



PRESENTATION OF CIRRUS SHIELD CRM

YOUR PLATFORM FOR BUSINESS GROWTH

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WHY DID WE CREATE CIRRUS SHIELD CRM?

Cirrus Shield CRM was built by a team of experienced CRM consultants and passionate software engineers. Our mission is to provide a CRM that is:



EASY TO USE



EASY TO EXTEND



PRIVATE

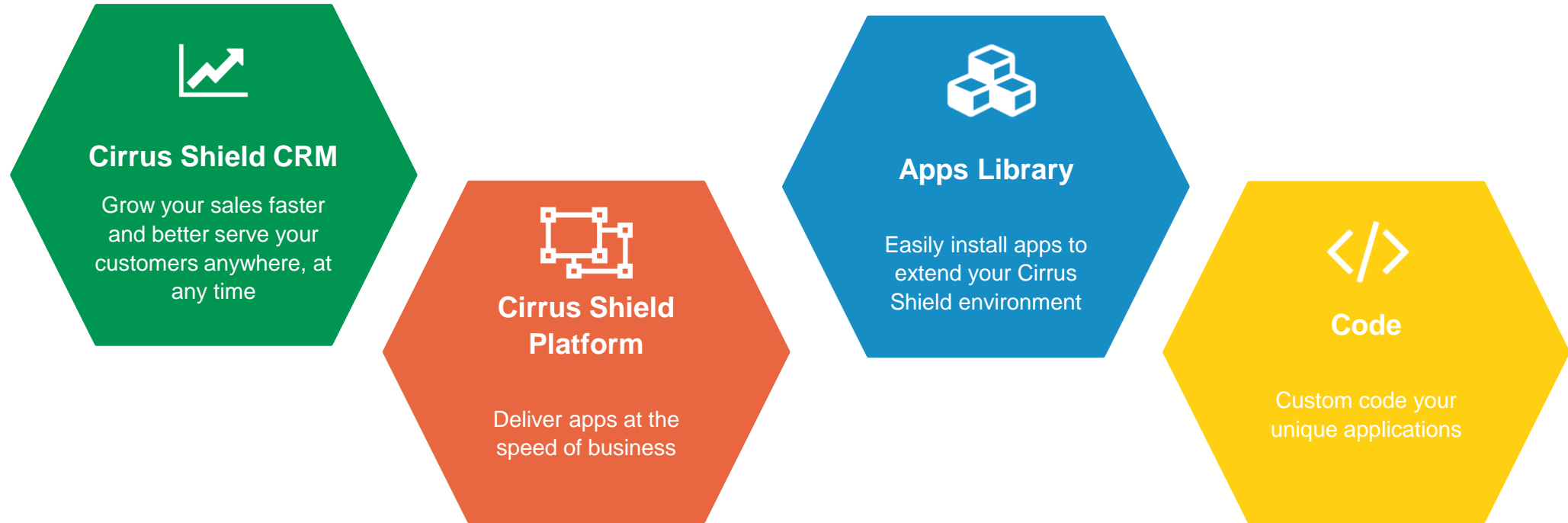


INNOVATIVE

Cirrus Shield CRM is the only solution of the market that is easy to use, fast to get started with, easy to extend and affordable.

CIRRUS SHIELD: IT IS NOT ONLY A CRM

Cirrus Shield is also the Next-Generation cloud platform allowing to accelerate the delivery of innovative applications. The building blocks of Cirrus Shield are:



Cirrus Shield platform allows you to extend your CRM by building your apps like a Lego™ using point and click tools.

WHAT CUSTOMERS SAY ABOUT CIRRUS SHIELD



Laurent Joly

VP WW CUSTOMER CARE AND
CLOUD PRODUCTION - INFOVISTA

*“Deployed in less than a month, our self-service portal built with Cirrus Shield allows us to **better serve the community of our customers** worldwide.”*



Alexandre Richa

GENERAL MANAGER –
QUALICONSLT MEA

*“**Cirrus Shield is intuitive and easy to use.** It took half a day to train our users on Cirrus Shield. The tool is now widely used by our teams.”*



Guy Routier

CEO – SOCNOT

*“**Cirrus Shield is a powerful and modular tool.** We were able to adapt the solution to our specific needs without the need to do specific developments.”*

CHOICE OF DEPLOYMENT MODEL



Public Cloud

- No technical resources needed for server maintenance.
- Automatic upgrades.
- Available 24/7.
- Minimal investment needed.
- Scalable, grow as you need.

FOR ANY NUMBER OF USERS



Private cloud

- Server maintenance can be outsourced to a third party.
- Easier upgrades than when on-premise.
- Available 24/7.
- Better compliance when data privacy is a concern.
- Allows for full control to teams managing the environment.

**ONLY AVAILABLE TO DEPLOYMENTS
OF MORE THAN 200 USERS**



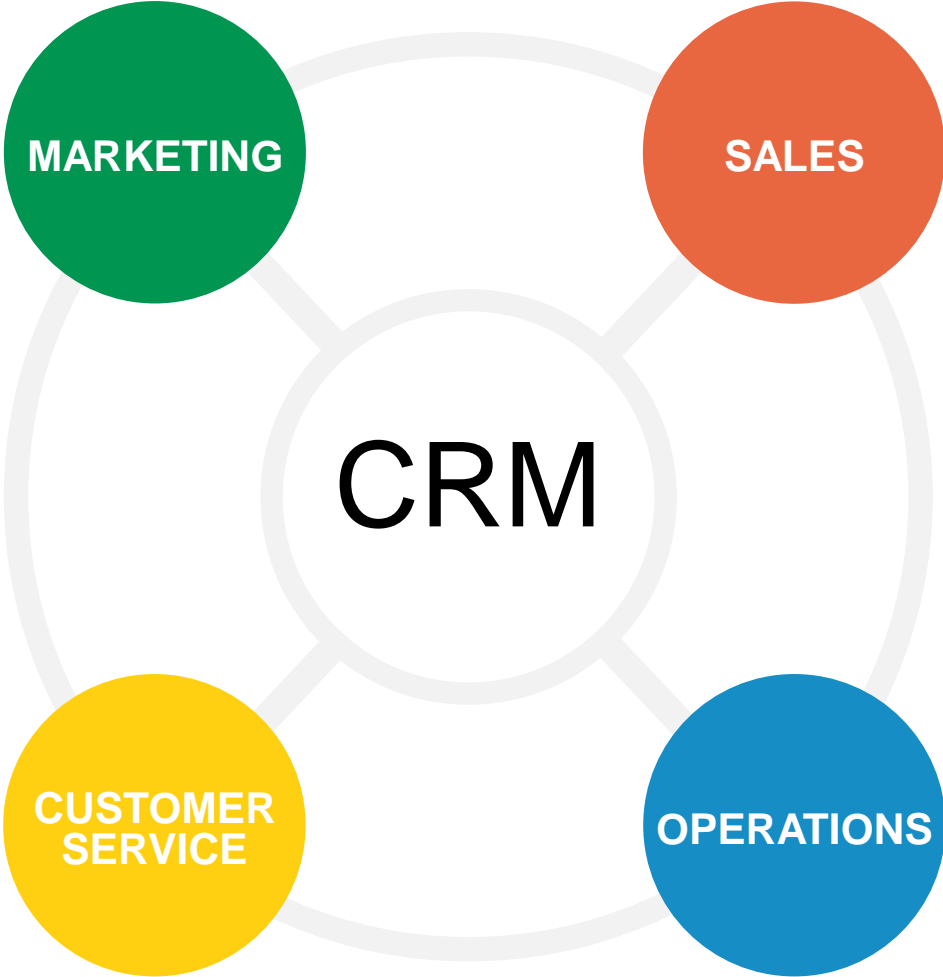
On-Premises

- Compliant when data privacy is a concern.
- Allows IT teams to have full control over deployment, equipment, security, and data.
- Easier to integrate with applications that are deployed on the internal network of the company.

