InfoServ®

2017

InfoServ® CRM

The fastest way to move your business forward!

What is a Contact Center?

A **Contact Center** (also referred to as a customer interaction center or client service center) is a central point in an enterprise from which all customer contacts are managed. A contact center is a modern Unified Communications Solution with specialized software that enables contact information to be routed to appropriate resources, contacts to be tracked and full customer interaction history to be gathered and managed.

What is a CRM?

At its simplest, a **CRM system** allows businesses to manage business relationships and the data and information associated with them. It allows you to store customer and prospect contact information, accounts, leads and sales opportunities in one central location (ideally in the cloud) so the information is accessible by many, in real time.

InfoServ® CRM combines into one single platform a Contact Center and a CRM system

Why do I need both – a CRM and a Contact Center?

The benefits of InfoServ® CRM are numerous, but here are those listed as most valuable by our clients:

- puts your business communication (e-mails, phone calls, web chat, meetings, documents) in order
- unified client database
- minimum sales reps efforts in client profile maintaining
- client service continuity
- automated client interaction
- exceptional customer service
- sales reps mobility

The InfoServ® CRM Platform

Cloud Infrastructure

InfoServ® CRM is in the cloud!

After an extensive research we chose Microsoft Azure as our trusted cloud partner.

Take advantage of cloud infrastructure and service and benefit from:

- **Economies of scale** – increase productivity with fewer people.
- **Reduced spending on technology infrastructure**
- **Reduced capital costs** (on hardware, software or licensing fees)
- **Improved accessibility** - you have access to your CRM anytime, anywhere!
- **Increased infrastructure reliability and performance**

Multi-Channel Communication

InfoServ® CRM combines most commonly used business communication channels into one unified platform. At present our platform supports: phone calls, e-mails, web chat, as well as outbound phone calls initiated from InfoServ's Mobile App, Internal Chat, SMS and Web Form Communication (COMING SOON). InfoServ® will automatically login your communication together with the voice recording of your phone calls, the content of your e-mail, the transcript of your web chat, or filled-in custom contact forms into your customers' profiles.

Configure and Customize

Taylor your CRM solution to your precise business needs. Add as much data as you need to your InfoServ® CRM by creating custom fields in your clients' profiles and custom contacts (invoice, phone call, meeting forms etc.) in your clients communication history The Point-and-Click development technology lets you create your own custom data fields without having to write a single line of code. And if a list of data fields is not good enough, request your own data forms and customer profile screens - provide the content and design, and let us do the job for you.

Easy Integration

To take a full advantage of your CRM system, you need to be able to integrate it with other web or non-web based applications you use (Support, Billing, ERP, Accounting, etc.).

InfoServ® CRM allows for robust integrations using various standard methods:

- **Import and Export** client data in multiple formats
- **Web Integration** - with this integration method your CRM users can open a web-based application or document directly from your CRM client's profile.
- **API Integration** - the ability for a real-time client data integration with external non-web-based applications using API (Application Programming Interface).

The InfoServ® CRM Functionality

Client Profile and Communication History

When customer data is integrated seamlessly within the CRM system, everyone who interacts with the client has access to all customer information, including previous communications. Employees do not need to search for prior emails or call logs, as complete information will be detailed within the customer profile. The 360 customer view allows for quick and easy viewing and analysis of all communications, contracts, documents, and promotions associated with a specific customer on one convenient screen. As your employees work from mobile or multiple locations, coordinating customer data and delivering consistent communications with customers becomes simple with the integrated client profile feature.

Campaign Management

Organize, Monitor and Track your marketing efforts with InfoServ® CRM. Use InfoServ® Campaigns to set up your sales or marketing campaign's Key Performance Indicators (KPIs) / stages and targets for each of them. Use its user-friendly interface to identify the KPI/stage reached for each customer in the campaign; to monitor and track your campaign progress, and to measure your campaign effectiveness by comparing the results achieved at each stage with its targets. InfoServ® Campaigns is successfully used when organizing and tracking the success of marketing initiatives such as: conferences, seminars, promotions, advertising campaigns, mass e-mail campaigns, promoting a new product among existing clients, etc.
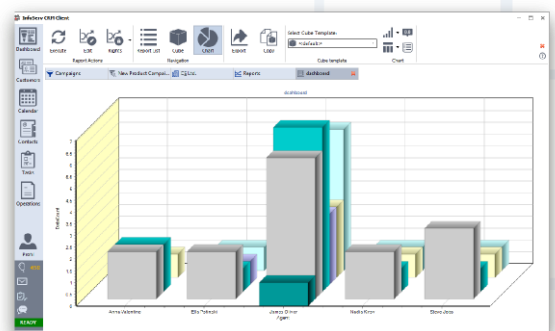
Task Management

When employees use a single point interface to communicate, delegate tasks, and collaborate on projects, internal communication is more productive. Having the ability to assign tasks, prioritize them, share pertinent documents, and discuss the progress of projects is an important feature of any CRM platform. When employees function as cohesive teams, the clients benefit. For businesses whose employees are either working at remote locations or at various office locations, task management systems allow for efficient project completion through the use of the task management system, which is cloud based.

