

# CURSOR-CRM

*Perfect customer orientation*



## Maximal success – maximal freedom – maximal confidence: Your independence with **CURSOR-CRM!**



### **Maximal success**

From creating the quotation and contract, up to the complex projects management: manual executions require too much time and are error-prone. CURSOR-CRM cares for the quality, speed increase and costs reduction through the automated workflows execution in standard processes. This enables achieving up to 50% of time saving.

More information can be found on pages 3 - 13.



### **Maximal freedom**

CURSOR-CRM provides technical and commercial data and reports when needed. Instead of being “hunter and gatherer” you become the information receiver. Configurability, workflows, reports, searches... - they all contribute to your maximal flexibility and freedom while using the software.

More information can be found on pages 14 - 17.

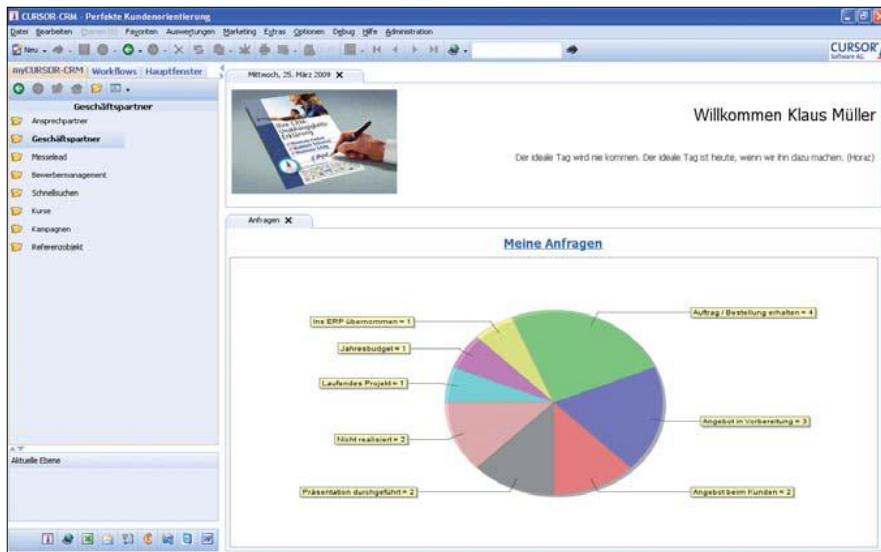


### **Maximal confidence**

Competences, partnerships and awards received during the 20-year experience with CRM products and projects, combined with the modern technology, guarantee the maximal safety of your investment and maximal confidence in good choice with CURSOR-CRM software.

Some of the references can be found on page 18.

## Entry portal: Overview from the cockpit.



The most important information is visible at glance. Arrange your cockpit according to your needs.

### Benefit:

- Actual projects information, reports, tasks etc. are available immediately after the application startup.
- In case of new tasks or projects setup or other requirements, your cockpit is easily rearranged in few steps.



Example of cockpit flexibility: with few clicks connect RDD-Feeds to the initial mask of your desktop.

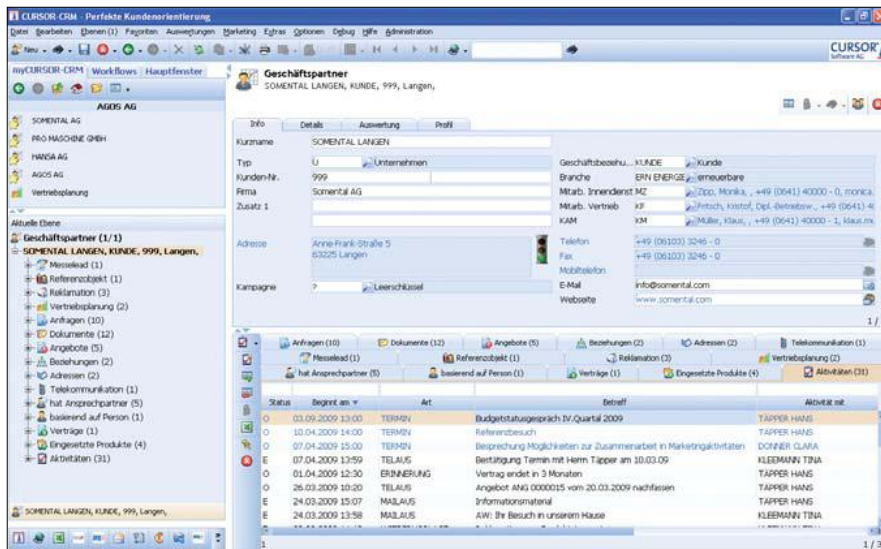
### Benefit:

Be effortlessly informed in the most efficient way.



Maximal success

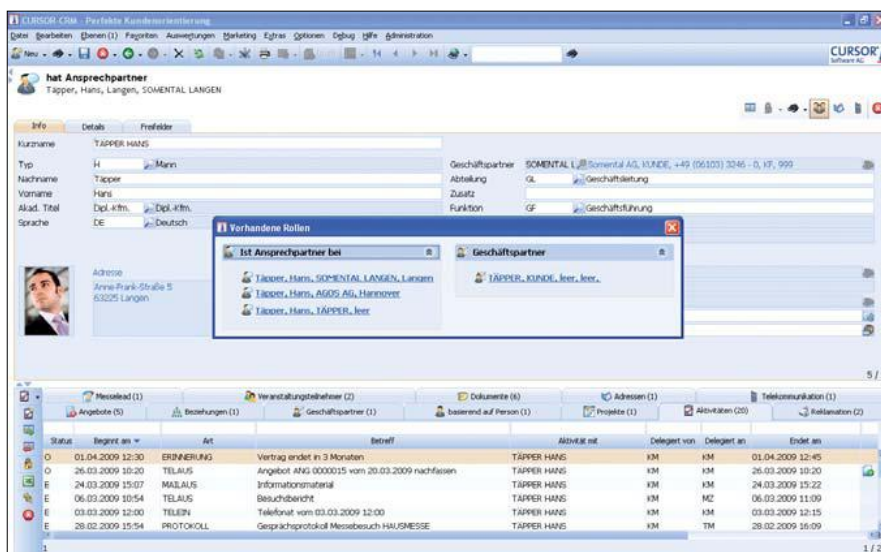
## Customers and business partners: All information available with a click.