**ONLY AVAILABLE TO DEPLOYMENTS
OF MORE THAN 800 USERS**

CIRRUS SHIELD CRM COVERAGE

Track Campaigns, Generate Leads
Build and enrich your Leads Database



Manage Leads, Track Opportunities, View
Customer 360°, Manage Sales Activities, Team
Collaboration, Reports, Mobile

Manage Cases, Conduct Trainings, Provide
Service, Develop Knowledge base

Deliver Products and/or services
Track ERP Quotes and Invoices, Track
Contracts

CIRRUS SHIELD CRM COVERAGE

Track Campaigns, Generate Leads
Build and enrich your Leads Database



Manage Leads, Track Opportunities, View Customer 360°, Manage Sales Activities, Team Collaboration, Reports, Mobile

Manage Cases, Conduct Trainings, Provide Service, Develop Knowledge base

Deliver Products and/or services
Track ERP Quotes and Invoices, Track Contracts

LEAD MANAGEMENT

Generate More Quality Leads

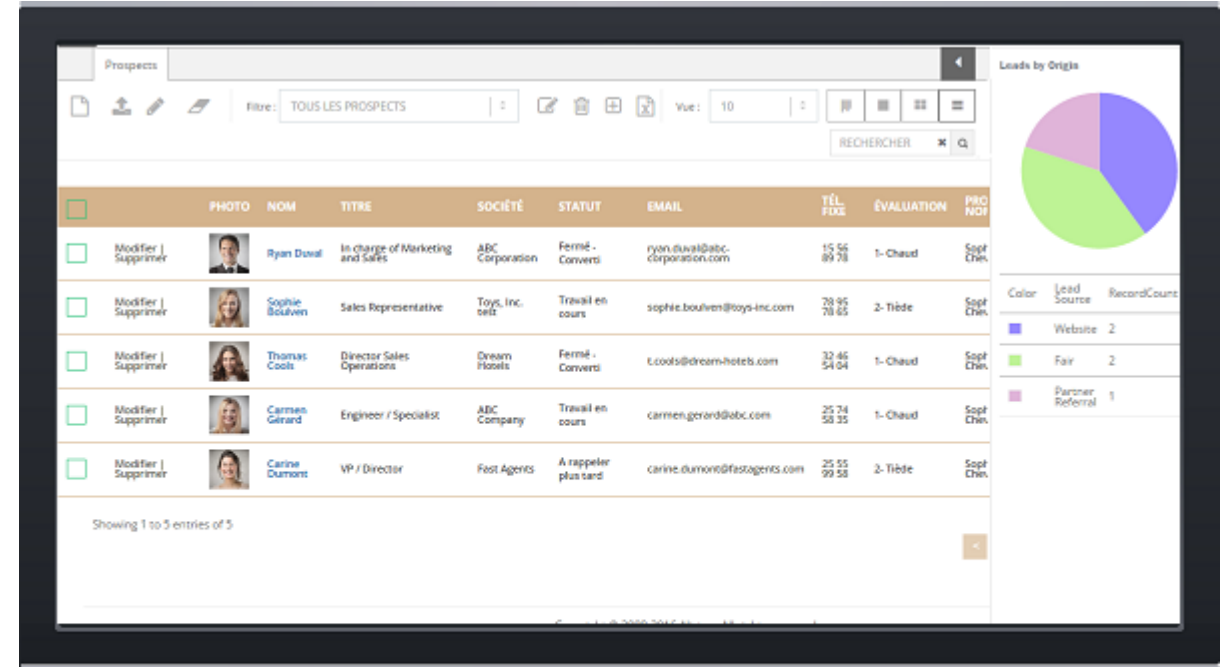
Import thousands of leads and contacts in a few clicks, and manage your contacts in a unique, shared database, accessible to you and your team anywhere and at any time.

Convert More Leads Into Opportunities

Track all the information about your leads from background, communications history, to any campaigns and events in which they have participated.

Plan and Execute Marketing Campaigns

Know which communications were sent to which contacts and when. Keep track of marketing campaign ROI to decrease the average cost of a generated lead.



OPPORTUNITY MANAGEMENT

Contact & Account Management

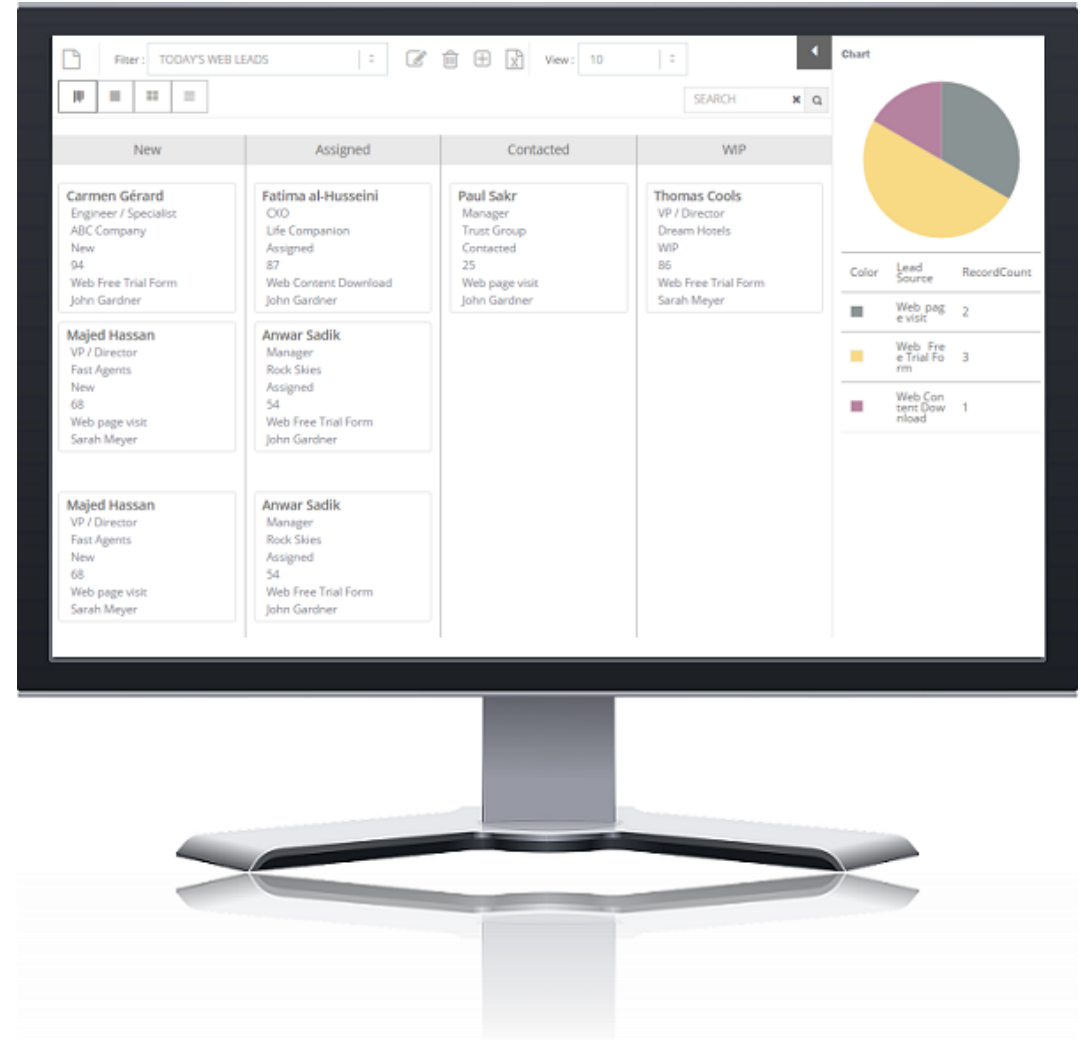
Manage all the information related to your customers such as contacts, activity history and related opportunities in one single shared database, accessible from anywhere.

