About *SalesFirst*

SalesFirst is the sales force and marketing automation component of the *CustomerFirst CRM Suite*. *SalesFirst* provides functionality that manages the marketing and sales process within your organization. It also allows you to track information about your prospects and gives a complete 360-degree view of each potential and existing client.

SalesFirst complements *CustomerFirst*, a product that focuses on the support, development, and professional service areas within your organization. All of the data related to both products is stored in the *CustomerFirst* database. The *CustomerFirst CRM Suite* is fully compatible with Microsoft SQL, Oracle, and IBM DB2 database platforms.

SalesFirst Can:

- Help facilitate your marketing efforts at a contact, group or campaign level.
- Track progress through your sales cycle and provide forecast information.
- Help ensure that prospects are contacted at the appropriate time.
- Alert sales persons to critical timeframes during the sales process.
- Track lead sources to allow you to analyze the effectiveness of your marketing campaigns.
- Maintain information about your competitors and identify competitors to whom you have lost business.
- Fulfill marketing literature requests and track what has been sent to a prospect as well as when it was sent.
- Provide a central repository for prospect information.
- Provide a complete 360 degree view of each prospect and customer.

SalesFirst *Key Features*

- Contact Management & Ticklers
    - Record activities against a Sales Opportunity or directly against a Contact.
    - Set Tickler Date for next follow-up.
    - View history of all contacts/activities for a specific customer/contact or for a Sales Opportunity. At the customer/contact level can view activities just for the contact, for all Sales Opportunities, for support issues (Incidents) or any combination.

1

- Marketing Campaigns and Lead Sources
  - User-defined Lead Sources can be defined within a multiple hierarchical structure.
  - Create Marketing Campaigns and Phases (steps in the campaign).
  - Relate a Lead Source to a Campaign. Track costs, responses, ROI, etc.
  - Email broadcast capability (produce newsletters or "individualized" email letters.
  - Monitor the success of tradeshows, advertising, or web seminars.
  - Report on the number of prospects and/or Sales Opportunities that result from each Lead Source.

- Sales Opportunities
  - User-defined Sales Stages to record your progress through the sales cycle.
  - Maintains all contacts and history for the opportunity.
  - E-mail to the contact directly from the opportunity.
  - Record the salesperson's projections.

- Tracking of Competition
  - Immediate retrieval of competitor's products and strategy and store information as attachments about your competitors.
  - If a sale is lost, track the competitive product the prospect purchased and why.
  - Query to identify competitors to whom you are losing sales.

- Literature Fulfillment
  - Use the "Forms" feature to define standard mailing letters.
  - On the Sales Opportunity, the salesperson can record what literature needs to be sent and can select the letter to accompany it.
  - Administrator can use the Fulfillment panel to print all letters by clicking on one button.
  - Can export the name and address information to use in a word processing Mail Merge to produce mailing labels. Records the date the literature is sent on the Sales Opportunity.

- Forecasting
  - Reports of forecasted revenue based upon the salesperson's percentages, the manager's percentages, and the standard percentages associated with the Sales Stage of the opportunity.

- Tasks can be created to define and assign work to individuals.

- Salespeople can view the support incidents for a customer or prospect.

- Laptop Synchronization for remote salespeople.

- Interface to MS Outlook Calendar to add tickers, alerts, and tasks to your calendar.