



Marketing

JEEVES ENTERPRISE

The Organic Business System



The Internet and integrated business systems have resulted in customer relationship management (CRM) becoming a much more feasible concept. We are aiming at automation of sales support, marketing and service, adapted to each individual customer. But CRM is not a phenomenon solely for the marketing department. The customer approach will permeate the whole organization. It is a basic requirement that there is a common and uniform customer emphasis in all company departments. Jeeves Marketing makes this possible by integrating the company's database with other parts of the company administration. Based on the link to the business system Jeeves Enterprise, Jeeves Marketing lays the technical foundation needed to intensify and automate customer relations.

Relationship management

Jeeves Enterprise can store an unlimited number of companies with searchable company characteristics. A recent contact may only have its name and contact source saved, but as the relationship is intensified and a business opportunity emerges, the flow of information increases. The company can be classified and prioritized by various prospect characteristics. Certain prospects gradually go on to become customers who have to be maintained. In the programs Prospects and Company file - marketing, Jeeves Marketing supports the relationship with external companies by each company's status in the sales cycle.

Customer contact takes place via the contact persons who are registered for each company. By means of extensive personal codification, together with full information on addresses and communication, a comprehensive overview of contact informa-

tion is obtained.

As Jeeves Marketing can be directly connected to e-mail, telephony (CTI) and MS Word, the module is also a suitable tool for making contact.

Segmentation

All companies registered in Jeeves Enterprise can be classified by a large number of characteristics.

Business prospects are defined by prospect characteristics. Contacts are personified by keywords. This means there is a solid base for market segmentation down to a level which is suitable for a directed marketing strategy. The company characteristics and customer status are used to plan activities and campaigns.

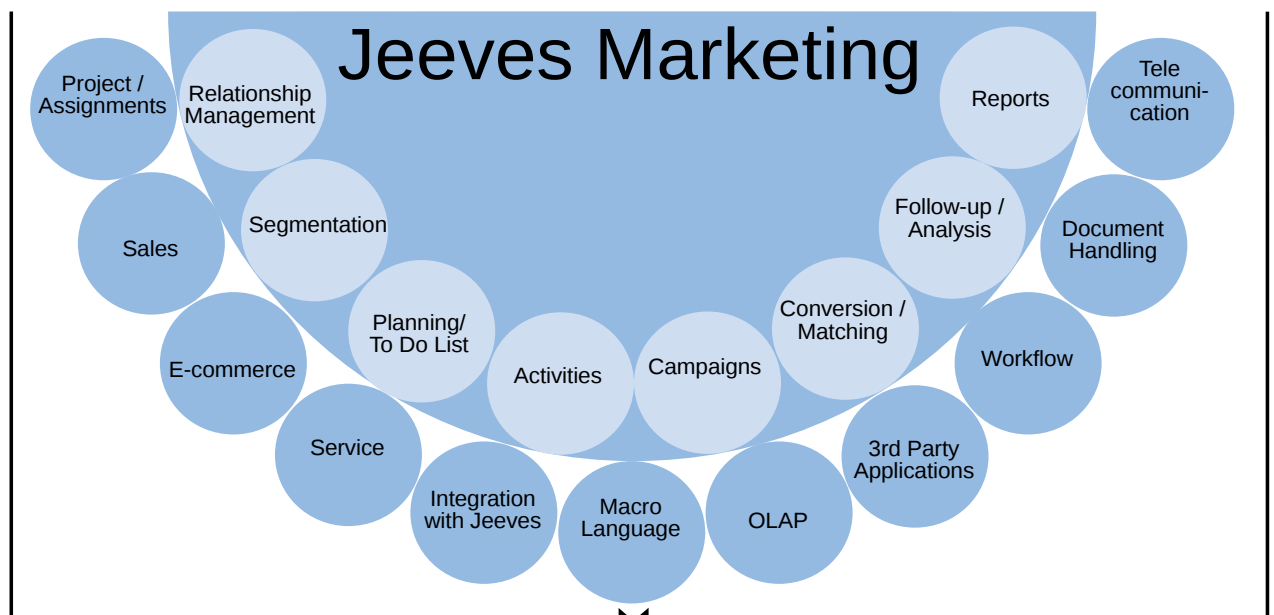
Activities

Customer processing is entirely based on various marketing activities. These can be linked to companies, business projects, and associated contacts. The user himself sets up the activities as either planned or reported. This is most easily done in the Company file - marketing and Prospects programs.

