

[www.smartcrm.com](http://www.smartcrm.com)



**SMARTCRM GmbH**  
**Simply MORE success**

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**SMARTCRM. Simply  
MORE success. CRM for  
the entire enterprise.**

The CRM system for retail and manufacturing, for sales, marketing and after-sales service, for analysis and planning, for information and communication

CRM – For us, it's  
all about inspiration.  
Every day.

Keeping it strong.

Keeping it fresh.

**SMARTCRM. Simply  
MORE success.**





# SMARTCRM at your enterprise. Simply PERFECTLY integrated.

## Customer relationships: the secret to success

„Underinvestment in customer service a common problem“, „Companies overlook valuable sales opportunities“, „Not enough known about customers' actual needs.“ Three randomly chosen headlines that all ask one thing: are customers an unknown quantity?

Or, to put it another way: do everything possible to understand your customers better! Seize the income opportunities that come from developing and cultivating customer relationships. Seize the opportunities offered by customer relationship management (CRM), especially when paired with ERP.

Companies often talk about their assets. Few assets, though, are more valuable than customer satisfaction. You can have the most innovative products and services in the market, but they will never take off without a stable and enduring customer base. In short, CRM is not just a yardstick for success – it is the yardstick for success, regardless of your target market.

## The everywhere CRM

SMARTCRM is the „everywhere CRM“ that assures end-to-end, perfectly coordinated customer relationship management across the entire enterprise. SMARTCRM has a modular design and an ideal feature set for interacting with the „outside world“ – for department managers and senior executives, or in sales, marketing and after-sales service.

## SMARTCRM – the strategic decision

Interacting with customers is easier than ever thanks to all the modern-day communication channels. Mere interaction will not, however, automatically guarantee customer loyalty. On the contrary, it takes more time and effort than ever before to keep existing customers.

SMARTCRM provides valuable breathing room so you can successfully tackle today's CRM challenges:

- Disloyalty has become easier. In our globalized digital world, alternatives are literally just a mouse click away. Today's customer can quickly become tomorrow's ex-customer at the slightest hint of dissatisfaction.
- „We want CRM – but not at any price.“ Many companies are trimming costs to stay competitive. Often, they first place they look is IT investment. SMARTCRM preserves your budget flexibility since the CRM system grows with your business. Its basic feature set already covers much of your CRM workflow. And expansions can wait until they are actually needed and fit in with your investment cycle.

## Designed to do MORE

Our philosophy: customer communications are only successful if they build on information from all the processes in and outside the company.

CRM software aggregates, filters and condenses this information into clear, actionable intelligence for all stakeholders. Few information sources are more important than the ERP system. It contains the most valuable data for effective customer communications: Why are the order volumes for this one product so far off from our forecast? Which customers are worth providing the most high-touch service to? Why are some sales projects more successful than others? The answers to these questions are invaluable when crafting a strong CRM strategy – but only if you can figure them out.

That is why we designed our CRM system to interface flawlessly with ERP environments from the very beginning. When both applications work hand in hand, it is easier to deploy resources effectively and engineer efficient business processes.

SMARTCRM. Simply MORE success.

# SMARTCRM for SMEs.

## Simply more AGILE in business.

### SMARTCRM – the CRM software for retailers and wholesalers

The near-universal availability of products has made each customer twice as valuable – especially for retailers and wholesalers. All the more reason to step up your customer care:

- **Make decisions faster**

CRM means being better informed and coming to the right conclusions. SMARTCRM pools all your customer knowledge and drives sound decision-making. It transforms figures into trends, customer numbers into personalities, market developments into strategies.



SMARTCRM is a versatile tool that can help you improve your market positioning. Every single day.

- **Personal service all the time**

Immediately access a customer's history when they call. Tailor direct mailings to addressees' preferences. With SMARTCRM, your customers will always feel like they mean more to you than just a number.

- **Take the shortest path from A to B**

Use SMARTCRM to coordinate all your inside and outside sales activities, draw up a logistically flawless schedule for customer visits and respond immediately to changing conditions. You will always take the most direct route to your customers – because you always take the most direct route in your own business.

