

Manage

Managing your Customers



SalesOutlook



CERULEAN

Common sense CRM

Product features

SalesOutlook® is built natively into Microsoft Outlook® and Microsoft Exchange®. It is packed with powerful, friendly features that help everyone in your organisation be more pro-ductive and work more efficiently. It can improve the level of service your team provides to customers or prospects enabling you to develop stronger, more enduring relationships.

Information is provided in the way you want it when you need it, but best of all, SalesOutlook® users enjoy being able to use this “common sense CRM solution” inside the application used most: Microsoft Outlook®.

Account Management

By default, Microsoft Outlook® is a Contact-Centric application. It organises information around Outlook’s Contact records. SalesOutlook®, on the other hand, is Account-Centric.

In SalesOutlook®, Outlook’s contacts are filtered and displayed within the context of an Account (an organisation). In addition, SalesOutlook® enables your organisation to define account associations and hierarchical relationships such as accounts with multiple office locations, franchise accounts, and even partner and/or competitor account relationships. SalesOutlook’s design enables users to access information pertinent to the account from the account form.

Contacts are filtered and displayed, as are notes, opportunities, service items, and other account related information. At the account level, all information from the various account contacts is automatically rolled-up so users are able to see “the big picture” quickly and with minimal effort.

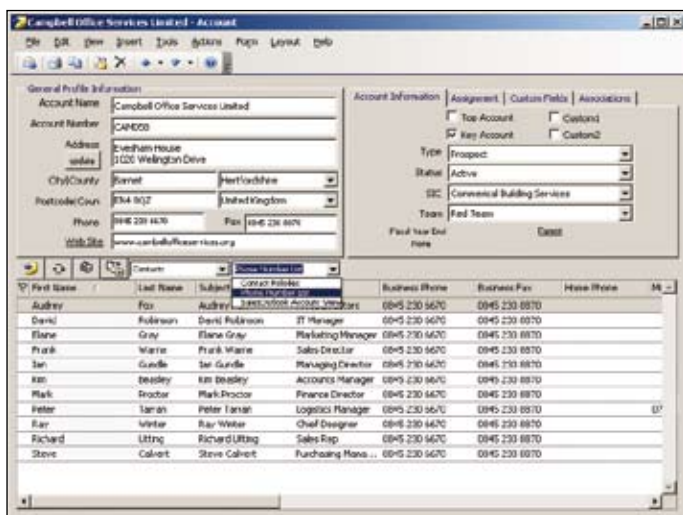


Figure 1: SalesOutlook® – Account

Contact Management

SalesOutlook® extends the standard Microsoft Outlook® contact form to include the information that is most vital when dealing with your most important relationships.

From the Account Contact form, SalesOutlook® users are able to create and access notes, tasks, email messages, linked documents and more, all from one central, convenient location. As with Outlook, users are able to schedule new activities and create email messages right from the Contact’s record. SalesOutlook® simply makes users more productive by providing them with the information that’s important when and where it’s needed.

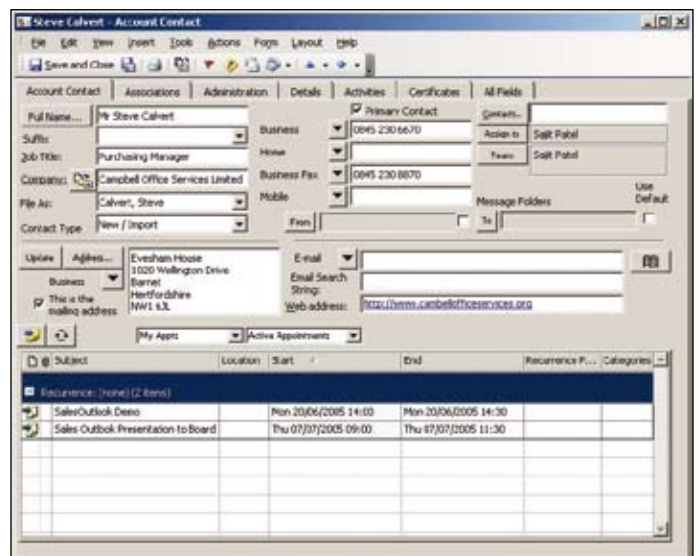


Figure 2: SalesOutlook® – Account Contact Window

Opportunity Management

The goal of every organisation is to identify opportunities for it to sell its products and services to prospective and/or existing customers. Once identified, it is important to manage the opportunity through the sales process in an efficient and effective manner. SalesOutlook® provides the tools users need to do just that.

In SalesOutlook®, an opportunity can be created for the account as a whole, or it can be created from a contact record. Either way, the opportunity is visible and accessible through the Account Profile form.