Improve Your Win Rates

Get a real-time view of all your ongoing sales opportunities. Track your sales activities and know where every customer is in the sales cycle and deal size.

Focus On the Right Opportunities

Sort all your opportunities based on your priorities in order to focus on the important ones. Track competitor information on each deal in order to better position your sales messages.



CUSTOMER 360°

Be Closer To Your Existing Customers

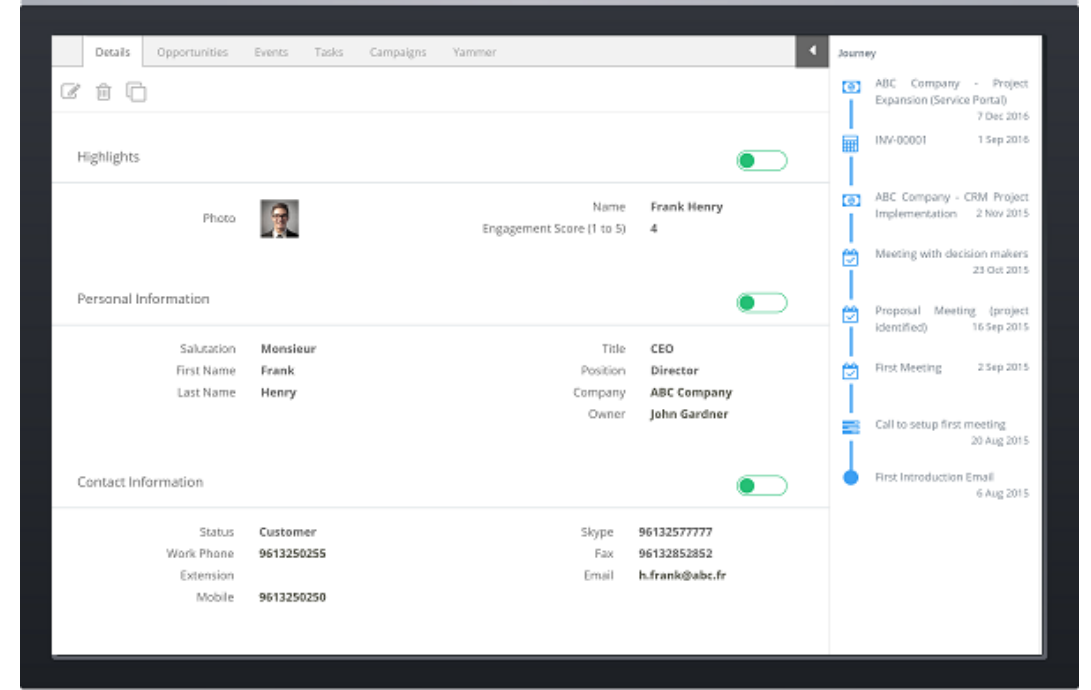
Displays the customer 360° view including relationships with other contacts, life events, cross-selling suggestions and any other information you might need.

Interactions History

Keep track of the history of interactions with your clients. Get a view on the customer journey using various data gathered from multiple systems and centralized in Cirrus Shield.

Take Informed Decisions

Keep connected and see all the information shared by your team that you never knew existed, making it easier to move your work forward and close more deals, faster.



SALES ACTIVITY MANAGEMENT

Track Your Team's Activities

Keep track of your sales activities and highlight pending tasks and reminders, allowing you and your salespeople to act at the right moment, from anywhere.

Stay Connected

Take your collaboration to the next level with powerful and secure mobile apps that keep teams connected and informed, wherever they are.

Improve Sales Efficiency

Cirrus Shield lets you improve your sales efficiency by better managing your day to day activities and focusing on the right leads at the right moment.



TEAM COLLABORATION

Collaborate With The Right People

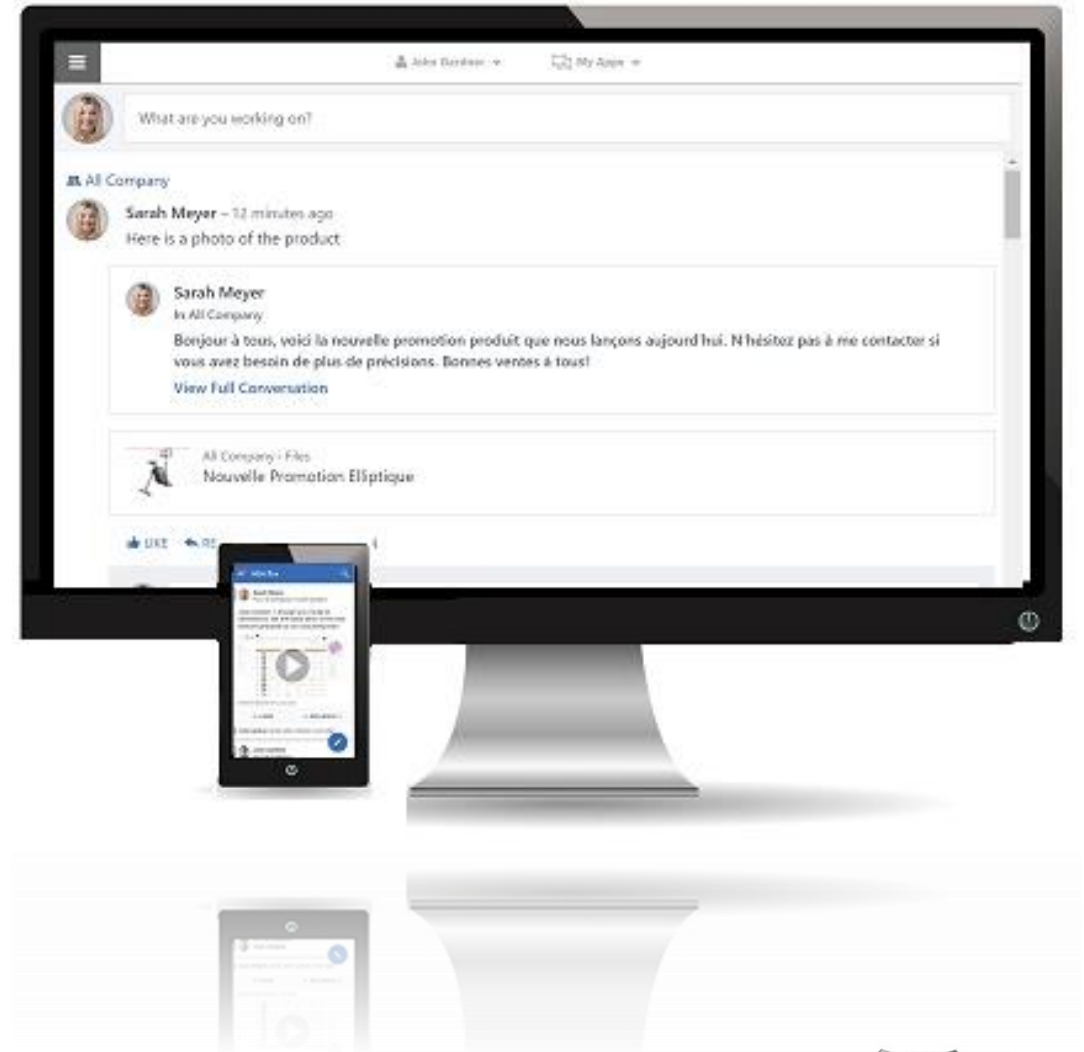
Communicate, share files and work together in groups directly from Cirrus Shield. Extend the conversation by looping in external partners whenever needed.

Work Together

Work together with anyone across the company on projects, initiatives, and events. Groups provide open, flexible workspaces for your teams.

Discovery Feed

The Discovery feed centralizes all the information of what is happening in your network and on the records you follow. All directly form within Cirrus Shield.



