SMART
CRM

Tailored CRM

**As much standard as possible,
as individual as you,
and yet 100% updatable.**

Success factor #1: A partner with expertise

SMARTCRM is...

✓ ... a team of 50 creative minds, some of whom have been on board since the founding year 1992 and therefore know exactly how CRM works.

✓ ... a CRM manufacturer attaching internally utmost importance to CRM.

✓ ... completely flexible: short decision paths with development, project management and hotline under one roof.

✓ ... the CRM for Germany, Austria and Switzerland: our head office is in Kandel, Germany, customers from Austria and Switzerland are attended to directly by our branches in Groedig, Austria and Frauenfeld, Switzerland.

✓ ... for 30 years clearly focused on mid-sized enterprises in the industry and wholesale – and therefore whose industry know-how is a key advantage.

✓ ... your partner who is there for you at each phase of your CRM project: from the CRM decision to the real start and of course beyond.

✓ ... award-winning CRM: the German Federal Association of IT-SME (Bundesverband IT-Mittelstand e.V. – BITMi) has awarded us the label "Software Made in Germany".

Success stories: more and more B2B companies rely on SMARTCRM

2006 2007 2008 2009 2010 2011 2012 2013 2014 2015 2016 2017 2018 2019 2020 2021
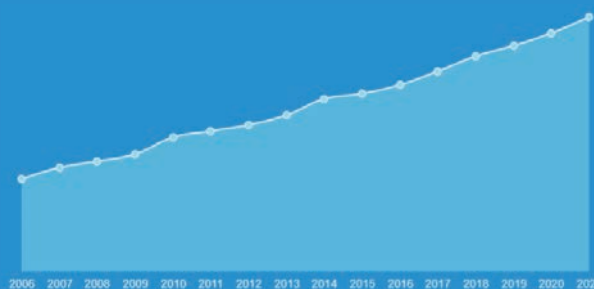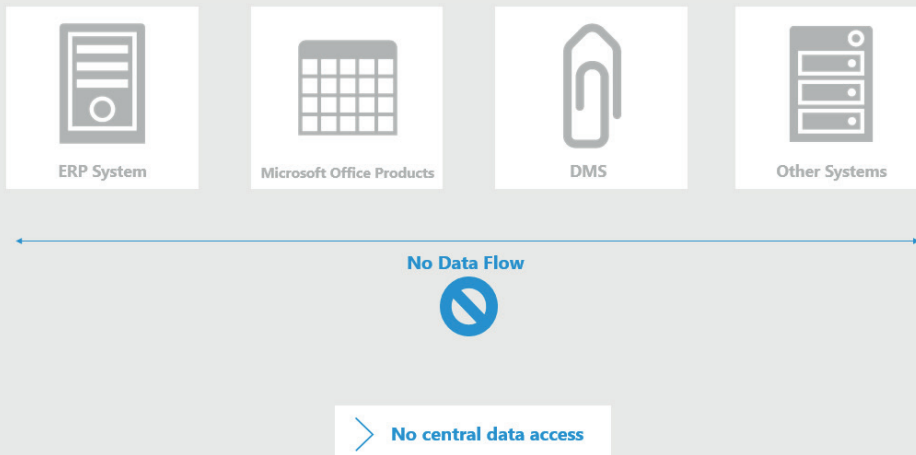
ZIMM®

"The SMARTCRM GmbH offers us competent care and a partnership contact. As a midsize company, the CRM manufacturer is for us a company at eye-level and true-to-word."

Elke Lun, ERP project manager at ZIMM Maschinenelemente GmbH + Co KG

Without SMARTCRM:

| ERP System | Microsoft Office Products | DMS | Other Systems |

- Numerous isolated applications
- No direct data access
- No information transparency
- Time-consuming processes
- High staff workload
- High cost for customer service

No Data Flow

> **No central data access**

With SMARTCRM:

| ERP System | Microsoft Office Products | DMS | Other Systems |

Data for Sales, Purchasing, Marketing, Service

SMART CRM

> **Central data access in one system**

- Information bundling
- Central data access
- Significantly more transparency
- Access of all employees
- Improved customer service
- Increasing customer satisfaction
- Higher customer loyalty
- Potential for referral marketing
- Optimized customer acquisition
- More efficient processes
- Huge time-saver
- Decreasing costs
- Increasing employee satisfaction

