

## CRM Objectives



### Marketing and Sales



#### Demand Generation

- Lead nurturing
- Campaigns
- Events
- Advertising

- Online
- Offline



#### Newsletters and Email campaigns

- Dynamic content, personalised URLs



#### Sales funnel and forecasting



##### Prospect Classified

- Lead Scoring
- Cash flow and workflow visibility
- Web Analytics and Dashboards
- Click through, lead score, response time, rate



#### Reporting

- Shared access to information
- Lead allocation



### Customer Service



#### Customer Data

- Demographics on each customer, buy patterns,



#### Manage customer service

- customer call centre
- Track and Manage complaints



#### Survey and Research

- Manage data for accuracy for communications
- Send out customer sat surveys



### Business Operations



#### Integration of database with operational platform



##### Outlook integration

- back end with front end



##### Accounts

- invoicing and payments
- Financial Statement

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##### Content management

- customer information
- Templates
- Style guide
- Logo



##### Policies and Procedures

- Documents Location
- Who can contact customer

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