

# HOW CAN MANUFACTURERS REALIZE THE COMPLETE POTENTIAL OF

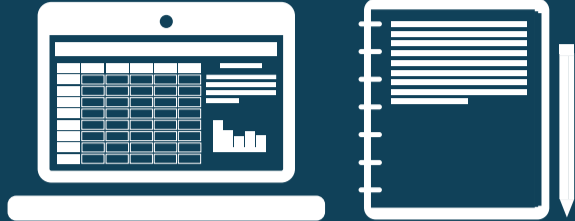
CRM

WITH

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ERP

## HOW MANUFACTURERS OPERATE WITHOUT A CRM SYSTEM?



Lead generation & prospect/opportunity information are stored in **Spreadsheets & Notebooks.**

Customer contact information & Schedules are usually maintained in **Notepads, Visiting Cards, Outlook or Gmail.**



Sales and Accounting Data are maintained in an **ERP** (without a dedicated CRM module) or manually.

## IMPORTANCE OF CUSTOMER RELATIONSHIP MANAGEMENT (CRM)

### Improved Customer Service

- ▶ Provides vital customer info at a single-click.
- ▶ Enables lead tracking, data centralization and easy data retrieval.
- ▶ Quick query answering, thereby saving precious time.

### Improved Lead Management

- ▶ Complete 360-degree view of lead information across sources.
- ▶ Easily distinguish High Quality Leads (HQL).
- ▶ Track Interaction and responses pertaining to each HQL.
- ▶ Drive critical focus and marketing efforts towards HQLs & convert them into full fledged sales orders.
- ▶ Increase quality of leads for efficient sales and order management.

### Improved Sales Numbers

- ▶ Know 'whom to sell' using CRM capability of identifying HQLs.
- ▶ Conduct in-depth analysis to identify best lead sources, locations, industry segment, demographics etc.
- ▶ Analyze sales campaign data to gauge campaign success and failures.
- ▶ Arrive at buying patterns, peak order time and down time.
- ▶ Leverage data to proactively get in touch with customers and procure repeat orders.

### Improved Production Forecasting

- ▶ Arrive at production forecasting based on total number of leads, HQLs, and potential sales conversion numbers.
- ▶ Create in-depth production plan to ensure adequate raw materials, machine & manpower availability.

### Post-sales Customer Service

- ▶ Study the service history of products, product issues and solutions offered.
- ▶ Improve service & product quality by analyzing product issues and fixing it for future products.
- ▶ Keep customers pre-informed on their product service by tracking service history, warranty details, and upcoming service dates.

## THE RELATIONSHIP BETWEEN CRM AND ERP



### CONNECTED TO CENTRALIZED DATABASE

- ▶ Instantaneous updates in CRM and visible across ERP owing to a single, centralized database.
- ▶ Quickly raise invoices, respond to customer queries, track shipments etc. owing to clear sales management visibility.
- ▶ Remove data duplication and human errors through real-time data updates.

### INCREASED MOBILITY & FLEXIBILITY

- ▶ Access customer data from anywhere, anytime through any hand-held device and browser.
- ▶ Collaborate easily with departments and personnel with real-time information on sales orders, customer shipment, order status etc.
- ▶ Instantly interact with customers and reply to their queries, grievances, sales info, product information & support etc.

### COMPREHENSIVE INVENTORY, ORDER & QUOTE MANAGEMENT

- ▶ Increase response to RFQs, reduce quotation and proposal preparation time.
- ▶ Quote accurately using integrated BOM, material cost, labor cost, production cost, & outside services.
- ▶ Get instant information on latest inventory levels, production status, shop floor status, shipment status, supply chain data etc.

### COMPLETE 360 DEGREE CUSTOMER VISIBILITY

- ▶ Complete visibility of customer orders, interactions, service tickets, shipment, payments etc.
- ▶ Track changes in customer preferences, buying patterns, customer loyalty & payment patterns.
- ▶ Improve customer relationships based on data analytics and reports.

### REDUCE OVERHEAD COSTS

- ▶ Track labor costs, employee attendance, payroll, taxes and other associated tasks.
- ▶ Increase production speed by accessing work orders, parts specifications, BOMs, routers and other data from devices.
- ▶ Create and configure cost types for various cost categories (materials, overheads, labor).
- ▶ Avoid unnecessary errors, material wastage, machine downtime, job delays etc. by allocating the right job to the right operator.

### REAL-TIME VISIBILITY

- ▶ Get real-time visibility to inventory levels, machine availability, sales order conversions, work order allocation, daily shipments, RFQs, supply chain etc.
- ▶ Analyze and derive sales trends which enables you to target and re-target prospects in a way that guarantees sales conversion.
- ▶ Efficiently plan and schedule production, procure goods from suppliers, efficiently manufacture and deliver products to customers just in time.