All relevant information assigned to the business partner.

### Benefit:

- Comprehensive information at a glance.
- Fast overview of actual events. Individually defined criteria (for example credit rate, customer satisfaction, customer loyalty) can be graphically presented, for example in the form of traffic light.



Person role model provides clear overview of different roles or functions of the same person. The same person can be for example our employee but also a private customer.

### Benefit:

- All data and information from different roles connected to one person.
- No data loss, even when one person has more roles or a role changes over the time.
- Double results avoided, which improves the data quality.
- Decreased effort when entering new data.



Maximal success



## Activities and appointments: Clear overview with CURSOR-CRM.

Status	Beginn am	Art	Betreff	Aktivität mit	Delegiert von	Delegiert an	Endet am
O	07.04.2009 15:00	TERMIN	Besprechung Möglichkeiten zur Zusammenarbeit in Marketingaktivitäten	DOPFER CLARA	KM	KM	07.04.2009 19:00
O	01.04.2009 12:30	ERINNERUNG	Vertrag endet in 3 Monaten	TAPPER HANS	KM	KM	01.04.2009 12:45
O	26.03.2009 10:20	TELAUS	Angebot ANG 0000015 vom 20.03.2009 nachfassen	TAPPER HANS	KM	KM	26.03.2009 10:20
E	24.03.2009 15:07	MALAIUS	Informationsmaterial	TAPPER HANS	KM	KM	24.03.2009 15:22
E	23.03.2009 14:10	WIEDERVORLAGE	Reklamation zum Produktstamm 1	KLEEMANN TINA	KM	AG	23.03.2009 14:25
E	23.03.2009 13:19	MALAIUS	Ihr Besuch in unserem Hause	KLEEMANN TINA	KM	KM	23.03.2009 13:34
E	06.03.2009 10:54	TELAUS	Besuchsbericht	TAPPER HANS	KM	MZ	06.03.2009 11:09
E	03.03.2009 12:00	TELEIN	Telefonat vom 03.03.2009 12:00	TAPPER HANS	KM	KM	03.03.2009 12:15
E	01.03.2009 15:54	AUFGABE	Nachbereitung HAUSMESSE	KLEEMANN TINA	KM	TM	01.03.2009 16:09
E	28.02.2009 15:54	PROTOKOLL	Gesprächsprotokoll Messebesuch HAUSMESSE	TAPPER HANS	KM	TM	28.02.2009 16:09
O	28.02.2009 10:53	TELEIN	Rückfragen zum Angebot 00015	KLEEMANN TINA	KM	KM	28.02.2009 11:08
E	28.02.2009 10:20	PROTOKOLL	Angebot ANG 0000015 vom 28.02.2009 versendet	TAPPER HANS	KM	KM	28.02.2009 10:20
O	28.02.2009 09:23	ERINNERUNG	Angebot ANG 0000022 vom 28.02.2009	TAPPER HANS	KM	KM	28.02.2009 09:23
E	27.02.2009 09:09	WIEDERVORLAGE	Reklamation	TAPPER HANS	KM	AG	27.02.2009 09:24
E	25.02.2009 09:23	DOKUMENT	Angebot ANG 0000022 vom 25.02.2009	TAPPER HANS	KM	KM	25.02.2009 09:23
E	23.02.2009 11:01	WIEDERVORLAGE	Reklamation zum Produktstamm 1	TAPPER HANS	KM	AG	23.02.2009 11:16
E	17.01.2009 15:50	POSTAUS	Terminbestätigung Messebesuch	TAPPER HANS	KM	TM	17.01.2009 16:05
E	22.12.2008 09:30	PROTOKOLL	Budgetbesprechung 2009	TAPPER HANS	KM	KM	22.12.2008 09:45
E	27.02.2008 15:49	TERMIN	Besuch auf Messestand - Termin	TAPPER HANS	KM	TM	06.05.2008 17:04
E	01.11.2007 16:39	DOKUMENT	Vertrag VTK00002 vom 01.11.2007	DOPFER CLARA	KM	KM	01.11.2008 16:59
E	31.10.2007 14:44	TELEIN	Telefonat vom 31.10.2007 14:44	TAPPER HANS	KM	KM	02.11.2008 14:44
E	26.08.2007 10:04	TELAUS	Bedarfserhebung und Potentialermittlung	TAPPER HANS	KM	KM	05.11.2008 09:04
E	17.06.2007 09:59	TELAUS	Nachfassen nach Messe	TAPPER HANS	KM	KM	02.07.2008 10:14
E	02.06.2007 10:12	MALAIUS	Versand von Produkt-Broschüren	TAPPER HANS	KM	KM	20.06.2008 10:27
E	15.05.2007 09:57	PROTOKOLL	Erstkontakt auf Messe	TAPPER HANS	KM	KM	15.05.2007 10:12
E	26.03.2007 09:00	TERMIN	Produktpäsentation	TAPPER HANS	KM	KM	26.03.2008 11:00

Activity overview helps in organizing the appointments, tasks and reminders.

### Benefit:

What, when, where, with whom etc: activity overview helps you get organized. Also your coworkers and shared services have the actual information.

