

# Full-Featured CRM Software Solution

## Overview

With its rich palette of functionalities, **InfoServ CRM** offers everything you need to be able to offer exceptional customer service, to attract new and win the loyalty of existing customer.

In its Basic versions, InfoServ CRM comes equipped with essential CRM functionalities which allow users to build a standardized client database, log in client related communication (e-mail, notes, sample documents), as well as time management tools to **boost efficiency** like calendars, reminders, and task management system. InfoServ CRM's Advanced versions offer complex features related to multichannel communication, elaborate reporting, campaign, sales, and ticket management, and integration, all aiming at improving the end result – **happy customers** and more profitable business!



## Key Features



### 360° Customer Profile

Detailed profiles with contact information, communication history, meetings, documents.



### Communication History

Customer Profiles contain a detailed communication history – phone calls, emails, web chats.



### Mobile Application

You can access your clients' data, calendars, sales deals regardless of time and location.



## Integrated Communication

A key role in efficient and working CRM is the ability to integrate the most commonly-used corporate communication channels – phone, email, and web chat. You receive and send e-mails directly from InfoServ CRM, without using external email applications (e.g. Outlook) and your communication is automatically recorded in the client profile along with the content of the message sent.

Phone integration in InfoServ CRM is easy – no need of expensive phone equipment and PBX. InfoServ CRM accepts telephony both from an internal PBX and directly from your Telecom operator.



### Phone Integration

Integrate your company phone lines and provide superior service to your customers.



### Email Integration

Email your customers directly from InfoServ CRM, no external email client needed.



### Web Chat integration

Let your customer contact you with a real-time live chat request from your web site.



### Built-in Soft Phone

Call your customers directly from InfoServ CRM, without the need of a phone device.



### Call Recording

Phone calls can be recorded and the call recording is available for fast and easy review.



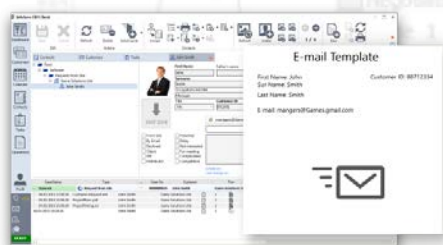
### IVR Technology

Convenient IVR menus including marketing messages, you serve customers with ease.

## Campaign Management

Campaign activities are often used in business – from emailing monthly bulletins, informing about upcoming updates, recalling products from market, through automated phone call notifications (Agentless Dialing) for missed payments or interrupted services, to organizing marketing initiatives such as Trade Shows, Conferences, Symposiums, Webinar, or Information Panels.

Use InfoServ CRM's user-friendly interface to identify the KPI/stage reached by each customer in the campaign; to monitor and track your campaign progress, and to measure your campaign effectiveness by comparing the results achieved at each stage with its targets.



### Marketing Campaigns

Organize and track marketing initiatives execution process and measure their effectiveness.



### Email Campaigns

Organize mass email campaigns with customized messages to precisely selected target groups.



### Phone Campaigns

Inform customers about upcoming events and deadlines with Automatic Phone Campaigns.





## Manage Business Processes

With its rich functionalities and a variety of additional modules, InfoServ CRM facilitates the management of various business processes and activities - from sales activities and customer service (Help Desk departments and service centers), to internal knowledge bases (FAQ), document management and other business-specific processes. An even greater competitive advantage is achieved when these activities are managed in the same system. This ensures that the different types of data - sales, service requests, claims and documents - are all visible and accessible in one place – the Customer Profile in your CRM.



### Sales Management

By effectively managing your sales processes, you turn leads into opportunities and win deals.



### Help Desk Management

Improve Service Levels (SLA) with integrated communication and well-arranged information.



### Document Management

Digitalize your business documentation and enrich client profiles with contracts and protocols.



### FAQ Knowledgebase

Maintain internal database with answers to frequently asked questions and documents used.



### Forms & Scripts

With personalized custom forms and scripts, you document various types of business activities.



### Notes

Complement your customer profiles with information about office visits and meeting results.

## Time Management

Regardless of the industry and business, there is a scarce resource that is absolutely important to everyone and always - it's Time. Time is never enough - to call another client, to process another request, to send another offer, to make another deal. Good organization, traceability and accountability of tasks, digitalization of tasks and endless to-do lists, automation and the use of templates are the basis for effective work and time management.

Time management tools are key to effective work, better concentration, fast and reliable service, and inevitably lead to employee satisfaction, loyalty to customers, and better financial performance.



### Calendars

Use calendars to organize meetings and reserve a shared resource (car, meeting room).



### Task Management

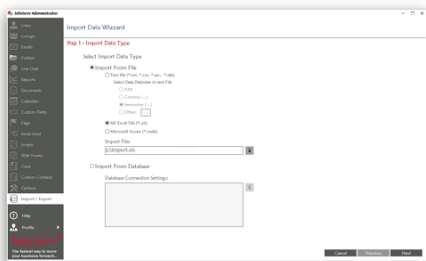
Delegating and tracking tasks' execution is easy for both managers and employees.



### To-Do Lists

Clean up your desk from endless to-do lists – digitalize them with InfoServ CRM.





## Automation & Integration

For a CRM system to be really effective, you must be able to integrate with existing company infrastructure and systems - Windows Active Directory, corporate phone and e-mail communication, web sites, ERP and Accounting systems.

InfoServ CRM offers a variety of standardized integration methods which allow for a real-time integration for customer data and quick access to customer information available on external systems. Our integration tools range from periodic import / export of client data through API integration interface, and the ability to call (application or web based) systems with a given parameter.

Automatic actions and integrations make employees work more efficient, prevent errors and automate business processes overall.



### Web & API Integration

Standardized real-time integration with external ERP, Billing, and Reservation systems.



### Automatic Actions

Automate routine tasks and activities, save time and never miss important events.



### Import/Export

Import client data into InfoServ CRM using wide variety of file formats and databases.

## Monitoring & Reporting

Continuous improvement of processes and work is impossible without detailed reporting and monitoring. InfoServ CRM provides intuitive tools for in-depth analysis of calls, emails, customer inquiries, sales deals, delegated and completed tasks, opened and resolved help desk tickets.

The availability of all the information in a single application, accessible by all employees, provides real-time access for managers to important business metrics.

With the integration of communication channels, phone, email and web chat, you have a full and detailed activity report with automatically calculated metrics such as call numbers, average call duration, missed calls, abandonment rate, service level (SLA), and more.



### Real-Time Monitoring

Have a steady look at the status, phone and chat conversations of your service team.



### Call Center Reporting

Improve your call center efficiency with metrics like Service Level and abundant rate.



### Report Generator

Create your own reusable report templates using combination of different types of data.