### SMARTCRM – the CRM software for manufacturers

In manufacturing, CRM is mainly about one thing: thinking long-term. You need strong arguments to keep your customers loyal:

- **Assuring quality in customer care**

With SMARTCRM, you can impress your customers with superior service. The system categorizes and intelligently cross-references documents and files. You can instantly get „up to speed“ on customers' needs and communicate effectively with them.



SMARTCRM is innovative CRM – and innovations are what hone your competitive edge in manufacturing.

- **Global teamwork**

CRM is increasingly becoming an international 24/7 process. SMARTCRM keeps data flowing freely across national and organizational boundaries. It even comes in different languages and offers a glossary management tool. SMARTCRM is global CRM.

- **Up-to-date everywhere**

Even in high-security production environments not fully connected to the digital world, you can keep the information flowing: by generating reports, scheduling follow-up meetings, entering purchase orders. Data is logged offline and immediately uploaded to the central SMARTCRM server once you return online.

In retail and wholesaling.  
In manufacturing.  
In small and mid-sized  
enterprises.  
SMARTCRM helps you  
tackle day-to-day  
challenges. Reliably.  
SMARTCRM. Simply  
MORE success.

Contact us today:

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Machine and equipment management

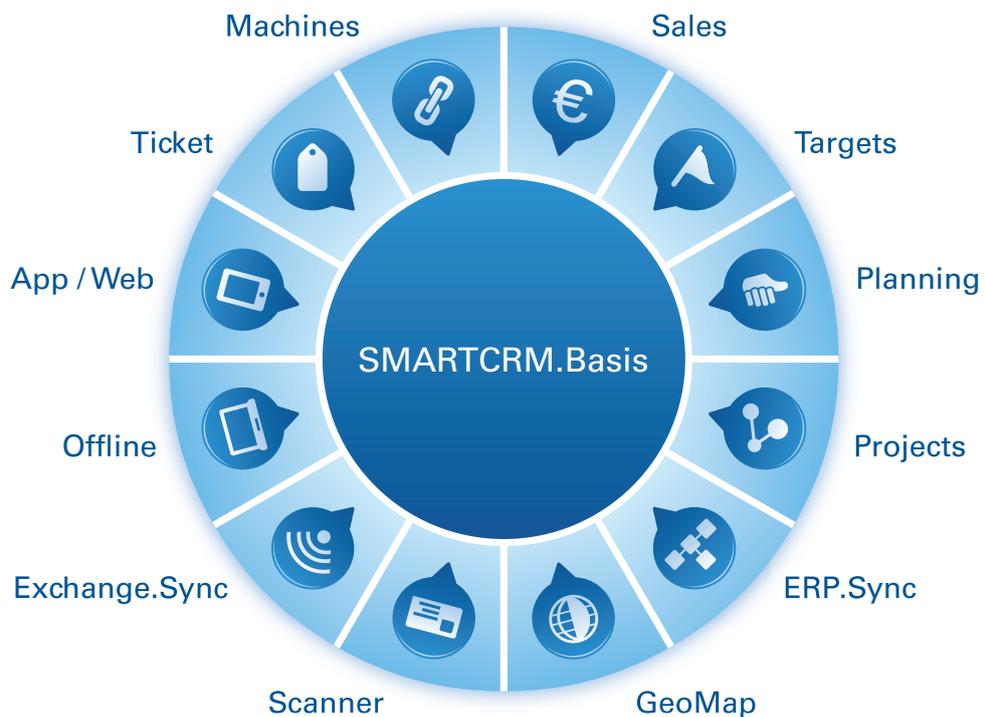
Statistics/controlling

Quote generation and tracking

Address and contact management  
Tasks, information and appointment management  
Document management  
Campaign management

# SMARTCRM.modules

## Simply EVERYTHING you need.





Complaint and service management

Competition monitoring

Performance agreements

Mobile solutions

Interfaces to ERP, DMS, etc.

### Sales

Instantly access customer figures and statistics

### Targets

Define objectives for employees, teams or the entire company

### Planning

Effectively plan a market segment over a definable period of time

### Projects

Draw up quotes, document sales projects

### ERP.Sync

Interface with countless ERP systems

### GeoMap

Visualization of addresses, area search

### Scanner

Quick entry addresses, read imprints and signatures

### Exchange.Sync

Synchronization between SMARTCRM and Microsoft Exchange

### Offline

License to run SMARTCRM on a laptop

### App

CRM for iOS and Android devices

### Web

License for the use of the WebClient

### Ticket

Assign, manage and document service processes

### Machines

List of plants and equipment, scheduling maintenance calls

# SMARTCRM for the entire enterprise.

## Simply know MORE.



All your customer information is available – from anywhere. All your tasks are defined – completely. All your appointments are entered – immediately.

