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CRM System

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SYSTEMS LIMITED

Canvass.WORKS

CANVASS AND CONTACT MANAGEMENT SYSTEM

Canvass.WORKS

C a n v a s s   a n d   C o n t a c t   M a n a g e m e n t   S y s t e m

Canvass.WORKS, designed specifically for publishing is a complete customer relationship and campaign management system integrating seamlessly with the Sales.WORKS advert booking system to give users the ultimate electronic sales workspace. The products combined ensure that relevant, timely information is at hand to help understand and strengthen your customer relationships. With its intuitive operation and organised desktop, this system provides an essential tool for today's publishing business needs.

Product Overview

Developed by our own team using the latest development tools Canvass.WORKS has a well-designed GUI, it offers flexible navigation through the abundance of information available about your customers. The intuitive hyperlinks mean navigation through the various forms to view related information is easy and follows a logical sequence. The desktop can be personalised to the user with users belonging to one or more teams and record cards belonging to the user, team or department. All information contained within drop down lists and check boxes are definable by the system administrator allowing you to customise and maintain the options independently without changes to the core software.

Customer Details

This identifies the customer and the relationship with the publisher i.e. existing account advertiser, prospect, "dead" advertiser, agency or client of agency, prepaid advertiser etc. The customers details are held such as address, email, website etc as well as the account number if relevant. Also on this form are the contact details of personnel at the customer, detailing name, type of contact, phone, mobile and email which can be easily maintained by appropriate users. The customer profile

Customer details showing Agency/Client

tab allows the setting up and maintenance of information relevant to the customer's nature of business, segmentation information, advertising preferences or any other details you wish recorded. The account info tab provides a link to the latest account information available either directly from your accounts system or alternatively within the customers table in Sales.WORKS. There is also available, analysis of previous advertisement revenue from the statistical database with the ability to drill down through year, month and date to see

information about adverts and insertions. If the customer record card is that of an agency then all the clients of that agency are listed and have their own customer information, toggling between client and agency is easy. The customer record cards can be searched or filtered and information such as diary entries pending, account status and presence on the telephone preference list are indicated to the user.

Customer History

Here, for the customer currently selected in Customer Details, is every contact or Sales.WORKS transaction for that customer. Recorded is the user, date and time of the contact, the URN number if the contact generated an advert booking, the reason for the contact as well as the result, who was contacted and the

Customer History

follow up action required. Hyperlinks for the URN give a summary of the advert and if required can take you through to Sales.WORKS calling the advert to screen. A hyperlink in the follow up action will take you to the entry in question whether it is in the history or in the diary waiting to be processed. The Customer History list can be filtered by various criteria such as user, action, result etc. Entries can be created as and when new contact information is known. Reports can also be created and printed.

Sales Diary

Presented to the user are the diary entries for themselves or, if set-up as such, those of the team. A simple colour coding mechanism informs if the entry is overdue. Detailed in the list are the user, date and time, account number (with a hyperlink through to the customer details), customer name, action required and notes relevant to the entry. If the diary entry has resulted from a campaign or has been placed by a supervisor

then the operator cannot delete the diary entry, the only option is to complete it. In doing so a result for that entry has to be selected, who was contacted and a follow up action is created

Sales Diary

with the option to assign it to other users at a given date and time. Diary entries can be filtered by various criteria and, if authorised, reassigned to other users.

Sales Activity

This details, for the user, every contact with all customers, viewable for any given date. The time, customer, type of contact, result and if the result was a sale then the URN, size and value of the advert as well as a comments field. Entries can be made for events such as lunch breaks, team meetings etc. Activities are entered by the user, this has the number of calls made or received, a strike rate on the calls resulting in a

Sales activity

sale as well as the revenue generated. All this information can be printed if required.

Year on Year Comparison

Graphically displayed are the business patterns for the customer, by month or week, this can also be filtered by advertisement category. Each publication or group of publications can be viewed giving totals for the revenue, volume or number of insertions booked. This information is displayed for three years from a base year with a fourth quadrant giving the differences between two selected years worth of data. This allows you to identify the peaks and troughs as to when advertising is placed and perform a year on year comparison, quickly identifying if performance is greater or lesser. The information can also be viewed in spreadsheet format.

Year on Year comparison

Record card

For the selected customer, information is presented that, at a glance, you are able to see when adverts were booked in any given year by means of a chequer board with weeks where adverts were running highlighted. This appears in conjunction with a list giving specific information of the advertisements for

Record Card

the currently selected week, the titles or groups and insertions booked, size and revenue as well as the unique reference number (URN) from which a re-book can quickly be performed. These views are filterable by year and category of the booking.

