



Contact & Customer Management Tools

What is Contact & Customer Management?

Contact and customer management is the management of all tasks and information related to developing and maintaining relationships with the people, groups and companies with whom you do business.

It involves a variety of activities such as:

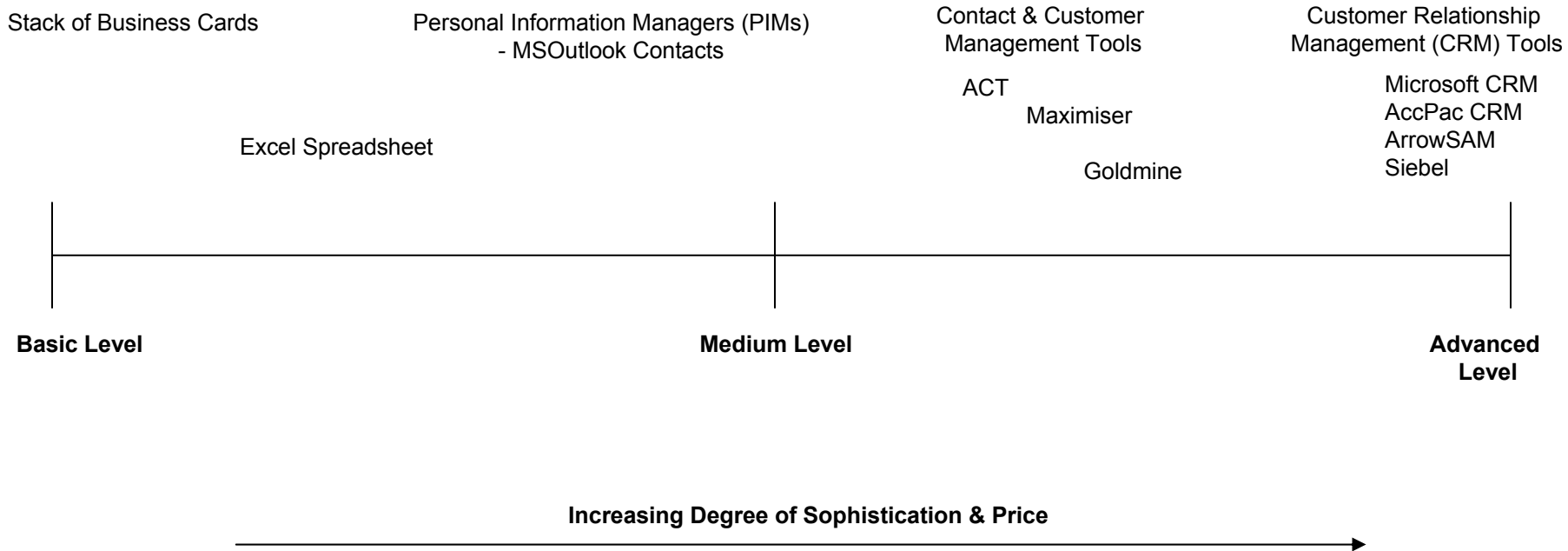
- Manage all the details related to your contacts, such as address, phone numbers, email, Web sites, notes, personal attributes, correspondence, documents, to-do items and activities.
- Communicate and effectively follow-up with your contacts by telephone, mail and email.
- Send personalised correspondence to your contacts.
- Maintain accurate records of all your interactions with contacts and schedule appointments and to-do items.
- Forecast and track sales opportunities to improve results.
- Generate reports for reviewing activities.

Typical business benefits include:

- Central repository of customer & contact details for quick & easy access.
- Complete history of customer/contact interaction (incl. notes and attachments).
- Improved tools for proactive communications & follow-ups with customers – building relationships.
- Improved tools for tracking & reporting on sales opportunities.



Contact & Customer Management Tools





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Type of Tool

Level of Sophistication & Capabilities

Personal Information Managers (PIMs)
ie. MSOutlook Contacts

- Basic contact details, such as name, address, phone numbers, email, Web sites, notes & attachments, user definable fields, tracking of historical activities, etc.
- Mail merge with MSWord letters
- Task reminders

Contact & Customer Management Tools
ie. ACT, Maximiser, Goldmine

- Corporate/Contact relationships
- Sales opportunity management
- Marketing campaign management
- Analysis & reporting
- Integration to MS Outlook & portable handheld devices
- No. of users <250

Customer Relationship Management (CRM) Tools
ie. Microsoft CRM, AccPac CRM, ArrowSAM, Siebel

- Service & Support (Maintenance) management
- Web based portals for accessing information
- Workflow tools
- Larger number of users



Contact & Customer Management Tools

What Do They Cost?

	Basic Product	Corporate Edition
ACT	\$300 per user	\$400 per user (incl. SQL CAL)
Maximiser	\$250 per user	\$800 per user plus SQL CALs
Goldmine	\$345 per user	\$845 per user (incl. SQL CAL)
Microsoft CRM	\$1500 server \$650 per user	\$1500 server \$1100 per user