Benefits of CRM Integrated into Your Environment

IBM's New eServer Line

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Agenda for Today's Meeting

- What is CRM and Engage?
- Benefits and Features of Engage CRM
- CRM Returns on Investment
- Keys to CRM Success
- Engage Quick Demo
- Open Discussions & Questions

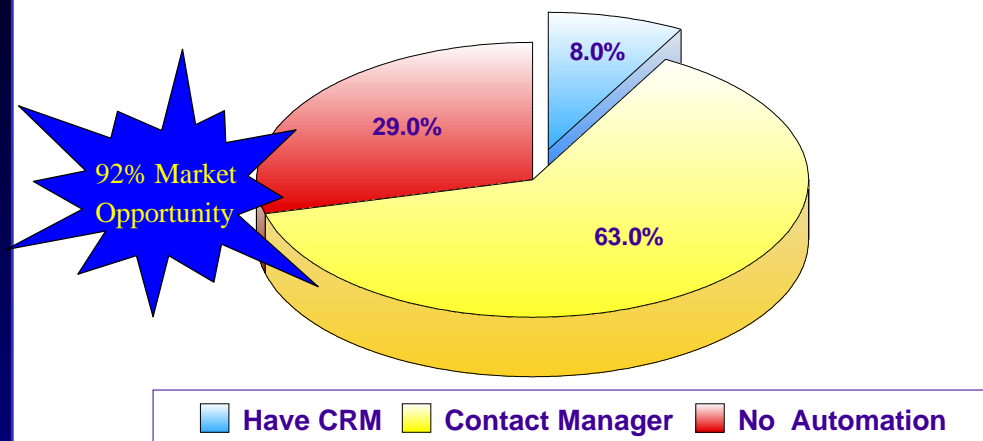nterprise relationship management suite
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What is CRM?

Middle Market CRM Solutions...

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The CRM Middle Market

Less than 8% have CRM yet 63% have only Personal Contact Management and 29% have no type of CRM Automation! - This is a Huge Opportunity!!
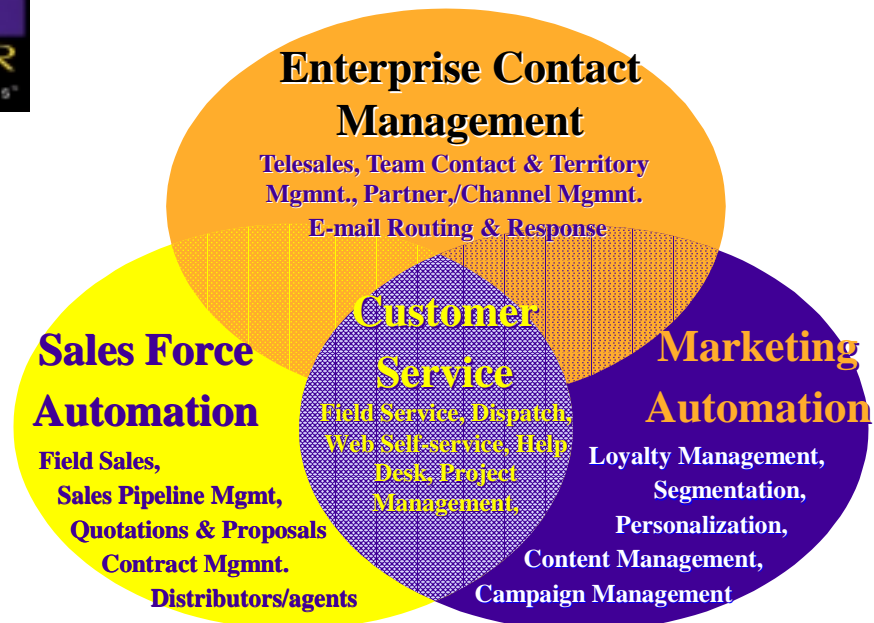
8.0%

29.0%

92% Market Opportunity

63.0%

■ Have CRM ■ Contact Manager ■ No Automation

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What is CRM?