Contracts

Individual advertisement contracts can be set-up for customers or standard contracts set-up and re-used. These allow for the input of information such as incept and expiry date, how many warning days before contract expires at which point a diary entry is created to renew or review the contract. What the

Contracts

contract relates to i.e. publications, category or style of advertising etc. the measures by which the contract is negotiated and monitored i.e. volume, revenue, number of bookings etc. The discounts applied can have different thresholds dependant on a sliding scale of measure for the contract. A document, using mail merge can then be created incorporating the standard terms and conditions as well as the criteria from the contract.

Campaign Management

Utilising the profile set-up in the customer details with an option to cross-reference this with previous appearance in publications or categories over given date criteria a list of matches can be

Campaign

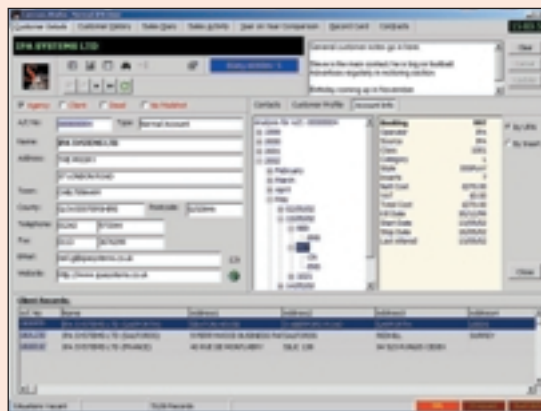*Customer details showing customer profile*

created from a search of the Canvass.WORKS database. For example a list of customers who have previously advertised in a weddings feature or who have a customer profile that includes weddings can be created very quickly. The selections used to arrive at the list can be saved as a campaign with a given name and re-used on a later date. The list that results from the search can then be sent to create diary entries, faxes, letters, emails or even SMS messages. The destination can be the user designated to look after the customer, a random allocation to a team or manually designated by an administrator or by the recipient of faxes or emails as detailed in the contacts list for the customer.

Integration with Sales.WORKS

Sales.WORKS integrates seamlessly into the Canvass.WORKS CRM system from IPA. This allows the creation of call back diary entries automatically on booking an advert. One button click takes you from Sales.WORKS through to Canvass.WORKS and visa versa

Integration with Neptune

If desired the copy chasing function can be part of Canvass.WORKS integrated into the Neptune workflow and is linked into production deadlines and priorities.

Customer details showing Spend analysis

Key Points at a Glance

Customer Record Card

✓ User-definable customer profiles and segmentation criteria.
✓ Generic customer note field as well as notes attached to individual activities or actions.
✓ Customers designated as "Agencies" can be linked to multiple "Client" record cards.
✓ Customisable filter to search for record cards with results presented in form or grid mode.

Customer Activity Record

✓ Record of all sales to a customer showing WHEN business was placed, WHAT volume and revenue was taken and WHERE by showing the publications / products booked.

Customer History

✓ Entry tracking enables location of follow-on actions by use of 'hyperlinks'.

✓ Advert booking history with URN information with link through to Sales.WORKS.

Reps Diary

✓ User-defined action and result codes, with automatic assignment of follow-on actions.
✓ Admin operators can re-assign diary actions between operators.
✓ Completing a diary action automatically moves the entry to the history record.

Reps Activity Record

✓ Daily activity sheet by individual rep. No. of calls, call result, lunch breaks etc monitored.
✓ Strike rates calculated

Contract management

✓ Multiple contract per customer with contract incept & expiry dates.
✓ Discounts based on a sliding scale relevant to business placed.

Campaign Management

✓ Create and save marketing campaigns
✓ Campaigns based on combinations of profile, segmentation and business activity.
✓ Results can be mail merged, emailed or faxed

Brief System Specification

Server

Intel Server, WIN2000 or NT O/S or UNIX. RAM, number of processors and storage are dependent on publishers criteria i.e. number of bookings per day, titles and average insertion run. SQL2000 or Sybase database, scalable from small to large enterprise.

Clients

PC Clients, Win2000, XP, Windows 98, NT workstation, minimum of 64 MB RAM and 500 MHz processor. Citrix metaframe client also available.

Distributor Stamp

S Y S T E M S   L I M I T E D