

MS Dynamics CRM 2011

Prezentacja systemu



AGENDA

- Moduł sprzedaży
- Moduł marketingu
- Obsługa serwisowa klientów



MS Dynamics CRM 2011

MODUŁ SPRZEDAŻY

Lejek sprzedaży

The screenshot displays the Microsoft Outlook CRM interface. The top menu bar includes 'File', 'View', 'Opportunities', 'Charts', 'Add', and 'Customize'. The 'Charts' ribbon contains options like 'Import Chart', 'Export Chart', 'Delete Chart', 'Refresh Chart', 'Assign', and 'Share'. On the left, a navigation pane shows 'Immersion CRM' with sub-sections for 'Marketing', 'Resource Center', 'Sales', 'Leads', 'Opportunities', 'Accounts', 'Contacts', 'Marketing Lists', 'Competitors', 'Products', 'Service', 'Settings', 'Workplace', 'CRMPMG demo', 'Mail', 'Solutions', and 'Calendar'. The main area is titled 'My Pipeline' and contains a table of sales opportunities. A context menu is open over the first row, showing options like 'Edit', 'Quick Print', 'Create', 'Reply with IM', 'Assign', 'Categorize', 'Follow Up', and 'Delete'. The 'Follow Up' sub-menu is expanded, showing options like 'Today', 'Tomorrow', 'This Week', 'Next Week', 'No Date', 'Custom...', 'Add Reminder...', 'Mark Complete', 'Cigar Flag', and 'Set Quick Click...'. To the right, a 'Sales Pipeline' funnel chart shows four stages with corresponding budget values: \$296,000.00, \$350,000.00, \$112,650.00, and \$161,000.00. A legend below the chart identifies stages '1-Qualification' and '2-Discovery'. At the bottom, a detailed view for '15 - Product A (SKU JJ202)' is shown, including fields for 'Topic', 'Potential Customer', 'Budget', 'Priority', and 'Timeframe'.

Topic	Potential Customer	Est. Close Date	Budget
15 - Product A (SKU JJ202)	Rims Company	Mon 10/18/2010 12:00 AM	\$125,000.00
Good prospect for Product	Adventure Works	Fri 2/4/2011 12:00 AM	
Good prospect for Product	Adventure Works	Fri 10/15/2010 12:00 AM	
Interested in our newer off	Adventure Works	Fri 2/11/2011 12:00 AM	
Mailed an interest card back	Adventure Works	Thu 10/28/2010 12:00 AM	
They have an on-line store	Adventure Works	Fri 1/28/2011 12:00 AM	
on-line store	Adventure Works	Fri 12/3/2010 12:00 AM	
of the same	Adventure Works	Fri 2/25/2011 12:00 AM	
about 10 -	Adventure Works	0 12:00 A...	
ing about 110	Adventure Works	11 12:00 ...	
ing about 8 products	Adventure Works	010 12:0...	

Podgląd planowanej wartości sprzedaży w zależności od etapu sprzedaży

Lista szans sprzedaży, np. usług finansowych

Szczegóły szansy sprzedaży

Planowanie sprzedaży

Microsoft Dynamics CRM | Flemming Pedersen

File | Goals | View | Charts | Add | Customize

Records | Actions | Collaborate | Process | Data

Goals: Active Goals

Name	Goal Owner	Fiscal Period	Fisc
<input checked="" type="checkbox"/> Nikhil's Q3 Goal	Nikhil H	Quarter 3	FY2010
<input type="checkbox"/> Corporate Goal for Q3 -2010	Bill P	Quarter 3	FY2010
<input type="checkbox"/> Eric's Q4 Goal	Eric B	Quarter 4	FY2010
<input type="checkbox"/> Varun's Q 4 Goal	Varun K	Quarter 4	FY2010
<input type="checkbox"/> Nikhil's Q4 Goal	Nikhil H	Quarter 4	FY2010
<input type="checkbox"/> Barry's Q4 Large Accounts	Barry G	Quarter 4	FY2010
<input type="checkbox"/> Corporate Goal for Q4 - 2010	Bill P	Quarter 4	FY2010

Search for records

Goal Progress (Money)

Legend:

- Target (Money)
- Today's Target (Money)
- In-progress (Money)
- Actual (Money)

Przypisanie planów sprzedażowych handlowcom

Podgląd realizacji planu sprzedażowego

Potencjalni klienci

The screenshot shows the Microsoft Outlook CRM interface. The main window displays a list of leads under the heading "My Open Leads". The list includes columns for Name, Topic, Status Reason, and Lead. A pie chart titled "Leads by Rating" is visible on the right, showing the distribution of leads by rating: Cold (5), Hot (13), and Warm (21). A callout box points to the "Leads by Rating" chart with the text "Klasifikacja potencjalnych klientów (ang. leads)".