- Covers all Customer touch points for a Company
  - Enterprise Contact Management
  - Marketing and Campaign Management
  - Enterprise Sales Force Automation
  - Customer Service, Help Desk, Self Service
- Gartner considers CRM to be the largest IT Growth Segment over the next 10 years
- Easiest of all Solutions to Cost Justify - Fast ROI

What is CRM ?

Enterprise Contact Management
Telesales, Team Contact & Territory Mgmnt., Partner/Channel Mgmnt. E-mail Routing & Response

Sales Force Automation
Field Sales,
Sales Pipeline Mgmt,
Quotations & Proposals
Contract Mgmnt.
Distributors/agents

Customer Service
Field Service, Dispatch, Web Self-service, Help Desk, Project Management,

Marketing Automation
Loyalty Management,
Segmentation,
Personalization,
Content Management,
Campaign Management

What is CRM?

- Enterprise Workgroup Contact Manager
  - Team based Workflow and Document Distribution
  - Supply Chain Partner Communications
  - Integration to all Customer Web Touch Points
- Enterprise Sales Force Automation
  - Powerful Quotation/Proposal System
  - Contract Management System
  - Products and Services Warehouse pricing System

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What is CRM?

- Enterprise Marketing and Communications System
  - Marketing Campaign Management
  - Powerful Broadcasting & Communication System
  - Marketing Encyclopedia, Presentations, Collateral
- Enterprise Service Billing and Project Tracking System
  - Time Billing Management
  - Project Billing Management
  - Help Desk and Incident Tracking

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CRM leverages Teamwork across your Enterprise...

CRM Integrates to your Web site Activity...
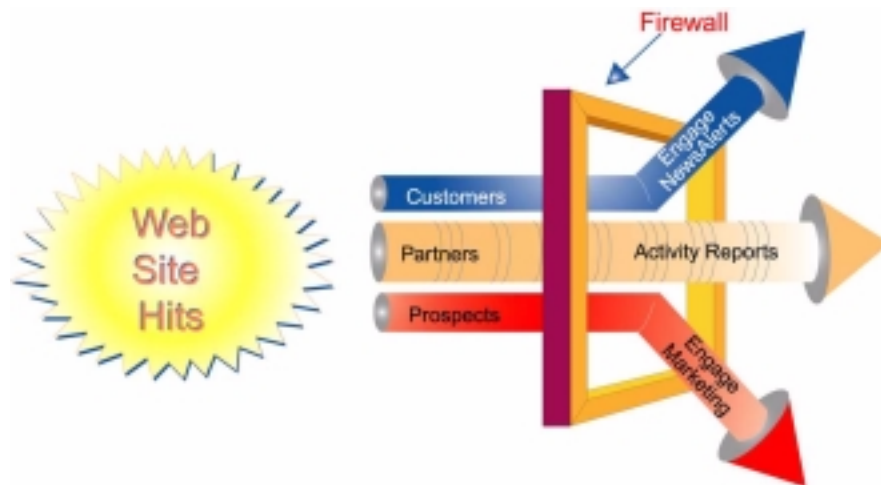
CRM Automates Marketing & Communications...
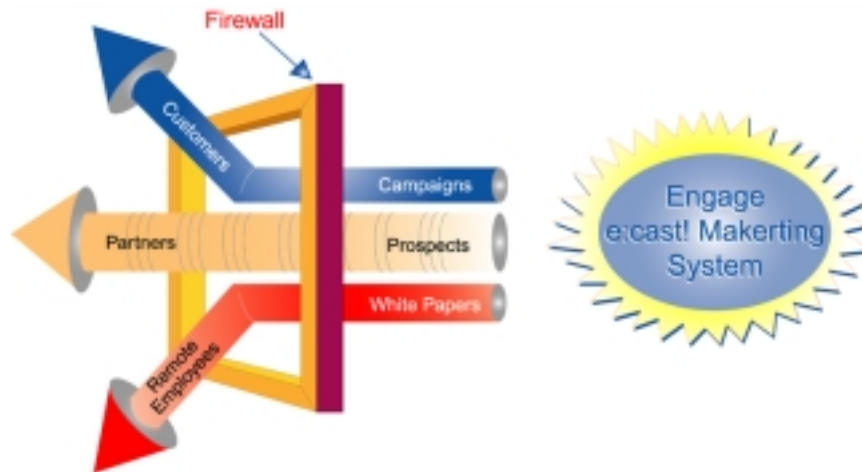
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CRM Increases Sales, Marketing & Services Efficiency

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What is CRM?