REPORTS

Take Critical Decisions from Anywhere

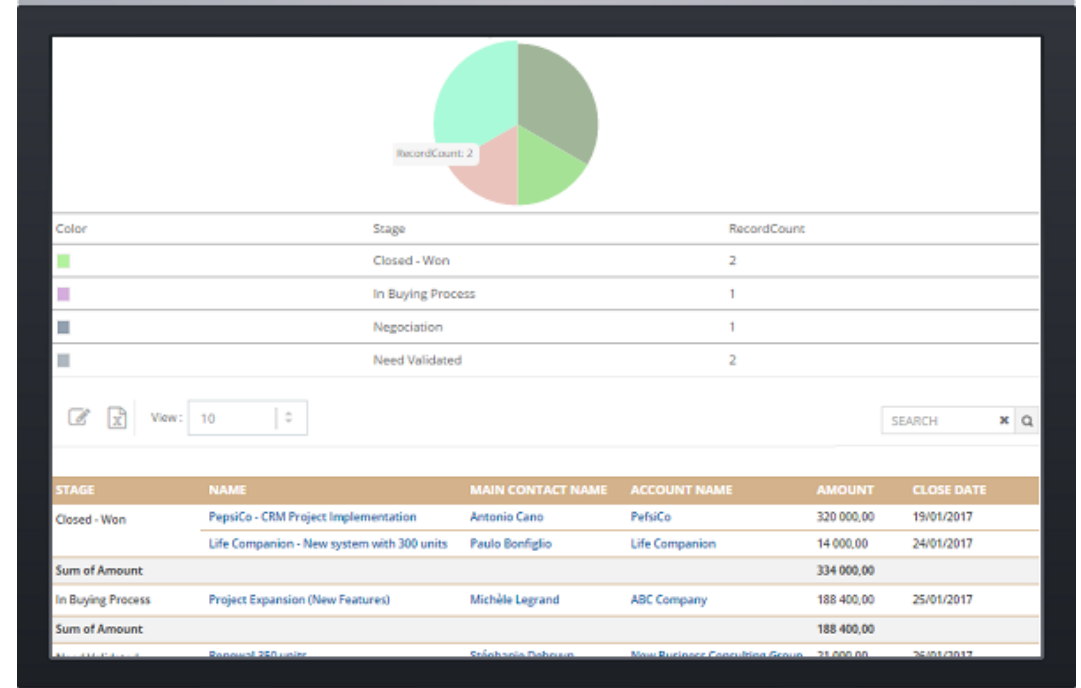
Share a common and unique view of your business with your colleagues in order to take critical decisions for your business with the right insight.

Track Your Team's Performance

Have a better view on the activities of your sales teams by using reports and dashboards to proactively correct courses or motivate your team.

Specific Role Dashboards

Whether you're a Sales Manager, a Field Sales, or the Sales Director, dashboards in Cirrus Shield will display the right data to you.



MOBILE

Manage Your Sales

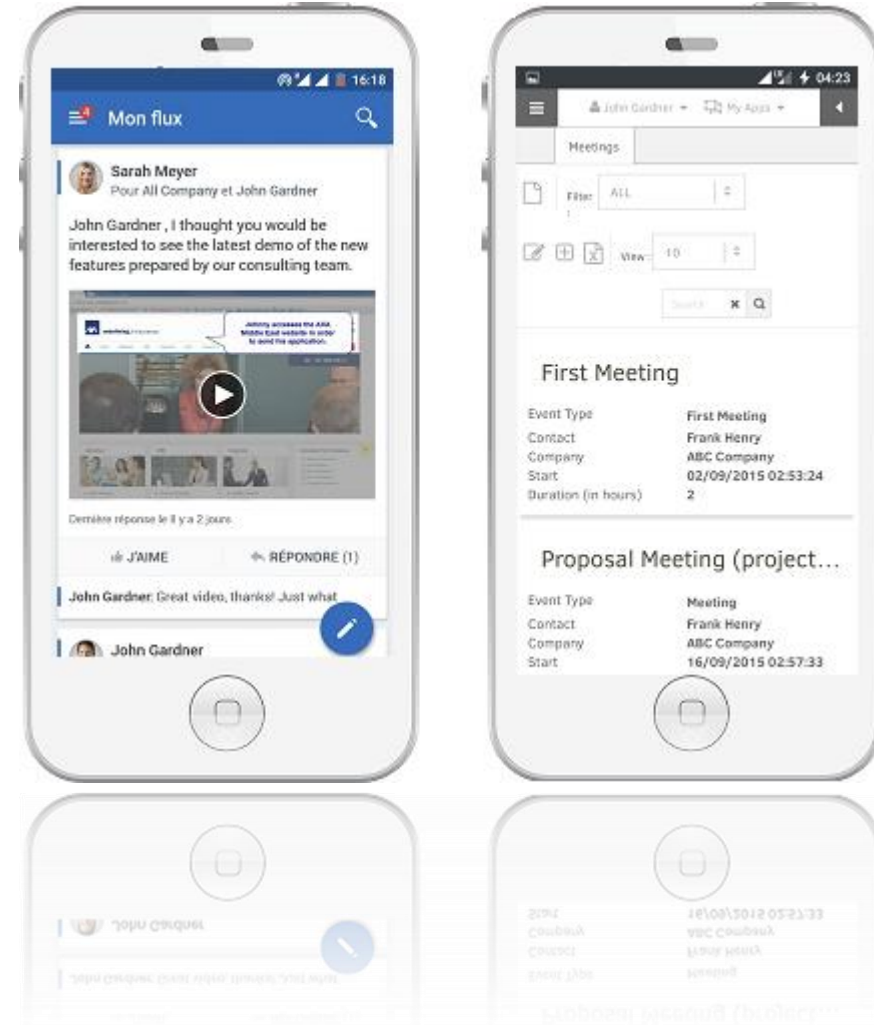
Allow your sales on the go to access and manage their customer's information in order to make deals happen from anywhere, anytime, on any device.

Access Reports and Dashboards

View your key dashboards directly from the app. Dashboards are generated in real-time and give you a snapshot of your organization's key metrics.

Keep Your Team Connected

The Yammer mobile app allows you to stay connected to team updates, messages, and notifications while on the go so that your team can be productive anytime, anywhere.



CIRRUS SHIELD CRM COVERAGE

Track Campaigns, Generate Leads
Build and enrich your Leads Database



Manage Leads, Track Opportunities, View
Customer 360°, Manage Sales Activities, Team
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Manage Cases, Conduct Trainings, Provide
Service, Develop Knowledge base

Deliver Products and/or services
Track ERP Quotes and Invoices, Track
Contracts

OPERATIONS

Track Your Sales

Enable complete sales cycle management features by tracking Quotes and Invoices. Connect your ERP to easily generate invoices based on information from Cirrus Shield.

Manage Your Products List

Manage your Product Catalogs and Price Books so that your salespeople can give the right price to the right customer at the right moment.