Info	Details
Betreff	Budgetstatusgespräch IV. Quartal 2009
Beginnt am	03.09.2009 13:00
Endet am	03.09.2009 16:00
Erinnerungsdatum	03.09.2009 12:45
Art	TERMIN
Ort	
Status	Nicht begonnen
Delegiert von	KM Müller, Klaus
Delegiert an	KM Müller, Klaus
Deleg. an Gruppe	Leerschlüssel

Kalender	Tag	Wochentag	Monat
31. August - 6. September 2009	31. Mo	1. Di	2. Mi
3. Do	4. Fr	5. Sa	6. So

Appointments, tasks and contacts can be bi-directionally synchronized with the Groupware systems (Microsoft Outlook, IBM Lotus Notes and Novell Groupwise).

### Benefit:

All important information and appointments are always available, also with the possibility to synchronize with the mobile devices. When correctly sorted, no appointment will be missed.



Maximal success

## E-mails and documents: Consistent transparency of all communication channels.

**hat Ansprechpartner**  
Kleemann, Tina, Langen, SOMENTAL LANGEN

**Info** Details Profiler

Kurzname: KLEEMANN TINA  
 Typ: F Frau  
 Nachname: Kleemann  
 Vorname: Tina  
 Abad. Titel: Dipl.-Ing.  
 Sprache: DE Deutsch

**Geschäftspartner**  
 Abteilung: SEK Sekretariat  
 Funktion: SEK Assistentin der Geschäftsleitung  
 Einfluss: C Trägt nicht zur Entscheidung bei  
 Just. Vollmacht: KEINE Keine

**Adresse**  
 Anne-Frank-Straße 5  
 83225 Langen

**Telefon**  
 +49 (0)6103 3246-15  
 Fax: +49 (0)6103 3246-99  
 Mobiltelefon:  
 E-Mail: ts@sonental.com  
 Website: www.sonental.com

**Aktivitäten**

Status	Begint an	Art	Betreff	Abwickelt mit	Delegiert von	Delegiert an	Endet an
E	23.03.2009 14:10	WIEDERVORLAGE	Reklamation zum Produktstamm 1	KLEEMANN TINA	KM	AG	23.03.2009 14:25
E	23.03.2009 13:19	MAILEIN	Ihr Besuch in unserem Hause	KLEEMANN TINA	KM	KM	23.03.2009 13:34
E	01.03.2009 15:54	AUFGABE	Nachbereitung HAUSMESSE	KLEEMANN TINA	KM	TM	01.03.2009 16:09
E	28.02.2009 10:53	TELEN	Rückfragen zum Angebot 0015	KLEEMANN TINA	KM	KM	28.02.2009 11:08
E	01.02.2009 16:39	DOKUMENT	Vertrag VTR000002 vom 01.11.2007	KLEEMANN TINA	KM	KM	01.02.2009 16:39
E	16.03.2009 09:56	POSTEIN	Befolgung Einigung Informationsmaterial	KLEEMANN TINA	KM	KM	16.03.2009 10:11
E	24.03.2009 13:58	MAILAUS	AW: Ihr Besuch in unserem Hause	KLEEMANN TINA	KM	KM	24.03.2009 14:13
E	07.04.2009 13:59	TELAUS	Bestätigung Termin mit Herrn Tapper am 10.03.09	KLEEMANN TINA	KM	KM	07.04.2009 14:14

Contact person history consistently documents all the relevant business events in past as well as the future activities.

### Benefit:

All-embracing information overview: every employee can optimally react upon inquiries because he "knows" the customer and actual matters.

**Aktivitäten**  
Versand Informationsmaterial, 13.04.2009

**Info** Details

Betreff: Versand Informationsmaterial

Sehr geehrte Frau Kleemann,  
 anbei senden wir Ihnen die gewünschten Unterlagen.  
 Für Rückfragen stehe ich Ihnen gerne zur Verfügung.

Mit freundlichen Grüßen

Begint am: 13.04.2009 15:09  
 Endet am: 13.04.2009 15:24  
 Erinnerungsdatum: 13.03.2009 14:54  
 Art: MAILAUS E-Mail-Ausgang  
 Ort:  
 Status: E Erledigt  
 Delegiert von: KM Müller, Klaus  
 Delegiert an: KM Müller, Klaus  
 Deleg. an Gruppe: Leerschloss

**Versand Informationsmaterial - Nachricht (HTML)**

Diese Nachricht wurde noch nicht gesendet.

An: ts@sonental.com

CC:

Betreff: Versand Informationsmaterial

Sehr geehrte Frau Kleemann,  
 anbei senden wir Ihnen die gewünschten Unterlagen in digitaler Form im PDF-Format.  
 Für Rückfragen stehe ich Ihnen gerne zur Verfügung.

Mit freundlichen Grüßen  
 I.A. Klaus Müller  
 Vertrieb

E-mail can be sent via Microsoft Outlook, IBM Lotus Notes or Novell Groupwise program. Incoming e-mail can be imported with a mouse click into the CRM system and assigned to a business partner.

