

Customer Relationship Management for SYSPRO

Full-Service CRM Built for Manufacturers and Distributors



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2021 SIIA CODiE FINALIST
Best CRM Solution

“CRM for SYSPRO has had a great impact on us. Our team has the ability to see sales order history, recent customer service issues, and other pertinent items related to each customer—no matter where they are.”

-Performance Machine



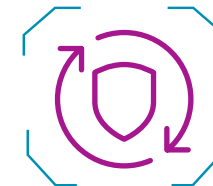
*CRM for SYSPRO is only available in North America.

Provide Superior Service throughout the Customer Journey

After-sales service satisfaction is a key for **customer retention** and **upsell** consideration

Modern customers expect transparency, proactivity, and responsiveness from your service department whenever an issue arises. CRM for SYSPRO gives your teams the tools they need to provide a higher level of service and assist at every point as your customers move through their journey from their initial purchase to becoming an advocate.

CRM for manufacturers and distributors has a wide range of functions that cater to after-sales service processes. These include:



Features built specifically to support recalls of lotted and serialized products



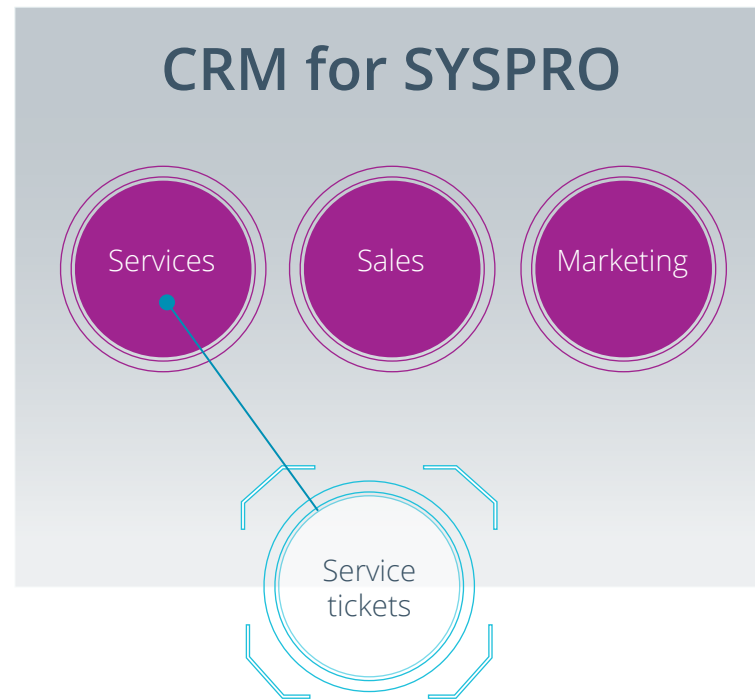
Managing various types of warranty contracts



Providing in-house or remote complaint handling, repair, and preventative maintenance services

The core service module within CRM for SYSPRO is **service tickets** – a dedicated area to track all aspects of a customer issue; from the Account and Contact to the specific invoiced item to the fine details about the problem.

- A set of 3 dependent lookup fields (Problem Class, Type, and Subtype) offer a framework to easily report on and segment issues as they are logged.
- Unlimited custom fields allow clients to build out a database that gives them all of the KPIs and metrics needed to run a proactive and engaging service department.
- Automated escalations and assignments based on issue type, geography, or technician expertise are included standard and can be built into the automated, rules-based process flows to ensure nothing falls through the cracks.



Coupled with the terms of a warranty contract, these features help guarantee service level agreements (SLAs) are met and time to respond or resolve (TTR) adhere to the agreed upon levels. Likewise, the terms also determine whether service parts, labor, or expenses are billed directly to ERP upon completion and all service costs are accurately maintained. Your customer knows exactly what to expect when a problem arises.

The details about completed tickets are incredibly valuable in building a central repository of issues and their resolutions. CRM for SYSPRO gives users instant access to similar tickets and also allows direct access to the categorized knowledge base from anywhere in the application. This provides a tool that not only keeps your technicians up to date, but also serves as an onboarding utility and a great resource for customer self-service.

Get a 360° View of Every Customer

Win more repeat business by strengthening relationships across the entire value chain.

CRM for Manufacturing and Distribution is built for manufacturers who rely on loyal relationships up and down the supply chain, efficiency, and quality to be competitive. No other application pulls together data from every customer interaction and every source so you can build a customer-centric organization.

