

## Infor CRM i Edition

➔ To meet the need for enhanced CRM capabilities among our ERP customers on System i platforms, Infor has developed CRM i Edition, a new solution with an innovative approach to leveraging customer-related information.



### Do business better.

Companies using the proven Infor™ ERP (enterprise resource planning) solution for IBM®'s System i® platform may think they have everything they need to perform well against the competition. But even when things are working well, companies must realize that in today's hyper-competitive environment, they can ill afford to stand still. Continuously improving every aspect of the business is the key to sustained success.

That's why many forward-thinking System i users who have improved the back end of their businesses as much as possible are turning their attention to the front end. In short, they are looking for ways to take their customer relationship management (CRM) to a new level. They understand the business value of having easy access to all customer data and the specific customer-facing applications that can leverage that data.

### Leverage experience.

To meet the need for enhanced CRM capabilities among our ERP customers on System i platforms, Infor has developed CRM i Edition, a new solution with an innovative approach to leveraging customer-related information. Infor CRM i Edition features a single database for customer information that is tightly linked to the System i platform and Infor ERP application. The result is a single, integrated view of all customer-related information, including credit limits, financial transactions, customer orders and quotes, and shipments.

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Infor CRM i Edition's wide range of CRM functions allows you to capitalize on enhanced customer information to improve opportunity management, helping you take the next logical step in improving your business performance.

### Get business specific.

Infor CRM i Edition is a versatile solution that gives you maximum flexibility to customize and personalize the way you implement and use advanced CRM capabilities. Created using the Infor Development Framework (IDF) for System i—a development tool and series of design blueprints for building IBM i applications—Infor CRM i Edition allows you to configure the solution to support numerous CRM and non-CRM business processes. End users can easily access the application via a web browser interface to ensure data availability anytime, anywhere. With Infor CRM i Edition, access to data is both secure and flexible. You can control the data that is accessible to individual users—both internal and external—depending on the role of those users.

These usability features are an integral part of delivering advanced CRM functions such as:

**Campaign management.** Users can leverage CRM and ERP data to easily target subsets of your customers with offers tailored to specific wants and needs. For example, you can create a campaign targeted to customers with more than \$20 million in revenue who haven't purchased anything in

more than six months. To better define and execute campaigns, the solution supports the use of mass email, call lists for telesales, and the mail merge function. It also allows you to manage marketing events—such as invitations, response tracking, and post-event surveys—as well as measure the success of campaigns.

**Opportunity management.** A structured process helps you better manage every sales opportunity, improve your close rate, and shorten the sales cycle. It also allows you to define and establish best practices for use in monitoring and managing sales opportunities. Opportunity management is ideal for companies of all sizes in a wide range of industries. For example, it can help companies that sell large, expensive machinery using a long, complex sales cycle, as well as companies with a broad range of products and thousands of customers to target.

**Sales process management.** This function allows you to use multiple sales processes within your overall CRM business process. User-defined sales processes include additional sales to an existing customer, service without a contract, maintenance renewal, sales to a prospect, sales through a partner or reseller, and major account sales.

Within each sales process, the solution creates a record of every opportunity, shows a status for each, and generates a detailed record of opportunities using parameters such as deal value, predicted close date, stage, and probability. Sales process tracking capabilities include process-based, track record, and a blended approach that includes the salesperson's prediction. You can also track sales by person.




**Quotation management and order management.** Infor CRM i Edition takes advantage of the information already addressed by your ERP system, including pricing, discounting, promotions, sourcing, and more. Using this data, the solution simplifies the prospect-to-customer and quote-to-order conversion process, allowing you to increase the number of inquiries converted to orders.

**Customer information portal.** To facilitate high-impact CRM, Infor CRM i Edition provides a single place for users to access all information about customers, prospects, and contacts. The solution provides a single access point for information typically found in a CRM solution—such as basic customer information and organizational structure—as well as information typically found in ERP solutions, such as credit limits, financial transactions, orders, quotes, and shipments.

## See results now.

Infor CRM i Edition can help Infor ERP customers using the System i platform take great strides in improving their overall management of customer information. The solution works in conjunction with your well-developed CRM processes and trained staff to increase the productivity of sales, customer service, and marketing. With Infor CRM i Edition, you can:

- Increase sales revenue by closing more sales, increasing the quote-to-order conversion rate, reducing the occurrence of discounts, and increasing repeat business.
- Reduce sales costs by eliminating unprofitable opportunities and shortening sales cycles.
- Expand data visibility.
- Enhance forecast accuracy.
- Improve customer service with lower costs.

 Infor CRM i Edition is a versatile solution that gives customers and end users maximum flexibility to personalize the way they implement and use advanced CRM capabilities.

## About Infor.

Infor acquires and develops functionally rich software backed by thousands of domain experts and then makes it better through continuous innovation, faster implementation options, global enablement, and flexible buying options. In a few short years, Infor has become the third largest provider of business software. For additional information, visit [www.infor.com](http://www.infor.com).

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