Amassing information is easy. What is hard is deftly preparing and sharing it for many different uses. And when it comes to winning business, something else matters, too: speed. Being well-informed is not enough – you also have to be faster than the competition.

That is only possible if CRM is viewed and treated as an enterprise-wide process, if processes are always transparent, and if information is immediately translated into active, targeted action.

You can accomplish all that with SMARTCRM. Quite simply. Everywhere.

### SMARTCRM – simply perfect organization

- **Administer information in one place**  
Addresses, contacts, e-mails, appointments, reports, presentations – SMARTCRM shares all types of information across departmental and team boundaries. To help users, it also shows the customer or process associated with each piece of data.
- **Engineer processes productively**  
Everyone has to follow certain routines – from notifying the secretary when reserving a conference room to forwarding the latest sales figures to the CFO. In SMARTCRM, you can define and fully automate this kind of regular routine work.
- **Track activities efficiently**  
Tasks, call memos, reports – SMARTCRM documents all your activities seamlessly and consistently. You instantly see what remains to be done and the most efficient way to split up the work.

- **Document knowledge completely**  
SMARTCRM is your company's memory. It holds all the knowledge about your customer processes for instant access by any user. This avoids redundant data storage, and guarantees anytime, anyplace access to the latest data.
- **Manage your organization effectively**  
SMARTCRM provides instant visibility into every aspect of your business. Current variance analyses of revenues and targets, pending service calls, top ten customer lists, „hot“ sales prospects or attendee numbers at a recent sales event – with SMARTCRM, you can make sound decisions quickly.

### SMARTCRM – simply perfect communication

- **Form useful target groups**  
Who are your „right“ customers? You can spend a lot of time on this question – or you can simply use SMARTCRM to generate the ideal customer and prospect profile using categorizations, automatic classifications, freely definable characteristics and the latest customer figures.
- **Keeping the dialog alive**  
It's one thing to reach out to customers by letter, e-mail or phone. It's another to develop and maintain an ongoing dialog with them. With SMARTCRM, you can document this process from start to finish: your actions, the customers' response, follow-up actions, etc.
- **Always find what you need**  
Improvisation is part and parcel of constructive communication. You can't always know everything – but you have to know where to find it. SMARTCRM comes with a host of search and filter tools to track down the answers that you and your customers need.

### As the CEO ...

... I believe satisfied customers are the foundation of our future. And it is our job to meet and exceed their expectations, every single day. With SMARTCRM, we can all stay on track to reach this goal together as a team.

