

> Delivering Microsoft CRM Success in Financial Services

Customer Relationship Management (CRM) is becoming a well-known term in today's marketplace. Financial services companies of all kinds are embracing the concept of using software to give employees a single platform for the capture, storage and analysis of customer and prospect information. There are a number of CRM products available which vary in approach, but all promote the potential to boost visibility among target markets, increase sales and provide superior customer service. With this variety of choices in the marketplace, how do you know which CRM platform to implement?

Capital Effective is an easy-to-use CRM solution build by Customer Effective explicitly for Financial Services professionals. Based on the Microsoft Dynamics CRM platform, Capital Effective is the fastest, easiest way to add CRM capabilities to any financial services organization that uses Microsoft Office system applications, including Microsoft Office Outlook.

> Microsoft Dynamics CRM – It Works the Way You Do

Because it's designed to work with Microsoft Outlook, Capital Effective delivers lower training costs, broader user adoption, less application-switching, higher productivity, and a fast return-on-investment. It gives your employees direct access to customer information through Office Outlook, which means they can get the information they need whether in the office or out on the road.



> User First Design Formula™

CRM is not just a technology, but a comprehensive approach to an organization's philosophy in dealing with its customers. This includes policies, processes, sales, front-of-house customer service, marketing, and information management. Therefore, it is important that your CRM strategy stretches beyond the technology, towards your specific situation and your customers' needs and expectations. And the CRM system you choose must work the way you work, slipping right into your employees' existing work environment. After all, what good is a CRM system if your employees won't use it?

Our User First Design Formula is our field-proven implementation approach for delivering your objectives on time and on budget. Looking beyond the technology alone, we start with an extreme focus on user adoption:

- **Define:** Building on our best practices experience, we help you define exactly what your end users need in the system.
- **Design:** We then design the simplest processes and workflows that will enhance their personal productivity. Role-based dashboards organize information and compel users to drive achievement of critical business metrics.
- **Develop:** Next we develop the system to surround each user with a 360° view of all of your interactions with your customers. We'll configure, integrate and test your system.
- **Deploy:** We'll deploy your system to your users with a pilot, hands-on training and the support you need to ensure success.

> Capital Effective offers:

- **Information when and where you need it.** Accessible from Microsoft Office and the web, Capital Effective is designed to help your sales, marketing and service team collaborate for increased customer effectiveness.
- **Increase Sales Success.** Shorten sales cycles and improve close rates with leads and opportunity management, automated sales processes, quote creation, and order management. Maintain contact with customers via targeted e-mail. Leverage real time sales reporting to channel your best resources on the best sales opportunities.
- **Make Informed, Agile Decisions.** Capital Effective provides detailed reports and a complete view of sales and support activity and history, so you can identify the opportunities, trends and problems to guide your decisions.
- **Work from Outlook or the Web.** Salespeople can access full sales functionality from Microsoft Outlook from any location using a web browser, whether they're online or offline.
- **Share Information.** Integrated Sales and Customer Service modules give employees a complete, updated view of key customer information across the business.
- **Automate Business Processes.** A built-in workflow engine with customizable templates and rules lets you define and automate processes for sales, customer service, and activity management.
- **Integrate Across Your Business.** Capital Effective offers tight integration with Microsoft Business Solutions and Microsoft Office, and supports rich integrations with third-party applications and Web services.
- **Get Benefits Quickly.** Straight-forward configuration and ease of use mean your employees become productive fast and you start enjoying benefits quickly.

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