Welcome To the Presentation

A PRESENTATION ON

ERP & CRM
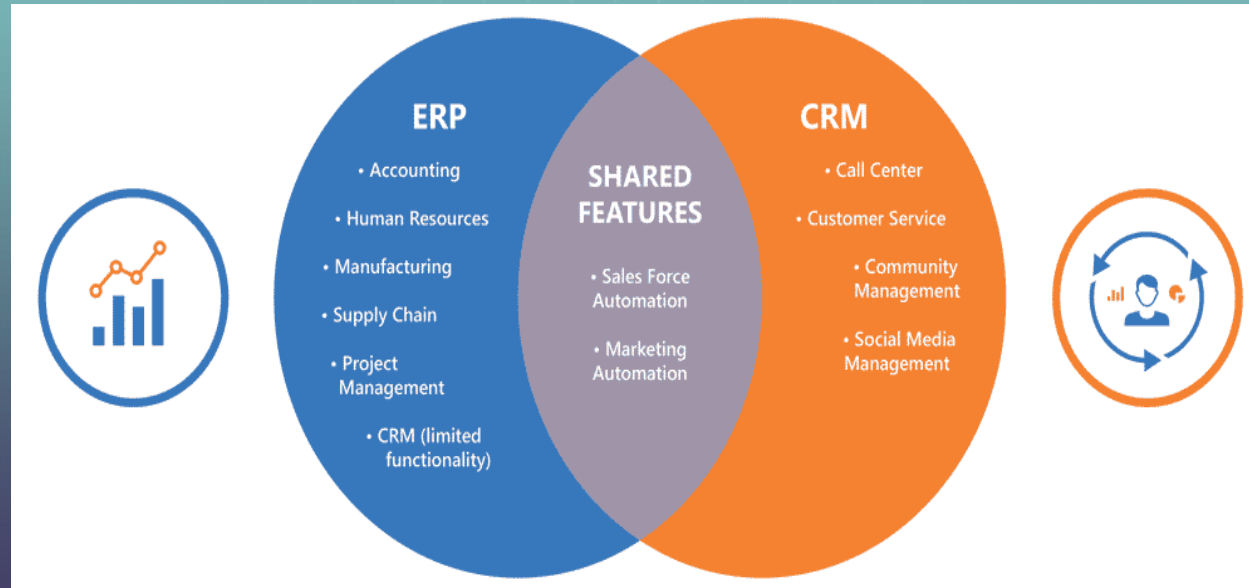
PRESENTED BY

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Q1 Why Our company need an enterprise system (ERP/CRM)?

What is ERP?

01 Enterprise Resource Planning (ERP) is an integrated management system of the main business process in real life and is mediated by software and technology.

02 It is usually referred to as a business management software typically an integrated application that an organization can use to collect, can manage store, and interpret data from other business activities.

03 ERP systems track business resources, for example, cash, raw materials, the capacity of products, and the status of business commitments like orders, purses orders, and payrolls.

01

Better Accounting and Financial Reporting: Keeping track of our financials is a critical factor. As our company grows the complexity of transactions may seem overwhelming without an efficient centralized system. Manual data entry significantly lessens our productivity, but an integrated ERP application that keeps track of our incoming and outgoing transactions can help with our betterment in accounting and finances.

02

Faster Response Time: As our reputation increases the ability to improve our service delivery could act as a key differentiator from our competition. To deliver better customer service, our front-line executives and sales team need maximum access to all information of customers and product. For this, we need an ERP.

03

Regulatory Compliance and Security: ERP solution providers monitor compliance and regulatory changes and keep updating their features to help us meet the new requirements. Not only does ERP software simplify data processing and streamline our internal processes, but it also enhances our security with features like regulated data access and in-built firewall systems.

04

Mobility and Flexibility: As our company grows, we will need to leverage technology to maintain control over things and stay ahead of the competition. Through ERP software, data from our organization will be streamlined into a unified platform. With this, our work will be flexible.

What is CRM?

01 Customer Relationship Management or CRM which is a technology used for managing a company's relationships and interactions with the customer.

02 The main goal of CRM is to improve business relationships to grow a business.

01

01

Targeted Promotions: A CRM will help us to gather all the relevant information about our customers. When we know what our customers want, it will help us plan our promotions in a more targeted and systematic way. For example, when we know that a particular customer had visited our shop/website and looked at a specific product, we can forward promotional material of that item to their mailing list.

02

Improve Customer Service: With a CRM in place, we can develop long-term, fruitful relationships with all of our customers. More so, when we know the customer lifecycle, it should not be difficult for our team members to give them excellent service.

03

Provide Personalized Service to Customers: With a CRM system in place, we can track all the purchases made by our customers and also keep a tab on the service calls that they make. Hence, if there is a problem during the time of purchase (or maybe later), we can sort out the issue quickly.

