CURSOR-CRM

Perfect customer orientation

CURSOR®
Software AG

NOEMA
COOPERATING

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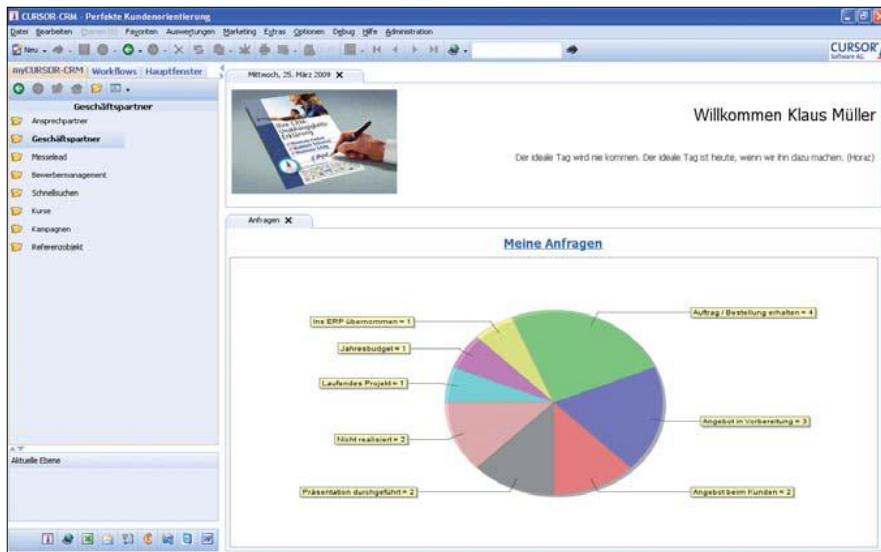
The most important information is visible at glance. Arrange your cockpit according to your needs.

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.

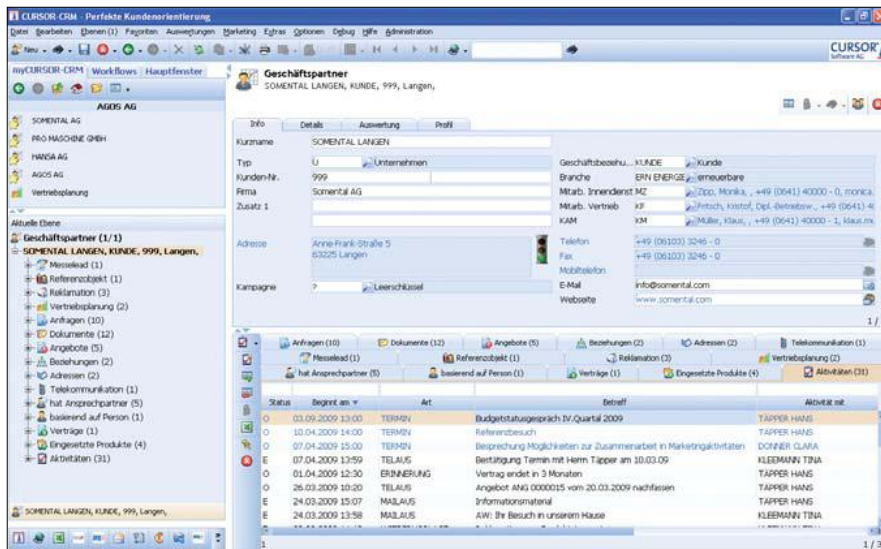Example of cockpit flexibility: with few clicks connect RDD-Feeds to the initial mask of your desktop.