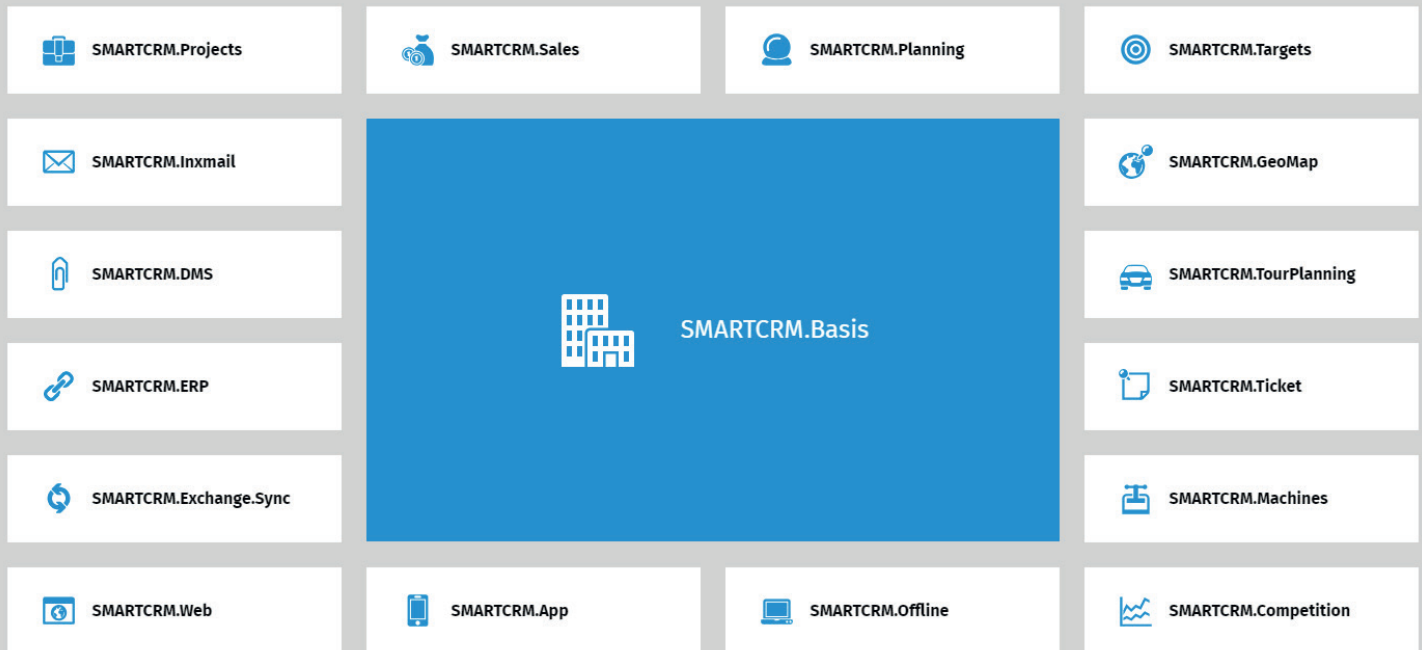## CRM provides answers, such as …

- Which customers need special support?
- Which product can I offer to which customer?
- How is the target achievement of my sales staff?
- Do I have to take counter measures for certain targets?
- How do the target/performance comparisons look like?
- In which sales territory do I have to strengthen my actions?

- What about my order backlog and my incoming order?
- How high are the open items of my customers?
- Which customer has not purchased anything for a long time?
- What open complaints do I have?
- For which products are there numerous complaints?
- Are the terms of reclamation processing optimal?

BLUHM® systeme

"Over time SMARTCRM has adapted to our requirements, since the developers of SMARTCRM take our sales processes into consideration and implement their findings in product development."

Kurt Hoppen, Managing director of the Bluhm Systeme GmbH

Success factor #3: Tailored CRM

SMARTCRM, your CRM building set

With SMARTCRM you do not buy the pig in a poke - but invest with a sense of proportion! SMARTCRM is your CRM building set, where you purchase only the components you actually need for your daily CRM processes.

SMARTCRM.Basis constitutes the foundation for the most important basic functions. Thereon, you build your individual CRM system with our modules. So, you just purchase the building blocks you actually need. Should your requirements change with time, no problem: you can always expand your SMARTCRM solution. For the users, SMARTCRM always remains clear and intuitive to operate, since they only see the functions important to them thanks to individual authorizations – this way they can focus on the essential.

| SMARTCRM.Projects	SMARTCRM.Sales	SMARTCRM.Planning	SMARTCRM.Targets
SMARTCRM.Inxmail			SMARTCRM.GeoMap
SMARTCRM.DMS	SMARTCRM.Basis		SMARTCRM.TourPlanning
SMARTCRM.ERP			SMARTCRM.Ticket
SMARTCRM.Exchange.Sync			SMARTCRM.Machines
SMARTCRM.Web	SMARTCRM.App	SMARTCRM.Offline	SMARTCRM.Competition

100 % update capability

New version – for you no problem! We have developed our CRM solution in a way
that all your configurations and rules are retained in your SMARTCRM installation.
Guaranteed!

