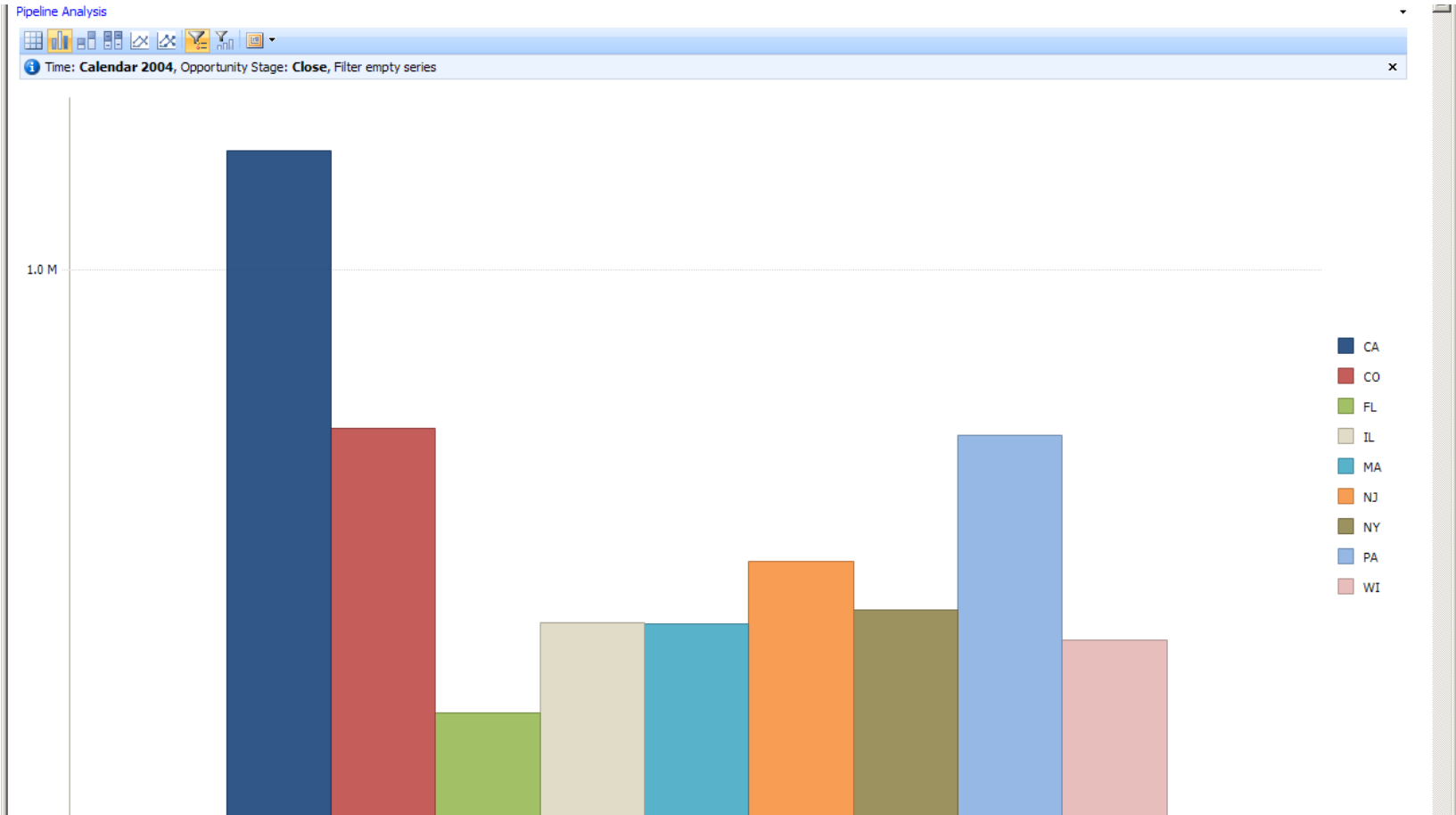
Forecast accuracy is far below the target of 90%, this might be one reason why their actual vs. target has a gap or it can also mean that they cannot accurately predict their sales.