Customers Portal

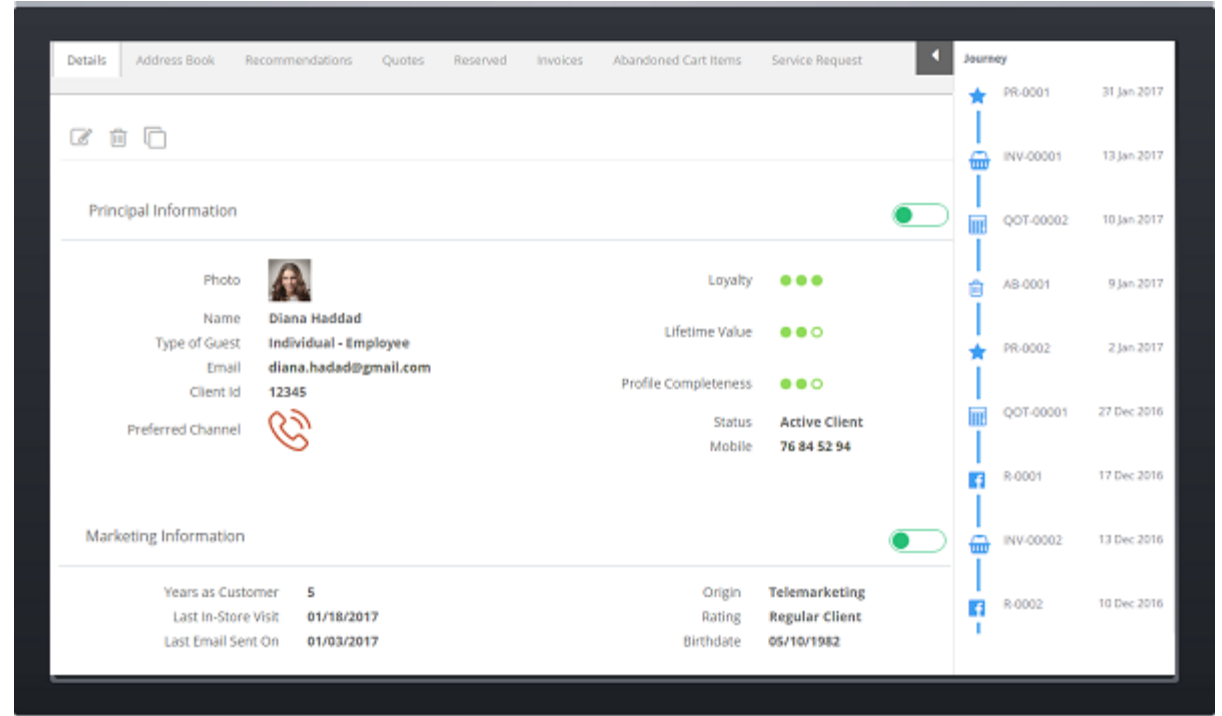
Give your customers a complete and secure visibility on their contact information, quotes, invoices, orders, delivery status in real time, and let them interact with support via the portal.

Contract Submission

Suppress paper forms by allowing customers to submit applications directly from their tablet/computer. Applications can then be e-submitted to generate contracts.

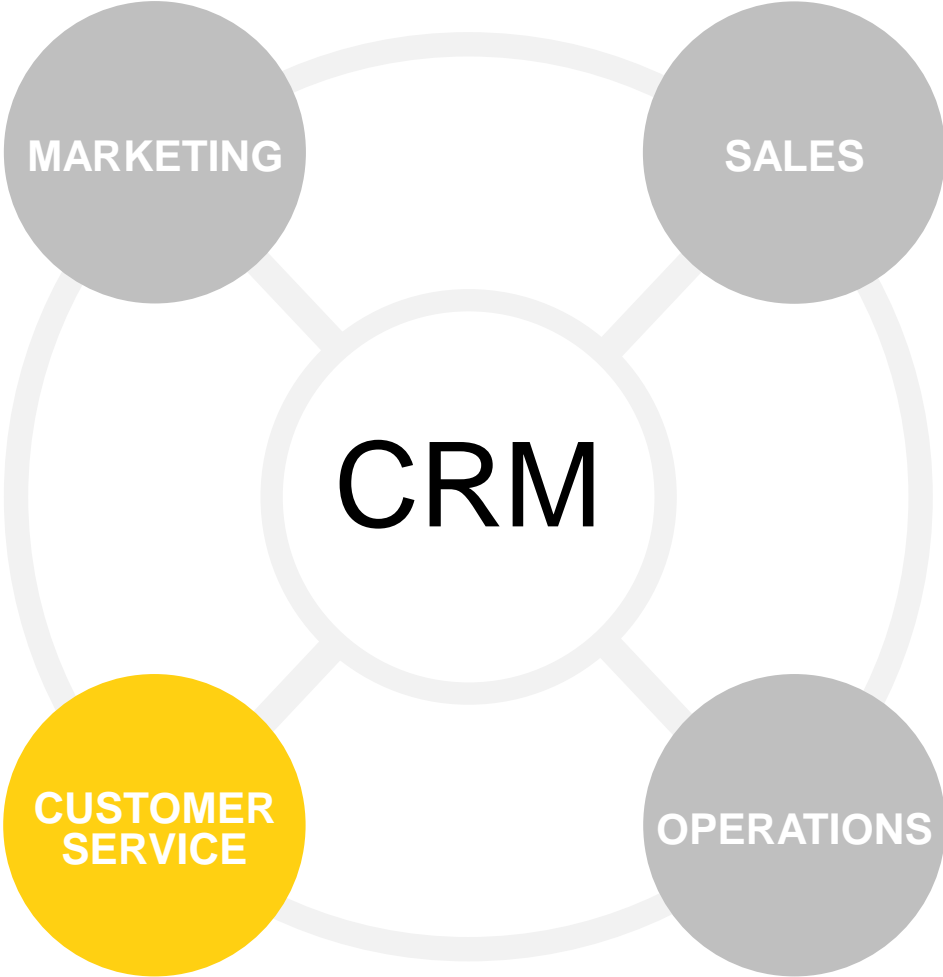
Create Custom Reports

Create custom reports and dashboards to track the KPIs of your choice. Reports and dashboards allow you to see in a glimpse the information you need.



CIRRUS SHIELD CRM COVERAGE

Track Campaigns, Generate Leads
Build and enrich your Leads Database



Manage Leads, Track Opportunities, View
Customer 360°, Manage Sales Activities, Team
Collaboration, Reports, Mobile

Manage Cases, Measure Customer
Satisfaction, Develop Knowledge base, 24/7
support through Self-Service Portal

Deliver Products and/or services
Track ERP Quotes and Invoices, Track
Contracts

MANAGE CASES

Customer Support Requests

Manage all customer requests from initial contact to resolution, keeping track of the history of interactions with your customers, whatever the communication channel.

Case Management

Manage your cases end-to-end in Cirrus Shield's CRM, including escalation process, RMA processes, and SLA. Clarify to whom each customer case is assigned, its channel, its priority and when it was created, updated and resolved.

Enrich the Customer 360°

Any data you input, any communication you have with the customer can be tracked in Cirrus Shield and will enrich the 360° view of the customer in a single, centralized and customer-centric database.



MEASURE CUSTOMER SATISFACTION

Measure and Act on Customer Feedback

When a case is closed, custom-built customer satisfaction surveys are automatically sent to your customers in order to measure and improve your customer's satisfaction.

Measure Quality of Service

Because speed of response and resolution are some of the main drivers of customer satisfaction, Cirrus Shield lets you measure response times on your cases automatically.

Share Satisfaction KPIs

Whether for customer feedback or for SLA results, you can track and report on your success KPIs in order to improve your customer satisfaction and loyalty. Reports let you share customer satisfaction scores across the company.



