

# 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 have 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



### Increased Visibility into Sales Cycle

Pipeline visibility, auditability, traceability and sales process automation tools help sales reps have the right conversation at the right time.



### Increase Customer Retention

Access up-to-date information from a single source of truth to provide consistent and tailored communication that builds loyalty and satisfaction over time.



### Maximize Productivity

Automated lead capture and a unified customer view allow teams to quickly access relevant information and streamline service delivery.



### Quick & Efficient Campaign Creation

Enable quick and efficient campaign creation with real-time collaboration tools, performance tracking, and easy adjustment.

## Key capabilities

### Pro-active customer engagement

Cut costs and time with AI-powered automated calling and connect with customers how they prefer (like, text, call, email, or direct social media engagement) 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, SMS, 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.

### Engagement studio

Give contact center service agents all the relevant, contextualized information they need in a simple, intuitive desktop application. Engagement studio consolidates relevant customer data, contact center data points, case management details and more into a simple and intelligent "fit for purpose" customer service application. Guide agents through complex requests, present data at the appropriate point to support decisions, and increase customer satisfaction metrics.

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.

### Lead management

Capture new leads and eliminate duplication with AI-powered automated lead capture. Nurture leads with personalized automated outreach to ensure important information and touchpoints are not missed. Once qualified, easily convert leads to prospects to continue driving the sales cycle.

### Opportunity management

Effectively oversee the sales process from the creation of each business opportunity. Empower sales reps to capture essential information and perform critical actions through customizable sales workflows. Seamlessly connect opportunities with quotations, ensuring accurate valuation and automatic visibility in the sales pipeline and forecasts. Provide sales managers with complete visibility and control over every stage of an opportunity, allowing them to monitor and act on ongoing sales activities with confidence.

### Contact management

Quickly access valuable information and utilize role-based recommendations, like persona or security profile, to communicate more effectively from a single pane view of your customer or prospect. 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. Fully integrated with the Contact Management capabilities in IFS Cloud, IFS marketing campaigns 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.