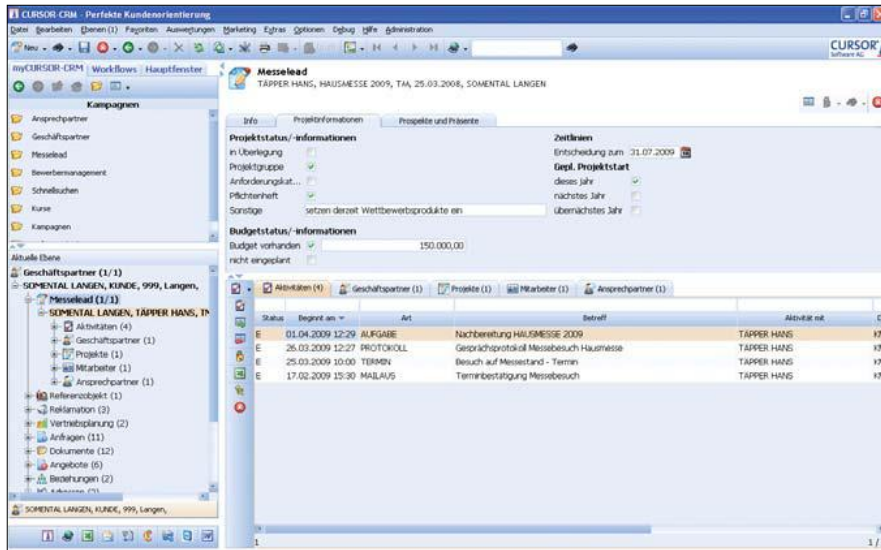
### Benefit:

Communication from one source! Business processes can be simply and comfortably handled.



Maximal success

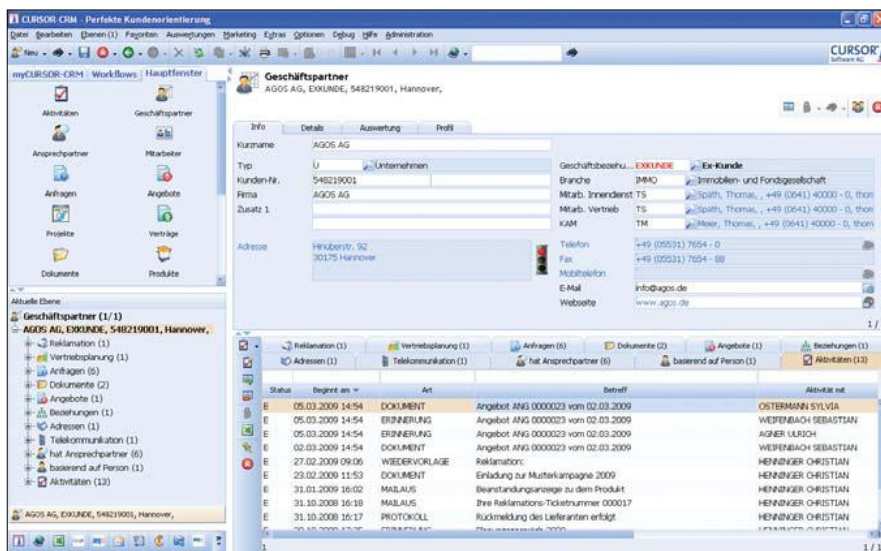
## Gaining new and regaining old customers: Potential with the success probability.



Together with the fair lead a conversation with the potential customer and her needs are exactly documented.

### Benefit:

All customer-related information is available for the future fair lead processing (for example sending the info material, sending the quotation). That makes fair a success!



Automated process execution supports back-winning of old customers.

### Benefit:

Simple overview of all information relevant for targeted customer regaining.

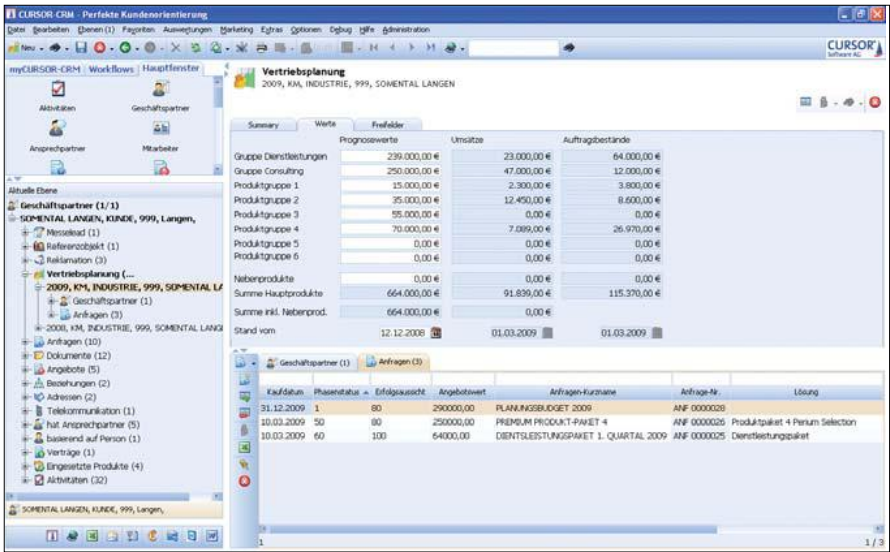
For example:

- Why did customer go to other provider?
- What is the potential?
- When did the contracts expire?



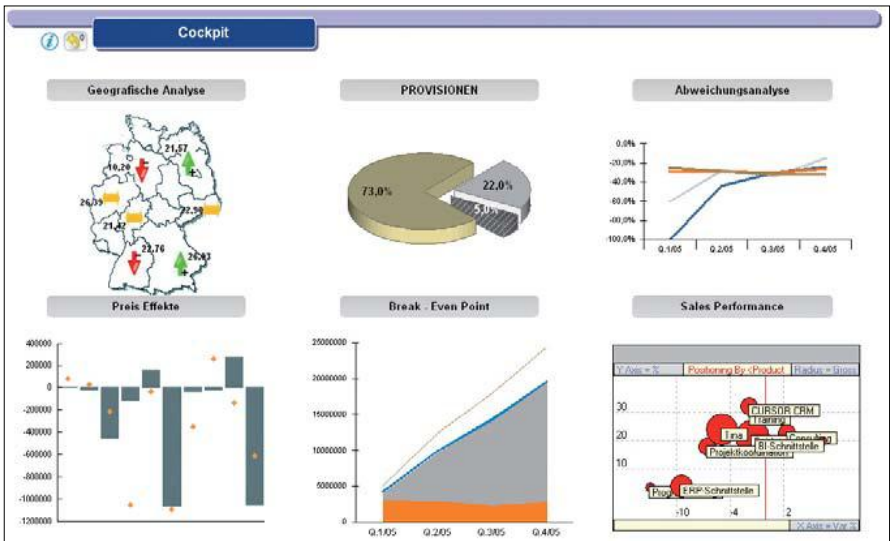
Maximal success

# Sales planning: Targeted operations and sales planning brings the higher security.



Consistent sales management through transparent sales planning on the customer and product level.

