

Giving you the ability to find all relevant business relationship information quickly

AbilitySuite®

Complete Relationship Management



Highlights

- ◆ **See all communications with an organization**
- ◆ **Find relevant documents quickly and easily**
- ◆ **Manage relationships more effectively**
- ◆ **Prominent alerts to display critical details**
- ◆ **Record communications and create follow-up's**
- ◆ **Integrated sales pipeline management**
- ◆ **Simple to install and use**



CRM?

Let's face it—CRM or Customer Relationship Management solutions have been around for some time. These apparent “solutions” are often very scalable and sophisticated, and more often than not require a substantial investment by those companies implementing them.

It can cost ten times as much to bring in a new customer than it does to retain one. If information about the customer is made available to the person interacting with the customer, this can go a long way not only to better service their current needs, but also in creating very good relationships for future business.



Strategy

Unfortunately, the advent of the early CRM systems saw the creation of yet another “Information Island”. Information that is vital to the relationship process with customers and for that matter, suppliers, was locked away in one place, often with little or no integration to other systems.

Letters and faxes were either manually filed or stored on the network somewhere. Phone conversations were typically recorded in the CRM system but email communications, which are increasingly critical to business were stored in the dedicated email system across many individual mail files.

This begs the following question: Shouldn't you be able to draw on the intellectual property contained within all the business-related communications belonging to your company?

The term “CRM” should reflect this requirement of seeing all relevant information relating to a person or organization. After all, this is vital to effectively manage business

relationships, not only with customers but will all contacts.

Complete Relationship Management

AbilitySuite® enables you to easily locate and view all relevant communications and documents relating to a person/organization.

These communications include documents, phone conversations, fax messages and also meetings. Also all relevant emails received and sent across your company as it relates to a person or their organization. Your company's valuable intellectual property is now safe.

Imagine being able to retrieve all relevant documents relating to a specific client, project, case or claim.

Not only can historical records been seen across the company relating to a person or organization, but also new information can simply be added with a click of a mouse. Now you can have a true CRM solution, one that is focused on complete relationship management.

Sales Pipeline

Is your company sales-focused and needing a way to manage the registration of prospective new business? **AbilitySuite®** provides that capability as an extension of CRM. New opportunities can be recorded against a customer and tracked throughout the sales process.

The Bottom Line

Manage customer relationships more effectively.



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Produced in New Zealand
10/03

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Printed in New Zealand.

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Create Save & Close Save Close Write Email Print Help									
Created on 26/06/2003 by Gordon Inkson					Modified on 16/10/2003 by Vaughan Nankivell				
Alerts Add View Delete 16/10/2003 New account - give TLC (Vaughan Nankivell)					Show Me Show All Documents for this person Show All Documents for this Person (Last 30 days) Show All Communications with this Person Show All Communications with this Person (Last 30 days)				
Person Details					Organization Details				
Salutation	Mr				Organization Name *	ACME Limited			
First Name	John				Account Number	987654			
Last Name *	Johnson								
Title	CIO								
	Ctry	Area	No.	Ext		Ctry	Area	No.	Ext
Phone/DDI	64	9	123-4567		Phone	64	9	123-4567	
Mobile				N/A	Fax	64	9	123-4568	
Fax	64	9	123-4568		Free Phone				
Pager									
Email	acme@convergence.co.nz				General Email	acme@convergence.co.nz			
Qualifier	Primary Commercial Contact				Website	www.acmeenterprises.co.nz			
Internal Contact	Gordon Inkson				Internal Contact	Vaughan Nankivell			

AbilitySuite® CRM Person Screen