#### SMARTCRM.Modules for the entire enterprise



Sales



Targets



Planning



App



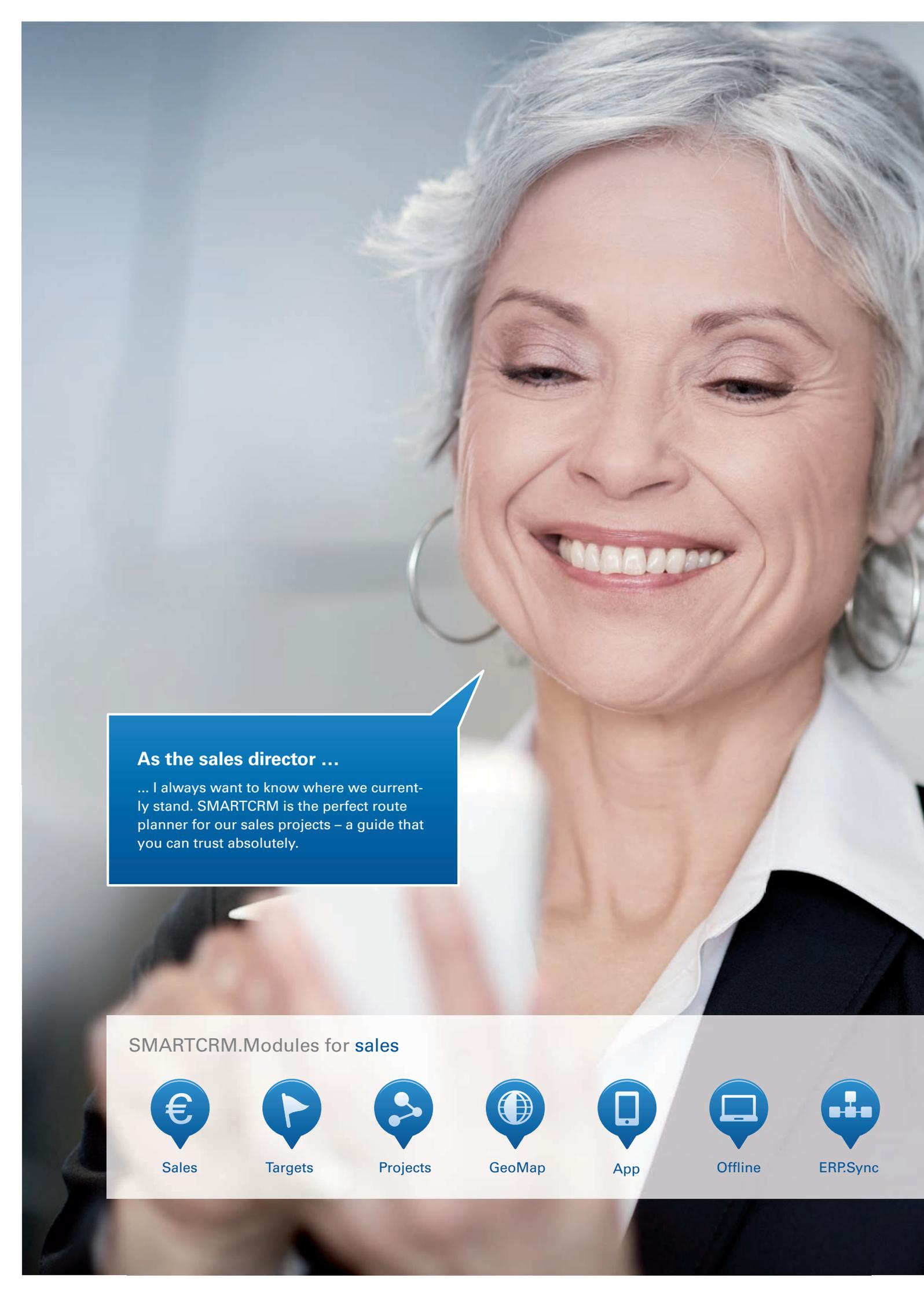
Offline



Exchange.Sync



ERP.Sync



**As the sales director ...**

... I always want to know where we currently stand. SMARTCRM is the perfect route planner for our sales projects – a guide that you can trust absolutely.

SMARTCRM.Modules for sales



Sales



Targets



Projects



GeoMap



App



Offline



ERPSync

# SMARTCRM in sales.

## Simply sell more EASILY.



Planning strategies in detail – identifying the right target groups – reaching revenue targets as early as possible. That is what successful sales is all about.

It sounds simple, and can be simple – if you use CRM effectively. If you clearly and effortlessly separate „worthwhile“ customers from those who cost far more than they bring in. If you identify, intelligently develop and properly communicate cross-selling opportunities. If you flexibly incorporate market, technology and product developments into your sales strategy.

In that case, you won't need to spend much time talking about what you want to accomplish. Because you've already accomplished it. SMARTCRM helps you with every aspect of your sales activities since it has the broadest sales focus of any CRM system available today.

### SMARTCRM – simply see more clearly

- **Efficient with group dynamics**  
With SMARTCRM, you can sort customers into manageable groups based on regional distribution, purchasing behavior or other criteria, and then define your sales/marketing activities in order to do more with less effort.
- **Spot opportunities better**  
SMARTCRM places a laser focus on cross-selling. Identify untapped sales potential right away so you can be proactive – instead of merely reacting to changes in customer behavior.
- **Analyze competitors thoroughly**  
Why would customers tend to the competitor? Answer this question with a well-grounded analysis of your rivals and their market activities. In SMARTCRM, you can tie all this knowledge together and immediately see where you need to take action.
- **Stay focused on targets**  
Am I going to hit my targets? This is the key question in sales. With SMARTCRM, you can define and track a variety of targets, such as total revenue, revenue from individual products or

product groups, number of visits or new customer projects. Up-to-date variance analyses and an early warning system will immediately highlight trouble areas for you.

