

Customer Relationship Management

ENTERPRISE
SOLUTIONS

What is EcosAgile CRM ?

Customer Relationship Management or CRM is increasingly becoming a priority for national and international concerns that are focusing their energies and strategies on current and potential customers; on every business opportunity and lead.

EcosAgile CRM provides perfect supports for these activities, with **detailed standalone contact management and/or prospects classified by type, activity, industry, references and markets**, with immediate commercial budget management and all the tools needed to process information and help make the right commercial decisions.

It is a **powerful communication and marketing tool** which is both **thorough and flexible**, supporting the entire company and sales team in their objective: **growth and retention of customers and markets**.

The data can be easily loaded from xls files, and all your information can always be exported at any time with a single click, without any complication.

It is seamlessly integrated with all the other products in the EcosAgile suite so it can interact with any other required processes.

Who is it designed for

EcosAgile CRM is for businesses oriented towards the development of client relations and loyalty where, in business-to-business and business-to-consumer climates, the client is the centre of attention and the focus of corporate strategies.

EcosAgile CRM is designed to function in international companies and/or foreign subsidiaries and allows you to share or separate content across multiple companies/clients that have different functions within the same group and/or between national/business units/departments.

Why EcosAgile CRM ?

EcosAgile CRM is a **platform for the creation of web-based CRM solutions according to the client's 'tailored' requirements**; it can help you obtain excellent results in terms of quality and cost thanks to an innovative approach based on its functional layout and the configuration of the processes.

It is an extensive solution with a range of standard features that are preconfigured for immediate activation and which cover not only all the core processes, but also correlated activities (**External Communication, Knowledge Management, Help Desk, Events/Gatherings**, etc.).

Unlike other CRM solutions, EcosAgile is able to **perfectly adapt** to the **particular requirements of your business and your processes** with ease and with quality and cost levels that our competitors cannot match.


Predefined interfaces and a **specific configurable integration component** allow you to import and export record layouts in any format, avoiding the frequent compatibility problems seen in competing solutions.

SALESFORCE MANAGEMENT:

- Objectives, commissions, variables
- Sales budgets and forecasts
- Time off and overtime requests
- Leave planning
- Task allocation
- Timesheet / hours
- Project management
- Control of running totals/advances
- Project information on margins/data
- Management expenses, per diem and trips



LEADS & COMMERCIAL ACTIVITIES



SALESFORCE MANAGEMENT



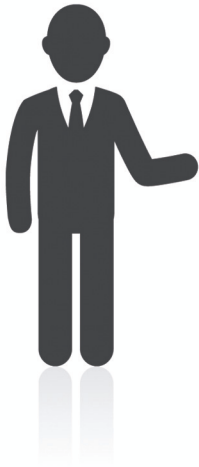
EVENTS & GATHERING



COMMUNICATION MANAGEMENT



REPORTING ANALYTICS



LEADS AND COMMERCIAL ACTIVITIES:

- Clients / Partners
- Management of Referrals
- Management of Agencies
- Management of Products
- Management of Actions and Contacts
- Visit reports
- References
- Reports
- Opportunities
- Commercial campaigns
- Client services
- Ticket management
- Help Desk
- Order Management
- Billing
- Knowledge management
- Timetables

EVENTS AND GATHERING:

- Events and gathering program
- Activities within events
- Personal data
- Management of subscriptions
- Calendar management

COMMUNICATION MANAGEMENT:

- Communication Lists / Mailing List
- Gifts management
- Frequently Asked Questions (FAQ)
- Internal communications
- Guidelines / procedures
- Managing events / demonstrations
- Mailing

REPORTING ANALYTICS:

- Dashboard
- In-page charts
- Configurable letter templates
- Notifications/timetables
- Factsheets/Hot spots
- Dynamic pivot tables and charts
- Integrated BI tools

Customer Relationship Management

Don't make any decisions without having assessed why **EcosAgile CRM** is so different.



INNOVATIVE solutions

A unique and innovative platform

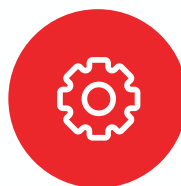
F O R E N T E R P R I S E

The EcosAgile platform is based on an innovative technology that manages objects and relationships through a configuration approach, without complex and expensive project, programming and testing phases.

The product can be customized with simplicity and functionality is constantly improved. A unique feature is the fact that **customizations and release upgrades coexist without additional costs and risks**, adding value to the investment over time.

The same end user can manage changes over time in a simple and autonomous fashion, without any programming.

The **solution** is fully **web based** and is delivered in **Cloud/SaaS mode** or in **on-Premise/License Agreement mode**.



MAXIMUM ACCESSIBILITY, WEB 2.0

Easy extension of the information/procedures to management and staff through the Self-Service functions and workflows already bundled in the standard product.



NATIVE HANDLING DEPTH HISTORICAL DATA

The correlation between the current and historical information is handled natively by the package, with significant benefits in terms of lower cost, higher quality and better integrity of the information managed.



POWERFUL AND STATE OF THE ART

Multi-company, multi-country, multi-language (including Unicode management) and multi-currency. Careful security/privacy management. Powerful workflow engine.



MAXIMUM WEALTH OF INFORMATION

Any report, list or grid can be exported to excel. Default charts, flexible analyses and analytics rapidly provide all the information needed to work with your business data.

Advantages



Extraordinarily flexible and easy to use



Complete and integrated, even with existing company software and always updated to the latest version



Quality for Total Cost of Ownership that competitors cannot match