The Customer

Touch Points

| Mobile/Pervasive | Contact Center | Web & Automated Interaction | Direct (Branch) Interaction | Mail/Fax |

Personalization

CRM

Relationship Management

Customer Knowledge

Campaign Management

Service Management

Sales Management

Channel Management

Integrated Customer Information

Product Support

Marketing

Sales

CRM Process Integration

Service Delivery

Business Intelligence

Data Mining

Business Integration

Core Enterprise Operations (ERP)

| Industry Core Systems | Financial Systems | Human Resource Management | Supply Chain Management |

Supply Chain Integration

e-business IT Infrastructure

Messaging/Collaborative Infrastructure

Hardware/Server Platforms

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What is Engage?

Engage is Modular and Flexible and fits IBM's new eServer Scaling Features

Image Gallery	Service **New!**	Opportunities	Quote
CMS	Activities	e:cast!	Warehouse
Engage Mail	Projects **New!**	Legacy XML **New!**	Contracts

| ApLink | Sequoia |

| Domino iSeries eServer | Domino pSeries eServer | Domino xSeries eServer |
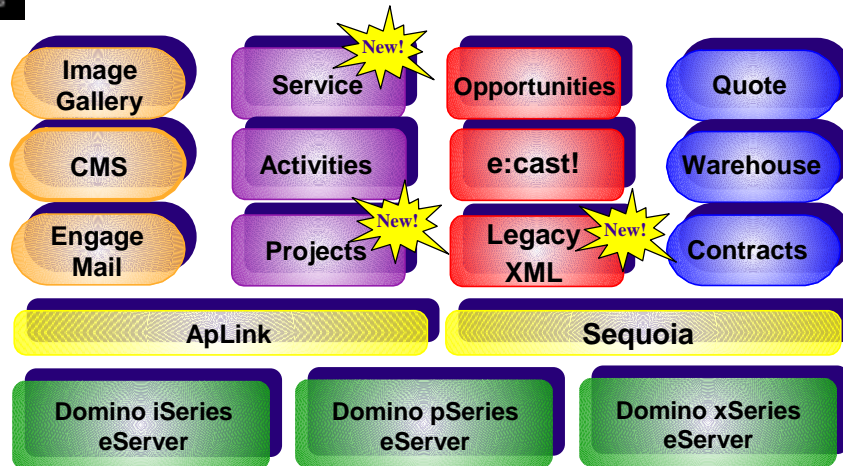
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What is Engage?

Engage can integrate to a broader range of Applications in your Company...

Customer Self Service

Domino Web Site Links

MQ Connectivity to other Systems

Websphere Business to Business

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ERP

e-Commerce

High Availability

Business Intelligence

Benefits and Features of CRM?

Middle Market CRM Solutions...

Functional Overview of CRM
Enterprise Contact Management

- Manage Customers at multiple locations
- Automatically Assign your Team to your accounts
- Follow Projects & Tasks to completion
- Track Team and Personal Tasks within your Calendar
- Campaign to Prospects or Customers about new products or Services
- Access Company Knowledge Base, Send Collateral
- Share information with your Supply Chain Partners

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Functional Overview of CRM
Marketing Campaign Communications

- Define Marketing Campaigns w/ Targets and Demographics
- Tie-in Prospects or Customers to Corporate Marketing Activities
- Send to thousands of Customers on a scheduled or manual basis by e-mail, fax, and mail
- Send broadcast in Notes or HTML format complete w/pictures
- Update Opportunities Measure Marketing Campaign Results

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Functional Overview of CRM
Sales Force Automation