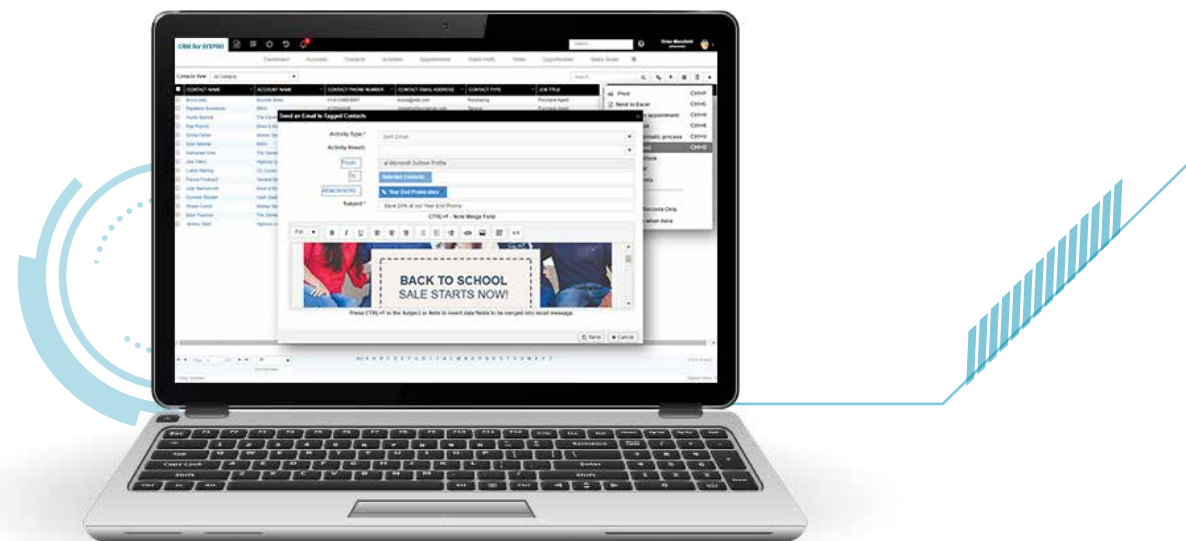


Make it easier to manage every customer touchpoint from a single location.

- ✓ **Deliver** quick, accurate, personalized service across all touchpoints, devices, and employees.
- ✓ **Analyze** customer and prospect behavior to shed light on hidden opportunities and risks.
- ✓ **Reduce** the effort and time it takes to provide accurate forecast data and perform product recalls.
- ✓ **Automate** and standardize sales processes so qualified leads can move through the funnel faster.
- ✓ **Empower** sales teams and field technicians to open quotes, update contacts and histories, and access critical data while away from the office.
- ✓ **Trust** CRM for Manufacturing and Distribution to provide solutions built specifically to solve manufacturing pain points and leverage industry trends.

Support Higher Levels of Service Quality

- Proactively support B2B and B2C customers with complaints, returns, and repairs
- Reduce the cost of managing warranties
- Increase after-sales service revenue
- Facilitate up-sell and cross-sell opportunities
- Quickly and efficiently perform product recalls
- Efficiently determine root causes of complaints, returns, and product failures
- Maintain a complete history of service interactions with each account for better continuity of service
- Build a repository of FAQ's and searchable issue resolutions to get common questions answered quickly
- Perform extensive searches for problem resolution and similar tickets



Service Features:

- Automated escalations & routing
- Intuitive search
- Service ticket tracking
- Remote service billing
- Knowledge base
- Track cost per service
- Web-based service forms
- Track subcomponent replacements
- Customer self-service
- Drill-down capabilities
- Field change triggers
- Email notifications
- Milestone tracking
- Serialized product ownership history



Sell Effectively with Data-Driven Insight

- Turn salespeople into true account managers
- Visualize sales pipelines and forecasts
- Quickly view the complete history of an account
- Segment and classify key accounts
- Know the key players in every deal
- Centralize your contact database
- Track key sales milestones
- Analyze competitors, buying issues, and project trends
- Work when and where you want, on any device
- Email, schedule appointments, sync contacts, create tasks, interact on social media directly within CRM
- Customize your dashboard with KPIs tied to your quotas

Sales Features:



Create and Manage Targeted Marketing Campaigns

- Lead and campaign management from one central location
- Track the effectiveness of trade shows, targeted emails, print advertising, etc.
- Communicate and collaborate better as a team
- Illustrate real-time profitability analysis
- Execute targeted email blasts and direct mailings