DEVELOP KNOWLEDGE BASE

Maximize Your Agent's Productivity

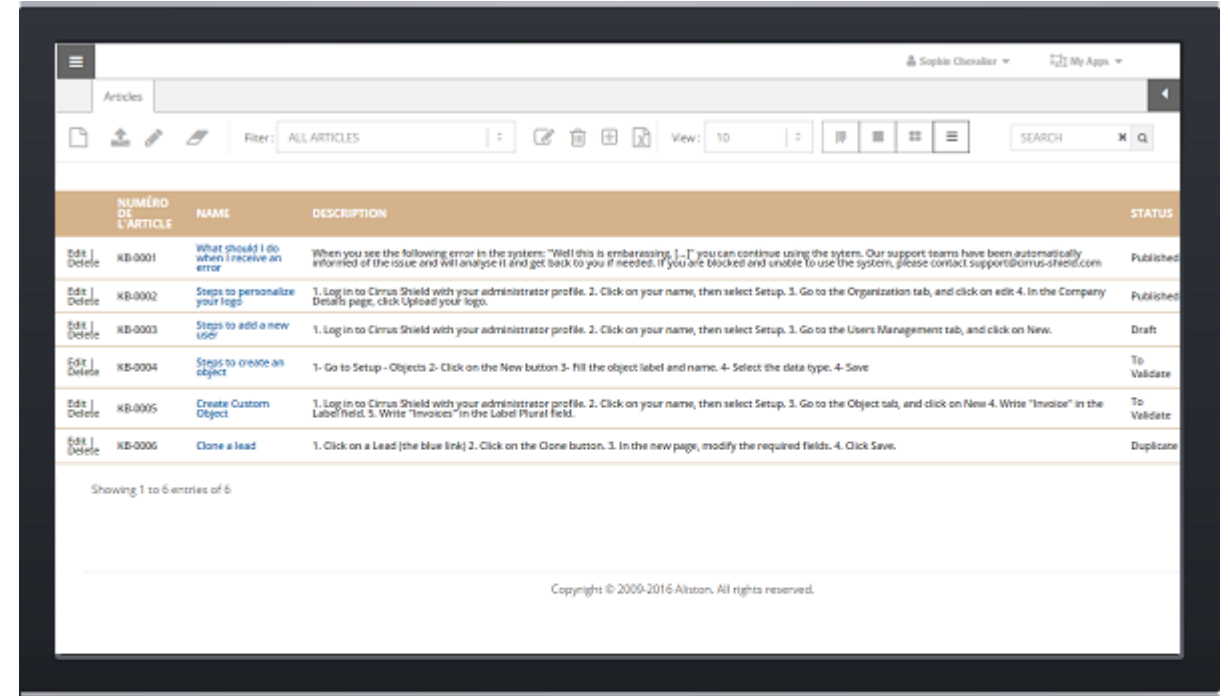
Cirrus Shield's Knowledge Base lets your customers find answers without needing to contact support. Your agents can create and publish articles for common answers to enrich the Knowledge Base.

Rating System

Analyze articles efficiency to see which article is working and which one needs to be improved in order to be more helpful to your customers.

Public Access

Give access to your knowledge base to public users on your website. RESTful web services allow you to easily integrate your knowledge base into any Content Management System such as WordPress.



	NUMÉRO DE L'ARTICLE	NOM	DESCRIPTION	STATUT
Edit Delete	KB-0001	What should I do when I receive an error	When you see the following error in the system: "Well this is embarrassing. [...]" you can continue using the system. Our support team has been automatically informed of the issue and will analyse it and get back to you if needed. If you are blocked and unable to use the system, please contact support@cirrus-shield.com	Published
Edit Delete	KB-0002	Steps to personalize your logo	1. Log in to Cirrus Shield with your administrator profile. 2. Click on your name, then select Setup. 3. Go to the Organization tab, and click on edit. 4. In the Company Details page, click Upload your logo.	Published
Edit Delete	KB-0003	Steps to add a new user	1. Log in to Cirrus Shield with your administrator profile. 2. Click on your name, then select Setup. 3. Go to the Users Management tab, and click on New.	Draft
Edit Delete	KB-0004	Steps to create an object	1- Go to Setup - Objects 2- Click on the New button 3- Fill the object label and name. 4- Select the data type. 4- Save	To Validate
Edit Delete	KB-0005	Create Custom Object	1. Log in to Cirrus Shield with your administrator profile. 2. Click on your name, then select Setup. 3. Go to the Object tab, and click on New 4. Write "Invoice" in the Label field. 5. Write "Invoices" in the Label Plural field.	To Validate
Edit Delete	KB-0006	Clone a lead	1. Click on a Lead [the blue link] 2. Click on the Clone button. 3. In the new page, modify the required fields. 4. Click Save.	Duplicate

Showing 1 to 6 entries of 6

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24/7 SUPPORT THROUGH SELF-SERVICE PORTAL

Customer Portal

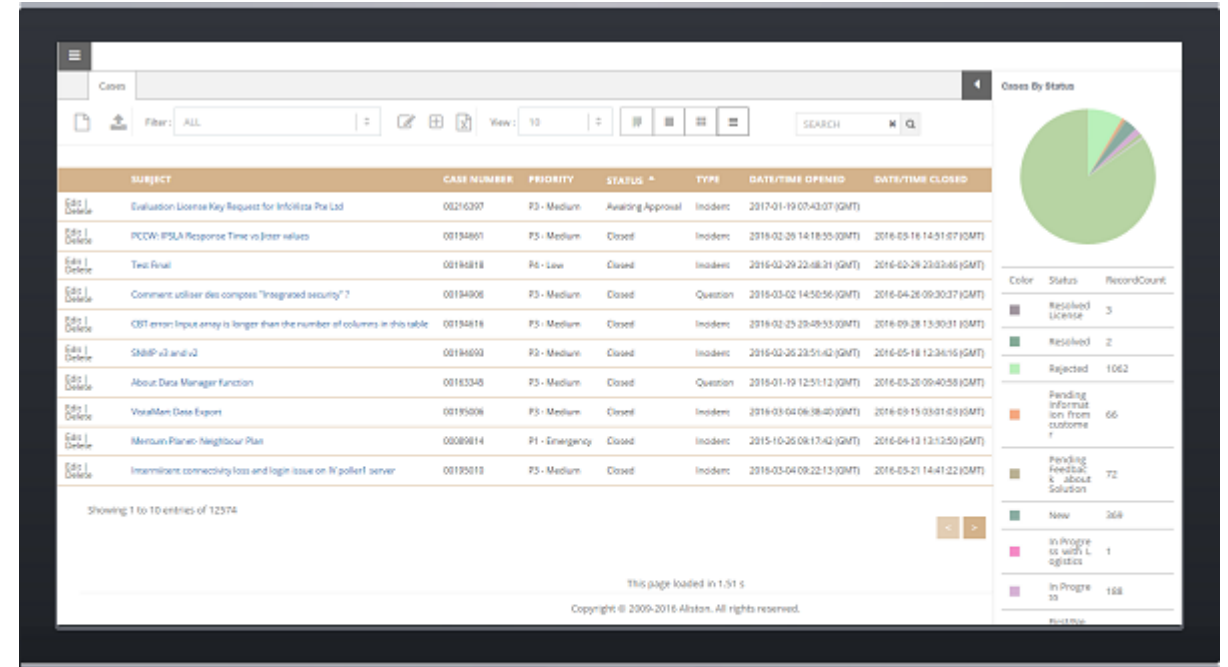
Provide a private and secured environment to your customers where they can access any information you want to share with them, such as product documentations, orders history, invoices, product recommendations based on their purchase history, support requests, etc.

Self-Service Portal

The portal capability of Cirrus Shield can be leveraged to easily put in place a Self-Service Portal where your customers can submit cases 24/7, track the progress on existing cases and interact with your support teams.

Communities

Leverage Yammer's capabilities to transform the way you interact with your clients. Yammer has been fully integrated into Cirrus Shield. Include members from outside your organization, such as partners, vendors and customers, into conversations and deliver top quality support through Cirrus Shield Yammer Communities.



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Manage Cases, Measure Customer
Satisfaction, Develop Knowledge base, 24/7
support through Self-Service Portal