Individual start screen: SMART Board
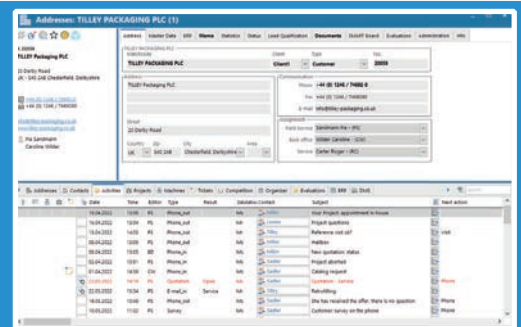
SMARTCRM.Basis: customer file with activity history

"Thanks to SMARTCRM, the communication between field service and back office finally runs efficiently, no more important information will be lost. The call-off orders are easier and better monitored and offers tracked promptly. The evaluations such as the year-to-date sales revenue comparison are really helpful to refrain comparing apples and oranges."
Klaus Holzer, sales manager and board member of the PAJUNK Medical Produkte GmbH

Success factor #3: Tailored CRM

SMARTCRM.Basis can tell you: what, when, with whom and with what result – centrally available in the CRM system for all employees and traceable even years after.

With SMARTCRM.Projects, you know exactly in each phase of your sales project you need to start.

SMARTCRM.Sales evaluates the figures from your ERP system in detail and gives you a daily overview of the most important parameters. Because SMARTCRM is your figures CRM.

SMARTCRM.Planning offers you the long-term vision without losing sight of the latest developments.

With SMARTCRM.Targets, you keep the target in mind.

SMARTCRM.GeoMap shows you the direct path to customers.

Schedule your tours with SMARTCRM.TourPlanning at the blink of an eye: save time with visit suggestions, calendar entries and predefined visit reports.

With SMARTCRM.Ticket, complaints become an opportunity to whip up enthusiasm in your customers.

SMARTCRM.Machines is our support for your service department.

With SMARTCRM.Competition, you keep an eye on your competitors and always find the right arguments for successful sales work.

With SMARTCRM.Offline, you always have your CRM with you – wherever you are.

SMARTCRM.App is your practical CRM on the go. Access important CRM data online at any time.

SMARTCRM.Web is your practical CRM on the go.

Central instead of local: so easily SMARTCRM.Exchange. Sync cares for the synchronization of your communication and contact data between the CRM solution and Outlook through Exchange Sync.

SMARTCRM.ERP: 98% of our customers use an interface between SMARTCRM and their ERP solution.

SMARTCRM.DMS: bundle the advantages of CRM and DMS and connect SMARTCRM to your Document Management System.

SMARTCRM.Inxmail supports you with a wide range of data protection, tracking and double opt-in features for GDPR compliant e-mail marketing.

Supports: ■ Sales ■ Field Service ■ Control- ■ Marketing ■ Service ■ Purchasing

SMARTCRM.Projects: project file with evaluation matrix

SMARTCRM.Sales: evaluation, target/performance comparisons

"Our employees were very quickly convinced by SMARTCRM and from the advantages of the CRM system in their daily work. This makes the active use of the software clear: we record on average 100 to 200 activities a day in SMARTCRM."

Alexander Hachen, Sales and customer care manager at Dienes Werke for Maschinenteile GmbH & Co. KG

Success factor #4: Suitable solution

Tailored CRM for each department

SMARTCRM is your company-wide CRM, since it offers the suitable functions for all departments.

> ### Sales
> SMARTCRM is your sales support and provides structured processes, well-informed decisions and the reinforcement of your customer retention.

> ### Field service
> SMARTCRM offers the suitable solution for all requirements in sales and service field activities and optimizes your processes, communication and customer service.

> ### Controlling
> SMARTCRM provides you with all current analyses that you need as a found basis for your management. Isolated applications are a thing of the past since our CRM system brings together all relevant data from third-party systems.

> ### Marketing
> SMARTCRM caters for addressing the right target group, automating and structuring your campaign management and sustainably reducing the time spent.

> ### Service
> Using SMARTCRM, you have all necessary machine or ticket information ready, can coordinate your service appointments and can keep track of everything even on the go.

> ### Purchasing
> SMARTCRM provides all information as well as analyses concerning suppliers and supports you in establishing and strengthening successful business relationships.

Tailored CRM for every department

How well do you know your customers? Does your sales staff know, how satisfied the customers really are? And your field service employees? Are they always aware of the issues they should address during the next customer visit such as open quotations or new products? Can your marketing department select the appropriate target group for campaigns and send personalized mailing? Does your controlling department know at an early stage by which customer a change of trend outlines? Are sales declines detected quickly? Are updated data available to all decision-makers? Does your service staff have access to the customer's previous tickets while processing a claim?

