**Customer Relationship Management (CRM) Software**

**for AOS Ltd.**

MARKETING

* 1. Market Research

The market research will manage the market research on products and services provided by CRM so as to get topics on marketing campaign.

* 1. Marketing Campaign
* The system should coordinate multiple marketing campaign
* Support single database for customer support, sales and marketing information
* Configurable marketing automation and complain management
* Support multi-channel marketing programs
* Support multiple sales channels. Example social media, internet, email, telephone.
* Integrated workflow and collaboration for campaign approval and execution
  1. Marketing campaign planning

Marketing complain execution needs a planning. The System should allow to plan for a particular complain in time and tasks to be conducted under the campaign.

* Complain time (starting and ending dates and time)
* Task and their time schedules.
  1. Personalised market campaign

The system should be able to plan and execute a campaign for a particular category of customers.

A personalised campaign consists of marketing that targets a group of customers.

* 1. Marketing campaign execution

The system makes a follow up of marketing campaign execution and its tasks as of planning, and the system can be able to rate the execution of a particular marketing complain.

* 1. Loyalty marketing

It consist of keeping the loyalty of customers by various activities ( visits, special attention etc..)

* 1. Events Marketing

The system must allow the planning and supporting multiple marketing events such as seminars, trade shows, conferences, products demonstrations etc…

The system should manage the whole marketing process for event;

* Event plans, activities, tasks and budget
* Partnerships and vendors
* Venue management
* Design, create and undertake targeted invitation campaign
* Provide one-click access to online registration from email invitations
* Automatically schedule and send remainder emails. Etc…
  1. Trade promotion marketing

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| * Facilitate trade promotions |
| * Support strategic and tactical marketing |
| * Manage account planning, sales volume planning |
| * Manage promotion plans to consumers (indirect customers) |
| * Analyze plans and promotion simulations |
| * Manage promotional agreements and guidelines |
| * Manage sales promotion tactics eg features, displays, temporary price reductions |
| * Support sales activities between manufacturers, resellers / retailers and consumers eg planning, maintenance, tracking, settlement and evaluation |
| * Store merchandising management eg store visits, store analysis and comparison |
| * Field management including surveys |
| * Trade funds management eg using and monitoring trade funds, trade expenses |
| * Trade claims management eg claim validation, payments, deductions, contract disputes   1.9. Campaign Budget and revenue tracking   |  | | --- | | * View and update campaign financials eg budget cost, revenue, profit / loss, and phase over any time period | | * Manage total campaign budget | | * Allocate budget to tasks and / or external suppliers | | * Track all components of marketing budget | | * Compare actuals with budgets - costs, revenues, profits / losses | | * Track forecasts versus actuals, budgets, by task or component within a campaign | | * Evaluate potential revenue by campaign or by target group | | * View revenue real-time (as sales linked to a campaign are updated) | |

* 1. Campaign Response tracking

As the given feedbacks to a campaign are sent, the system should be able to manage those responses for analysis.

* 1. Analytics (BI)

Includes:

* Marketing analysis
* Campaign analysis
* Customer analysis
* Products and service analysis

1. Sales

In the sales management, the following activities shall be automated:

* 1. Sales Configurations
* Sales Strategies management
* Territory management
* Account configuration
* Contact information and their updates
* Integration with mail server
* Prospecting Management, etc.…
  1. Sales Opportunity management

In this management point, the following activities will be carried out:

* Track Sales Opportunities
* Capture, reference and view sales opportunity information eg opportunity history, customer communications, key decision makers and their interests, customer organization charts, internal customer relationships, milestones, progress tasks etc..
* Configurable filters eg to view specified lists of opportunities
* Search for and group opportunities that match specific criteria
* Combine or separate - multiple opportunities from the same potential customer
* Allocate multiple opportunity priorities
* SWOT(Strengths, Weaknesses, Opportunities and Threats) Analysis
* Configurable 'sales processes' for different sales situations eg with different business units, different products, different sales channels, simple or complex processes
* Assign opportunity to sales rep or sales team
* Multiple dates eg sale process opened, opportunity qualified, proposition developed, solution presented, estimated close date, days open, actual date sale closed
* Add notes on sales opportunity etc…