Q2 What factors contributed to the successful implementation and outcomes?

There are many factors that contributed to successful implementation and outcomes. Those are-

01

Focus and Planning: ERP is a complex software product that takes time to integrate the business. Allow enough time for each step, ensure important milestones get priority and manage schedules tightly. Project management skills are essential, and exceptional planning plays a vital role in achieving success.

02

Budget Rigorously: Implementation will carry several layers of costs, including software license fees and the help of an integrator. Other costs include internal staff's time as well as any disruption to your business during implementation. Add these costs up and budget so that a lack of resources does not trip up for our business ERP progress.

02

03

Select the Right ERP Partner: There are two factors to get right in the selection process. At first, our business should be looking for ERP experts who have in-depth experience of implementing ERP solutions rather than just broad software experience. Next, our business partner must understand our business in all terms and condition.

PARTNERS

Is Your ERP Partner the Right One For You?

04

Ensure Everyone is on Board: Basically, ERP implementation can bring challenging changes to everyday operations, particularly where ERP has never been used in an organization before. Staff need to adapt to this change and will do so more easily if they feel motivated and part of the process. Communication is the key factor; a communications strategy must ensure all-round participation.

ON BOARD

05 Test as We Progress: Correcting course once our business implementation is nearly complete can be expensive and time-consuming. Wherever possible test software and processes to see whether the implementation is achieving the target progress, it is an important period for testing our whole business progress.

06 Leadership: For the smooth process, select a strong leader who implementation the process of the client-side. The Team Leader have strong organizational & communication skill. For example, the project manager should make sure everyone in the company understands the importance of the software, what role each worker will play in the implementation process, what it means for business operations and how employees' jobs will change with ERP solutions.

07

Ongoing Support: Once the system is up and the users are comfortable, and we want to be able to transition to support. Having dedicated support is an invaluable investment for the company to ensure the new system stays updated.
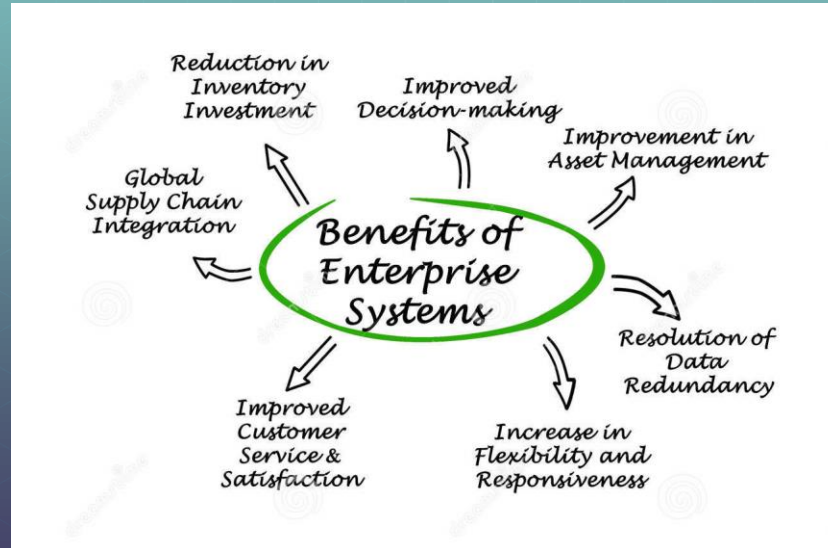

08

Prepare for Change: The employees of the organizations need to prepare for change. Employees in any situation prepare the new task and responsibility. They also take responsibility for the new and older business policy.

Q3 Enterprise systems are expensive. What factor helped justify the investment?

We will now discuss about two ERP system, one is the Extreme Office, and another one is DeshERP. Now we will compare 2 ERP software.

01

Accounting: Extreme office controls day to day sell record, cost and revenue record, account creation, company information, voucher configuration, cost category, cash flow, bank and cash, profit and loss analysis, balance sheet.

DeshERP controls voucher configuration, cost category, receipt and payment, voucher reports, cash flow, profit and loss, balance sheet, cash and bank book, trading.
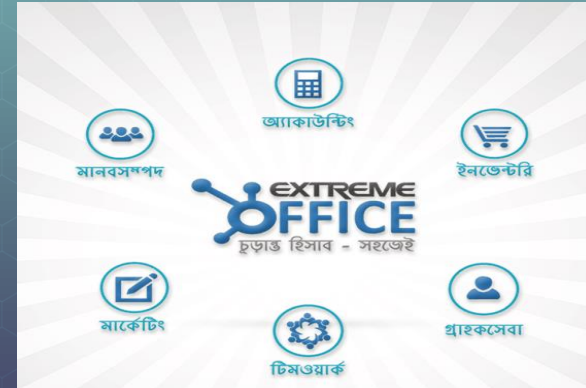
02

HR: Extreme office controls ideal manpower calculation, manpower utilization, monitoring the progress of employee, employee list, working hours, attendance and making salaries.