- Track Leads and Opportunities
- Get Forecast and Pipeline numbers easily
- Create Quotes, Proposals and Contracts
- Flexible HTML and Rich Text Output
- Proposal & Quote Archiving System
- Tight Accurate Integration of Quotes to Forecasting
- Interface with ERP Configurators
- Link Mapics Item master, Order Entry to CRM

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Functional Overview of CRM
Field Service Automation

- Flexible Project tracking and Reporting System
- Powerful Time Billing and Service Management
- Help Desk Automation
- Update Service Activities, Incident Tracking
- Tight Accurate Integration to Contracts and Quotes
- Integration to Mapics Billing System
- Integration to Service Calendar

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Why do Customers Like Engage?
General Reasons...

- Easier to Use, Easier to Implement
- Systems can be tailored to specific needs w/o Programming
- Low cost implementation, ongoing Maintenance
- Customer can Buy only those Systems that he needs
- Extremely Secure
- Customer can phase implementation based on Prioritie
- Each Module can run on separate Server-very scalable

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Why do Customers Like Engage?
Specific Benefits...

- Can Greatly Improve the Accuracy of Forecasts
- Can Improve Sales Productivity by 20 - 40%
- Can Manage Team based Projects and Opportunities
- Can Track and Drive Marketing Campaigns
- Can Reduce Sales Administrative Overhead
- Can Communicate w/ Supply Chain Partners
- Can Integrate to All Web and e-business Customer Touch Points
- Can Integrate to existing ERP systems

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CRM Returns on Investment

Middle Market CRM Solutions...

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CRM is changing the Business Model

IDC CRM Study of 300 Large Corporations

	Before CRM	After CRM
Enterprise Vision	Short Term Product Focused	Long Term Customer- Focused
Organization	Hieracrchical Structures	New Business Processes, new Organization, Quick to Adapt
Sales	Little Customer Knwoledge, Face to Face selling	High Customer Knowledge,Mass-Customization, Multi Channel Selling, e-commerce
After Sales and Services	Reactive, Separtate processes Organization Slow to reacte to problems	Proactive, Integrated processes, High Responsiveness

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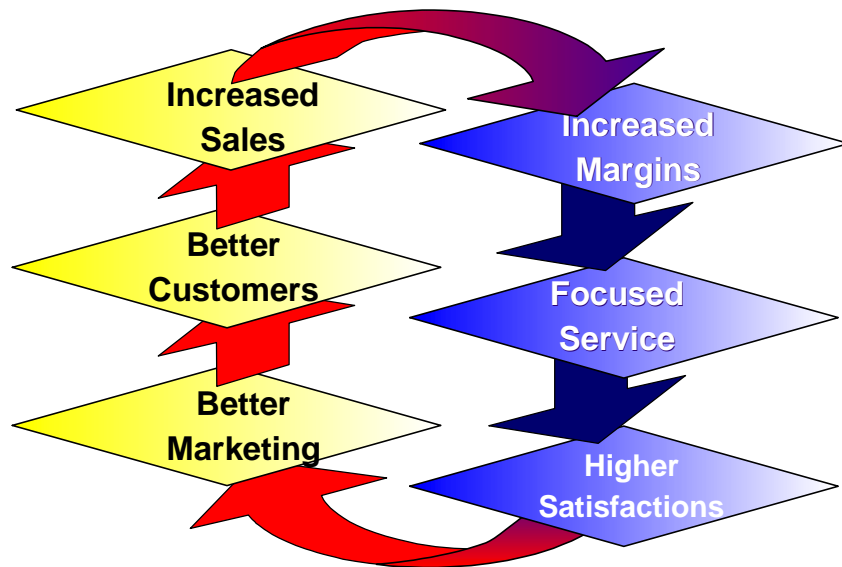
Return on Investment Cycle

Components of CRM ROI

- More Effective Marketing Tools & Methods
  - Broadband Communications to Prospects & Custome
  - More Refined Market Segmentation
  - More Accurate Measurements of Campaigns
- Increased Sales
  - Better Defined Sales Processes
  - More Effecient Productivity Tools
  - More Refined Customer Profiling

Components of CRM ROI

- Increased Margins
  - Better Value Approach to Customers
  - Better Margin Based Sales Tools
  - Right Types of Customers
- More Focused Customer Service Program
  - Better Customer Response to Problems
  - Increased Company Visability to Customer Sat.
  - Better intra-Company and inter Supply Chain Communications

What Sort of ROI Can You Expect?

