Customer Relationship Management (CRM) system for Business

Best Suited for: Corporate any others organization of Credit Rating Industry, Trading & Service Organization

Used Technology: C#, ASP.NET, SQL Server 2012, JavaScript, Ajax, HTML, CSS/CSS3, Adobe Photoshop CS5

Brief: Our Customer Relationship Management (CRM) system is automates administrative processes to keep record the database of customer details including sales invoice & mgt., outstanding of bill, collection history of service bill and etc., so user can focus on managing the most valuable of an organization people.

Client Reference: CRISL, CRAB, EMERGING CREDIT RATING LTD.

Customer relationship management (CRM) system is an effective tool for customer database which helps with contact management, sales management, and productivity of works. Our company "Opus Technology Limited" is being providing a customer management solution with database. The primary goal of CRM systems is to integrate and automate sales, marketing, and customer support. Without a robust CRM system, customer details and interactions can get

lost, calls are not followed up promptly and prioritizing customers can be a matter of guesswork.

As the customer has become more connected, the focus on 'customer relationship management' has transitioned and also become a strategy to customer engagement. The CRM is no longer just a database of information; it now needs to meet the needs of a customer who wants to connect with a business across multiple channels. It also needs to be able to provide relevant and up-to-date information to all departments. Customer Relationship Management is process that a company follows for proper execution of practices, strategies and technologies to manage customer interaction. The data is then analyzed in order to improve business relationships. CRM systems compile information of customers which are used to derive sales targets.

Customer Relationship Management System

Our Core Modules:

- Account
- Contacts
- Activities
- FI Details
- Opportunities
- MOU/Agreement
- Billing
- Collection
- Settlement
- Reporting
- Setting

Module Features:

Customer Management System

- Accounts
- Activities-visit, call & Activities
- Opportunities-
- MOU-Create MOU & MOU Verification

- Billing-Bill Generation, Collection & Bill Status
- Admin
- Settings
- Reports-Yearly MOU status, monthly business performance, annual business performance, Daily Activities, FI details, Bill generation and Collection, Target VS achievement

User Management:

- Create new user
- User privilege setting
- Change user password

Setting:

- Company Information setting
- FI Type Entry
- FI Entry
- FI Branch
- Sector
- Division Setting
- Department setting
- District Setting
- Religion setting
- Customer setting

CRM Process flow Diagram

Why would you Customer Relationship Management (CRM) system need?

A good CRM system will be integrated into your ACD, and when the customer calls and the number is recognized it will "screen pop" the customer's details and previous history. As well as basic contact information, a CRM system should also be able to present a unified screen that has all the relevant information – including a complete history of all your transactions with that customer.

- Scale-ability
- Security
- Analysis and Report
- Data Sharing
- User friendliness
- Automatically update
- Customization

Product Features

User friendly and intuitive

CRM systems have a single interface for all users with endless tabs, menus and dashboards. This often results in a high level of complexity and different departments within the business struggling to efficiently reach the data that they require. Choosing a CRM with an intuitive and user-friendly interface, that can be changed to suit different departments or teams, can help your system adapt to suit departmental processes and business workflows.

A 360° view of the customer

Your CRM system should be integrated with the contact centre, so that your customer service agents benefit from a 360° view of the customer. Fully customizable user dashboards can provide a single unified view of information from case and line of business applications. The dashboard can also be tailored to highlight or flag key bits of information to the agent. Also make sure your contact centre system integrates with major applications.

Mobile application

A CRM system with a mobile application to enable mobile working can minimize trips into the office to update data.

Intuitive task wizard workflow design engine

An intuitive task wizard workflow design engine can provide the contact centre with total ownership and customization of workflows. This can allow contact centre managers to design workflows once and then use them multiple times.

Customer self-service portal

A customer self-service portal with integration into the CRM workflows can enable a shift away from more expensive channels towards self-service. This can help reduce costs, improve agent productivity and reduce the re-keying of information.

Flexibility and customization

The CRM system needs to include a level of flexibility so it can be tailored around your business and can be customized to work the way you want it to.