DeshERP controls salary sheet, attendance report, leave transaction report, employee list, absent report and monthly salary.

03

Inventory: Extreme Office controls product category, product list, warehouse, purchase details, inventory reports, stock in and out, stock adjustment, stock report, current stock position, purchase history, stock register.
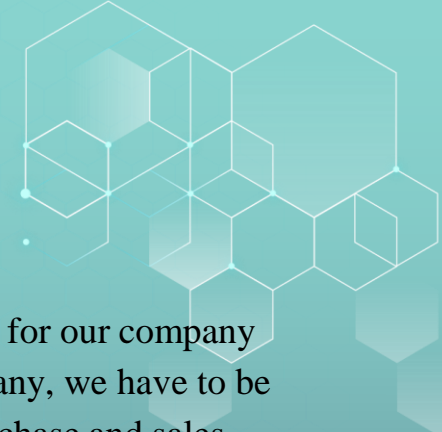
DeshERP controls stock category, stock group, stock item, warehouse, inventory transfer, inventory receipt, inventory issue, item list, transaction statement, stock management.

Purchase and Sales: Extreme office controls supplier info, purchase entry, expense entry, purchase invoice, purchase return, customer information, sales entry, sales edit, sales type, money collection, invoice creation, sales report.

DeshERP controls supplier info, purchase order, purchase invoice, purchase register, customer list, sales price setting, sales order, sales invoice, receipt voucher, delivery challenges, sales return, sales register,

We will use Extreme Office ERP system. Both ERP systems are suitable for our company because they are mostly similar. As our company is gadget selling company, we have to be more concern about accounting section, inventory management, HR, purchase and sales. The most important thing is that we have 17lak cash in hand where 15lak has been spent on all expenses. In the extreme office, one time set up cost is 20,000 taka and for the business standard monthly cost is 2000 taka. On the other hand, DeshERP installation cost for multi-desktop is 95,000 taka without any monthly cost, which is not compatible with our budget.

03

Now we will discuss Two CRM systems, one is Extreme office, and the other one is monday.Com, and also identify which one will be useful under all circumstances for our Business.

Service operations of monday.Com:

01 monday.com key field of action is streamlining contribution, and helping teams and departments perform in the best possible way.

02 monday's most distinctive advantage compared to similar systems is the advanced scheduling capability, which applies both to task and project management, and helps companies get rid of arcane paperwork.

03 It makes sure that there will be no manual entry errors, and which makes the brand even more trustworthy and reliable in the eyes of prospective buyers.

04 monday.com uses a unique Board concept, which means it provides in-depth insights on your projects or tasks or even the entire company's performance upon need.

05 monday.com remains extremely sensitive to customization, and lets the user configure almost any option until he gets a brand-specific platform.

03

Service Operations of Extreme office:

01 Keep reports of all kinds of purchases and selling like; suppliers, customers. Have access to all sales lead generation.

02 Well functional lead management and attendance management.

03 Keep all the customer's list, Ledger book and also collection history.

04 Directory setup, Barcode based products setup and also have reporting and statements module and keep all employee's profile.

05 Keep records of agent commission, cash transfer, bank cash management and report management.

EXTREME
OFFICE
চূড়ান্ত হিসাব - সহজেই

03

Marketing operations of Monday.com:

01 Powerful Campaign Planning template as being useful for marketing and creative agencies, in-house marketing and creative teams, and marketing and creative freelancers.

02 Managing entire social media campaign workflow - from the initial request to the client's campaign going live.

03 Enable clients to stay up to date on all campaign requests and campaign statuses in one place.

04 Very much customizable as much as the clients want to customize.

Marketing operations of Extreme office:

01 Extreme office has its resources and tools to carry out an extensive campaign.

02 Have large numbers of E-mail templates for campaign.

03 Run E-mail campaigns among the country.

04 Have large numbers of SMS templates for the campaign and run a massive campaign among the country via SMS.

05 Easily customizable as client's demand.

03

We will use Extreme office CRM system for our company. Though we can see nonday.com has more features than Extreme office. Still, it is also essential for us to calculate all the expenses and for that Extreme office is very much suitable for our company, and again it has all the features to fulfil our business demands. monday.com will cost $39 per month where we can use Extreme office for both our ERP & CRM at just $26 or 2000 taka per month.

For our Business, we need both ERP and CRM and for this are using one software name Extreme Office which is eligible for both functions. We can do all the necessary task through this one software, and for this we can say that both of our CRM and ERP functions are compatible.

THANK YOU