Name	Topic	Status Reason	Lead
Jeroen Cool	Restock of JJ202	New	Sen
Jay Hamlin	Interested in Product B (SKU AX305)	New	Adv
Lori Penor	Interested in online only store (sam...	New	Adv
Hatim Aiad	Will be ordering about 36 products ...	New	Trac
Yosi Ran	New store opened this year - follow ...	New	Trac
Ann Beebe	13 - Product B (SKU AX305)	New	Wel
Jesper Herp	Will be ordering about 184 product...	New	Adv
Yosi Ran	They have an on-line store only for P...	New	Adv
Sidney Higa	Mailed an interest card back for Pro...	New	Trac
Lori Penor	50 - Product A (SKU JJ202)	New	Emp
Jay Hamlin	New store opened this year - follow...	New	Trac

Leads by Rating

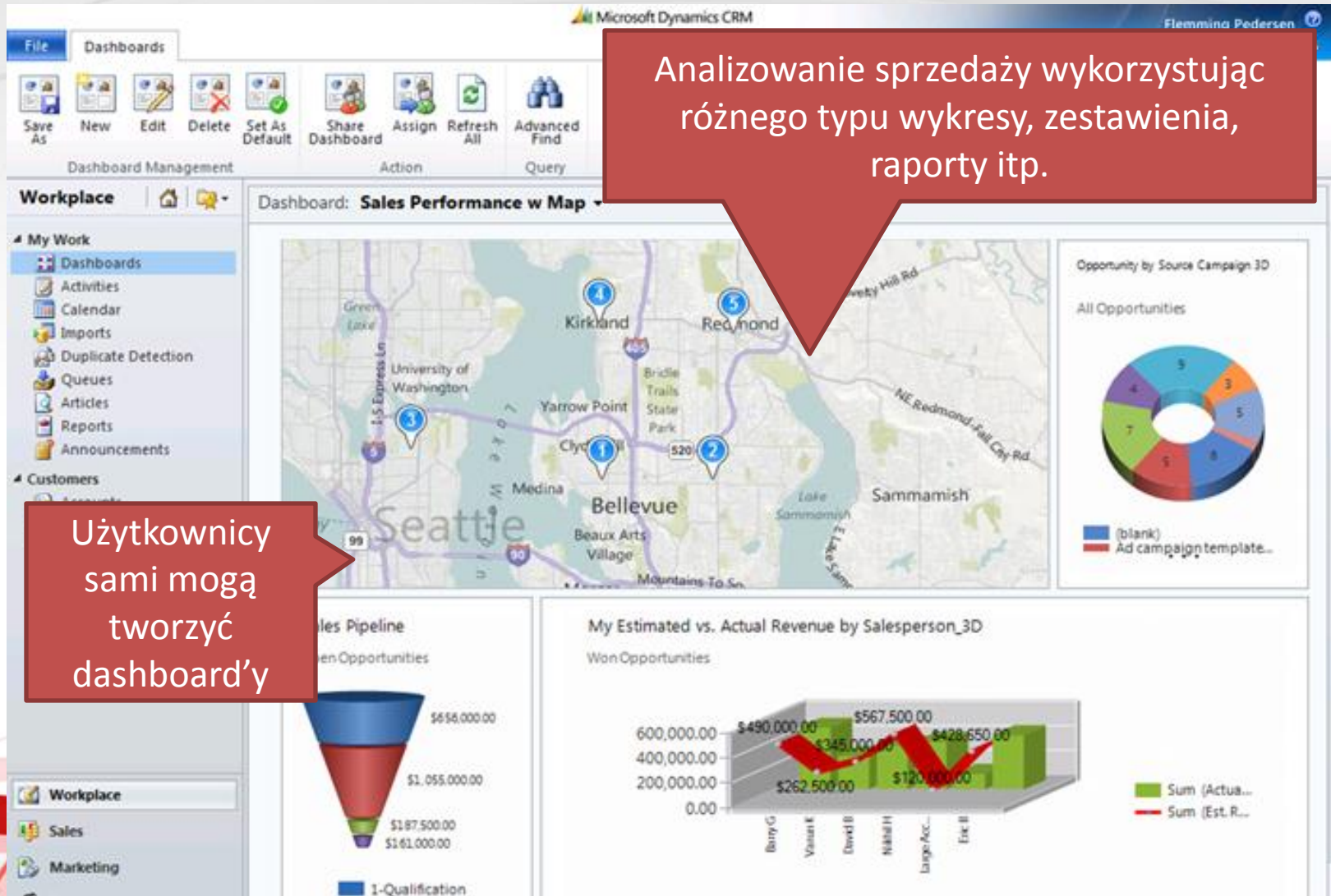
Rating	Count
Cold	5
Hot	13
Warm	21

Klasifikacja potencjalnych klientów (ang. leads)

Analiza sprzedaży

Analizowanie sprzedaży wykorzystując różnego typu wykresy, zestawienia, raporty itp.

Użytkownicy sami mogą tworzyć dashboard'y





MS Dynamics CRM 2011

MODUŁ MARKETINGU

Kampanie marketingowe

The screenshot displays the 'Web Offer' campaign configuration in the Datacom system. The interface is organized into several sections:

- General:** Name: Web Offer; Status Reason: Proposed; Campaign Code: [1111-0100-12345]; Currency: US Dollar; Expected Response(%): 100; Offer: Special web offer for new product release.
- Schedule:** Proposed Begin Date: 8/7/2010; Actual Begin Date: 8/7/2010; Proposed End Date: 8/24/2010; Actual End Date: 8/21/2010.
- Financials:** Total Cost of Campaign Activities: \$ 30,000.00; Budget Allocated: \$ 30,000.00; Miscellaneous Costs: \$ 0.00; Estimated Revenue: \$ 100,000.00; Total Cost of Campaign: \$ 30,000.00.

A red callout box points to the financial data, containing the text: "Przygotowanie kampanii marketingowych poprzez określenie ich parametrów finansowych, planowanych działań itp."

Planowanie kampanii

The screenshot displays the Datacom software interface for campaign management. The main window is titled "Campaigns: All Campaigns and Campaign Templates". It features a table of campaign templates and a chart comparing budget vs. actual costs.