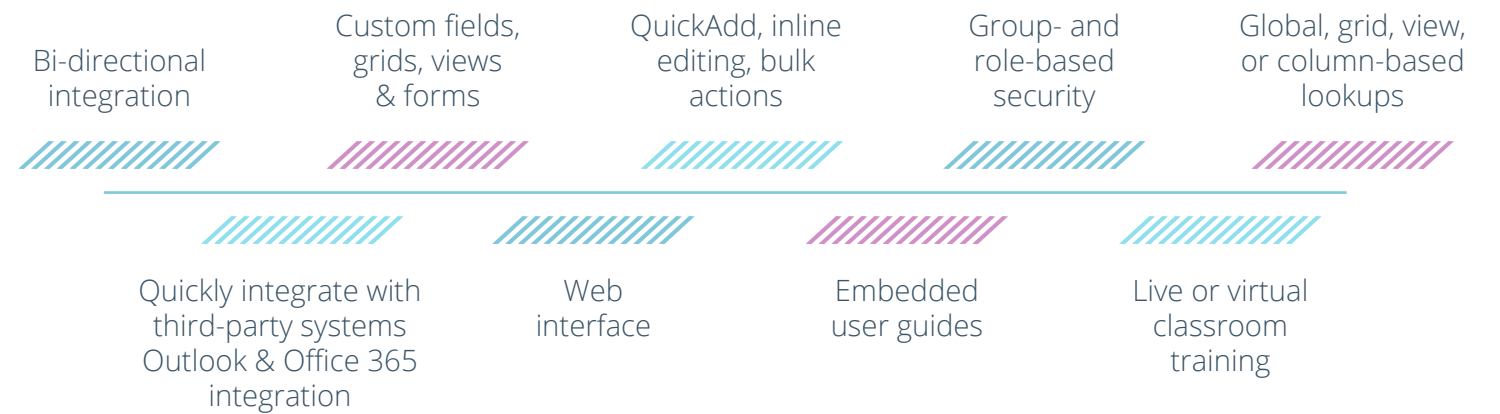
Marketing Features:

- Web interface for consistent access across all devices
- Built-in support for LinkedIn, Facebook, YouTube
- Drag-and-drop dashboards and reports
- Intuitive search capabilities
- Quickly import, clean, and merge data with import wizard
- Bulk email
- Track estimated budgets and actual expenses to generate ROI and cost reporting
- Integrates with your marketing automation solution and third-party tools



Focus on Generating Business, Not Accessing Data

Easy-to-use interface and robust functionality so sales and operations teams can work together to enhance customer relationships.



The benefits of CRM for SYSPRO for Manufacturing and Distribution



Boost Productivity: Automate repetitive tasks such as emailing, scheduling appointments, creating alerts, and syncing records. Streamline and standardize quoting, invoicing, complaint resolution, and service ticketing.



Power Strategy with One Source of Truth: Combine real-time data from CRM, SYSPRO ERP, and other data sources for a complete view of each relationship. Build custom dashboards, charts, graphs, and reports; drill down into this data for deeper analysis.



Accurate Demand Forecasting: Visualize trends in order histories, profitability, product releases, and seasonality fluctuations to build correct product mixes, lower inventory levels, optimize promotions, and hit revenue targets.



Data Privacy Compliance: Consolidate private data into one single location so you can easily track consent and opt in or out preferences.



Strengthen Customer & Supplier Relationships: Use detailed interaction histories to provide a fast, accurate, and seamless experience across all devices and touchpoints.



Maximize Cross-Selling and Upselling: Analyze historic sales and service data across your territories, industries, or product lines to proactively respond and engage.



Enable Digital Transformation: Support expanded service, B2C retail, mobilization, data integration, IoT, automation, new market development, and more.



Align Marketing with Sales: Improve conversion rates and accelerate your sales cycle by tracking engagement levels and analyzing win-loss opportunities.



Simplify Infrastructure: Deploy in the cloud or across-the-globe, multiple device access, or on-premise for higher levels of security.



About SYSPRO

Established in 1978, SYSPRO is an industry-built Enterprise Resource Planning (ERP) solution designed to simplify business complexity for manufacturers and distributors worldwide. SYSPRO provides an end-to-end business solution for optimized cost control, streamlined business processes, improved productivity, and real-time data analysis for comprehensive reporting and decision-making. SYSPRO is highly scalable and can be deployed either in the cloud, on-premise, or accessed via any mobile device.

What sets SYSPRO apart is an unwavering, sustained focus on the manufacturing and distribution sectors. Combined with a practical approach to technology and a passionate commitment to simplifying business processes, SYSPRO dedicates itself to the success of its partners and customers alike.

SYSPRO dedicates its resources to the advancement and improvement of the complex and changing needs of its customers. Recognized as a leader in customer service, SYSPRO has one of the highest customer retention rates in the industry.

SYSPRO's intuitive product features, business intelligence capabilities, and easy deployment methodology are unmatched in the marketplace. The depth of software functionality and targeted industry knowledge makes SYSPRO an excellent fit for a number of select manufacturing and distribution industries, including food and beverage, machinery and equipment, electronics, fabricated metals, automotive, and many more.

SYSPRO has more than 15,000 licensed companies in over 60 countries.

For more information, visit www.syspro.com.





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