SMARTCRM shows you all this – and for the entire company. Our CRM system indeed offers the suitable solutions for all departments.

PULTEX

"SMARTCRM is simply a terrific piece of software. Here at Pultex, it's just: there is nothing it can't do. And the support is also perfect: after sales is a top priority with SMARTCRM."

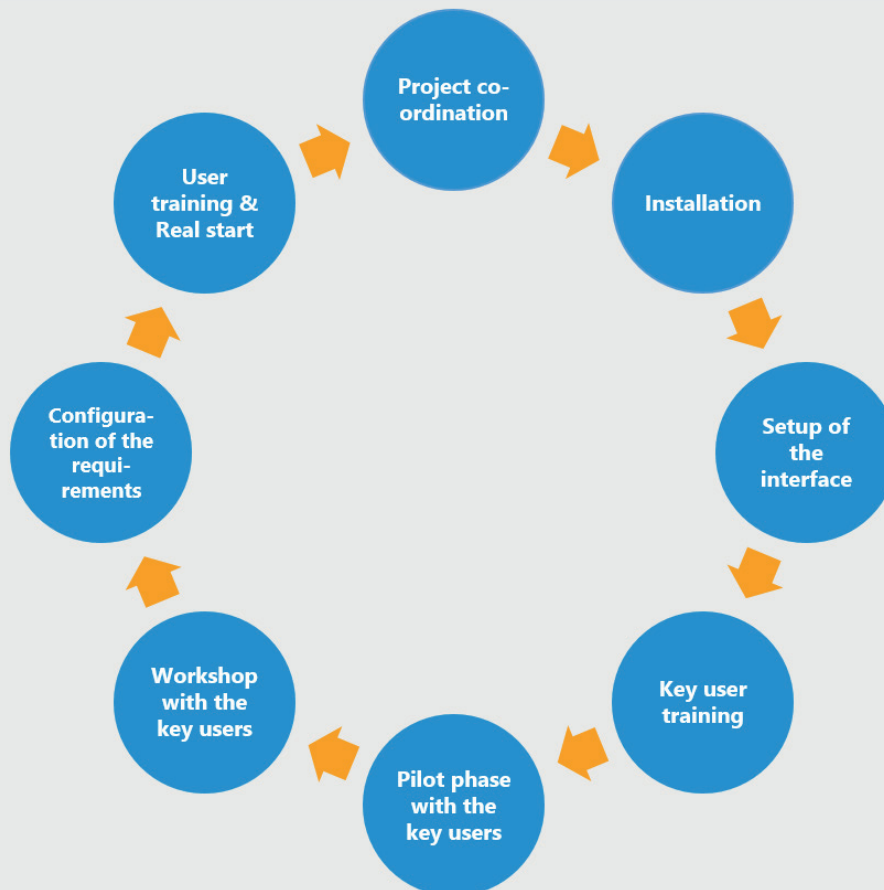Thomas Bongard, Managing Director at Pultex GmbH

Success factor #5: Customized implementation

Step by step through the SMARTCRM implementation

No CRM project exactly matches the other. And yet, when it comes to the required functionalities, processes to be mapped and interfaces, there are more parallels than differences. In over 25 years on the CRM market, we have therefore developed and established a clearly structured process which will remain comprehensible in every phase to you as a new customer.

A successful CRM has system – just as the implementation of SMARTCRM.

CRM project phases

- Project co-ordination
- Installation
- Setup of the interface
- Key user training
- Pilot phase with the key users
- Workshop with the key users
- Configuration of the requirements
- User training & Real start

Real start, and now?

Of course, we will be there for you to answer your questions, to introduce innovations, to further develop your CRM system and to train your new colleagues.

As your satisfaction is our goal.

The pillars of this process

- Clarifying all requirements
- Mediation of the core message "CRM is a company philosophy" for a broad user acceptance
- Customized software concept
- Close cooperation in each project phase
- Qualified trainings
- Continuing support

CARL GEISSER AG
Sichern • Signalisieren • Steuern • Schalten

"CRM is part of our corporate philosophy and with SMARTCRM we found the tool that supports us hereby considerably. Since the installation, we have always adjusted the software to our processes. Meanwhile, we cannot imagine working without SMARTCRM."

Bruno Senn, CEO of the CARL GEISSER AG

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Read enough?

Would you like to really get to know SMARTCRM?

Then, see our CRM system live – free of charge and non-binding directly on your screen.

Request an appointment by phone or via our website:

smartcrm.gmbh/en/company/online-demo/