



# Inno 8

## CRM Express

### Introduction:

Customer Relationship Management is a very large and complex topic. Consequently the installation of a CRM IT System can quickly become very complex, time consuming and costly.

Innov8 recognise that some clients embarking upon Customer Relationship Management may not have the time or budget to invest in a large scale implementation and all the activities that go with it.

Many of Innov8's clients have adopted a progressive approach to the development process allowing changes to their business to be managed carefully and in a cost effective manner.

In recognition of this requirement Innov8 have developed their "CRM Express Project" offering. This option provides clients with a basic install of Sage CRM with minimal configuration, appropriate training and guidance on how best to obtain the maximum benefits from Sage CRM with the minimum effort and expenditure in the short term.

CRM Express is a unique product from Innov8, allowing smaller businesses to overcome the often initially expensive first steps in the implementation of a state of the art CRM solution.



### Who is Sage CRM Express Aimed at?

Sage CRM Express is aimed primarily at clients with a mixture of un-connected information stores. These could take the form of Spreadsheets, miscellaneous databases or paper files. These business will also often have little or no management tools to measure Sales/Customer Service performance and are lacking the technology to perform basic marketing functions such as mass emails or mail merge. The CRM system should allow the business to standardise their operational processes and ensure all staff are working in the same way.

Are you interested in improving communications with your customers and potential customers?

- o Improve the efficiency of managing your customer data, remove data duplication, potential errors etc.
- o Ensure a 360 degree view of your customers and view any interactions with your entire business from marketing campaigns to sales to customer services.
- o Provide management with comprehensive, reliable reports on a regular basis with the minimum of administration effort.

### What is included in Sage CRM Express?:

Sage CRM Express offers clients the opportunity to implement Sage CRM in around 100 hours. This will enable the client to experience the basic functionality offered by the product and plan to improve and extend the system in a manageable affordable manor.

**CRM Express supplies a cost effective route to CRM ownership without the expensive pitfalls normally associated with these projects.**

The project will consist of the following activities:

### **Installation**

- o Installation of Sage CRM Server.
- o Installation of Sage CRM Application.
- o Integration of Sage CRM to Sage 200 Accounts where required.

### **Configuration**

- o Review of client business processes and identification of key data items to be captured by Sage CRM.
- o Essential Configuration of Company, Person, Lead, Opportunity and Case areas of the system to store client specific data.
- o Application of preconfigured Sales and Support Workflow for management of Sales Opportunities and Customer Service Cases.
- o Configuration of Report Templates.

### **Data Import**

- o Data Import of client customer data: Company, Person, Lead, Phone, Email and Address Details. Data must be provided in a predefined CSV format.

### **Training**

- o Train the Trainer training. Enables a client representative to administer Sage CRM and provide user training to their users. Additional Training can be provided upon request.
- o Report Training. Provide key users with suitable training to run and create reports using the standard CRM Reporting Tool.
- o Sage 200 Training. Train key users to use the Sage 200 quotation and order management functionality with Sage CRM.

## **Why Choose Innov8**

Innov8 Technology Group are a one stop shop for all your IT needs. Based in England, Ireland and Scotland we are able to implement anything from a small scale finance solution for your business to company wide infrastructure solutions.

Our determination to deliver high quality solutions with excellent support has enabled us to build a loyal customer base and a bright future, below are just a few comments from our satisfied customer base:

“We had struggled with inadequate IT provision in the past – then along came Innov8 to set us on the right course” – **Lynne Coakley, Catholic Children’s Rescue Society**

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