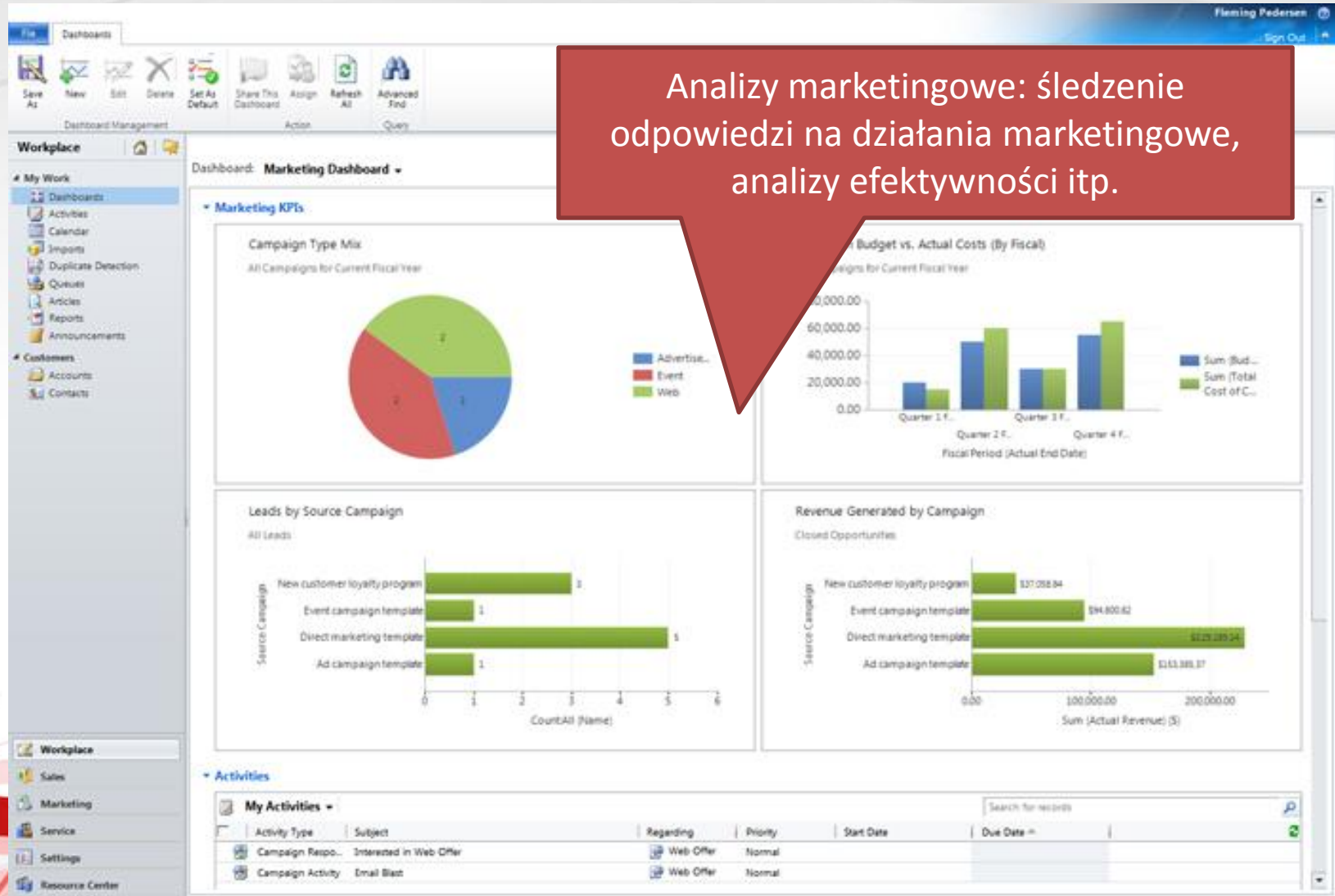
Name	Template	Status Reason	Created On
Ad campaign template	No	Proposed	10/26/2010 1:10 P...
Charity event	No	Proposed	10/26/2010 1:10 P...
Co-branding with large retailer	No	Proposed	10/26/2010 1:10 P...
Direct marketing template	No	Proposed	10/26/2010 1:10 P...
Event campaign template	No	Proposed	10/26/2010 1:10 P...
Executive Breakfast Event	No	Completed	11/15/2010 8:06 P...
New ad campaign	No	Completed	10/26/2010 1:10 P...
New customer loyalty program	No	Proposed	10/26/2010 1:10 P...
Product launch campaign	No	Proposed	10/26/2010 1:10 P...
Web Offer	No	Proposed	11/15/2010 8:26 P...

Fiscal Period (Actual End Date)	Sum (Budget Allocated) (\$)	Sum (Total Cost of Campaign) (\$)
(Blank)	20,000.00	15,000.00
Quarter 1 FY2011	100,000.00	120,000.00
Quarter 2 FY2011	30,000.00	30,000.00
Quarter 3 FY2011	50,000.00	60,000.00

Planowanie i śledzenie kampanii marketingowych. Możliwość tworzenia szablonów kampanii.

Analiza marketingowa

Analizy marketingowe: śledzenie odpowiedzi na działania marketingowe, analizy efektywności itp.





MS Dynamics CRM 2011

OBSŁUGA SERWISOWA

Zgłoszenia serwisowe

Microsoft Dynamics CRM

File Cases View Charts Add Customize

Records Actions Collaborate Process Data

Service

- Service Calendar
- Cases
- Accounts
- Contacts
- Knowledge Base
- Contracts
- Products
- Services
- Goals
- Goal Metrics
- Rollup Queries
- Workplace
- Sales