Deliver Products and/or services
Track ERP Quotes and Invoices, Track
Contracts

TRACK CAMPAIGNS

Track Your Marketing Campaigns

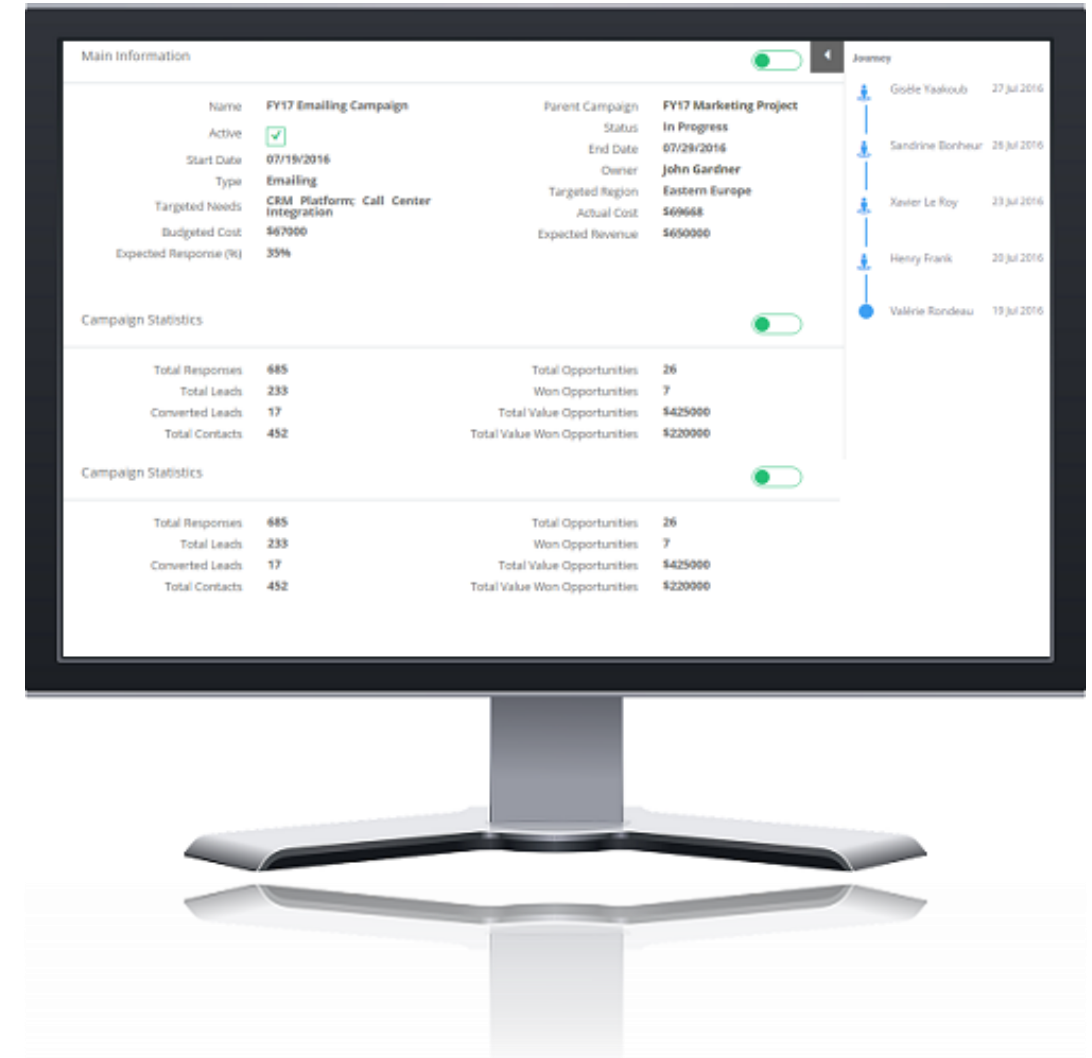
Manage your campaigns to keep track of which lead was targeted by which campaigns in order to take smarter decisions about where to invest your marketing budget.

Improve Lead Follow-up

Analyze the lead-to-cash funnel on the leads generated by Marketing to identify and improve lead scoring and customer segmentation.

Best-of-Breed Approach

Cirrus Shield CRM can be deeply connected with third-party solutions such as emailing engines, marketing automation tools, or any other system.



GENERATE LEADS

Identify More Leads

Easily mass upload leads into Cirrus shield CRM.
Automatically prioritize work on generated leads to focus on the high-value ones.

Load Millions of Records

Import your data into Cirrus Shield CRM, and manage your contacts in a unique, shared database accessible to all whether from their desk or on the go from their mobile.

Web-To-Lead

Capture leads online using Web-to-lead form and populate Cirrus Shield CRM automatically in real-time. Manage captured leads effectively by starting the follow-up process.



PORTAL CAPABILITIES IN CIRRUS SHIELD CRM

CIRRUS SHIELD PORTALS



Customer Portal

Give your customers 24/7 support with a great self-service portal where they get the answers they need whenever and wherever they need them.



Employee Portal

Whether for Project Management, Human Resources, CRM, or any other application, use Cirrus Shield as a one-stop portal for your employees.



Communities

Allow your teams to self-organize, stay connected, and tap into the network of stakeholders inside and outside your company.



Partner Portal

Help your partners succeed by giving them an exclusive access to marketing resources, leads and opportunities submission and tracking tools, training information, product documentation, etc.

CIRRUS SHIELD PORTALS



Customer Portal

- Submit new cases.
- Track the progress on existing cases.
- Interact with your support team.
- Send file to the support via a secure channel.
- Track all your invoices within the portal.
- Track your assets and see which products or services need to be renewed.



Employee Portal

- Customizable Timesheet.
- Track the time spent by your employees on a task.
- Communicate, share files and work together directly on the records in Cirrus Shield.
- Submit and manage leaves in a single environment.
- Manage your expense reports.



Communities

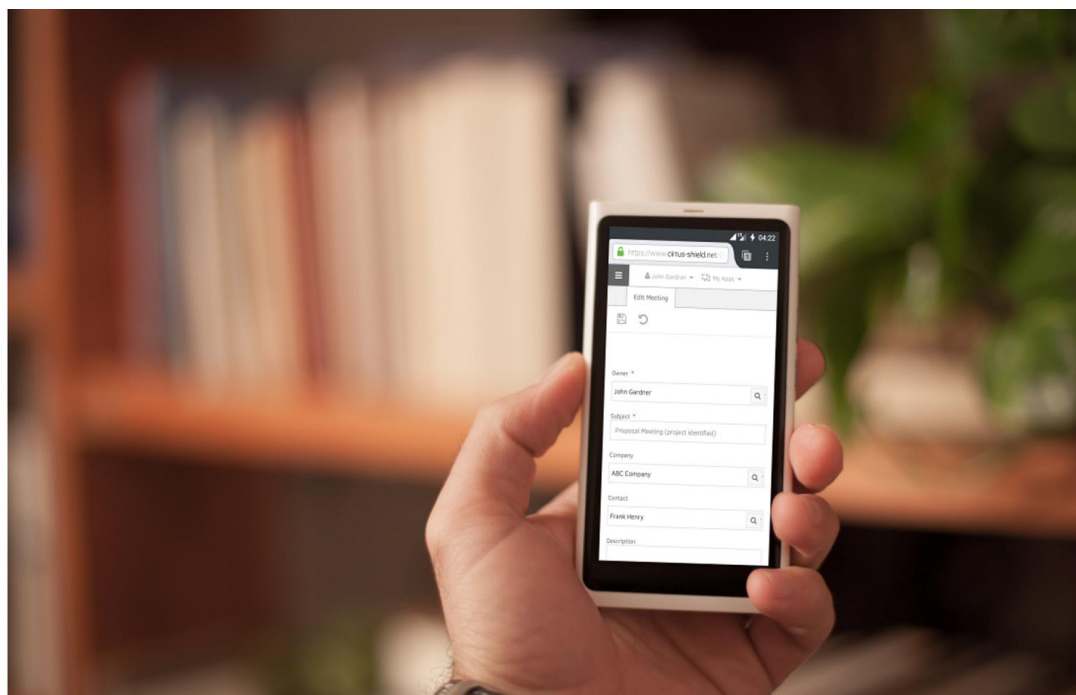
- Communicate and share files.
- Centralizes all the information of what is happening in your network and on the records you follow.
- Work together with anyone across the company on projects, initiatives, and events.
- Stay connected to team updates, messages, and notifications while on the go.



Partner Portal

- Support and resources to help you succeed.
- Submit and manage your leads in a single and private environment.
- Accelerate your innovation and time to market.
- Get a real-time view of all your ongoing sales opportunities.
- Communicate and share files with your team.

CUSTOMER STORIES



A SELF-SERVICE PORTAL DEPLOYED IN 3 WEEKS
A PORTAL SEAMLESSLY INTEGRATED WITH INFOVISTA'S WEBSITE
A COMMUNICATION TOOL BETWEEN CUSTOMERS AND INFOVISTA
A SECURE CHANNEL TO SEND FILES TO CUSTOMER SUPPORT



ONLINE SALES OF INSURANCE POLICIES COUPLED WITH CONTACT CENTER CAPABILITIES FOR PROSPECTS CALL-BACK.