**Benefit:**  
In every moment you have overview of planned results development as well as appropriate tasks and operations. This allows for optimal assignments leverage among the employees.



Data can be transferred to the external IT systems, for example the planning system BOARD.

**Benefit:**  
Data from CURSOR-CRM can be transferred to the specialized applications, for example for analysis, planning, calculations etc. The results can be transferred back to CURSOR-CRM if needed, for example within the process of quotation preparation or the internal reporting.



Maximal success



## Inquiry management: Optimal inquiry evaluation and monitoring.

Requests for proposal can be collected in CURDOR-CRM together with all relevant information.

### Benefit:

Sales employees get fast overview of all important decision criteria and success factors. Even in the case of longer decision-making processes, no information gets lost.

Gewonnene Anfragen			CURSOR Software AG®	
25.03.2009			CURSOR-CRM - Perfekte Kundenorientierung	
Statistik nach G/V-Begründung				
G/V-Begründ.	Anzahl	Angebotswert		
Bessere Beziehungen (BEZIEHUNGEN)	9	374.720,00		
Preis (PREIS)	5	410.440,60		
Technik (TECHNIK)	16	1.154.900,00		
<b>Gesamtsumme</b>	<b>30</b>	<b>1.940.060,60</b>		
Statistik nach KAM				
KAM/Vertrieb	Anzahl	Angebotswert		
Meier, Thomas (TM)	8	525.280,00		
Müller, Klaus (KM)	15	1.268.295,60		
Späth, Thomas (TS)	4	131.600,00		
Zipp, Monika (MZ)	3	14.885,00		
<b>Gesamtsumme</b>	<b>30</b>	<b>1.940.060,60</b>		

All inquiries can be reviewed through reports.

### Benefit:

- Every sales employee has constant overview of actual status of his inquiries.
- Basis for making the decision about the future measures, for example win/loss analysis.



Maximal success

## Quote management:

### Quotes are precisely calculated and quickly prepared.

Position	Anzahl	Produkt Nr.	Einzelpreis in FW	Rabatt	Gesamtpreis in FW	Positionstext	Alternativposition	Im Angebot verbleiben	Pos. Typ
1	46,00	ARTIKEL 3	1500,00		69000,00				N
2	8,00	ARTIKEL 4	2000,00		16000,00				N
3	46,00	4002007	180,00		8280,00				N
4	8,00	INSTALL / STUNDE	100,00		800,00				N
5	65,00	BERATUNG (SENIOR)	1280,00		83200,00				N
6	12,00	SCHULUNG	600,00		7200,00				N

Quote generator enables automated quote preparation and structured follow-up.

#### Benefit:

Quote requested by a customer is quickly prepared, in few working steps. Through the integration with the calculation application, different quote variants can be automatically prepared or simulated.

Pos	ProduktNr / Bezeichnung	Menge	Einzelpreis	Gesamtpreis
1	Artikel 3	46	1500,00	69.000,00
2	Artikel 4	8	2.000,00	16.000,00
3	4002007	46	180,00	8.280,00
4	Install / Stunde	8	100,00	800,00
5	Beratung (Senior)	65	1.280,00	83.200,00
6	Schulung	12	600,00	7.200,00
<b>Angebotssumme</b>			<b>EUR</b>	<b>184.480,00</b>

Quote text is prepared in MS Word, based on the system-wide available templates.

#### Benefit:

Quote document is readily available for sending and is archived in CURSOR-CRM. Optionally, a document management system can be integrated. Documents are always available via one mouse click.



Maximal success

## Contracts management: All contract-related information immediately available.

**Verträge**  
VTR000003, AKTIV

**Info**

Vertrags-Nr.: VTR000003  
 Vertragsgegenstand: Liefervertrag Telekommunikation und Internet  
 Vertragsstatus: AKTIV  
 Vertragsbeginn: 01.01.2009  
 Vertragsende: 31.12.2010  
 Risikodatum:   
 Tariftyp: STANDARD  
 Produktart: DL  
 Vertragstyp: LIEFERVTR

**Details**

Geschäftspartner: SCHMENTAL LANGEN, KUNDE, Schmenthal AG, +49 (0)5103 3246-0  
 Mitarbeiter AD: Müller, Klaus, +49 (0)511 40000-1, klaus.mueller@cursor-lee.de, Vertrieb  
 Mitarbeiter ID: M2  
 Gewonnen von: CURSOR GEB  
 Verloren an:   
 Vertragswert: 10.000,00  
 Währung / Kurs: EUR / Euro 1,00  
 Betrag in Fremder:   
 1/2

Abkürzung	Geschäftspartner	Dokumente	Abkürzung	Betreff	Art	Aktions	Prozess	Status	Beginn am	Ende am	Aktuelle mit
IM			IM	Kündigungfrist 30.09.2010 Verlängerung?	ERINNERUNG	VERTRAG	A	O	16.08.2010	16.08.2010	TAPPER HANS
IM			IM	Tarifvergleich Telekommunikation und Internet	ERINNERUNG	VERTRAG	C	O	20.08.2010	20.08.2010	TAPPER HANS
IM			IM	Rücksendung unterschriebener Liefervertrag VTR000003 Telekommunikation und Internet	POSTAUS	VERTRAG	B	E	11.12.2009	11.12.2009	TAPPER HANS
IM			IM	Unterzeichnung Liefervertrag VTR000003 Telekommunikation und Internet	ERINNERUNG	VERTRAG	B	E	08.12.2009	26.03.2009	TAPPER HANS
IM			IM	Eingang Liefervertrag VTR000003 Telekommunikation und Internet	POSTEIN	VERTRAG	A	E	27.11.2009	27.11.2009	KLEEMANN TINA

All contract-related information is stored in CURSOR-CRM.