Cases: Active Cases

Title	Case Number	Priority
Average order shipment time (sample)	CAS-01015-P5K5L2	Normal
Broken Record	CAS-01041-S6V9Z7	Normal
Complete overhaul required (sample)	CAS-01017-N7T1P0	High
Contact information required (sample)	CAS-01000-K1S2D4	Low
Contact information required (sample)	CAS-01018-W0L6N5	Normal
Damaged (sample)	CAS-01001-F7K8V1	High
Damaged during shipment (sample)	CAS-01014-Z5W5W6	Low
Defective item delivered (sample)	CAS-01002-B6F2M5	High
Delivery never arrived (sample)	CAS-01003-H4H2J4	Low
Delivery never arrived (sample)	CAS-01020-Q9R8W2	High
Faulty item (sample)	CAS-01024-F7N9T5	Normal
I have a problem with the new widgets	CAS-01028-H2V3C7	Normal
item broken	CAS-01034-V1W9Q5	Normal
Item defective (sample)	CAS-01004-Z7T7J4	Normal
Item defective (sample)	CAS-01009-RM1R5	High
Looking for setup instructions	CAS-01005-T8V9W2	Normal
Missing parts (sample)	CAS-01011-U3V4W5	Normal
My item is broken	CAS-01012-X6Y7Z8	Normal
My Widget A burns up when I turn it on	CAS-01013-A9B0C1	Normal
My widget A is broken	CAS-01014-D2E3F4	Normal
My widget is broken	CAS-01015-G5H6I7	Normal
My widget is not working well	CAS-01035-C8Y6M5	Normal

Search for records

Case Mix (By Type)

Legend: Problem (Blue), Request (Green), Question (Red)

