

## i Edition

➔ To meet the need for enhanced CRM capabilities among its IBM i ERP customers, Infor has developed Infor CRM i Edition, a new solution with an innovative approach to leveraging customer-related information.



### Do business better.

With a well established Infor enterprise resource planning (ERP) solution for the IBM® i platform, your production and financial teams have everything they need to make your company perform well against the competition. Although everything is working well, you realize that in today's hyper-competitive environment, your company can ill afford to stand still. Continuously improving every aspect of your business is the key to sustained success.

Many enterprising IBM System i users are turning their attention to improving the performance of the front end of the business, now that they have taken the back end as far as they can. In short, they are looking for ways to take their customer relationship management (CRM) to a new level. They understand the business value of having easy access to all customer data and the specific customer-facing applications that can leverage that data.

### Leverage experience.

To meet the need for enhanced CRM capabilities among its IBM i ERP customers, Infor™ has developed Infor CRM i Edition, a new solution with an innovative approach to leveraging customer-related information. Infor CRM i Edition features a single database for customer information that is tightly linked to your System i platform and Infor ERP application, such as Infor ERP System 21 and Infor ERP XA. The result is a single, integrated view of all customer-related information, including credit limits, financial transactions, customer orders and quotes, and shipments. Infor CRM i Edition helps you take the next

logical step in improving your business performance, offering a wide range of CRM functionality to leverage your enhanced customer information for improved opportunity management and sales forecasting.

## Get business specific.

Infor CRM i Edition is a versatile solution that gives customers maximum flexibility to customize and personalize the way they implement and use advanced CRM capabilities. Created using the Infor Development Framework (IDF), a development tool and series of design blueprints for building IBM i applications, Infor CRM i Edition enables customers to configure the solution to support numerous CRM and non-CRM business processes. End users can easily customize the Web-browser interface to personalize the way data is presented in lists and detail screens. With Infor CRM i Edition, access to data is both secure and flexible. Customers can control what data is accessible depending on the role of individual users, both internal and external.

These usability features are an integral part of delivering advanced CRM functionality, including:

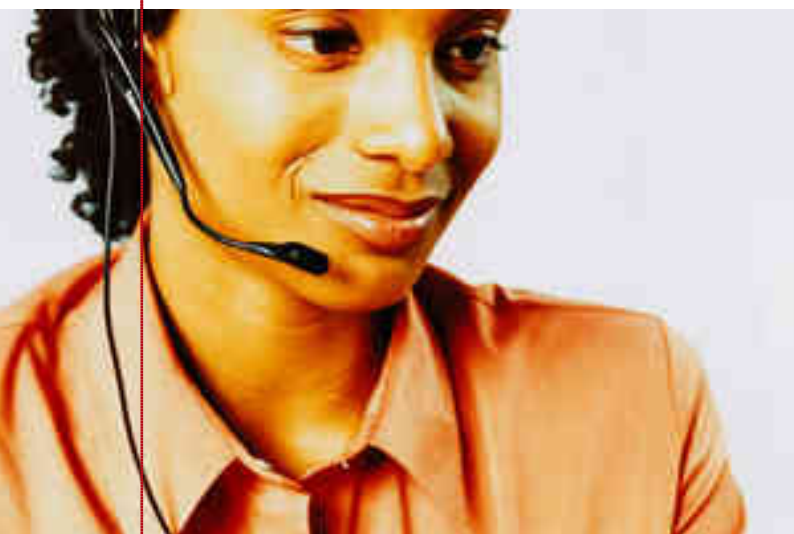
**Campaign Management.** Campaign Management enables users to leverage CRM and ERP data to easily target subsets of your customers with offers tailored to specific wants and needs. For example, you can create a campaign targeted at customers with more than \$20 Million in

revenue who haven't purchased anything in more than six months. To better define and execute campaigns, the solution supports the use of mass email, call lists for telesales, and mail merge functionality. It enables you to manage marketing events, such as invites, response tracking and post-event surveys, as well as measure the success of campaigns.

**Opportunity Management.** Opportunity Management provides a structured process to better manage every sales opportunity, improve your close rate, and shorten the sales cycle. The solution enables you to define and establish best practices for use in monitoring and managing sales opportunities. Opportunity Management is ideal for companies of all sizes in a wide range of industries. For example, Opportunity Management can help companies that sell large, expensive machinery using a long, complex sales cycle, as well as companies with a broad range of products and thousands of customers to target.


**Sales Process Management.** Sales process management enables you to use multiple sales processes within your overall CRM business process. User-defined sales processes could include additional sales to an existing customer, service without a contract, maintenance renewal, sale to a prospect, sale through a partner or reseller, and major account sale. Within each sales process, the solution creates a record of every opportunity, shows a status for each, and generates a detailed forecast of opportunities using parameters such as deal value, predicted close date, stage, and probability. Forecasting capabilities include process-based, track record or a blended approach that also includes the salesperson's prediction. The solution also enables you to track sales by person.

**Quotation Management and Order Management.** For both Quotation Management and Order Management, Infor CRM i Edition takes advantage of the information already addressed by your ERP system, including pricing, discounting, promotions, sourcing, and others. Leveraging this data, the solution simplifies the prospect-to-customer and quote-to-order conversion process to enable you to increase the number of inquiries converted to orders.



**Customer Information Portal.** To facilitate high-impact customer relationship management, Infor CRM i Edition provides a single place for users to access all information about customers, prospects, and contacts. The solution provides a single access point for information typically found in a CRM solution such as basic customer information and organizational structure as well as information typically found in ERP solutions, such as credit limits, financial transactions, orders, quotes, and shipments.

**Planned Capabilities.** Infor is evaluating the introduction of several additional capabilities in future releases. Under consideration is an after-sales module that would help enhance customer satisfaction by improving the way you manage customer inquiries, product recalls, and complaints. Also, new analytics capabilities may be introduced to enable companies to look at groups of their customers (not just individuals) and analyze patterns within the group so the information can be used to strengthen future campaigns. Infor also is assessing the integration of IBM's telephony offering so users will be able to make calls from the application using Voice over IP (VoIP). The functionality would leverage Caller ID capabilities so detailed background information about a caller would be available at the time of interaction. A third telephony capability under evaluation is call transferring, which would make it possible to transfer call information to another operator.

 Infor CRM i Edition is a versatile solution that gives customers and end users maximum flexibility to customize and personalize the way they implement and use advanced CRM capabilities.

## See results now.

Infor CRM i Edition can help Infor ERP customers using the IBM i platform take great strides in improving their overall management of customer information. The solution works in conjunction with your well-developed CRM processes and trained staff to increase the productivity of sales, customer service, and marketing. With Infor CRM i Edition, you can achieve:

- Higher sales revenue by closing more sales, increasing the quote-to-order conversion rate, reducing the occurrence of discounts, and increasing repeat business.
- Reduced sales costs by qualifying out of unprofitable opportunities and shortening sales cycles.
- Improved data visibility
- Improved forecast accuracy
- Improved customer service with lower costs.

## About Infor.

Infor makes business software better by acquiring and improving proven, functionally rich software backed by domain experts. Infor makes it better through continuous innovation, faster implementation options, global enablement, and flexible buying options. In a few short years, Infor has become the third largest provider of business software. For additional information, visit [www.infor.com](http://www.infor.com).

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