Case Management

Use InfoServ® CRM's built-in Case Management system to track raised customer support issues' progress and resolutions. In combination with Customer Support Forms you will be able to describe in details what the issue is about, all related with the issue technical details (e.g., operating system, database, screen resolution, etc.) and later analyze all support related issues with InfoServ® Report Generator and aggregate results related to customer service reps productivity as well as reports and dependencies related to the issues resolved. Cases can be also successfully used to track progress on sales processes that take longer completion time.


Document Management

Have all your customer-related documents – proposals, presentations, price offers, purchase orders, contracts, etc. always at hand in your customer's profile. InfoServ® CRM's built in Document Management System lets you create a document classification (e.g., proposals, price offers, sales contracts, support contracts, protocols, etc.) that is tailored to your business. Categorize documents as per your company's needs and share documents among colleagues by granting rights.

Knowledgebase (FAQ)

Accessing information quickly and delivering a consistent message to customers is the primary function of an integrated knowledgebase. When customers call looking for product information or account information, it is important that accurate answers are communicated to them, regardless of who answers the call. With a CRM platform that offers an integrated knowledgebase, customer care and sales specialists can quickly access answers to frequently asked questions and account details in order to assist customers with the answers that they need. When employees can rely on an integrated knowledgebase to provide instant access to the information required to quickly service customers, they become more effective and productive.

Dashboard, Analytics and Reporting

The ability to view either an overview or specific details of real time activity within your business is invaluable. Visualizing performance and other metrics in a variety of visuals and graphics allows management to track employee efficiency and productivity. By providing insight into the day to day business operations, business owners have the tools that they need to make sound decisions and allocate resources appropriately. Dashboards also allow management to receive an overview of customer activity. Sales staff can easily monitor customer activity in an effort to maximize ongoing sales and ensure sufficient customer support.
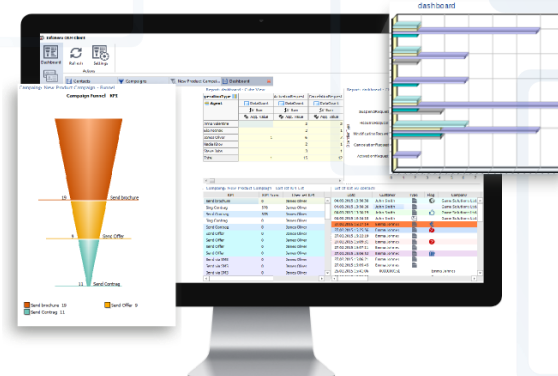
Calendars and Reminders

Nothing communicates incompetence to a client more than a missed appointment or deadline. Creating transparency with employees about client deadlines, appointments, and other time lines improves employee efficiency and customer reliability and communicates an impression of professionalism and organization. A CRM platform that makes use of a calendar and reminder system allows employees to rely on one platform for day to day functioning and organization. Corporate calendars may be integrated with personal calendars to prevent double booking and to streamline the scheduling process.

The InfoServ® CRM Advantages

- **Straightforward Simplicity**
- **Intuitive and User-friendly Interface**
- **Rich Functionality**
- **Affordable Pricing**

Our Promise

- **Quality and Product Improvement**
- **Devotion to Customer Satisfaction**
- **Customer Trust and Loyalty**
- **Competitive Prices**

About DAN electronic

InfoServ® CRM is an initiative of DAN electronic, a privately-owned company with a 25 year history of building management software systems. The InfoServ® CRM service is the final evolutionary stage of DAN electronic's On Premise Contact Center and CRM solutions. Our expertise ranges from Real Estate Management and Business & Accounting software, to developing proprietary communication technology, i.e., InfoServ®. DAN electronic has more than 15 years of experience in the areas of Interactive Voice Response (IVR), Computer Telephone Integration (CTI), Customer Relationship Management (CRM), and Call Center Software Systems.