### Benefit:

You have access to all contracts. There is no unnecessary searching on different locations.

**Aktivitäten**  
Kündigungfrist 30.09.2010 Verlängerung?, 16.08.2010 13:50

**Info**

Betreff: Kündigungfrist 30.09.2010 Verlängerung?  
 Der Vertrag endet am 31.12.2010. Die Kündigungsfrist endet am 30.09.2010. Prüfung des Vertrages und Entscheidung über Verlängerung

**Details**

Beginnt am: 16.08.2010 13:50  
 Endet am: 16.08.2010 14:05  
 Erinnerungdatum: 27.03.2009 13:35  
 Art: ERINNERUNG  
 Ort:   
 Status:   
 Delegiert von: IM  
 Delegiert an: IM  
 Deleg. an Gruppe: ?

**Aktivität mit**

Hauptanfrage: TAPPER HANS, DOL-RTM, SCHMENTAL LANGEN, +49 (0)5103 3246-10  
 Hauptprojekt: Leerschüssel  
 Workflow ID: ?

**Prozess**

Aktions: A  
 Status: VERTRAG  
 Ergebnis: OFFEN

Automatic generation of reminders about agreed dates from the contract.

### Benefit:

Because of the automated reminders about the contracts that are about to expire, no important date will be overlooked.



Maximal success

## Customer care: Perfect customer care – satisfied customers!

Service requests and claims are transparently handled in CURSOR-CRM, controlled by workflows.

### Benefit:

Activity overview offers the complete information needed for the structured requests handling, which enables optimal customer care.

Aktivitäten kumuliert			
30.03.2009			
CURSOR-Software AG®			
CURSOR-CRM - Perfekte Kundenorientierung			
Übersicht			
Art	Schlüssel	Beschreibung	Anzahl
	BESPRECHUNG	Besprechung (Abgleich mit Groupware)	1
	ERINNERUNG	Erinnerung (kein Abgleich mit Groupware)	4
	MAILAUS	E-Mail-Ausgang	2
	MAILEIN	E-Mail-Eingang	1
	PROTOKOLL	Protokoll	1
	TELAUS	Telefonat-Ausgang	1
	TELEIN	Telefonat-Eingang	1
	TERMIN	Termin (Abgleich mit Groupware)	3
	WIEDERVORLAGE	Wiedervorlage mit Zeitreservierung (Abgleich mit Groupware)	2
	Gesamtzahl		16
Anlass	Schlüssel	Beschreibung	Anzahl
	BESCH	Beschwerde	4
	BESCHLEIST	Beschwerde bzgl. unserer Leistung	3
	BESCHPUBLI	Beschwerde bzgl. einer Publikation	2
	BESCHRECHN	Beschwerde bzgl. Rechnungsstellung	3
	BESCHSEMIN	Beschwerde bzgl. eines Seminars	4
	Gesamtzahl		16
Ergebnis	Schlüssel	Beschreibung	Anzahl
	ERLEDIGT	keine weitere Aktion	12
	NACHFASSEN	erneutes Nachfassen	4
	Gesamtzahl		16

Each employee gets the up-to-date overview of his activities through the reports.

### Benefit:

Documentation and claim reports enable investigation about problem causes and solutions and offer the potential for optimization of all work processes.



Maximal success



## Campaigns: Perfect campaign planning and execution.

CURSOR-CRM enables perfect planning and execution of your marketing campaigns.

### Benefit:

- Target groups are precisely selected and can be contacted through all communication channels.
- Resources needed for the campaign execution are efficiently planned.

Each campaign can be associated with its budget plan.

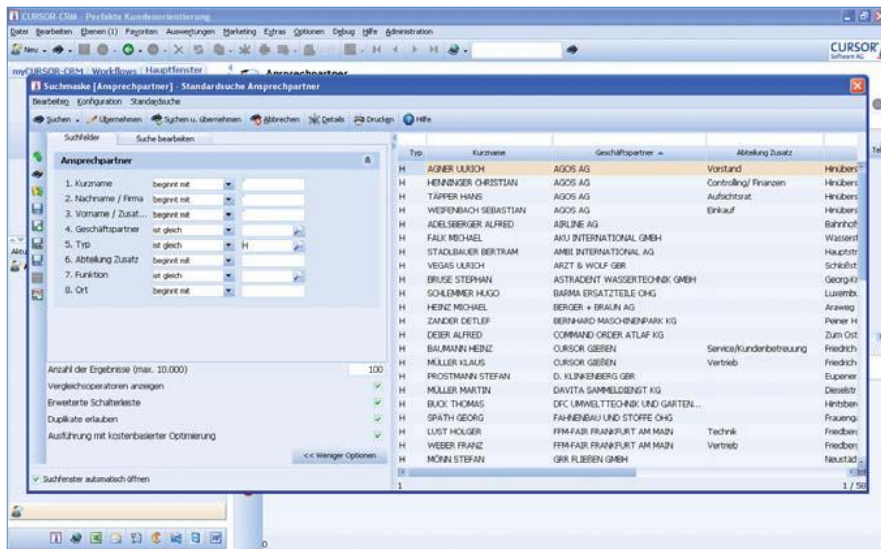
### Benefit:

Planned budgeting allows for the control over the expenses.