### SMARTCRM – simply work more systematically

- **Issue and track quotes professionally**  
With SMARTCRM, you can generate quotes as flexibly as needed: from detailed offers with pictures to „quick quotations“. Seamless support for all project phases keeps you updated on the quote's status. And, if you decide to continue generating quotes in another application such as your ERP system or configurator, you can still track the quotes in SMARTCRM.
- **Manage projects effortlessly**  
SMARTCRM takes the complexity out of sales projects: it always presents the connections between resources, documents, milestones, forecasts and assessments completely and transparently.
- **Keep your field sales team informed**  
Your field sales team needs instant access to current data too. For them, SMARTCRM also comes in a fully functional offline version. Entries are later automatically synchronized with the central SMARTCRM database.
- **Plan customer visits effectively**  
In SMARTCRM, you can schedule customer visits to make the best use of your employees' time. And if they have time left over, they can even drop in to visit a nearby customer – as suggested by SMARTCRM.

# SMARTCRM for after-sales service. Simply BETTER service.



Why do customers stay loyal? Product and service quality obviously has to be good – but that isn't a sure-fire recipe for long-term customer relationships. The secret: superior after-sales service and user support. If these areas are lacking, customers will quickly find another provider. It's up to companies to go the „extra mile“ to gain and retain customers' loyalty – and this extra mile keeps getting longer.

Service excellence is not just a nice-sounding promise. It's an absolute necessity if you want to get ahead in today's fiercely competitive environment.

With SMARTCRM, you can maximize the quality of your after-sales service.