Śledzenie zgłoszeń serwisowych

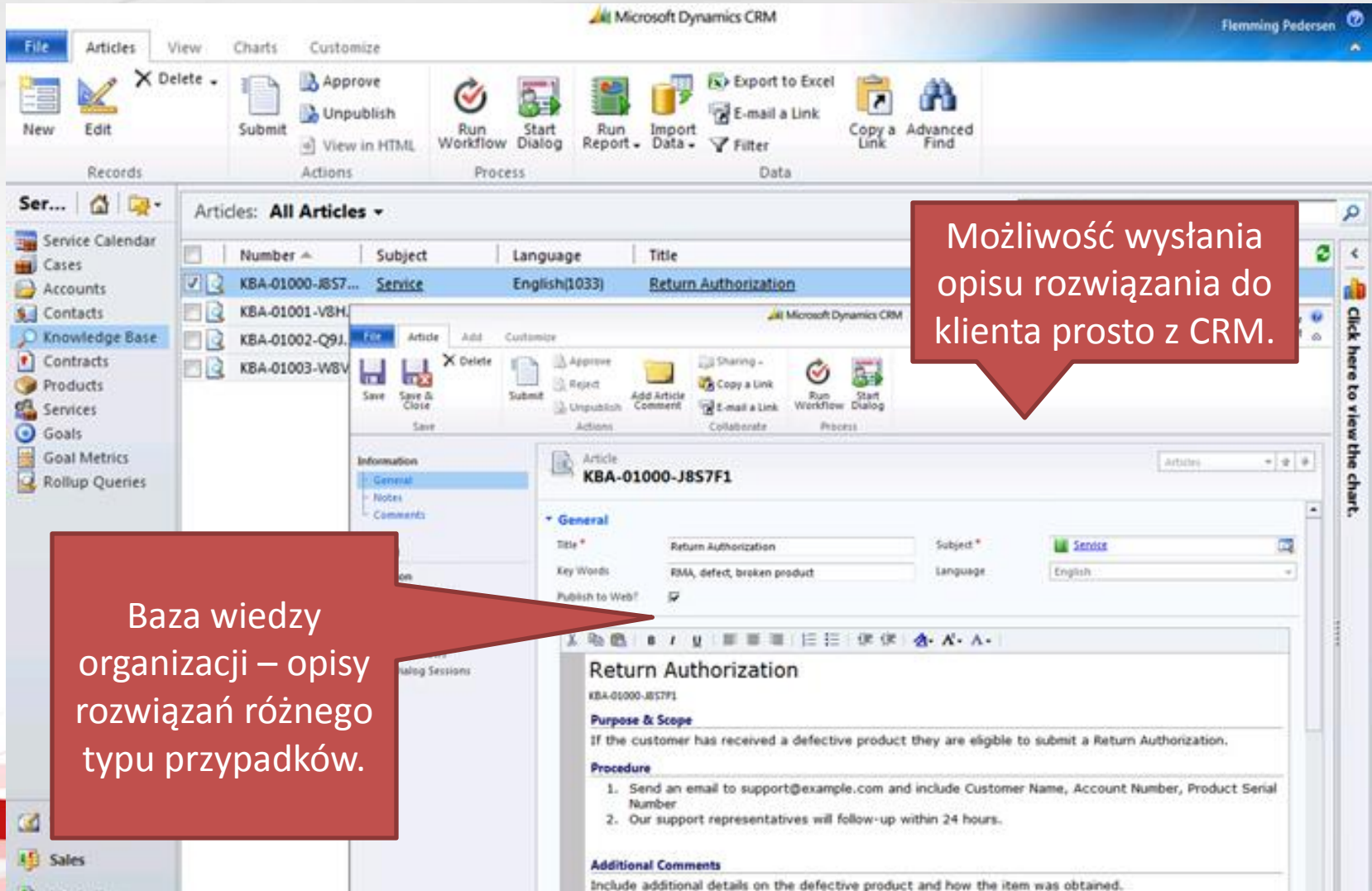
Umowy/kontrakty serwisowe

The screenshot displays the Microsoft Dynamics CRM interface. The main window shows a record for a 'Warranty Renewal' contract. The 'General' tab is active, displaying the following information:

- Contract ID:** CNR-01001-14N6E
- Contract Name:** Warranty Renewal on Gold Label Sports Equipm...
- Customer:** Affor
- Contract Start Date:** 12/20/201
- Contract End Date:** 12/...
- Duration In Days:** 376
- Billing Information:** Bill To Customer: Affor, Bill To Address: ...
- Status:** Draft
- Allotment Type:** ...
- Number...** ...