2.3. Pipeline Management

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| * View and monitor sales pipeline and opportunities to a close |
| * Predict probability of a successful close |
| * Real-time update of sales pipeline figures - to enable informed decisions to be made |
| * Identify the top opportunities and specific actions to manage those opportunities to a rapid closure |
| * Measure sales process effectiveness |

2.4. Quotation management

* Manage any number of responses to RFQ's (request for quotations) from any number of potential customers
* Configurable categories and types for classification of RFQ's and quotations
* Multiple quotation status eg in process, reply sent, converted to order
* Automatically generate quotations from proposals and new opportunities
* Log RFQ's received from potential customers via email / fax / post
* Automatic transfer to relevant staff / teams for responding
* Multiple, configurable quotation templates
  1. Prices

The system should manage the products and services pricing in a consistent manner

It Should

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| * Facilitate consistent pricing of products / services, from proposals through to quotes and orders, across multiple sales channels |
| * Multiple, user definable, price and discount rules |
| * Flexible price change rules eg as costs or circumstances change |
| * Price / discount variations eg for currency fluctuations |
| * Multiple price / discount amendments eg by item or group of items, lot, barcode, categories, shelf life, customer, or globally for all items |
| * Prices and discounts displayed to any number of decimal places |

2.6. Contracts

The system should be able to manage Contracts in all its aspects including

* Manage contracts eg proposed and agreed contracts, product / service delivery, contract additions, amendments, cancellations, renewals
* Handle multiple, complex contracts eg service support, maintenance, service level agreements, rentals, usage, chain store and shared-risk agreements
* Multiple service contract types eg onsite consulting, telephone support
* Multiple contract types eg time (hours, days), money amount, per incident
* Manage contract approvals

1. Orders

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| * Multiple types of orders handled eg direct draw down, back, forward, repeating (for recurring servicing and/or shipments), call-off, scheduled / unscheduled blanket orders and blocks of orders, inventory and non-inventory items, drop shipments |
| * Back to back orders, raising purchase orders based on sales orders |
| * Automatically generate sales orders from quotations |
| * Rapid conversion of partial / whole quotation into order, plus rapid handling of call off orders |
| * Automatically change the relation type to customer, on converting a quotation to a sales order (if not already a customer).   The systems should provide the following:   * Sales periodic book (Weekly, monthly etc…) * Customer Portal * Integrate Business intelligence. |
| 1. Invoicing   The system should be able to produce invoices from orders. |

1. Customer Support

The system should provide:

* 1. Account and Contact Management
* Account of every customer and its contacts management
  1. Support Management
* Strategic and tactical service planning
* Resource/agent planning and management
* Management of inhouse and external repairs or supports
* Facilitate customer support staff collaborating to resolve issues
* Synchronize support activities, contacts and calendar information with personal information managers eg Outlook
  1. Case Management
* Receive customer support requests from multiple channels
* Segment support requests based on user defined criteria eg by product categories, customer type, service level, skills required
* Multiple assignment rules to automatically transfer the issue to the correct support staff
* Multiple automated processes for resolving issues, for different support situations eg with different product lines, or different service level agreements
* Create and monitor service / support plans
* Schedule tasks and delegate actions to others, to resolve requests / issues
* Track the status of customer support requests
* Maintain full case history, previous support issues and customer interactions
  1. Ticket management

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| * Quick ticket creation |
| * Create tickets with information from customer phone calls, emails, online web forms |
| * Unlimited free format text for problem description / nature of the issue |
| * Configurable problem areas, categories, issues |
| * Multiple problem statuses eg assigned, in process, closed |
| * Multiple urgency or priority levels eg high, medium, low |
| * Flexible queue management |

* 1. Other Functionalities
* Ticket Escalation
* Knowledge base(Common issues and their handling procedures)
* Support portal
* Quick search
  1. Additional functionalities:

1. Workflow management and setup

* Process designing and configuration
* Scheduling
* Triggers
* Alerts
* Monitoring and reporting

1. Social media integration for customer care