- 20-40% Increase in Sales Productivity
- 15-30% Customer Satisfaction Gains
- 10-20% Gross Margin Increases
- 50% Overall Gain in Marketing effectiveness
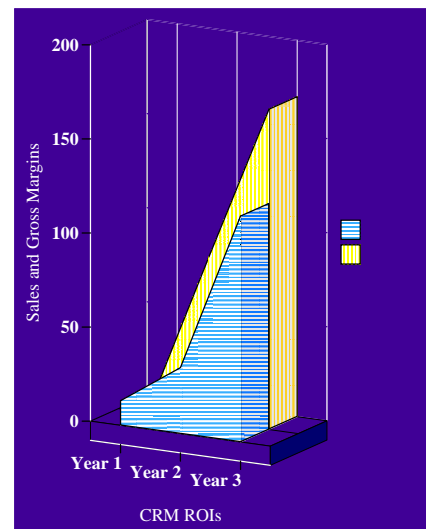
Customer Case Study #1
Engage Rapid Return on Investment...

- $200 Million Company
- 200 Engage Users
- $420,000 Investment w/ Options
- 4-6 Weeks to Productive Use
- Average Annual Sales Grow at 15% per Year
- a 20% Sales Productivity in First 12 Months
- Increased Revenue Growth by 3%
- 3% added $6,000,000 in sales
- Assuming a 10% Gross Margin = $600,000
- Investment Return of $420,000 in 8.4 Months

Customer Case Study #2
Pre-Project Analysis

- 600 Staff CPA Firm
- 200 Initial Engage Users
- $210,000 Investment w/ Options w/o Hardware
- 4-6 Weeks to Productive Use
- Estimated over $1.7 Million in Cost Savings Productivity Enhancements
  - $600,000 in Operational Cost Savings
  - $200,000 in Customer Retention
  - $400,000 in Marketing Support Enhancements
  - $500,000 in Productivity Gains

Keys to CRM Success...

One of Top Reasons CRM Projects Fail...

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Top 3 Reason CRM Projects Fail

- Lack of Executive Support
- Poor Training and & Education Plan
- Improperly Configured Servers or Workstation Performance

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Example of Engage Full Service Offerings

- Software Maintenance, 1 or 3 year plans
- Custom On-site Education
- Education Pack
  - Multimedia Education CDs for each user
  - Interactive Web Education - Life of User of Engage
- Development Pack
  - Custom Views, Screens, Reports
  - New Features
- Help Line Support
  - Incident Based 10, 15, 20 Packs
- Engage Gold Pack

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5 Ways to Educate Engage Users

- On-line Help
- Class Training
- Web based Training
- Education CDs
- Custom On-site Training

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IBM/Engage Solutions Bundle
Properly Configured IBM eServers

- 5 Engage/Bundles AS/400 iServer Line
- 5 Engage Bundles Netfinity xServer Line
- 5 Engage Bundles RS/6000 pServer Line
- 25, 50, 100, 200, 400 User Configurations
- Priced 20 % under Standard Pricing
- Published, Easy to Use Solutions Quick Pricers
- Each Base Solution has 15 add-on Options
- All Bundles and Options have IGF Special Financing
- Designed to Pull Additional Engage/IBM Products

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The Engage Quick Demo

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The Engage User Experience...

The Engage User Experience...

The Engage User Experience...

The Engage User Experience...

Look at Company Information...

Look at Company Information...

Look at People and Relationships.

Look at People and Relationships.

Drill Down to the Opportunity or Project...

Drill Down Further to the Quote...

Look at line item details in a Quote...

Look at Marketing Activities...

The Engage CMS Interface

Discussion and Questions

For a Live Engage Internet Demo
Call Clear Technologies
at 888-339-4244