

## ABM MODULE: CUSTOMER RELATIONSHIP MANAGEMENT (CRM)

# STEER YOUR BUSINESS TOWARDS DEVELOPING STRONGER BUSINESS RELATIONSHIPS

ABM CRM COMBINES EXTERNAL INTERACTIONS WITH BUSINESS FINANCIALS,  
STREAMLINING YOUR COMMUNICATIONS, ANALYSIS AND PROMOTIONS.



ABM Customer Relationship Management (CRM) is a powerful customer centric system, aimed at simplifying tasks such as client management, marketing, lead tracking and customer analysis, through anytime online access. With full integration of the ABM accounting system, and driven by a robust SQL database, the module provides a unique platform for accessing and utilising all your customer and supplier information.

If your business is focused on customer retention or generation, then managing customer information is vital. ABM CRM provides the tools to deliver a higher level of service and more effective promotional campaigns, while creating a work environment where real-time customer information is available at any time.



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## FEATURES

### CONTACT MANAGEMENT

Keep all your details for customers, leads, suppliers and colleagues in one accessible place, while tracking all interactions and communications between parties. Unique to ABM is the ability to draw on financial data for customers and suppliers, allowing for financial analysis per contact or group.

### REAL-TIME INFORMATION





Team members who are out of the office will have access to rich customer information, plus the ability to schedule tasks like meetings and follow-up appointments and much more. No syncing, no exporting, no waiting — just a more efficient team who are on the same page and in the same system, all the time.

### SALES PIPELINE MANAGEMENT

Easily keep track of your sales opportunities. See real time data on winning percentages and approximate values of your leads, have confidence that follow-ups will be met and direct the 'next step' in the sales process. Pipeline management streamlines tasks and gives you the ability to review and update leads whether in the office or on the road.

### CAMPAIGNS

Campaigns can be launched for rapid deployment of mass or focused campaigns, constantly giving you valuable feedback on your progress, success rates and pending tasks. List builder functionality gives you the ability to create and re-use filtered customer lists, making regional or demographically targeted campaigns far more manageable.

 Customers	Active Inactive Prospective	40 4 14
 Actions	In Progress Actions In Progress Tasks	1 0
 Pipeline	Active Pipeline Pending Pipeline	1 0
 Campaigns	Active Campaigns Pending Campaigns	0 1
<b>My progress this month</b>		
My sales \$xxx		
My pipeline \$0		
<b>My progress last month</b>		
My sales \$xxx		
My pipeline \$0		
<b>My Actions and Tasks</b>		
Total Actions 1		
Total Tasks 0		
<b>My Campaigns</b>		
Total Active Campaign 0		

### DASHBOARD

Your home-screen dashboard provides a quick overview of your business activities, statistics on sales, scheduled tasks and progress on leads. See how your business is doing from the first screen.



### WEB HOSTING

As a fully web-based application, ABM CRM runs in all popular browsers, whether on a desktop or mobile device, customer management is with you everywhere you go. All of this while keeping your data where it belongs - safe in your own hands, hosted from your own network.



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