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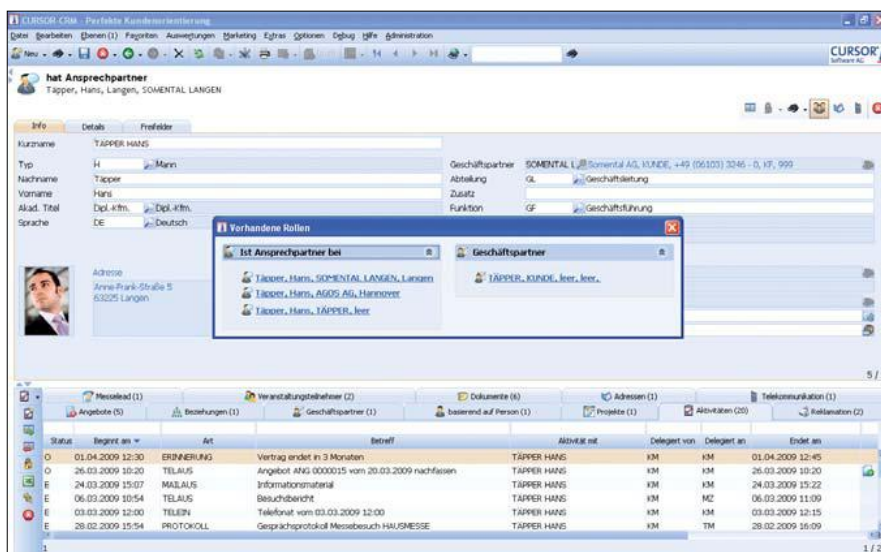
Person role model provides clear overview of different roles or functions of the same person. The same person can be for example our employee but also a private customer.

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.

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.

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.

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.

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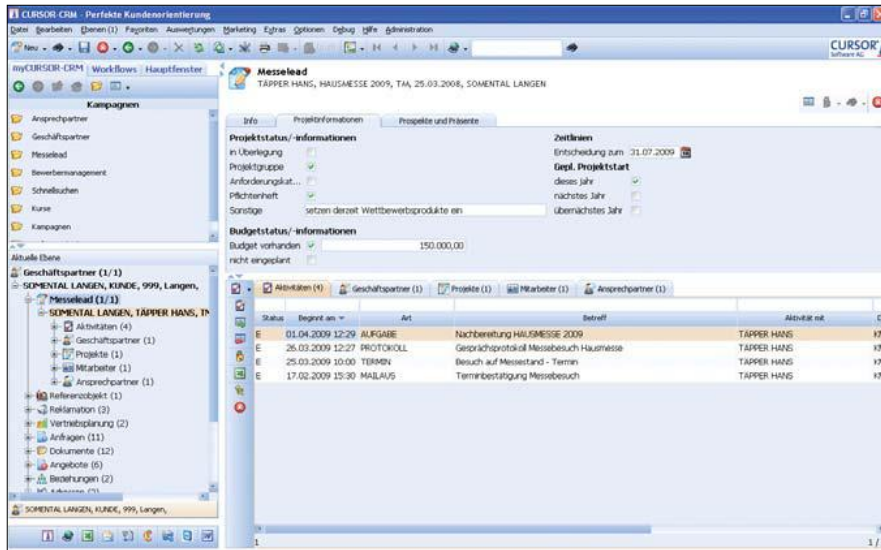
Benefit:
Communication from one source! Business processes can be simply and comfortably handled.


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!
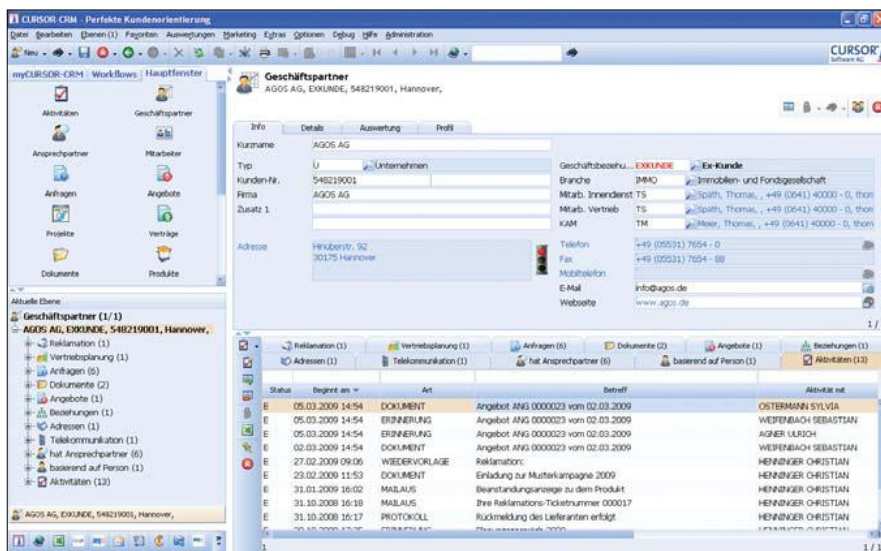
Automated process execution supports back-winning of old customers.

