CRM / Marketing Management

CRM (Customer Relationship Management) is all about managing the interface and relationship with your customers. It was once thought that CRM was a separate component to both your business and your business software. That thinking led businesses to hire independent personnel and provide them with independent software tools to handle the task. This will inevitably lead to isolation and islands of information that are not shared with others throughout the company.

CRM is a business philosophy, not just a software element. It is a decision made by business owners and managers to better identify their customer needs and to give their employees the tools to improve or maintain a high level of customer satisfaction. All employees, right up to the CEO, should be on board with supporting your CRM plan. That means that everyone must also have access to the tools and data to help them.

M3 provides you with the tools and information you need to successfully manage your customers and your processes. There is no need to spend time and money attempting to integrate a specialized sales application with the rest of the company. The advantage of having these tools fully integrated with the rest of your ERP business software is obvious.

While there are some main points to CRM (see below), CRM permeates the entire company and therefore should also permeate your entire software solution. You can't simple bolt on a screen that's called CRM without making sure it's fully integrated into the entire system.

- Customer and Prospect Management
- Contact Management
- Logs and Attachments
- Marketing Groups and Campaigns
- Customer Activity History

Customer and Prospect Management

M3 provides you with separate databases for customers and prospects, if you desire. Track prospects and their activities, then easily turn them into a customer when an order is being placed. Both may have an unlimited number of contacts associated with them and in turn an unlimited number of log entries and attachments. Send emails and quotations and track the success of mailings.

- Provides separate database for prospects and customers
- Easy lookup by name, phone, address, contact, or any other user-defined method you choose
- Maintain log of calls and contacts
- Reminders will pop to tell you when they are expecting a follow up
- Unlimited ship addresses per customer

Contact Management

A contact is a reference person that may be related to a prospect, customer, vendor and/or sales rep. Each contact may have their own set of addresses, phone numbers and emails. M3 allows you to log calls and activities and link attachments to contacts. This single point of control allows everyone access to see the current status of activity with a given contact, provided they have the security access to do so.

- Unlimited number of contacts assigned to any customer or prospect
- Unlimited notes available
- Interface to email

Logs and Attachments

Each customer, contact, vendor and sales rep can have an unlimited number of log entries and attachments. Log entries allow you to identify when the person was last called, what the conversation was about and how close in the sales cycle they may be. As with other M3 screens, there are an unlimited number of notes that can be entered for each of these activities.

- No limit on the number of call logs or attachments
- Set reminders and the system will issue messages and emails
- Attach any kind of record (pdf, jpg, bmp, Word doc, Excel, etc.

Marketing Groups and Campaigns

Define a marketing campaign, and decide which customer and prospect marketing groups are to be included in the campaign. Export tools and mailing list integration give you the ability to track the success of different campaigns. What works best for your company, email campaigns, phone calls, post cards and mailings? Whatever method you choose, M3 will help you track your marketing efforts.

- Define any number of marketing campaigns
- Assign group codes to identify which customers are included
- Identify action steps and dates
- Decide to include customers and/or prospects
- Create a mail merge list

Customer Activity History

No CRM system can be successful without maintaining activity history on customers. At the click of a button, M3 can tell you what a customer bought, when they bought it and what they paid for it. It can tell you what returns are in process and what the current status of their account is.

- Powerful customer inquiry, showing all activity on a single set of screens
- See sales history, both summary and detail
- Link to shipment status and retrieve freight tracking numbers
- Drill down to logs and attachments for customer and/or contacts

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