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Infor Customer Relationship Management



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Meet & Exceed Rising Customer Expectations

Manufacturing businesses today need a customer-centric business strategy to survive and thrive. They must increase customer loyalty and retention, as well as increase productivity and grow sales revenue. At the same time, they must meet and exceed rising customer expectations.

Customer relationship management (CRM) technology must play a significant role in a customer-centric business strategy. CRM serves as a single collection point for all customer information and activities and a single access point for that information for employees and business partners. Applied effectively, CRM can allow you to manage all the aspects of customer acquisition, existing customer retention and account growth, bringing together many of the advancements required to achieve world-class manufacturing status.

Manufacturers who implement CRM solutions as a part of their extended business system are much more likely to achieve their sales and market share goals, control their service costs and improve profitability. Infor XA Customer Relationship Management is a flexible marketing, sales and customer service solution specifically designed for the manufacturing environment.

Infor Customer Relationship Management helps manufacturers be world class by gaining market share, operating at peak efficiency, and exceeding customer expectations. Infor Customer Relationship Management integrates seamlessly with your extended ERP and supply chain management solutions to add value to each manufacturing business process, whether it's Design, Sell, Plan, Source, Make, Deliver, Service or Finance.

Infor Customer Relationship Management empowers your sales channels and customer service organization with a single, integrated, up-to-date view of prospect, customer, product and service information. Infor Customer Relationship Management monitors your customer relationships from initial contact through quote, product configuration, order processing, production and post-sale support and service. You get a total view of each customer relationship based on accurate, real-time information.

Individual players and departments on your team can use Infor Customer Relationship Management to manage their own priorities, as well as share plans, information, status, results and metrics with everyone else on your team. Infor Customer Relationship Management allows your “corporate memory” to grow over time — connecting people together and building a leveraged pool of team expertise.



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Infor Customer Relationship Management lets you:

- Locate products and pricing; quickly configure, place and manage orders
- Access customer histories including quotes, orders, cases, and RMAs
- View order status online
- Reduce order errors and improve lead times
- Prepare quotes in real time, with improved accuracy; cut quote-to-close processing time
- Extend your enterprise to customers
- Get 24x7 access to leads, opportunities and performance data
- Plan, execute and analyze multitier marketing campaigns
- Increase coordination between inside and outside sales resources

Design

To remain successful, manufacturers must provide a level of service that improves customer satisfaction and grows both long-term loyalty and profitability. More than ever before, your success hinges on providing exceptional customer service while controlling costs. To accomplish this, you need solutions to help you include customers in your product design and configuration processes.

Infor XA Customer Relationship Management coordinates the customer feedback required to deliver products containing the features and specifications the customers want, when they want it. Fast, accurate and consistent service can now be customized to each customer's unique needs.

Capturing customer feedback

Infor Customer Relationship Management provides the mechanism to consolidate customer feedback about product capabilities into a single, easily accessible system. The design and engineering teams can use this information to improve current products and develop new ones. Marketing and sales can contact customers, using this information, when the new product features are available, quickly and efficiently.

Order configuration

Infor Customer Relationship Management with order configuration capability enhances the ordering experience for both your customers and sales personnel, while decreasing the time spent on inaccurate configurations. Order configuration lets your sales force or customers interactively configure complex products — eliminating impractical product combinations and selection errors. Your sales force and customer service are more productive, and at the same time, you reduce errors and improve customer satisfaction.

Sell

Whether you sell to your customers direct or through distributors, Infor Customer Relationship Management delivers the tools you need to turn fresh leads into new business, respond quickly, and ensure on-time delivery to the promised date. This solution automates a complex process that requires a detailed understanding of customer requirements, easy access to timely product and service information, and skillful coordination of your sales organization and global connections.



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Infor Customer Relationship Management helps your sales team move prospects through the purchasing process by allowing you to manage complicated discount structures, multiple channels and configurable products. Each member of the sales team has access to the same up-to-date product information, pricing, availability details and analytical tools. Your sales force can easily perform "what-if" scenarios for prospects and customers to determine cost, configurability and availability.

Infor Customer Relationship Management supports custom sales processes that help you sell differently through distributors as compared with in-house sales reps, or lets you to sell differently based on the type of product being sold.

Campaign management

Infor Customer Relationship Management lets you manage and track an entire marketing campaign from beginning to end. You can plan and track each marketing campaign event, monitoring responses and lead conversion rates in real time. Infor Customer Relationship Management helps manufacturing marketing managers answer the tough questions about which marketing investments turn into sales results.

Marketing material management

Making sure the right people on the team have the right information is time consuming and expensive. The wrong information can destroy significant investments made in a customer relationship. The marketing library capabilities of Infor Customer Relationship Management allow marketing managers to provide the right information on any topic. Customer service personnel access the library to find the latest product data, competitive information, and even sales aids. Infor CRM provides administrative tools to manage access to and efficient updating of information to keep everyone on the same page.

