SuperOffice.

Dear Customer,

Thank you for downloading this preparation letter for basic settings. It contains a series of questions. Your answers will enable you set up your new CRM system in a way that fits your business processes. A system that is set up in a good way, will help your users to adopt to the new CRM system much faster.

1. Questions on companies and contacts

Information that you register in the system can be used as search criteria when you want to find certain target groups, for example for sending newsletters or other mailings. Therefore, it is important to discuss and consider your need for segmentation, and based on what criteria.

- How should relevant target groups be classified? E.g. customer, prospect, supplier, partner. (Lists->Category)
- Which industries do your target groups relate to? Do your customers work in, for example, transport, IT, service, production etc.? (Lists->Business)
- What information would you like to register about your customers/prospects/partners etc.? Is there any other information you would like to include on the company card to enable searches and reports? (User defined field)
- What kind of marketing activities and customer campaigns do you perform and how would you like to tag the customers to find your target groups? E.g. tag customer with "newsletter", "product information" and "reference customer". (Lists->Company Interest)
- What contact persons do you meet and which do you want to be able to target? E.g. General Manager, Purchase Manager, Project Manager etc.(Lists->position)
- What properties would you like to assign to these contacts? E.g. newsletter recipient, driving force, ambassador, reference person.(Lists->Contact interest)

2. Questions regarding your activities and documents

- What are your needs for activity registration and follow-up? What activities would you like to log and report on? Discuss and think about the level of detail (e.g. telephone or telephone out/in, meeting or 1st/2nd customer meeting).(Lists->follow-up)
- What documents/templates do you use and want to be able to write from SuperOffice Sales & Marketing? E.g. offer templates, letters, faxes.(Lists->document template)
- Do you have any input or thoughts about what steps the sales process should consist of? Also, what kind of hit rate these should be assigned?
- Do you have any current reports that you would like to retain in the Sales & Marketing solution? Feel free to specify your reporting needs.
- Do you have a need for storing information linked to different projects, and if so what types?

3. Questions on how you manage quotes/proposals

- Should product information be configured in SuperOffice CRM or imported (Terms and Conditions, Prices
- Do you want to create offers directly out of SuperOffice Quote Management
- Is there a need to handle different currencies and price lists
- Do you have special customer related discount models
- Do you want to offer different quote alternatives (different pricing, different sizing)

4. Questions about your users

- Which user groups/departments will be using SuperOffice Sales & Marketing and which users belong to which groups/departments?
- Which users should be super-users/administrators of the system?

- Is there a need to differentiate information between user groups? Should all groups be able to see the same activity types, documents, customer categories etc.? Or should some of them only be visible to certain groups?
- If yes, which users should see which information?

For more information and tips about how to get started go to our Community site.

Best regards