CRM Demo – Pipeline Analysis

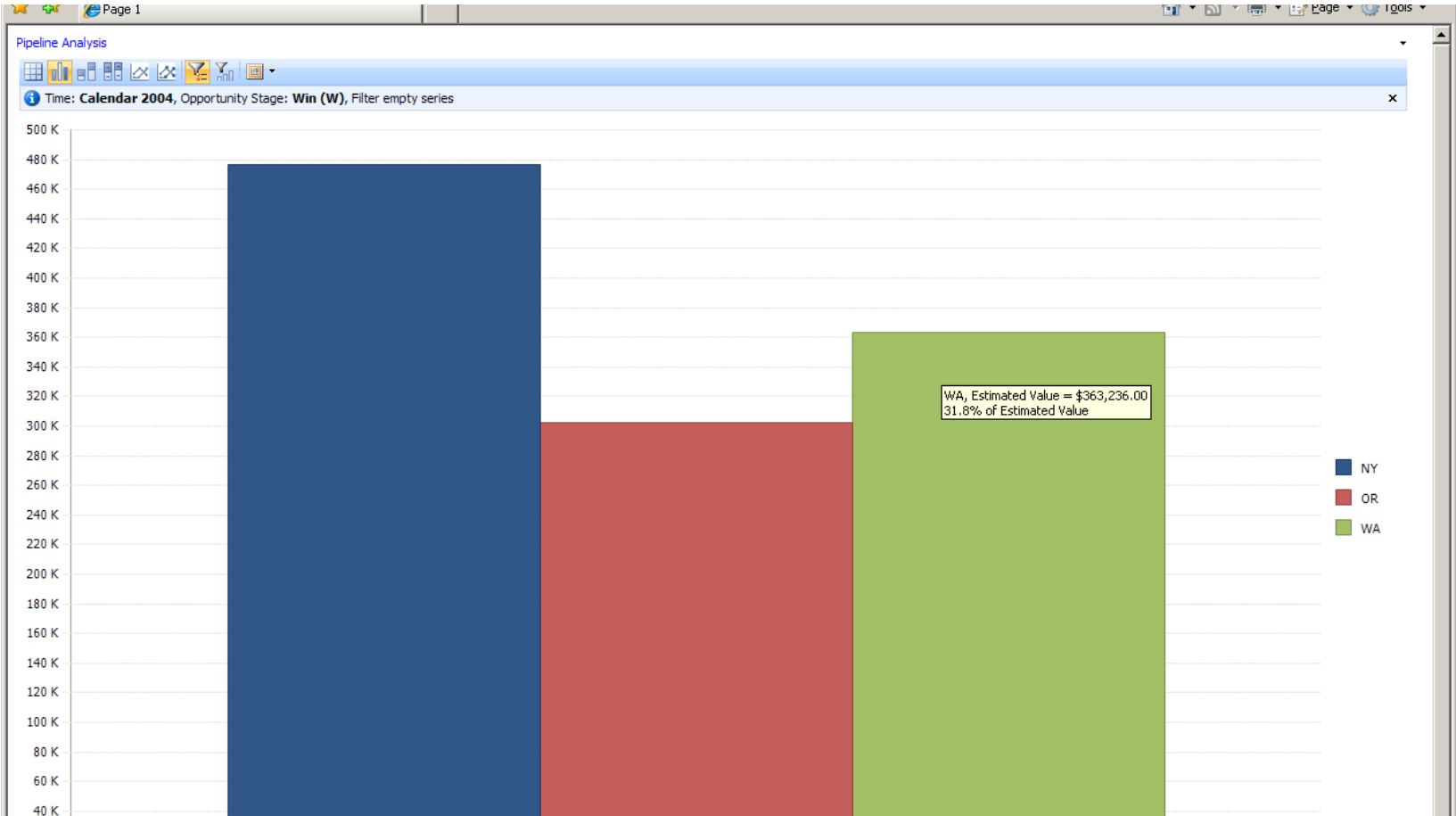
VP of sales is interesting in looking at the sales pipeline in detail.

Opening the sales pipeline in a new window shows that lots of deals were closed, but lesser number of deals was won, this means that a lot of deals were closed and lost.



