

ProWorks CRM for Sales User Case

Introduction

ProWorks CRM Sales is an add-on software tool that plugs into Microsoft Dynamics CRM 3.0 to provide CRM data analysis, reporting capability and useful sales features to sales professionals in a broad range of industries. Business users are presented with live customer specific information and recommendations that they can act on to improve their performance.

Using ProWorks CRM

Brian is an account associate at Reach Software, an independent vendor of math and financial software tools. He is on the phone with Glen Harvey, a self employed financial planner. Using ProWorks CRM, Brian opens Glen's account and is able to quickly review the recent activities and upcoming dates pertinent to Glen. Brian sees that Glen's support contract is due for renewal in just a few weeks and offers Glen the opportunity to renew over the phone with him. Glen was not aware of the renewal date and is glad for the chance to take care of it right away.

Brian also takes this opportunity to offer Glen products that he is likely to need based on his profile data. Using the ProWorks CRM pitch interface, Brian identifies the products and

services most likely to be needed by Glen and sees which products have been pitched to Glen in the past. Brian discovers that Glen was very responsive to a new product in the previous month and that his buying decision was dependent on price. An alert message within ProWorks CRM reminds Brian that annual support is being bundled with the new product at no cost to the buyer until the end of the quarter. After being presented with the added value of free support, Glen decides to add the new product to his renewal order.

Brian pitches a second product to which Glen shows no interest. After checking with Glen to ensure that he is completely satisfied, Brian says goodbye. Glen is pleased to have done business with a company that understands his needs and has grown to trust. Brian enters Glen's order, anecdotal notes, and the pitch responses into the CRM system using ProWorks CRM to be accessed by other account associates and managers, and used for future analysis.

Want to Learn More?

For partnering opportunities or for a free demonstration of ProWorks CRM Sales please contact us. Tap into the potential of your CRM data.

Key Benefits

View up-sale and cross-sale recommendations based on data analysis

View, sort and filter the account information you need through a single window

Receive automatic alerts when speaking with the customer to better manage the interaction

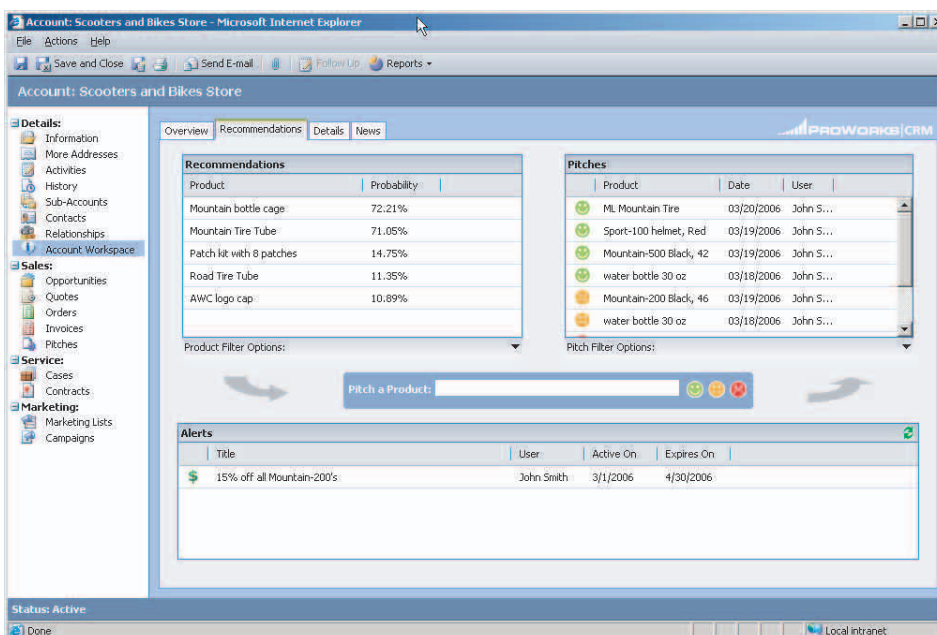
Understand the value of individual customers by viewing recency, frequency and revenue history

Access past communications such as phone calls and emails for a consistent and informed interaction with the customer throughout the team

Track historical sales pitches to the customer through an easy to use pitch interface to avoid pursuing 'dead ends' and concentrate the best prospects

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ProWorks CRM Sales adds analytic features to Microsoft Dynamics CRM 3.0