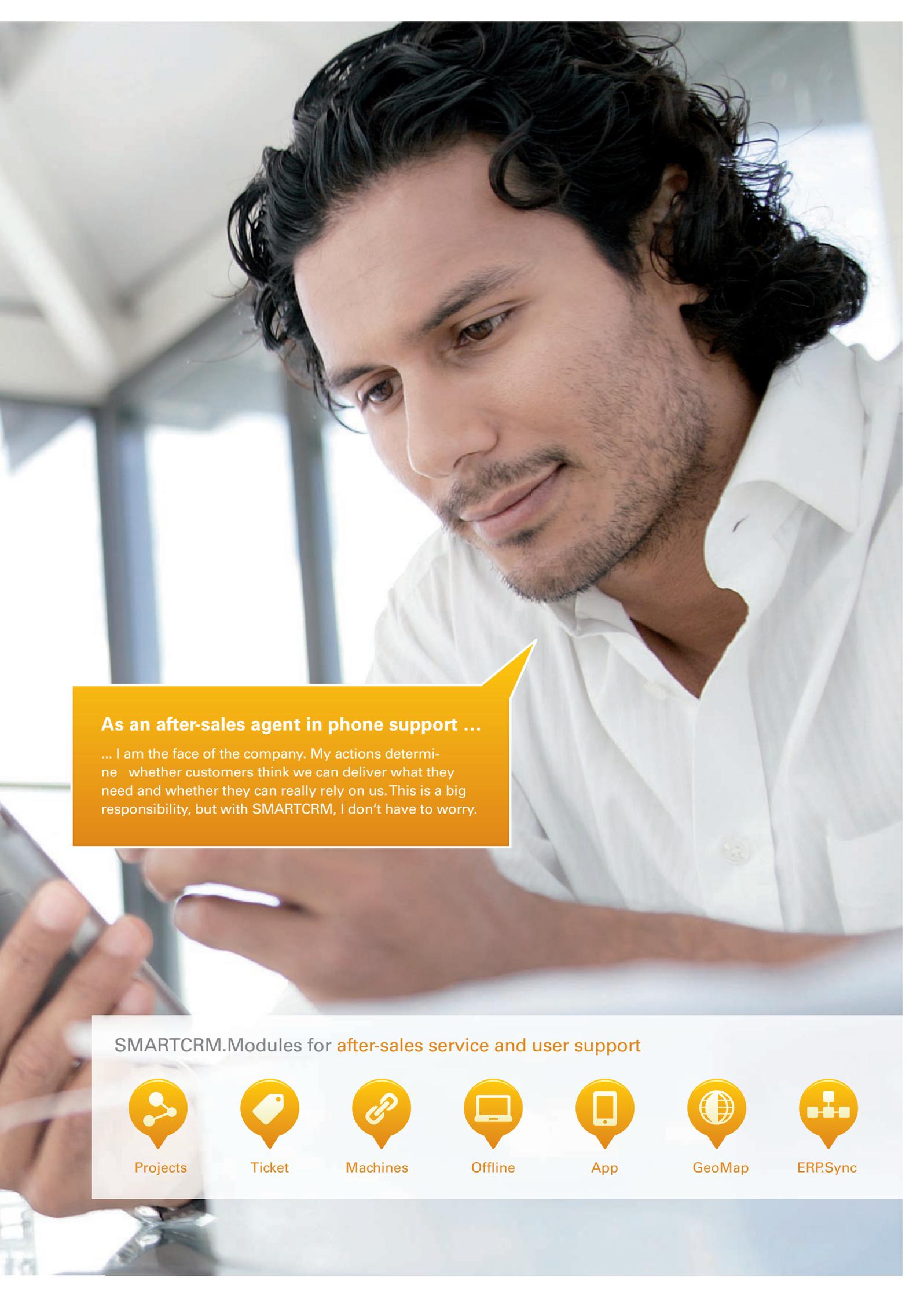
## SMARTCRM – simply better prepared

- **Stay on top of complex service processes**  
After-sales service agreements tend to be complex and packed with finicky details. SMARTCRM lets you clearly capture exactly what needs to be done for each customer, by whom and by when. This assures high-quality customer care even if the customer's regular after-sales agent is out of the office for the day.
- **Employ skills intelligently**  
In SMARTCRM, you can assign after-sales service tasks to employees based on their skills and availability. This is an excellent way to ensure you allocate resources more effectively, schedule service calls more efficiently, and reduce complaints and follow-up visits.
- **Perfectly planned logistics**  
When you schedule service calls, SMARTCRM helps you optimize technician workloads by presenting a map that shows other customers in need of service within a certain distance or travel time.
- **Develop helpful FAQs**  
In SMARTCRM, you can create a knowledge database specifically tailored to the requirements of after-sales service. Put prototypical solutions

at your agents' fingertips by documenting typical examples of common and rare problems along with suggestions for resolving them.

## SMARTCRM – simply more responsive

- **Provide better phone support**  
If the caller is already listed in SMARTCRM, the system will automatically display the customer history. Information from the phone call is logged using a checklist and shared across the system so it is immediately clear who is responsible for the customer and how the issue should be resolved.
- **Cross-sell based on after-sales service**  
SMARTCRM captures and organizes all the data associated with your maintenance and after-sales service agreements. As such, not only does it track current trends, but it also identifies new business opportunities. For example, if a customer has requested an unusual number of service calls for a particular machine, it may be time to offer them an upgrade. With SMARTCRM, it's easier to unleash these synergies between sales and after-sales service.
- **Solid basis for improvements**  
With SMARTCRM, you always know how efficient your after-sales service team is. You can capture and analyze your team's service calls in exquisite detail: the average number of service calls per employee, the time to complete each order, etc ... This enables you to drive highly focused improvements in your after-sales service.



### As an after-sales agent in phone support ...

... I am the face of the company. My actions determine whether customers think we can deliver what they need and whether they can really rely on us. This is a big responsibility, but with SMARTCRM, I don't have to worry.

#### SMARTCRM.Modules for after-sales service and user support



Projects



Ticket



Machines



Offline



App



GeoMap



ERPSync



Do you need another interface?  
**Just let us know.**

## SMARTCRM.Interfaces Simply PERFECTLY integrated.

With SMARTCRM, you see everything you need to know about your customers right when you need to see it. All the information is instantly at your fingertips – no matter where it may have come from. With all its interfaces, SMARTCRM frees you up from worrying about different data sources and formats, not to mention data consolidation and storage.

### Interface for ERP systems

We have invested much of our time in bridging the gap between CRM and ERP. You can connect SMARTCRM to any ERP system with a data export function. We will configure the corresponding interface to your exact specifications so you can easily exchange all essential data between the two systems. Through granular permission management you can determine who can see what data.