Benefit:
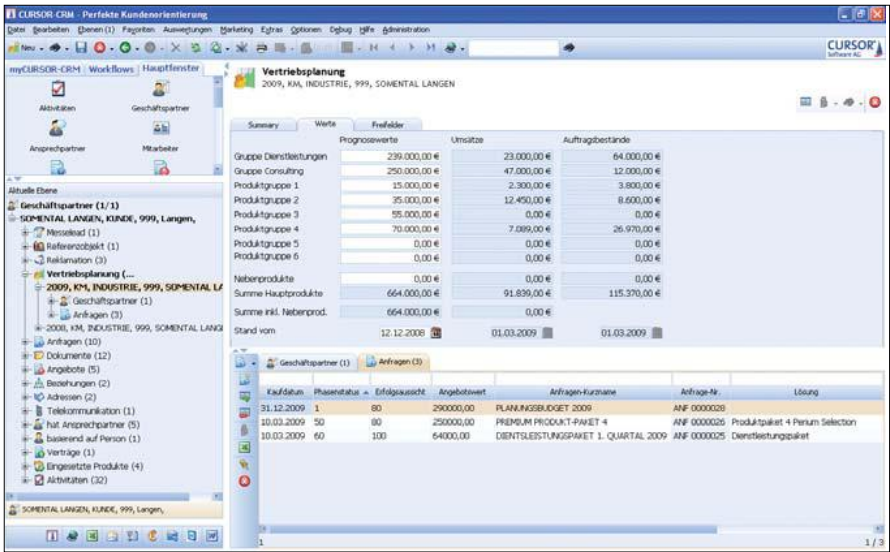Simple overview of all information relevant for targeted customer regaining.

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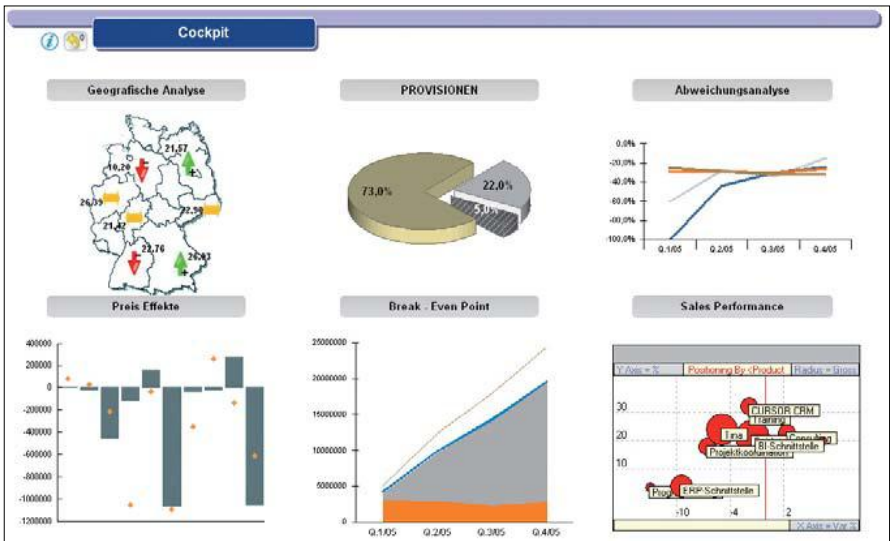
Data can be transferred to the external IT systems, for example the planning system BOARD.

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.

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.

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.

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.

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

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

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.