The activities can be linked to records in other modules in Jeeves Enterprise, for example, project, service, manufacturing order, customer order, and purchase order. In this way, Jeeves Marketing can keep track of all customer-related information processing that takes place for the user.

Planning / To Do List

To ensure that planned activities are actually carried out, each customer and prospect can be linked to one responsible person. Using a To Do list, market activities can be linked to this and can also be re-planned and reported. The list is based on a calen-



dar, common to the entire Jeeves Enterprise system. Continuous use of the To Do list reduces the risk of customer visits that fail to take place or expensive double bookings.

Campaigns

To implement market activities aimed at customer groups and customer topics, Jeeves Marketing includes easy-to-use functionality for planning and following up on campaigns. The customer segment to be processed can be listed via searches and the communication can then be automated via the connections to mail, CTI and MS Word. This provides good support for telemarketing and direct mail.

Jeeves Marketing also provides the possibility of a refined campaign strategy.

By updating from other Jeeves modules or external sources, the customer information can be kept constantly up-to-date. Using the Jeeves Macro Language or Jeeves Workflow it is possible to plan event-controlled campaigns that are triggered by changes in the purchasing behavior of, for example, web or premium customers.

Conversion/ matching

Up-to-date company information is a requirement for successful management of customer relationships. Every change in the customer structure needs to be adapted to the activities of the market. In practice, there are no limits concerning the number of companies or contacts that can be stored in Jeeves Enterprise. The precise search function allows the user to work only with a desired selection. Using conversion options such as MS SQL server 7.0, external information can be imported easily from PAR or Micromedia, for example. The adaptability of Jeeves enables automation of routines like this. This means that the company register can be continuously updated.

Reports and follow-up/analysis

As all customer-related data are collected in the same place, Jeeves Marketing enables analyses of markets and business opportunities to be made. Jeeves Marketing is supplied with a number of predefined reports. In addition, you can create your own reports using Crystal Reports. Unlimited search scope means that the reports can always be created from the desired customer segmentation. The simple conversion procedure makes it easy to export market information to external analysis tools, such as Excel. MS SQL-server 7.0 is supplied with an integrated OLAP tool that enables analyses of the market segment to be made in all possible directions.

Projects/assignments

Each business prospect can be drawn up as a project with associated activities. In this way there is a more detailed follow-up of times and costs. In practice, this involves a direct connection from

Jeeves Marketing to routines for setting up, planning and reporting of projects in Jeeves Enterprise. By assigning a task to the project, expenses and income will also appear in the accounts. In this way, the marketing costs can be activated.

Sales

Jeeves Marketing represents natural support for sellers and sales management. Integration with Jeeves Sales completes the customer information with things like order and credit information. From a CRM perspective, Jeeves Marketing has strength compared with other applications, because of the powerful order routines in Jeeves Enterprise.

e-commerce

Today, the Internet can become a natural place for your company's sales and profiling. At the same time, it is a very important source of customer information. It is important to be able to make the most of this and interpret it. A commercial website based on Jeeves e-commerce makes it possible to log data, which is stored directly in the customer record in Jeeves Marketing. This information broadens the customer picture and provides the basis for how web sales should be formulated.

Service

Jeeves Service makes service handling easier and its connection to Jeeves Marketing results in uniform customer contacts, irrespective of the person responsible and what way contact is established. With Jeeves Internet Client, a relocated call center can handle service and support directly in Jeeves Enterprise. Support and error messages become immediately accessible for each customer record.

Integration with Jeeves Enterprise

Jeeves Marketing is the basis for customer-specific marketing and is accessible via all the applications in Jeeves Enterprise, where the business system's interface allows individual program connections. With the link to Jeeves functions for mail, CTI and MS Word, Jeeves Marketing provides some of the most important information channels towards customers and becomes a natural tool for customer contact. In this way, your company's various departments can handle communication with the customer in a uniform, consistent way. With access to Jeeves document management functions (under development), all mail, telephone connections, and documents to and from a customer can be logged.

Telecommunication

Jeeves Marketing can be integrated with CTI (Computer Telephony Integration), which enables automatic telephone connection and displaying of current customer records.

Jeeves Enterprise can also be useful for mobile searching and reporting back via WAP and SMS.