Maximal success

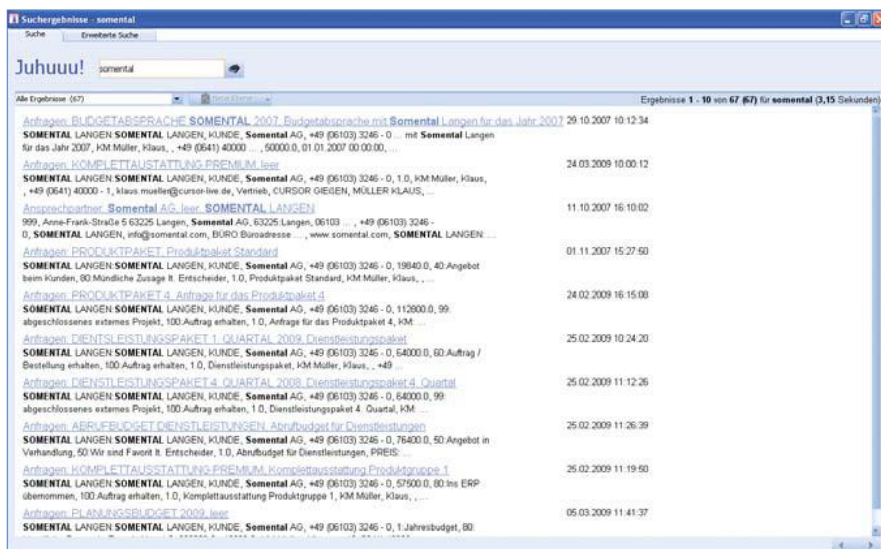
## Information gathering: Finding instead of searching: “Juhuuu!” text search.



Thanks to the clean CURSOR-CRM data structures, fast information access is possible.

### Benefit:

The searched information is available within few minutes.



Complex text search, “Juhuuu! Search” is alternative to the selective searches. Search result is significantly improved thanks to the integrated phonetic, error-tolerant search.

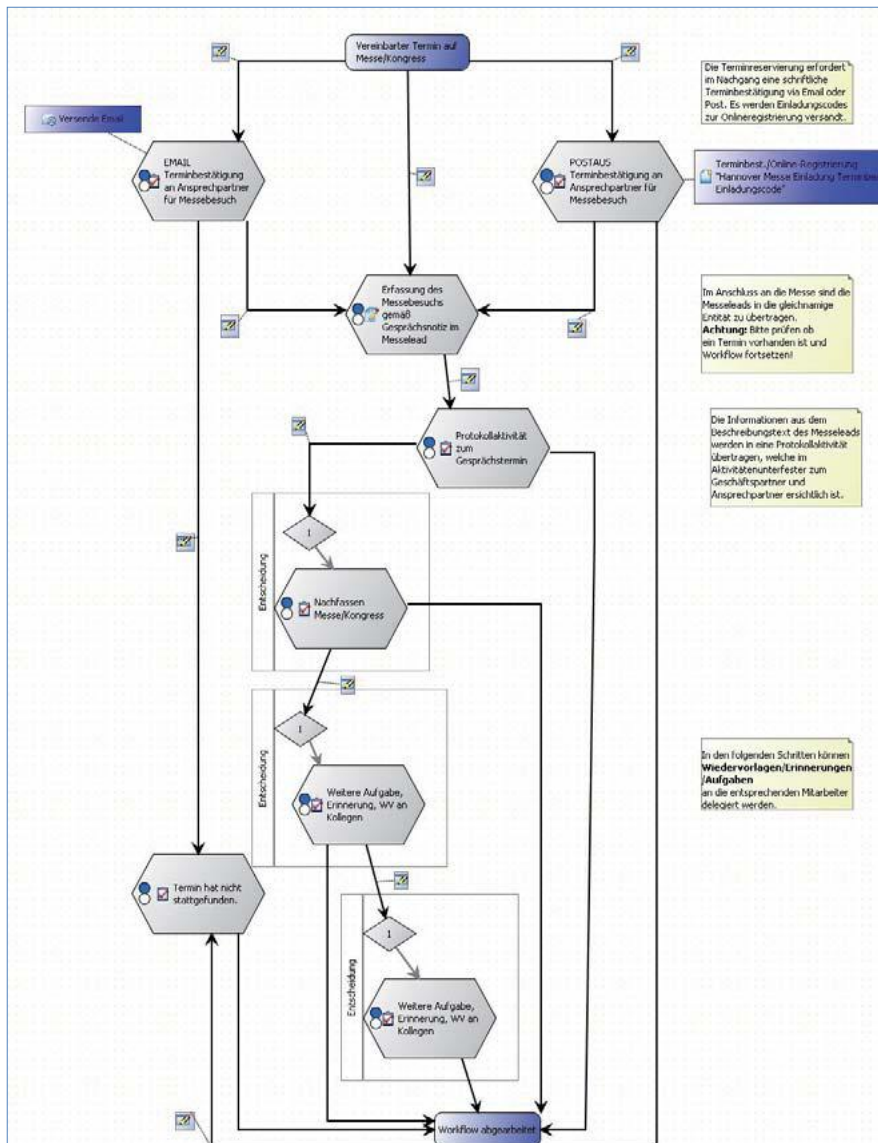
### Benefit:

Immediately found data!



Maximal freedom

## Workflows: Faster to the goal!



Based on your business processes, the templates for the process execution are defined. Detailed knowledge of business processes is not needed any longer.