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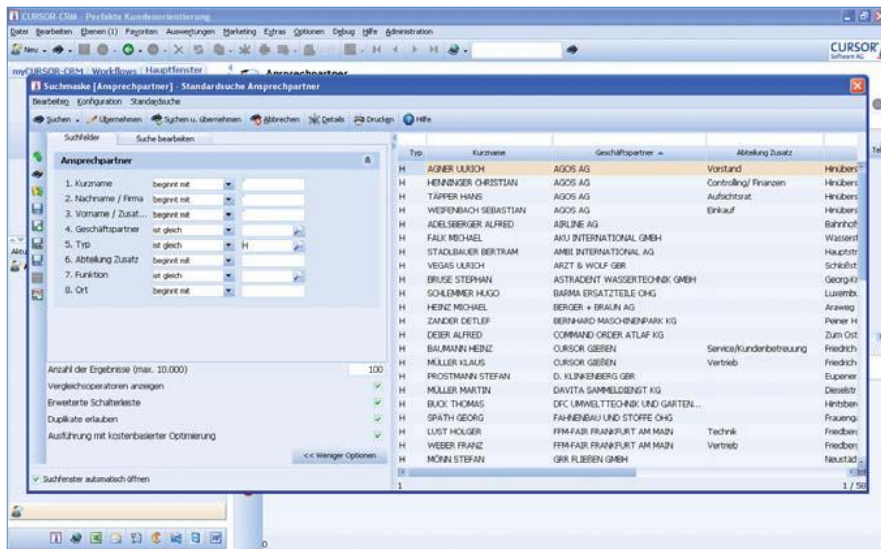
Thanks to the clean CURSOR-CRM data structures, fast information access is possible.

Benefit:

The searched information is available within few minutes.
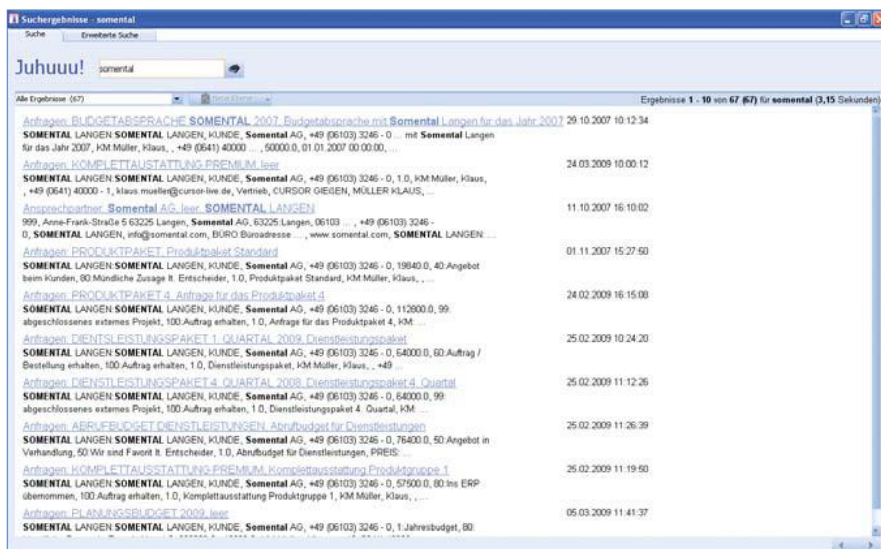
Complex text search, "Juhuuu! Search" is alternative to the selective searches. Search result is significantly improved thanks to the integrated phonetic, error-tolerant search.

Benefit:

Immediately found data!