Prospect management

Successful sales organizations need access to customer opportunities and information, as well as tools for guiding personnel through the sales process. Infor Customer Relationship Management provides an automated solution for your sales reps to easily receive leads, assign tasks and establish a sales process that matches your business needs whether they work on-line or off-line.

Quotes and proposals

When presenting a proposal to a customer, your sales rep needs accurate information — whether it is order history, pricing, availability or the ability to accurately configure the product. Using Infor Customer Relationship Management, your sales rep can create an order from history, configure a solution, prepare a quote, and then later review it with your customer and make changes as needed before the order is finalized. Errors are eliminated in the order fulfillment process due to tight integration to pricing, product availability and rules-based product configuration — resulting in a satisfied customer.

Electronic catalogs

Infor Customer Relationship Management enables your Web-based product catalog to be searched with a single click, giving instant access to key functions that save time during the order management process. Product catalog searches can be refined using filters to display exactly what a customer wants. Products can be quickly selected and added to a shopping cart, where availability can be checked, configuration options selected, and complementary products viewed and selected.



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Order processing

Infor Customer Relationship Management provides several order entry methods. Rapid order entry, designed for users who know the product quantities and numbers, enables orders to be entered in a matter of seconds, improving customer service and productivity. Order pads can be created by customer to speed the repetitive ordering process that can occur weekly or monthly for some accounts. Catalog ordering capabilities support customer-to-vendor item number cross-references, and permit you to add up-sell and cross-sell items.

And, Infor Customer Relationship Management enables your sales reps and customer service organization to seamlessly transfer your customer or prospect information directly to a sales order. This not only saves time by using existing customer information to build the sales order, but it also leverages the information to provide accurate pricing and inventory availability.

Plan

Infor Customer Relationship Management helps your company plan better by providing great visibility into every active sales process. Marketing campaigns generate interest and leads in products and these results are easily identified in the sales process, so their impact on production can be managed effectively. A clear view of sales, marketing and customer service activities and buying trends enables you to forecast and plan more accurately.

Deliver

No element of customer-centricity is more important than the delivery of the final product to the customer. Infor Customer Relationship Management integrates order management with fulfillment functionality so you can efficiently track shipping and returns processing, and ensure product configuration matches special orders.

Order status

Each sales or customer service rep can instantly access order fulfillment details — allowing them to keep customers informed on the order status — all using the same system. Infor Customer Relationship Management provides product availability checks that build confidence for making ship date promises, thus improving customer service.

Order fulfillment

Infor Customer Relationship Management tracks all information from shipment to the customer's installed site, including sales order information, part information, and the customer contact. Service reps can manage service calls and easily monitor RMA status.

Returns processing

Infor Customer Relationship Management ensures you spend less time managing your return materials authorization (RMA) program and more time improving customer satisfaction. By integrating with your ERP solution, customer service can provide real-time information to view the status of a customer's RMA.



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Service

Customer service doesn't end with the sale. To ensure customers are satisfied, bring repeat business and provide word-of-mouth referrals, Infor Customer Relationship Management helps companies improve customer service by providing a solution to make employees more effective in servicing accounts.

Internet storefront

Infor Customer Relationship Management allows Internet order entry and even configure-to-order entry for your customers and distributors. This allows customers and distributors to order custom-configured items on a 24x7 basis around the world. The Web storefront provides a way for your customers and business partners to browse the manufacturers' catalog for easier self-service.

Service management

Infor Customer Relationship Management provides capabilities to take your service and support to the next level via a closed-loop, call-tracking solution. You can build a knowledge base to assist your employees in resolving customer issues in less time, making them more productive and increase customer satisfaction. Technical support functionality helps you track issues, build your knowledge base, run projects, and manage service entitlement contracts.

Customer service

Infor Customer Relationship Management supports a full range of post-sale customer service activities — including rework, owner registration, warranty tracking, return material authorizations, help desk management, maintenance billing and field service management. Use Infor Customer Relationship Management to initiate service contracts by equipment type or family, manage customers' equipment and component data, and access warranty details such as serial numbers or warranty expirations.

Field service

Infor Customer Relationship Management gives field service technicians remote access to complete maintenance histories, links to OEM engineering drawings and problem resolution databases, and the ability to order repair parts online.

Finance

In addition to providing functionality for managing business processes, Infor Customer Relationship Management delivers powerful executive reporting. You can leverage your order, production and fulfillment information for better decision-making, more accurate forecasting and planning, and ultimately greater financial results. Infor Customer Relationship Management tracks metrics regarding active opportunities, average sales cycle length, close ratio, opportunity activity and more.



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Business analytics

Infor Customer Relationship Management's business analysis tools give managers a quick snapshot of sales, marketing and customer service activity and performance in real time, without needing to request reports. It's as easy as pressing a button to see a graphical depiction of sales performance.

These standard reports are available:

- Activity report
- Alternate items
- Case analysis
- Financial forecast
- Interchangeable items
- Notes
- Phone list
- Product list
- Revenue forecast
- Ship-to order summary
- Ship-to quote



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