A red callout box contains the text: "Obsługa umów serwisowych ze stałymi klientami, m.in. warunki rozliczeń, limity zgłoszeń."

Baza wiedzy



Możliwość wysłania opisu rozwiązania do klienta prosto z CRM.

Baza wiedzy organizacji – opisy rozwiązań różnego typu przypadków.

Planowanie zasobów

Schedule Service Activity
 Select the customers, service, and resources for this activity. Select the date, time, and duration, and click Find Available Times. Select the time you want from the list of available times, and click Schedule.

Customers: Form Assistant:

Requested Service Activity:

Service:

Resources:

Site:

Requested Time:

Start Date:

Start Time:

Duration:

Days:

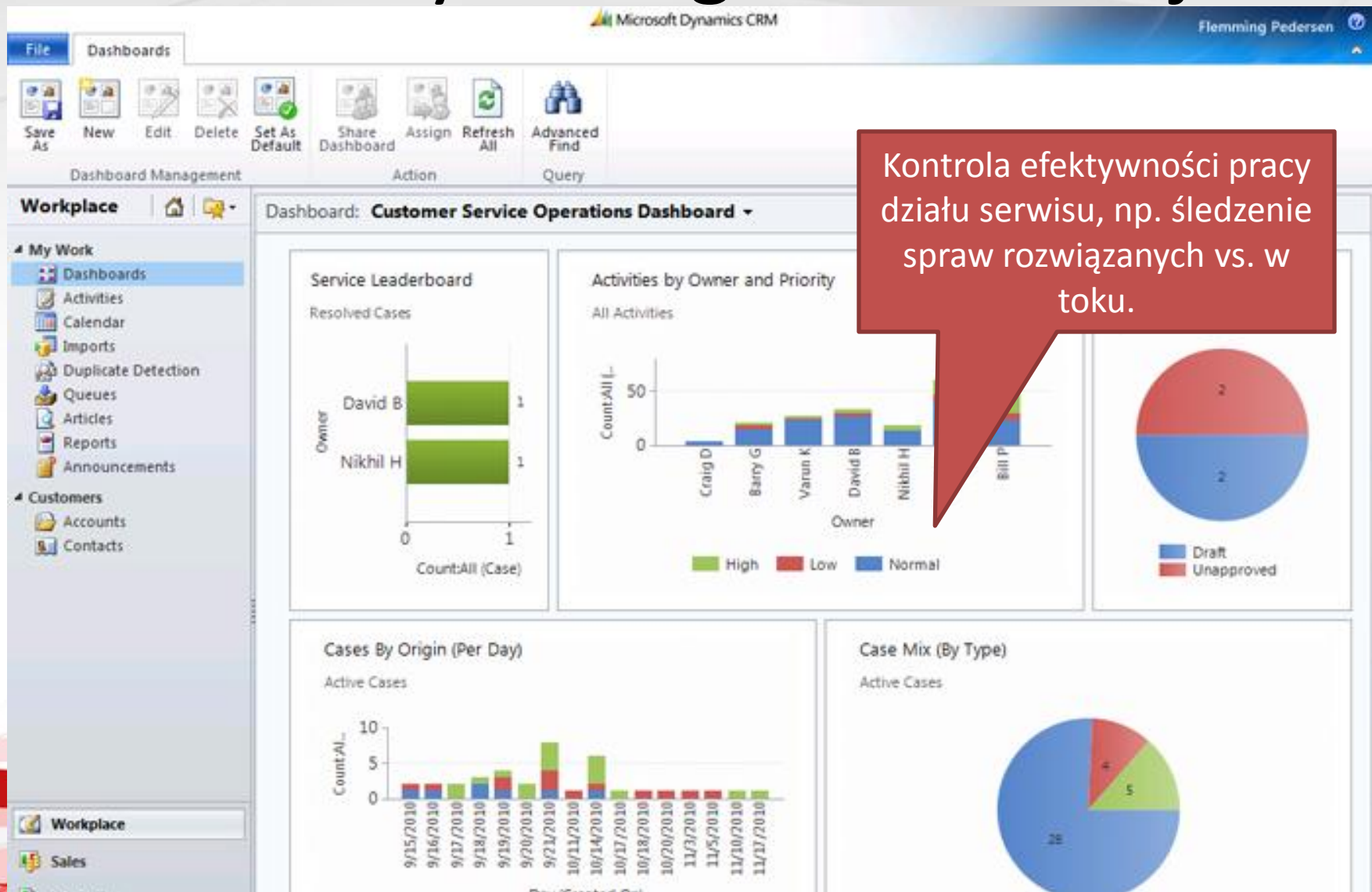
Customer Preferred:

Tips: To see whether the customer prefers a specific day of the week, select Days from the Form Assistant list. Preferences are stored on the Administration tab in account and contact records.

Service	Resources	Site	Scheduled Start	Scheduled End
<input checked="" type="checkbox"/> Service	Sidney Higa		11/21/2010 12:00 PM	11/21/2010 2:00 PM
<input type="checkbox"/> Service	Lori Penor		11/21/2010 12:15 PM	11/21/2010 2:15 PM
<input type="checkbox"/> Service	Sidney Higa		11/21/2010 12:30 PM	11/21/2010 2:30 PM
<input type="checkbox"/> Service	Yossi Ran		11/21/2010 12:45 PM	11/21/2010 2:45 PM
<input type="checkbox"/> Service	Sidney Higa		11/21/2010 1:00 PM	11/21/2010 3:00 PM
<input type="checkbox"/> Service	Lori Penor		11/21/2010 1:15 PM	11/21/2010 3:15 PM
<input type="checkbox"/> Service	Yossi Ran		11/21/2010 1:30 PM	11/21/2010 3:30 PM
<input type="checkbox"/> Service	Sidney Higa		11/21/2010 1:45 PM	11/21/2010 3:45 PM
<input type="checkbox"/> Service	Sidney Higa		11/21/2010 2:00 PM	11/21/2010 4:00 PM
<input type="checkbox"/> Service	Lori Penor		11/21/2010 2:15 PM	11/21/2010 4:15 PM
<input type="checkbox"/> Service	Yossi Ran		11/21/2010 2:30 PM	11/21/2010 4:30 PM
<input type="checkbox"/> Service	Lori Penor		11/21/2010 2:45 PM	11/21/2010 4:45 PM
<input type="checkbox"/> Service	Yossi Ran		11/21/2010 3:00 PM	11/21/2010 5:00 PM

Możliwość wskazania zasobów i ich dostępności w celu obsługi zgłoszeń serwisowych.

Analizy obsługi serwisowej



Kontrola efektywności pracy działu serwisu, np. śledzenie spraw rozwiązanych vs. w toku.

Zapraszamy do kontaktu

- Łukasz Bott, Kierownik Projektów IT
 - E-mail: lukasz.bott@datacom.pl
 - Tel.: (+48) 22 35 52 136
 - Kom.: (+48) 601 912 017