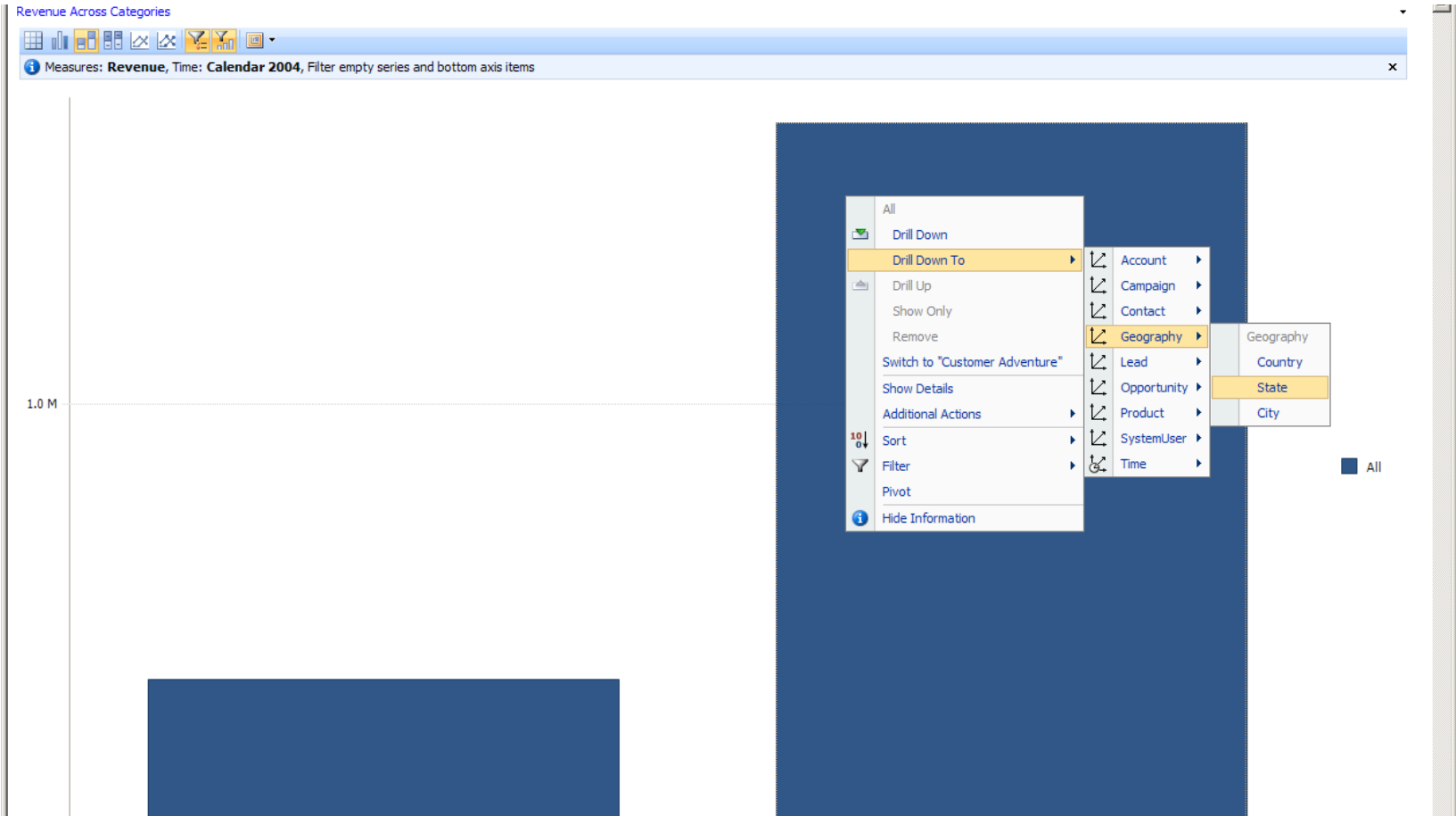
CRM Demo – Where the deals were closed?

To investigate this issue further, he clicks on deals closed and drills down to different geographies and finds that there are 9 states where deals were closed, the largest being CA, CO, and PA.