Maximal freedom

Workflows:
Faster to the goal!
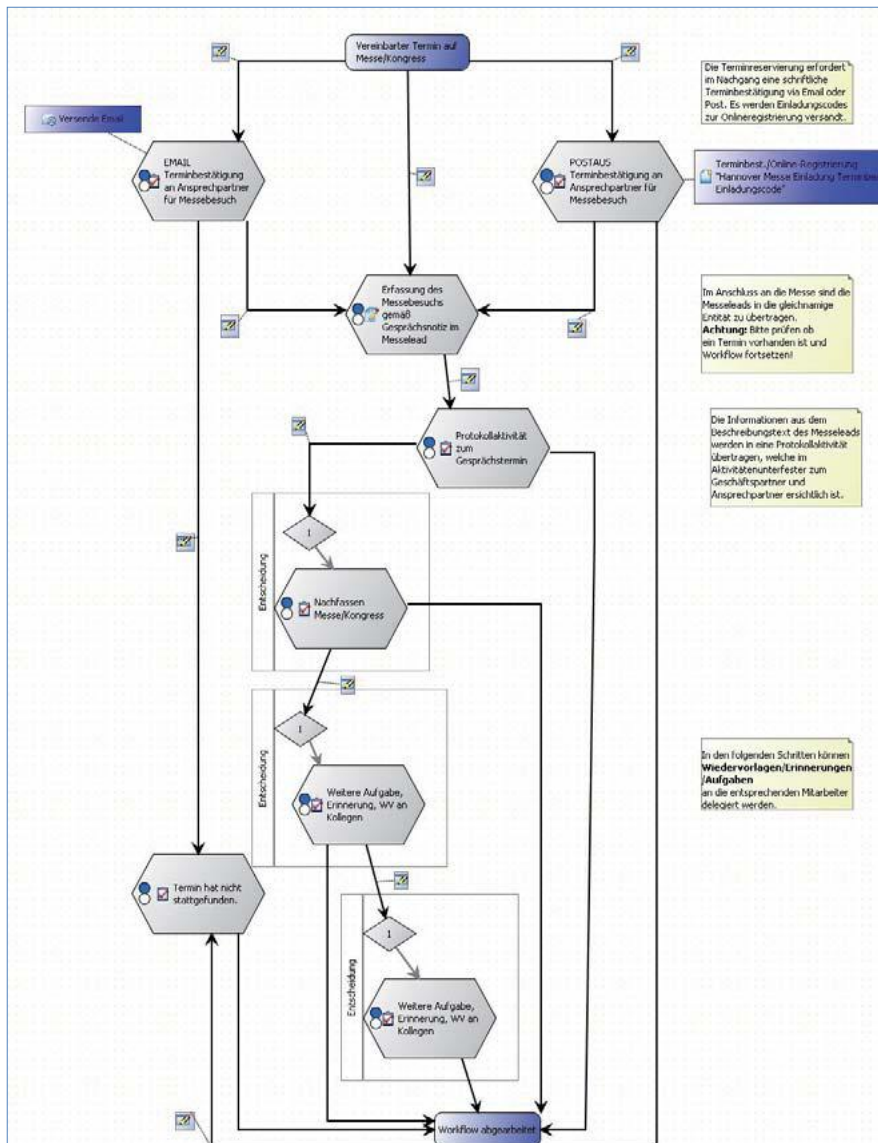
Based on your business processes, the templates for the process execution are defined. Detailed knowledge of business processes is not needed any longer.

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!

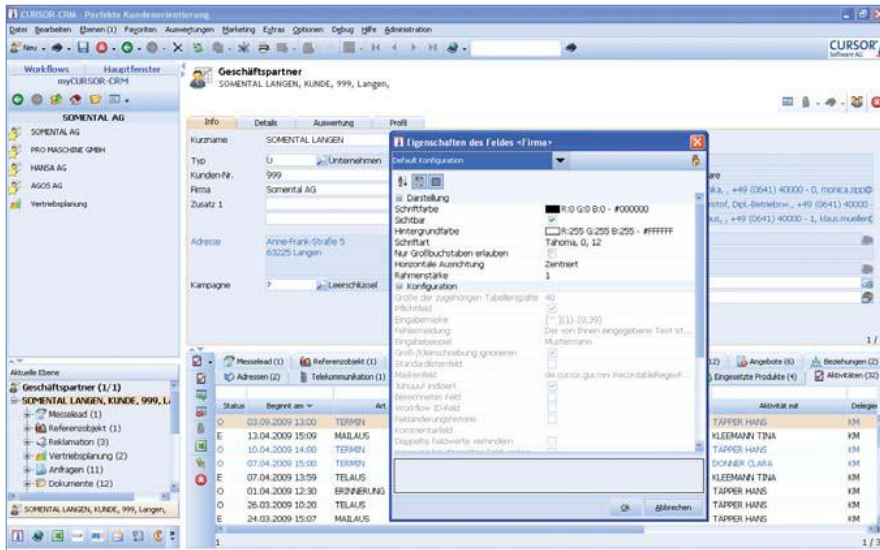Wide customization possibilities of the fields and forms.

