

CRM - CUSTOMER RELATIONSHIP MANAGEMENT

# CUSTOMER RELATIONSHIP MANAGEMENT

**"IMPROVES RELATIONS  
WITH YOUR CUSTOMERS"**  
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# CRM



## CUSTOMER RELATIONSHIP MANAGEMENT

For companies, it is vital to plan a strategy with the aim of increasing client loyalty and acquiring new market share. CRM is an essential tool for an expanding, forward-looking company.

Client Data are the corporate asset of the organisation. So that all the potential of CRM can be exploited to the full, a virtuous relationship must be created between the managerial and technological spheres, with the involvement of all departments, in order to align the organisation with the company's business processes.

The quality of the data is also a key factor in order to ensure the actions performed through CRM are effective for the business. This is why it is important to be fully aware of the potential of a strategic tool like BeOne's CRM, which improves client management, the interaction between the company departments and boosts productivity. Basically, it provides the management with technological instruments useful for maintaining its clients, increasing relations with the more important ones, and makes it possible to classify the profiles through indicators that can be fully managed by the user, thereby facilitating the commercial activity.





## DOCUMENTS

With BeOne's CRM, it is possible to obtain numerous documents: Spot offers, Client commercial sheets, Routing Order, Sales Leads, Relaunches Sales Leads.

## INTEGRATION

BeOne's CRM is integrated with electronic documents archiving, the Warehouse Management System and the Transportation Management System and with Business Intelligence, which enables the dashboards and tools for the creation of targeted reports to be managed. With the use of BeOne Analytics, it is possible to get to know more about the client through the extraction and analysis of data from CRM, in order to develop a personalised commercial offer. From the collaborative point of view, the technologies are integrated with the communication tools, in order to manage contacts with the client, including with the aid of the Marketing Division.



## INCREASED PRODUCTIVITY

Thanks to improved client management and interaction between the business's services, it is possible to increase productivity. As soon as a client gets in touch with your company, the sales contacts can call up the available data concerning previous activities, preferences and any other useful information.



## MANAGEMENT OF THE OFFERS

Possibility of preparing spot offers and rates depending on the needs of each individual client. Implementation takes place in a few seconds, enabling you to save precious time. The speed of the intervention allows your company to be competitive on the market, ensuring the loyalty of the client.



## SALES SUPPORT

BeOne's CRM favours the internal organisation of the sales department, through the assignment of the client to the respective sales representative, the traffic type and the temporary assignment, with a precise evaluation of the workload.



## IMPROVED RELATIONS

It provides management with the technological tools required to optimise and boost relations with clients. All details and information concerning the client company can be consulted by any user, at any time, in order to give the sales contact a clear picture of the situation.



## ACTIVITY AUTOMATION

Closing a sale is never a simple, immediate process. BeOne's CRM is sales oriented and allows you to optimise the entire process. This is made possible by an optimised database and follow-ups that can be adapted to the offers so that you can concentrate on the implementation of the sales actions.



## PERSONALISED STRATEGY

With BeOne's CRM, the sales data are managed through the measurement of the client by turnover or potential traffic, giving management the possibility of identifying the best sales strategy, personalising it to the needs of the client.



## RECORDS ARE THE REAL CORPORATE ASSET

### What commercial data can be entered in my client records?

The Client Data constitute the “corporate equity” of the organisation. Inside the virtual folder (Client records), many types of data can be registered but the essential data for the analysis of the client’s potential are the following:

- TYPE OF ENTITY: LEAD, PROSPECT, CLIENTS
- CONTACTS INSIDE THE CLIENT’S ORGANISATION;
- PROFILING;
- COMMERCIAL DATA;
- COMMERCIAL AND OPERATIONAL NOTES;
- COMMERCIAL ASSIGNMENTS.

### How do I consult the history of each client without having to search for documents and data for the whole company in order to do a client analysis?

The BeOne CRM solution enables, through the Client Analysis function, a single screen to be consulted with all the data and commercial, marketing, operational and administrative documents by individual company name (Client).



### WHAT IS THE TYPE OF ENTITY?

BeOne CRM users segment the entity (Record) in the following ways:

- LEAD
- PROSPECT
- CLIENT

### HOW ARE CONTACTS CLASSIFIED WITHIN THE CLIENT’S ORGANISATION?

In the BeOne CRM solution, it is possible to register Contacts of the Client’s organisation, making them accessible to its corporate departments that interface with them daily, since they are currently always difficult to find. Moreover, they are used by Communication Management users for the appropriate marketing and communication campaigns with the Client. The data that can be registered are the following:

- NAME
- COMPANY POSITION
- EMAIL/TELEPHONE/MOBILE/SKYPEID
- DATE OF BIRTH
- TRAFFIC SECTOR
- TYPE OF TRANSPORT MANAGED

### WHAT COMMERCIAL DATA CAN BE ENTERED IN THE RECORDS E-FOLDER?

In the BeOne CRM solution, in the Commercial Data section, we can enter all the traffic data:

- TYPE OF TRANSPORT (AIR/SEA/LAND)
- TRAFFIC SECTOR (IMPORT/EXPORT)
- NUMBER OF SHIPMENTS
- FREQUENCY (DAILY/WEEKLY/MONTHLY)
- NATION/MARKET/POSTCODE/PORT
- DEPARTURE AND DESTINATION AIRPORT
- COMMODITY TYPE

## WHAT IS MEANT BY COMMERCIAL NOTES?

Commercial users of the BeOne CRM solution usually enter a commercial note on how Customer Service should quote the spot offers: for example: Land groupage export price list – 10%.

