SALES AND MARKETING

Microsoft® Business Solutions–Navision® Sales and Marketing gives you complete and accurate information to focus your interactions on preferred segments.

Key Benefits:

- Improve the success of your CRM efforts.
- Make well-informed decisions about customers.
- Customize the solution to fit your processes.

Focus on Preferred Customer Segments

Good sales and marketing practices are all about making the right decisions at the right time. And in order to make better business decisions, you need to stay focused and be in control of all marketing and sales efforts.

Sales and Marketing gives you complete and accurate information so you can focus your interactions on preferred customer segments. You are empowered to:

- Increase your productivity.
- Sharpen your competitive edge.
- Grow your business.

Access Accurate Information

Your employees can access important information about previous sales and marketing campaigns and future opportunities. Within moments you have the answers to such questions as, “When did I last contact Company A?” or “When did Contact B last order?”

Identify Key Accounts

When you have real-time, accurate information on all your contacts, you can make better decisions. You know which accounts need your immediate attention and which accounts can wait. You can even classify customers based on the interrelation or more criteria – specified by you. Your contact and financial information is always accurate, and you can make strategic decisions promptly.

Overview Past and Future Activities

Sales and Marketing helps your sales staff keep track of and structure sales cycles. You can access exact sales information on each contact at the touch of a button. You gain a clear picture of what is pending in your sales pipeline, and you can adjust your planning accordingly.

Automate Routine Tasks

Not only do your employees provide quality service during every business interaction, they also become more effective because time-consuming processes are automated. You might consider using the automatic update of customers and activities between Sales and Marketing and Microsoft® Outlook®.

Plan More Effectively

You improve the hit rate on your sales and marketing campaigns through effective planning. Sales and Marketing keeps you well informed with real-time, accurate information that's readily accessible. You don't even have to know the exact customer name to retrieve more information on, for example, an opportunity.

Measure Results

You can also measure the overall results of your campaigns. You know how successful a particular campaign has been, and you can assess your overall company performance.

Understand Your Business

When you have a clear overview of your contact information, you can analyze and understand future demand, and plan accordingly. You can measure the success of your campaigns, and you have the insight you need to identify specific segments and opportunities.

Keep Customers Loyal

Holding on to an existing customer is a lot cheaper than attracting a new one. If you don't keep your customers 100% satisfied, you risk them taking their business elsewhere. Your customers expect a positive, consistent experience.

Personalize Relationships

Sales and Marketing enables you to identify specific segments in your contact database. You can personalize your approach to contacts – in any language you choose – and concentrate on one-to-one marketing. For example, you can select a particular group of contacts for a sales campaign based on past buying behavior.

Make Every Employee a Customer Expert

With Sales and Marketing, you can provide superior service during every customer interaction. Your employees always have access to accurate and detailed information on every contact – even e-mails sent between an employee and a contact can be logged in Sales and Marketing, enabling knowledge sharing between employees. Each employee becomes an expert on each and every contact, and you provide your customers with a better level of service – time after time.

Ask Your Partner

To learn more about Microsoft Business Solutions–Navision, contact your local Microsoft Certified Business Solutions Partner. They have the expertise to design a solution that fits your specific business needs. Or, visit our website at:
http://www.microsoft.com/BusinessSolutions

About Microsoft Business Solutions

Microsoft Business Solutions, a division of Microsoft, offers a wide range of integrated, end-to-end business applications and services designed to help small, midmarket, and corporate businesses become more connected with customers, employees, partners, and suppliers. Microsoft Business Solutions' applications optimize strategic business processes across financial management, analytics, human resources management, project management, customer relationship management, field service management, supply chain management, e-commerce, manufacturing, and retail management. The applications are designed to provide insight to help customers achieve business success. More information about Microsoft Business Solutions can be found at www.microsoft.com/BusinessSolutions.

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Microsoft Business Solutions

Data summary sheet

Key Features	Description
CONTACT MANAGEMENT	▪ Maintain an overview of your contact companies and contact persons. ▪ Duplicate check automatically alerts you if you enter contact information that already exists. ▪ Categorize your contacts based on profiling questions. ▪ Personalize your approach to your contacts.
CONTACT CLASSIFICATION	▪ Classify your contacts into different categories, and tailor your marketing messages to suit the individual needs of the customer. ▪ Automatically group your contacts into different classes based on criteria specified by you, for example, group contacts in terms of revenue. ▪ Rate your contacts based on weights of two questions to identify the value of a third question.
CAMPAIGN MANAGEMENT	▪ Organize campaigns based on segments that you have created. ▪ Segment your contacts based on specific criteria, such as sales, contact profiles, and interactions. ▪ Reuse existing segments, for example specify whether or not existing segments are to be updated every time new information about a contact is entered, or instead 'freeze' the group for follow-up activities, such as direct mailing. ▪ Make use of multilanguage templates to target contacts in different languages. ▪ Mail merge the identified segment with a Microsoft® Word® document.
OPPORTUNITY MANAGEMENT	▪ Keep track of sales opportunities. ▪ Section your sales process into different stages. ▪ Maintain an overview of opportunities in your sales pipeline.
TASK MANAGEMENT	▪ Organize your marketing and sales tasks. ▪ Create to-do lists for yourself. ▪ Assign tasks to other users or teams of users recorded in the program. ▪ Create an activity composed of several to-dos. ▪ Create internal to-dos without a contact.
DOCUMENT MANAGEMENT & INTERACTION LOG	▪ Log the interactions that you have with your contacts, such as a telephone call, a meeting or a letter. If an interaction contains a document, you can save it under the relevant contact and keep track of the document in question. ▪ Record interactions performed in other application areas, including documents sent to your contacts. ▪ Call a contact simply by clicking the button on the contact card and using TAPI (Telephony Application Programming Interface) compliant telecom devices.
CONTACT SEARCH	▪ Search for all information related to a contact, such as an opportunity, an address, or a comment. ▪ Misspell the contact name and you still retrieve information because fuzzy logic functionality is available.
E-MAIL LOGGING FOR MICROSOFT EXCHANGE	▪ Log all your e-mail correspondence – inbound or outbound. ▪ Log your e-mails sent through Microsoft Navision or sent through Microsoft Outlook. ▪ Server-based solution to keep your e-mails in their natural environment.
OUTLOOK CLIENT INTEGRATION	▪ Synchronize your to-dos and contacts in Microsoft Navision with meetings, tasks, and contacts in Microsoft Outlook. You can decide not to synchronize some to-do categories, for example holidays or private appointments. ▪ Receive a notification e-mail in Microsoft Outlook to inform you that you were assigned a new to-do. ▪ Create, update, cancel, and delete records in one program and the other program is automatically updated. ▪ Gain access to contact information when you are working offline. ▪ Update your information through a batch job when you are online again.

Data summary sheet

System Requirements

TO OBTAIN ALL OF THE FEATURES MENTIONED IN THIS FACT SHEET, THE FOLLOWING MODULES AND TECHNOLOGIES ARE REQUIRED:	Microsoft® Exchange Server (min. version 5.5 with service pack 4) for E-Mail Logging for Microsoft Exchange. Microsoft Business Solutions–Navision supports graphical 32-bit technology and genuine client server, multitasking environment. The following operating systems are supported: Client 32-bit – Microsoft® Windows® XP, Windows® 2000, Windows® NT, and Windows® 98. Server – Navision Database Server: Windows® 2000, Windows® NT, and Windows® Small Business Server 2003. Microsoft® SQL Server® Option for Microsoft Business Solutions–Navision – any operating system supported by Microsoft SQL Server 2000