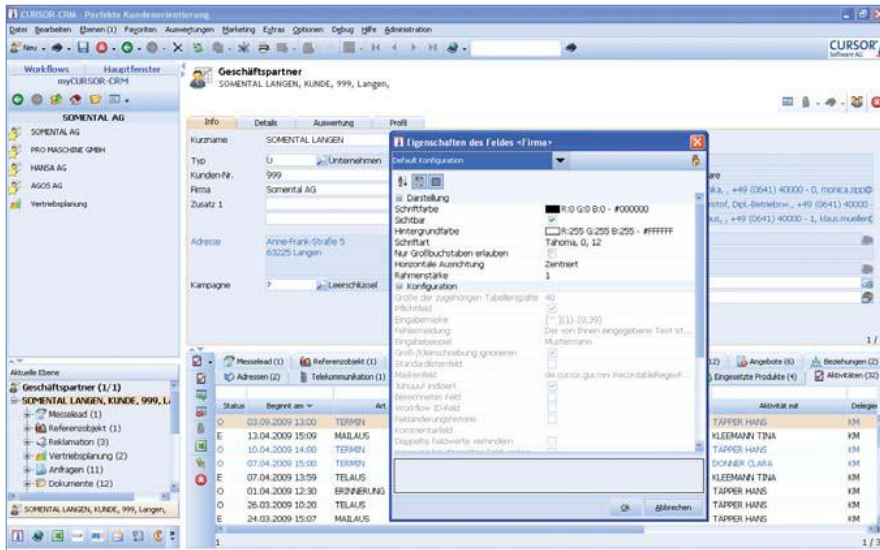
### Benefit:

Employees, who based on their every-day tasks know only the part of a business process, are now able to professionally execute even the most complex tasks. Next step is always defined and is automatically assigned to the right employee.



Maximal freedom

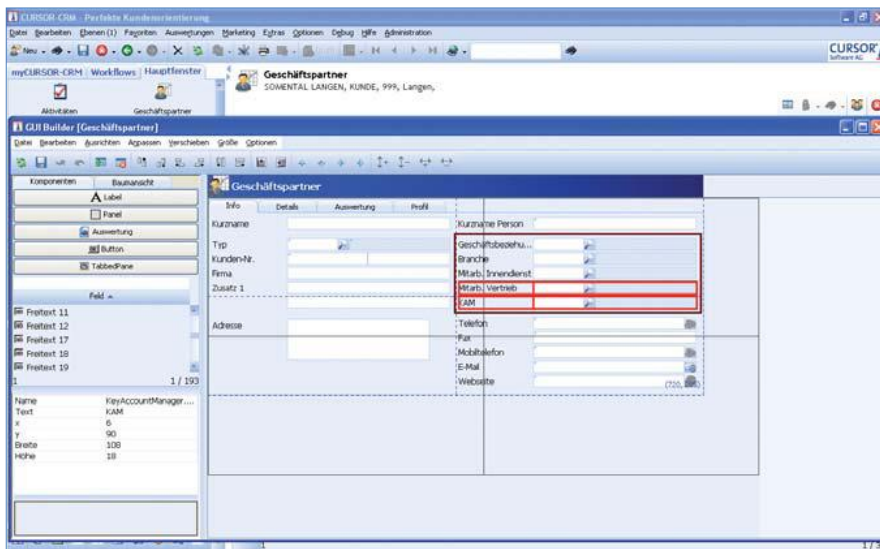
## Configuring – setup “your” CURSOR-CRM: Your maximal freedom!



Wide customization possibilities of the fields and forms.

### Benefits:

Individually configure “your” CRM, based on your needs.



Form designer enables individual customization of the standard CURSOR-CRM masks, as well as the definition of the completely new forms.

### Benefits:

You get the CRM which exactly fits your requirements and your industry branch.

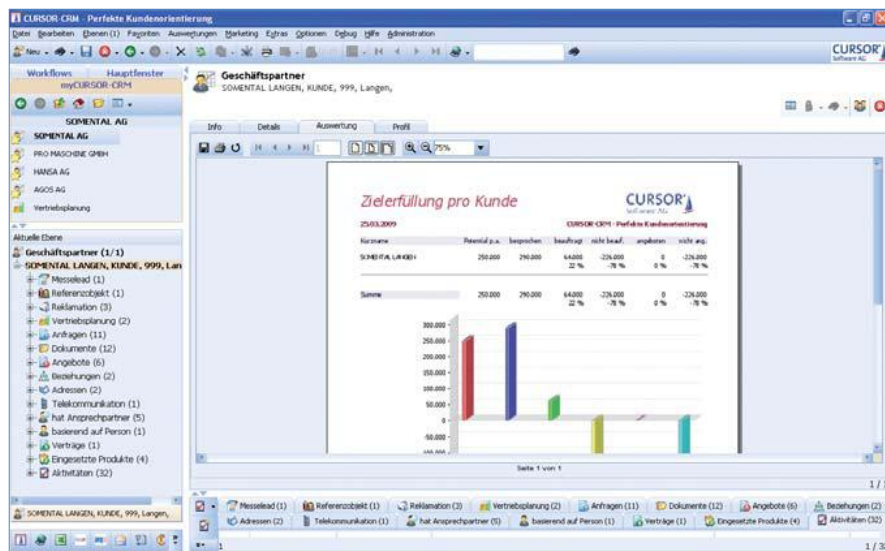


Maximal freedom



## Reports:

### Results on a mouse click.



Reports provide multiple views upon the numbers, facts and statistics.

### Benefits:

All necessary information is transparently available on a mouse click.

Now with enabled mobility:



With us on a road to success:  
Selection from our references



Above 10.000 users in different industry branches rely upon CURSOR solutions:

- Banks and financial institutions
- Energy suppliers
- High-school institutions
- Associations
- Specific branch solutions



Your contact:  
Špela Urh Popovič  
CEO  
spela@noema-coop.si



Noema Cooperating d.o.o.  
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Fax: +386 1 4300 254  
www.noema-coop.si