Benefits:
Individually configure "your" CRM, based on your needs.
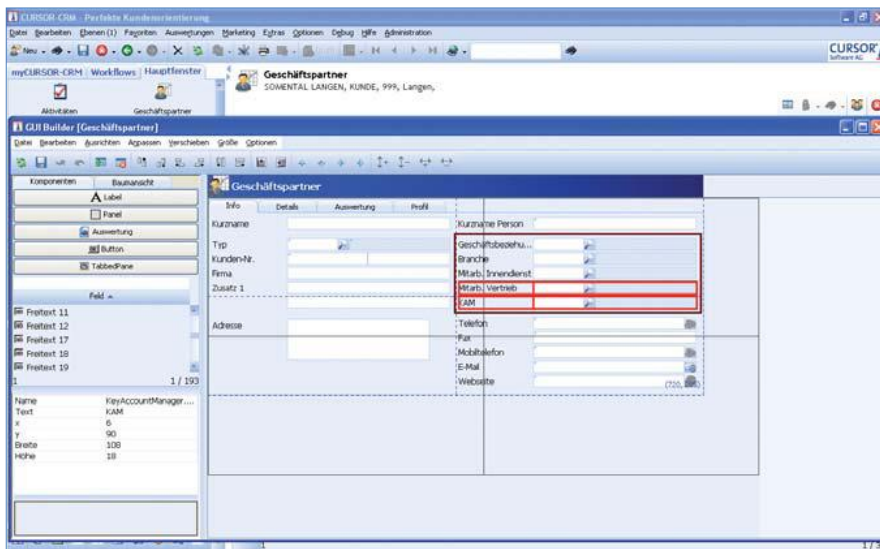
Form designer enables individual customization of the standard CURSOR-CRM masks, as well as the definition of the completely new forms.

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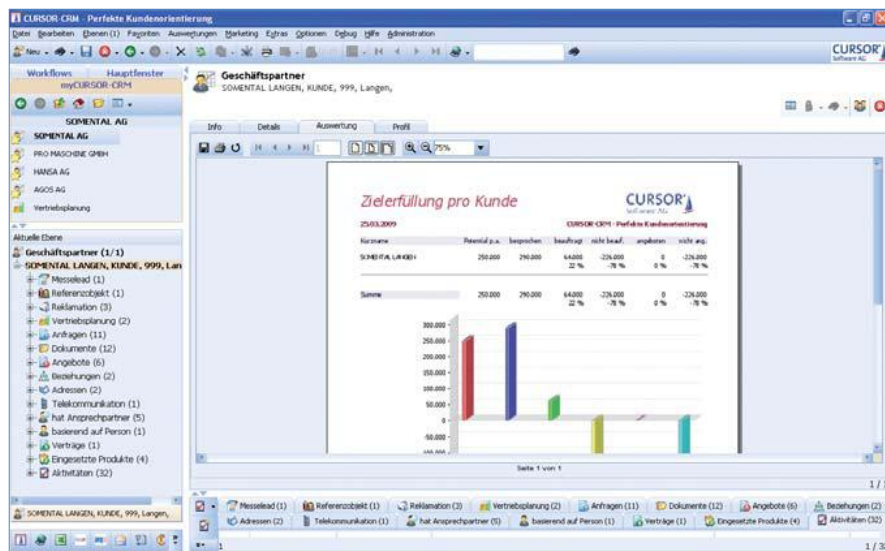

Maximal freedom

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

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Erfolg mit System!