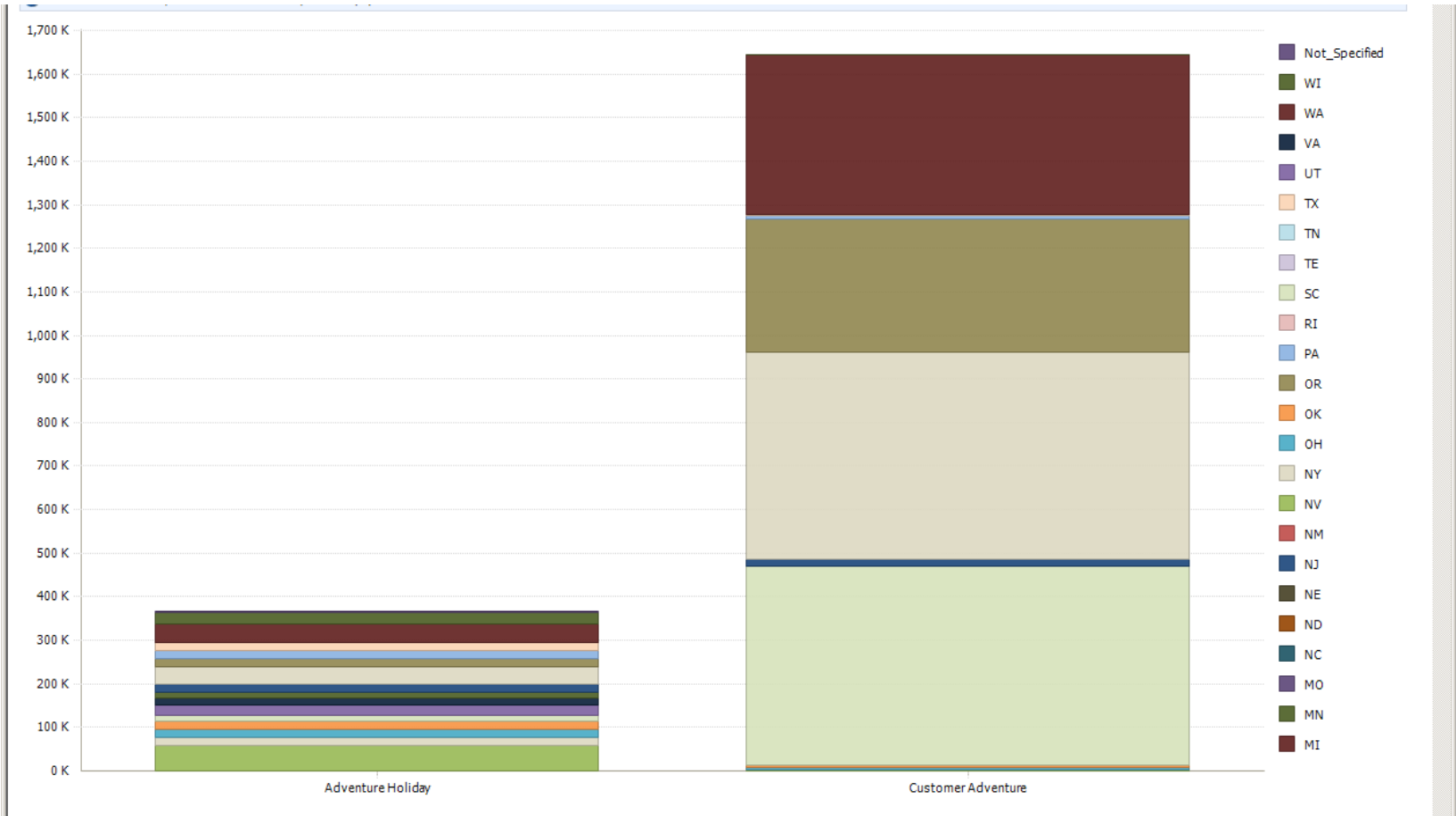
CRM Demo – States were deals were won

To find out the states were deals were won, he does similar analysis and finds out that deals were won in only 3 states, NY, OR, WA out of 9 and all the largest deal size states were lost. Next action item for him would be to call the territory managers and find out the reasons for lost deals.



CRM Demo - Campaign Management

In 2004, this company was running 3 campaigns and the VP of sales wants to look into the effectiveness of those campaigns. The chart shows that the Customer Adventure campaign was more successful than the Adventure Holiday campaign.



CRM Demo – Marketing Campaign Drill Down

Clicking on the customer adventure campaign and drilling down to states shows that this campaign was successful in 4 states- NY, OR, WA, and IL.

Three of these states are the states were deals were closed, so this campaign was really helpful in booking revenues. He can call up the campaign manager and find out the reason for the campaign success in these states vs. rest.

Contact us today to schedule a presentation and discuss your particular requirements



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