Once the opportunity is created, it can be managed either from the account record or from the account contact’s record. SalesOutlook’s Opportunity Management feature

incorporates a six-stage sales process. As the opportunity advances through the sales process, users simply need to tick the box for the appropriate milestone to signify it has been accomplished. SalesOutlook®, in turn, records the date the milestone is achieved. In addition to helping users manage the sales process, SalesOutlook® also enables them to track all correspondence and appointments together with competitive information and associate competitor activities through notes and associations. It is just a few clicks to create a note about a conversation or additional information and attach it to the opportunity for future access.

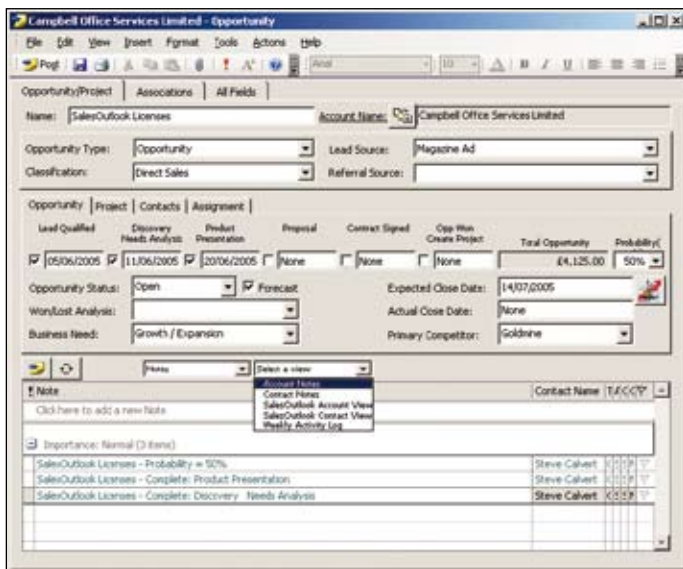


Figure 3: SalesOutlook® – Opportunity Window

Service Management

SalesOutlook® enables you and your staff to maintain loyal customers. Using its Customer Service Management features, users are able to create, manage and quickly respond to requests and issues. SalesOutlook® allows you to manage product inquiries, product support and/or returns, billing issues, or any number of customer service related interactions.

By storing any incident, cause, and the resolution on the main record, SalesOutlook® enables an organisation to turn its customer service activities into a searchable knowledge base that represents the organisation's combined learning and experience. By maintaining easily accessible information throughout the service management process, customers can be easily kept abreast of the latest status.

Additional customer service features include the ability to manage and track all the associated steps that were taken to

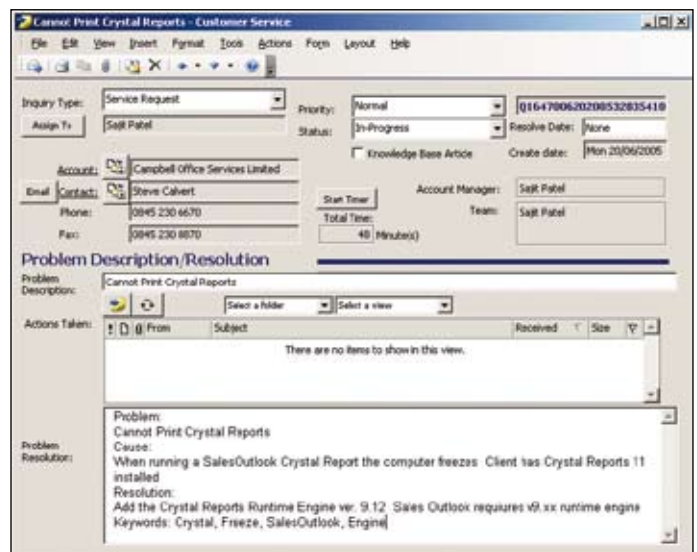


Figure 4: SalesOutlook® – Customer Service Win-

resolve a given situation. This enables an organisation to provide team based customer service in a very simple, cost-effective manner. It also enables your organisation to determine how many actions it takes to resolve an incident or process an inquiry. Additionally, an electronic stopwatch is provided that enables your organisation to track how long it takes to resolve incidents and requests of various types so you can be sure you are providing your customers the highest level of service.

In addition to the features above, SalesOutlook® offers Team Selling, Document Management, Email Marketing, and Pocket SalesOutlook® for a Pocket PC or PDA, and several other tools to help you power your business with technology.

It simply offers too many rich features to list them all in this document!

System Requirements

As a single user system, SalesOutlook® requires a PC running Microsoft® Office 2000 or higher. In order to use SalesOutlook in a multi-user environment, Microsoft® Exchange Server is required. SalesOutlook supports Microsoft® Exchange Server 5.5, 2000 and 2003. We recommend Exchange 2000 or higher due to its built-in support for full-text indexing, scalability and reliability, and for its XML-based Web Store



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