ELECTRONIC SUBMISSION OF AUTO CLAIMS WITH A MOBILE APPLICATION.

CUSTOMER PORTAL WITH POLICY RENEWAL AND ONLINE PAYMENT FEATURES.

COMPLAINT MANAGEMENT SYSTEM INCLUDING CUSTOMER SATISFACTION MEASUREMENT.

DISTRIBUTOR PORTAL WITH PROSPECTING TOOLS TO DEVELOP BUSINESS.

RECRUITMENT MANAGEMENT SYSTEM INTEGRATED INTO AXA MIDDLE EAST'S PUBLIC WEBSITE.

CIRRUS SHIELD VERTICALS

Insurance: Transforming insurance customer's experience in the digital age.

Increase Premiums:

Transform your distribution network into a sales machine by putting in place the right tools and processes to manage the sales process and help the distribution networks perform better.

Provide Great Customer Service:

With call center wizards plugged into the CRM, insurers can leverage the information present in Cirrus Shield in order to deliver outstanding customer service. Satisfaction surveys allows contact centers to keep track of satisfaction levels in real-time.

Reduce Operating Costs:

Cirrus Shield modules for operations allow insurers to improve the efficiency of internal teams and processes, all the while offering a front-end to customers for interacting with the company.

Innovate Faster:

Cirrus Shield brings you an edge by allowing you to deliver innovations in a much faster way all the while meeting strict compliance rules and regulations. Cirrus Shield also integrates nicely with your existing systems so the effort of setting it up is minimal.

Insurance Capabilities

Financial Services: Remaining relevant in the digital age.

Strengthen Relationship with Your Client:

We're at a time where technology is your main competitive advantage, allowing you to offer your customers with more speed, personalization and value. Build long-lasting relationships with your customers by delivering smart and personalized service anytime, anywhere.

Maintain Regulatory Compliance:

Cirrus Shield is a strong and secure platform as a service that can be deployed in a public cloud, private cloud or on-premises in your own data center. Maintain regulatory and data privacy compliance by selecting the right deployment option.

Better Manage and Convert Your Leads:

Integrate Cirrus Shield within your IT landscape to consolidate lead information and behaviors into one place for the advisors. Cirrus Shield's unique capabilities in terms of integration and user interface allows your advisors to better manage and convert your leads into clients.

Accelerate Innovation:

Cirrus Shield allows you to deliver innovations in a much faster way all the while meeting strict compliance rules and regulations. Cirrus Shield also integrates nicely with your existing systems so the effort of setting it up is minimal.

**Financials Services
Capabilities**

SMBs: Take your Company to the Next Level

Grow Your Sales:

Is your team generating enough sales to meet your near and long-term business objectives? Are you tracking your sales with an Excel sheet and emails? Cirrus Shield CRM improves the way you manage prospects and customers' information; interact with your team and close your deals.

Increase Customer Satisfaction:

Does your customer service reply to every customer request as if it was new because it can't track any history and didn't build any knowledge base? With Cirrus Shield CRM, your customer service agents are faster and smarter as they can.

Identify More Leads:

Do you lose opportunities while finding and sorting leads? Easily mass upload leads into Cirrus shield CRM. Automatically prioritize work on generated leads to focus on the high-value ones. Track lead qualification progress in real-time to identify what is working and what is not.

Manage Your business:

Do you need to track quotes and know which invoices were sent to which customer and when? Cirrus Shield offers capabilities that go beyond traditional CRM functions. Extensions are also available allowing you to add additional features to Cirrus Shield.

**SMBs
Capabilities**

Retail: Get Tomorrow's Retail, Today.

Bridge the Digital and Real Worlds:

Today, the buying experience starts most of the time out of the store. Your clients can easily access product information and peer reviews and can share their own opinion online. When entering your store, clients expect an experience that is consistent with its digital counterpart.

Boost Sales and Customer Satisfaction:

Capitalize on collected data by pushing targeted information to your customers and employees, regardless of the communication channel, whether online, in your point of sale, or through your call center. Create custom experiences that allow you to improve your conversion ratio.

Integrate the CRM to Your IT Landscape:

Whether you want to complement your app with additional features or build completely new apps, developers can leverage Cirrus Shield's model and web services APIs to deliver unique applications in any language. The interface is fully responsive and can be deployed on a public or private cloud.

Accelerate Innovation:

Deliver innovative applications with clicks and leverage Cirrus Shield's standards based integration capabilities to enrich customer data with information coming from connected objects. Empower your collaborators with tools that let them reinvent themselves in the face of e-commerce.

Retail
Capabilities

Non Profit: Strengthen your relationships with your ecosystem.

Grow Your Supporter Base:

Supporters are the base of your success as nonprofit organization. Cirrus Shield for Non-Profits helps nonprofit organizations in growing their supporters, converting those supporters to donors or members.

Strengthen Relationship With Members:

Manage your members and allow them to collaborate on a single platform. Foster communication among members to move forward your organization's projects. Share information on and manage the organization's internal processes and activities.

Track Payments:

Easily track the different types of payments received by the organization such as membership payments, activities payments, events payments, etc. Manage membership renewals so that the organization does not lose money.

Measure and Improve Your Events' ROI:

Because every dollar counts, Cirrus Shield allows you to manage your events using best practices from the enterprise world. Manage events as campaigns and track who was invited, who accepted and who attended.

**Nonprofit
Capabilities**

Healthcare: Put the Patient at the Heart of the Care Process

Get a 360° View of the Patient:

Get a complete visibility on patient data, including contact information, handicaps and illnesses, prescription history, appointment history, test results, insurance coverage, and even data coming from connected objects.

Take Informed Decision:

Connect Cirrus Shield to different data sources such as file storage, radios, scans in order to access patient information from a single location. Let your patients fill out pre-visitation or satisfaction forms (post-visit), and interact with them to make the right decisions at the right moment.

Maintain Regulatory Compliance:

Cirrus Shield is a strong and secure platform as a service that can be deployed in a public cloud, private cloud and on-premises in your own data center, Maintain regulatory and data privacy compliance by selecting the right deployment option.

Enhance Collaboration:

Cirrus Shield allows health professionals to communicate with each other and with their patients. Cirrus Shield improves communication within the institution and allows the transfer of documents and radios in order to share information and manage patient relationship from a PC, tablet or Mobile device.

**Healthcare
Capabilities**

Cirrus Shield CRM



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The screenshot displays the Cirrus Shield CRM interface. At the top, there's a navigation bar with tabs: Details, Address Book, Recommendations, Quotes, Reserved, Invoices, Abandoned Cart Items, and Service Request. The 'Details' tab is active. Below the navigation bar, there's a 'Journey' section on the right, showing a timeline of events with icons and dates. The main content area is divided into two sections: 'Principal Information' and 'Marketing Information'. The 'Principal Information' section includes a photo of Diana Haddad, her name, type of guest (Individual - Employee), email (diana.haddad@gmail.com), client ID (12345), preferred channel (phone), loyalty status (3 green dots), lifetime value (2 green dots, 1 orange dot), profile completeness (2 green dots, 1 orange dot), status (Active Client), and mobile number (76 84 52 94). The 'Marketing Information' section includes years as customer (5), last in-store visit (01/18/2017), last email sent on (01/03/2017), origin (Telemarketing), rating (Regular Client), and birthdate (05/10/1982).

This screenshot shows the same Cirrus Shield CRM interface as the one above, but with the text translated into Armenian. The navigation bar and 'Journey' section are visible. The 'Principal Information' section shows Diana Haddad's profile with her photo, name, email, client ID, preferred channel, loyalty status, lifetime value, profile completeness, status, and mobile number. The 'Marketing Information' section shows her years as a customer, last in-store visit, last email sent, origin, rating, and birthdate.