Although many providers say they offer this level of customization, this often means that the project will incur higher costs through third-party customization, resulting in a complex and expensive CRM implementation. A key requirement therefore is to procure a solution from a supplier who can customize it as part of the project and within budget. From this screen, the agent can see that there is an outstanding payment on the account, and can securely take

payment over the phone or transfer the customer to an automated voice payment system or send them to the self-service web portal for payment.

An overview of Customer Relationship Management

Customer service can become a key competitive differentiator. There has been an increased emphasis over the last few years on improving the experience customers are getting when engaging with a contact center. A CRM system can help an organization provide great customer experience as a key competitive differentiator, drive customer retention and have a direct impact on profits. Improving the customer experience with a CRM system can lead to increased customer retention. Having access to a full digital history can allow a contact centre to easily track performance against SLAs. Agents won't have to toggle between multiple screens to find information. If you can give agents a single sign-on experience they won't need to toggle between multiple screens to find the information they need when talking to customers. A simpler process can also give agents more confidence, allowing them to focus more on building professional rapport. CRM can simplify the process of dealing with multichannel requests. A CRM system can help to simplify the action of dealing with multichannel requests. This can allow the agent to focus their energy on dealing with the actual issue at hand, and therefore enhance the customer's experience. Make sure your CRM can pull and push information from other internal systems. This will enable a "single version of the truth" and minimize re-keying of information. It Workflows should be intuitive enough to allow internal users to create and edit them where necessary. Avoid systems where you need to get a consultant in every time you need to make a change.

Advantages of Customer Relationship Management

Enhances Better Customer Service

CRM systems provide businesses with numerous strategic advantages. One of such is the capability to add a personal touch to existing relationships between the business and the customers. It is possible to treat each client individually rather than as a group, by maintaining a repository on each customer's profiles. This system allows each employee to understand the specific needs of their customers as well as their transaction file.

The organization can occasionally adjust the level of service offered to reflect the importance or status of the customer. Improved responsiveness and understanding among the business employees results in better customer service. This decreases customer agitation and builds on their loyalty to the business. Moreover, the company would benefit more by getting feedback over their products from esteemed customers.

Facilitates discovery of new customers

CRM systems are useful in identifying potential customers. They keep track of the profiles of the existing clientele and can use them to determine the people to target for maximum clientage returns.

New customers are an indication of future growth. However, a growing business utilizing CRM software should encounter a higher number of existing customers versus new prospects each week. Growth is only essential if the existing customers are maintained appropriately even with recruitment of new prospects.

Increases customer revenues

CRM data ensures effective co-ordination of marketing campaigns. It is possible to filter the data and ensure the promotions do not target those who have already purchased particular products. Businesses can also use the data to introduce loyalty programs that facilitate a higher customer retention ratio. No business enjoys selling a similar product to a customer who has

just bought it recently. A CRM system coordinates customer data and ensures such conflicts do not arise.

Helps the sales team in closing deals faster

A CRM system helps in closing faster deals by facilitating quicker and more efficient responses to customer leads and information. Customers get more convinced to turn their inquiries into purchases once they are responded to promptly. Organizations that have successfully implemented a CRM system have observed a drastic decrease in turnaround time.

Enhances effective cross and up selling of products

Cross – selling involves offering complimentary products to customers based on their previous purchases. On the other hand, up – selling involves offering premium products to customers in the same category. With a CRM system, both cross and up – selling can be made possible within a few minutes of cross – checking available data.

Apart from facilitating quicker offers to customers, the two forms of selling helps staff in gaining a better understanding of their customer's needs. With time, they can always anticipate related purchases from their customer.

Simplifies the sales and marketing processes

A CRM system facilitates development of better and effective communication channels. Technological integrations like websites and interactive voice response systems can make work easier for the sales representatives as well as the organization. Consequently, businesses with a CRM have a chance to provide their customers with various ways of communication. Such strategies ensure appropriate delivery of communication and quick response to inquiries and feedback from customers.