*Extract of the possible ERP interfaces*

### Interface for Microsoft Office

Even the standard version of SMARTCRM comes with a Microsoft Office interface. As long as you already have a license, you can work in Microsoft Office, save your Word, Excel or PowerPoint files right in SMARTCRM, and even assign keywords and categories to your finished documents. Document templates can be stored and shared in a central directory to ensure that everyone uses the same formats and layouts.

### CTI interface

The CTI interface is a basic SMARTCRM feature. As long as you have a TAPI-compliant phone, every call will immediately bring up a screen showing who is calling along with their data. Incoming phone numbers are automatically associated with a particular contact (name, company, etc...). From there, you can go directly to the customer data record. You no longer need to waste valuable time looking up the basics, but can immediately devote all your attention to the customer's needs.



### **Interface for document management systems (DMS)**

In SMARTCRM, you can categorize documents, associate them with customers and projects, store standard templates and generate mass mailings. SMARTCRM can also interface with powerful third-party document management systems in order to seamlessly support the entire document workflow in your CRM processes – right up to audit-compliant archiving.

### **Thorough address verification**

The anti-terror ordinance 2580-2001 of the EU prohibits businesses to offer goods or services to individuals or companies which are listed on the black lists. In order to prevent these business relationships, we offer you, as an option, the appropriate software which allows you to check the SMARTCRM database. Thus you identify easily and quickly possible match with diverse black lists (e.g., UNO, EU Commission, Bank of England, OFAC/SDN, CH List SECO). Therefore, you always know who you are dealing with.

### **Interface for E-mail Marketing Software**

SMARTCRM guarantees a customer approach of high quality thanks to the optional interface with professional e-mail marketing tool. The integration of the solution allows the use of all CRM system managed customer data for a personalized newsletter dispatch. Numerous relevant processes for the creation and delivery are automated. Efficient e-mail marketing offers you the low expenditure and the great time saver to support optimally your customer relation management.

Successful customer relationships are the result of personalized, flexible planning and actions. SMARTCRM gives you the tools to achieve this goal. Today and tomorrow.

SMARTCRM. Simply  
MORE success.

# SMARTCRM. Simply CLOSER to customers.

The first step to customer intimacy is identification. When you truly understand your customers because you are so much like them. And like our retail, wholesale and manufacturing customers, we are a SME. It shows in our organization, expectations and practices. We ask ourselves the same questions as our customers: How can IT support business processes? Where are its limits? How do you strike the right balance between requirements, knowledge and budgets?

Since 1992, we have been giving SMEs the right answers to these questions as the vendor of SMARTCRM. After having completed hundreds of CRM projects, we thoroughly understand our customers' special requirements in retailing, wholesaling and manufacturing.

## Progress at your fingertips

Our tradition also means that we have closely followed the recent transformations in IT technology and the new possibilities they offer, and have consistently incorporated the best ideas into our product.

Through these changes, SMARTCRM has evolved into a highly successful program – a readily configurable CRM solution that grows with your business and provides valuable room to maneuver. A CRM application that has a strong sales focus, but still interconnects all the customer-facing functions in your company.

## Success in numbers

Over 14,000 people at small and medium-sized retailers, wholesalers and manufacturers currently use SMARTCRM. They benefit not only from powerful software, but also from extensive support.

SMARTCRM offers the full range of customized services: consulting and system analysis, customizing, installation and in-depth training for users and administrators.

## Secret to successful CRM

We pay particular attention to the rollout process. Our extensive experience has gone into developing a rollout system that utilizes special techniques, but is still flexible enough to be fully adapted to our customers' unique requirements. The rollout covers seven phases: from the kick-off workshop to ongoing support in the form of feature modifications or enhancements after the initial period of use.

One thing, however, is particularly important for us. CRM is not just software – it's a company philosophy. That is why we aim to reach out to all stakeholders, generate enthusiasm and help them identify with the project. „This is about OUR customers. This is OUR CRM system.“ Only then will IT enjoy the kind of long-term user acceptance needed to deliver true benefits across the enterprise.

## Proven partnerships

We know our customers want end-to-end CRM solutions. That is why SMARTCRM provides an open system that features standard interfaces to common third-party applications such as DMS or ERP systems. We work closely with our partners to achieve this goal. Our solutions are distributed through direct sales and partners – in Switzerland and Austria via our own subsidiaries.



Contact us today:

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