

# Customer Relationship Management in IFS Cloud



Drive engagement with customers, prospects, across the entire relationship lifecycle.

Every business depends on the interactions and relationships it builds with prospects and customers feel valued when communication channels are adapted to their specific requirements and can get them the answers they need quickly and easily. This is key to the digital customer experience and central to building and maintaining profitable relationships.

Customer Relationship Management (CRM) in IFS Cloud is your key enabler to modern business growth.

Drive engagement with customers and prospects across the sales process and the entire relationship lifecycle, from lead management and marketing campaigns to sales quotations, contracts, and invoicing – all within a single platform.

Our CRM solution enables you to deliver more insightful and profitable relationships with key business partners, with less cost and complexity than running a separate, standalone CRM solution.

## Benefits:

Open up sales opportunities and increase customer satisfaction with our embedded CRM solution



**Grow your business** with clear pipeline visibility, auditability, traceability and sales process automation tools that **help sales reps have the right conversation at the right time.**



**Increase customer satisfaction** by identifying customer needs and storing all customer interactions and key customer information in one place.



**Maximize sales productivity with a single view of the customer** to optimize service and provide seamless customer experience.



**Reduce campaign turnaround time** with campaign management for **fast and simple campaign creation.**

## Key capabilities

### Pro-active customer engagement

Cut costs and time with automated dialing and connect with customers using the channel they prefer (through automated SMS notifications, email acknowledgements or direct social media messaging). Use advanced analytics to better understand and anticipate a customer's intent and have more relevant and profitable exchanges, while creating more personalized relationships.

### Omni-channel contact center

Our customer engagement functionality connects customers to the best skilled agent to deal with their request, irrespective of channel. Customer voice, email, social media or chat enquiries are presented on a smart agent desktop, accurately guiding agents through complex processes and ensuring a seamless cross-channel experience.

### Lead management

Manage potential deals with leads and buying center contacts. Keep leads duplicate-free with duplicate checks. Nurture leads with configurable qualification processes and ensure important information and touchpoints are not missed. Once qualified, convert leads to prospects and drive the sales process.

### Opportunity management

Manage the sales process, starting with the creation of the business opportunity. Ensure sales reps capture all necessary information and perform key actions with configurable sales processes. Make sure opportunities are valued correctly and clearly visible in the sales pipeline and forecast. Ensure sales managers can act at all stages of an opportunity and have clear visibility of ongoing sales activities.

### Contact management

Communicate more effectively with customers and prospects with all the information needed readily to hand. Use role-based functionality to communicate with them, based on persona and security profiles. Ensure the right conversations happen at the right time with a clear view of the next best action and task to drive interactions forward. Microsoft Outlook integration provides a familiar platform to create new opportunities, activities, and contact information—on desktop or with IFS's mobile App 'Sales Companion'.

### Campaign management

Run multi-level campaigns with confidence. Our marketing campaigns capabilities are fully integrated with the Contact Management capabilities in IFS Cloud and empower you to manage enterprise-wide campaign activity. Create campaign documents using mail merge. Capture campaign responses to document the interaction with the campaign target.

### Engagement studio

Give contact center agents all the relevant, contextualized information they need in a simple, intuitive desktop application. The engagement studio consolidates relevant customer data from across the organization alongside contact center channels, adding case management and other CRM capabilities. A simple and intelligent "fit for purpose" customer service application guides agents through complex requests, presenting data at the appropriate point to support decisions. Easily configure a contact center desktop—designed around specific service center needs—in a matter of hours. Slash the time your agents spend searching for data and processing requests while empowering front office staff to do more.

### Automation and self-service

Free your agents from repetitive and time-consuming tasks with our advanced natural language processing (NLP) capabilities. From virtual assistants, chatbots and knowledge bases to dynamic FAQs, automated calls, email and chat, deliver the self-service options your customers demand.

IFS develops and delivers cloud enterprise software for companies around the world who manufacture and distribute goods, build and maintain assets, and manage service-focused operations. The industry expertise of our people and of our growing ecosystem, together with a commitment to deliver value at every single step, has made IFS a recognized leader and the most recommended supplier in our sector.

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