Makes call centers more efficient

Targeting clients with CRM software is much easier since employees have access to order histories and customer details. The software helps the organization's workforce to know how to deal with each customer depending upon their recorded archives. Information from the software can be instantly accessed from any point within the organization.

CRM also increases the time the sales personnel spend with their existing customers each day. This benefit can be measured by determining the number of service calls made each day by the sales personnel. Alternatively, it could also be measured through the face – to – face contact made by the sales personnel with their existing customers.

Enhances customer loyalty

CRM software is useful in measuring customer loyalty in a less costly manner. In most cases, loyal customers become professional recommendations of the business and the services offered. Consequently, the business can promote their services to new prospects based on testimonials from loyal customers. Testimonials are often convincing more than presenting theoretical frameworks to your future prospects. With CRM, it could be difficult pulling out your loyal customers and making them feel appreciated for their esteemed support.

Builds up on effective internal communication

A CRM strategy is effective in building up effective communication within the company. Different departments can share customer data remotely, hence enhancing team work. Such a strategy is better than working individually with no links between the different business departments. It increases the business's profitability since staff no longer have to move physically move while in search of critical customer data from other departments.

Facilitates optimized marketing

CRM enables a business understand the needs and behavior of their customers. This allows them to identify the correct time to market their products to customers. The software gives ideas about the most lucrative customer groups to sales representatives. Such information is useful in targeting certain prospects that are likely to profit the business. Optimized marketing utilizes the business resources meaningfully.CRM software will remain relevant for quiet long as long as businesses desire a quick balance between product provision and customer acquisition. Inarguably, the advantages of customer relationship management will remain relevant as long as businesses desire to build a competitive advantage over their competitors.

Distinctive Features Customer Relationship Management (CRM) system

1. Contact Management

This is the most basic feature that every CRM application has. Contact Management helps business to collect and organize customer data efficiently. It tracks leads as it progresses through the sales pipeline and make first purchase. It manages customer profiles, relationships and communication history.CRM gives a complete picture of all customers.

2. Account Management

Account Management is another primary feature of CRM software. It captures and organizes company or division or household information and manages relationship. Account records contain information about the companies you do business with.

3. Quote and Order Management

When a customer is interested to buy product or service, sales person creates a quote with all details. If customer agrees to buy it with specified price, order will be generated. If not, sales person either cancels the quote or revises it to meet customer requirement. CRM automates and streamlines this process for business. It improves order processing capability, sales visibility and relationship with customers.

4. Opportunity Management

When business qualifies a lead, it becomes an opportunity. An opportunity is potential revenue generating contact or account. If business does not nurture contacts or accounts properly, it will lose selling opportunity. Opportunity Management enables business to manage and monitor sales funnel and provides necessary info to complete the sales process.

5. Sales Process Automation

Sales process automation is one of the most important CRM features. It automates and streamlines various sales functionalities to standardize business processes. Business can customize the application as per requirements. It reduces human error, makes sales cycle shorter and improves lead to customer conversion ratio.

6. Campaign Management

Campaign management plays an important role in any business. CRM leverages the efficiency of marketing campaign by marketing process automation. It reduces campaign cost, analyzes campaign data and forecasts future marketing strategy.

7. Customer Segmentation

Without proper customer segmentation, marketing campaign will never give you expected result. CRM captures and analyzes customer data, coming from various sources. It divides customers into groups that share similar characteristics such as geography, age, gender, buying pattern or any custom rules.

8. Call Center Automation

CRM with call center automation enables service agent to solve customers' problems quickly. It gives right information at the right time to improve overall customer experience.

Which Brand We Work With?

Opus is providing the **"Customer Relation Management (CRM) System"** solutions for companies in all scales that acquire our solutions for their organization. We can install the tailor made Customer Relationship management system for individual or Group of organizations for taking into consideration for various factors related to that specific organization.

Opus is proud to be partners with some of the largest and prestigious clients in the field of Credit Rating industry and business management systems that create unique quality products trusted by client's worldwide .Our imitation proof solutions help in creating a smooth Customer Relationship Management Solutions that works efficiently and effectively in all conditions and markets around the world.

__Our Respective Clients__