At the time of the creation of a spot offer, once the user enters that record, a pop-up will emerge giving the user an indication of the quotation parameters for that particular client/transport/service.

## WHAT DOES PROFILING MEAN?

BeOne CRM users activate the designated “Characteristics” function to appropriately profile the individual Client and, usually, the profiles are the following:

- FINANCIAL RELIABILITY OF THE CLIENT
- ANNUAL TURNOVER OF THE CLIENT
- NUMBER OF EMPLOYEES
- BUSINESS SECTOR (FOOD, FASHION...)
- FUTURE IMPLEMENTATIONS

Future implementations mean all that demand for services that we currently cannot deliver, for example, warehouse logistics, which we are however planning to implement in the near future.

## HOW IS THE COMMERCIAL ASSIGNMENT HANDLED WITH EACH CLIENT?

The BeOne CRM solution enables the key branch to be assigned that manages the Client and several Commercial assignments (for different services) for each individual client, for example:

- AIR EXPORT: MARK BROWN
- AIR IMPORT: FRANK WHITE
- LAND IMPORT/EXPORT: JO BLACK
- SEA FCL: MARY ROSE
- NATIONAL: ROBERT REDOFF

## MAXIMISE THE VALUE OF YOUR CLIENTS



### MARKETING

Flat, standardised marketing risks provoking profoundly negative fallout on the image and the corporate brand. These days, every communication must be personalised, both to acquire new Clients and ensure existing Clients remain loyal. BeOne's CRM, thanks to its sophisticated functions designed specifically for your sector, makes it possible to give value to the dialogue with Clients and Partners, with obvious advantages over the standard marketing tools on the web.



### SALES

Thanks to the powerful Sales Force Automation module, BeOne's CRM is the most complete and flexible software on the market for the management of sales networks and offers extraordinary support by significantly increasing the sales force's performance.

Wide-ranging and up-to-date screening in real time of the sales progress for each individual channel and the capacity to govern each sales level with the most appropriate tools.

With BeOne's CRM, you will have all the power of “sales force automation” tools and optimised corporate processes, designed to improve the sales operations.



### AFTER SALES

Each sales activity represents a vital moment in the life of a company.

Having detailed information on the sales negotiations underway and those in the past is an invaluable asset for any company.

Effectively supporting the sales force means, on one hand, providing all the operational tools required to manage the negotiation and, on the other, giving the managerial roles the tools required to evaluate every aspect, from measuring its effectiveness to an analysis of the deviation from the established targets.



# CRM

## A UNIQUE DATABASE

### EVERYTHING IS POSSIBLE

## WITH A UNIQUE E-FOLDER

Thanks to BeOne's CRM module, all the data and paper documentation can be stored inside a single virtual folder (e-folder) that represents the client/prospect/lead records, thereby eliminating all the bundles and files scattered throughout the organisation or the individual PCs. Any file type (\*.pdf, \*.docx, \*.xlsx, \*.jpg, etc.) can be archived (through upload or drag and drop) directly in the appropriate records e-folder.

- CLIENT RELIABILITY DOCUMENT PRODUCED BY THE RATING COMPANIES;
- LETTERS OF INTENT (FOR ITALY);
- RATES SUBSCRIBED BY THE CLIENT;
- PROTOCOLS WITH THE CORRESPONDENTS.



## RATES

### How much time do you lose in adjusting and varying your rates?

The BeOne CRM solution enables the variation of the adjustments to be done automatically, based on a deadline or on the definite date for these adjustments. With the parametric variation, a percentage of the entire rate can be varied with a few clicks of the mouse, on the sections down to the individual element.

## CONTRACTS

### How can I communicate the contract to my client without sending an additional email?

BeOne CRM enables, as well as sending an email, the bulk publication on the portal dedicated to the Client. Acceptance by the Client can be archived electronically, both at the data and document levels.

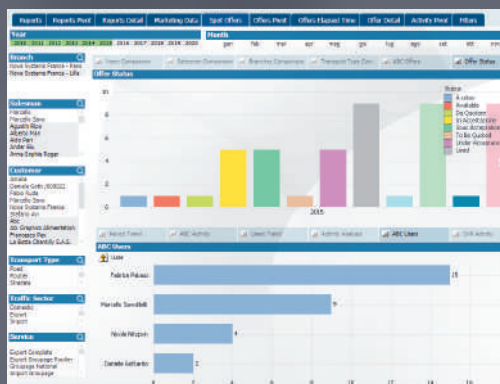
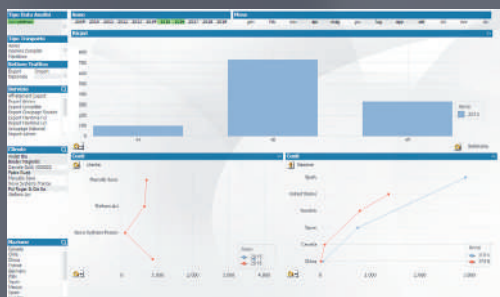
## SPOT OFFERS

### How is a spot offer quoted respecting the client rate?

The BeOne CRM solution enables the creation of a spot offer or rate in a few seconds, since the acquisition of the majority of the Client's requests very much depends on the time the offers are received.

### Can I monitor the status of my offer?

The BeOne CRM solution enables events to be created that oblige the business to give feedback on the status of the offer (follow-up in the case of spot offer or reminder in the case of charges). The status can be monitored in real time and the same is true for the results of the offers: For example: Accepted, annulled (giving the reason), rejected (giving the reason). All feedback and results can be analysed with the use of Business Intelligence tools.



Examples of processing that can be carried out thanks to the total integration between CRM and BeOne Analytics modules.



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