

# Deltek Maconomy Customer Relationship Management

Streamline sales and marketing with customer relationship management

## Benefits

- Improved analysis of historical and future revenue streams allowing more insightful business planning and prioritisation of client acquisition activities
- Accurate real-time revenue forecast
- Improved accuracy of quotations and a kick-through to project profitability through better and more consistent estimating process
- True understanding of the right staffing levels to meet your numbers
- Excessive or disproportionate sales cost avoided and controlled

## Advantages of tracking communications

The Deltek Maconomy Customer Relationship Management (CRM) Module allows you to maintain all the relevant information you require regarding your customers and prospects. The system can store company and contact information and can be used to track every communication (phone calls, letters, invitations, meetings, campaigns, etc.) that occurs between members of your organisation and your customers and prospects.

This is beneficial for a number of reasons. When a customer or prospect has contact with different members of your organisation, it is important that everyone is aware of what other activities are being undertaken. When an employee leaves your company, their contacts and the history of their activities with customers and prospects is maintained, giving their replacement a full history of all communication.

## Single gateway to all information

The CRM Module provides a simple gateway to viewing and updating all the relevant information about your customers, prospects and business partners. The basic company contact information is provided on a single screen with “tabs” allowing drill down into contact details and activities that have occurred. Current and past sales opportunities from both your customers and prospects can be kept and for existing customers you are able to see the performance and status of jobs/projects and review invoices and outstanding payments.

## Web-based, proactive interface

The CRM Module uses a web-based interface providing a proactive and intuitive way of working. The contact diary can prompt the employees with the tasks that they should perform. For example, rather than relying on account managers remembering to chase outstanding debts or follow-up on a query, they are prompted using the diary feature.

Deltek  
Maconomy  
CRM helps  
you improve  
profitability  
and get only  
the right  
customers  
on board.

There is no need to understand the modular structure of Maconomy, no need for advanced user training and no need to open multiple windows. Using the hyperlinks to drill down, it is quick and easy to create a new event, add a contact person, send an e-mail, update a sales opportunity or open a proposal/quote or any other documents. Follow-up on meetings, phone calls, sales cases, etc. can be created by the account owner or any other person in your organisation.

#### **Managing campaigns**

The CRM Module supports the planning, execution and management of ad-hoc events/campaigns such as seminars, product promotions and the issuing of regular publications/newsletters. Using the system, you can select a target group, define the activities around the campaign, assign people responsible for these activities and generate the initial contact.

Once an activity has been carried out you manage any follow up required depending on the response you get from the initial contact. When campaigns are completed the CRM Module enables you to measure their effectiveness through reporting on how many leads and opportunities it generated. The activities that take place with a company throughout campaigns are visible to account managers and others in your organisation.

#### **The key to your customers**

The CRM Module will become a key tool for account managers, project managers and others in the organisation who need information on your existing customer base. Having selected the relevant customer, the most important information is shown: Contact details, issued invoices, outstanding debts and the status on open projects.

Further information can be found by drilling down on this high level data or by including historical entries. This ensures that all members of your organisation are aware of what activities are being undertaken with the customer. The access control feature allows you to decide what information users can and cannot view.

#### **The key to your prospects**

The CRM Module is a key source of information for sales & marketing staff and other people who need information on your active prospects. Having selected the relevant prospect, the key contacts, their role in the buying process and the interaction with different people can be viewed in the contact management history. You can track what literature has been sent, which seminar they were invited to, whether or not they attended and any follow-up phone calls or meetings, etc.

#### **Reduce Budget Overruns**

The CRM module can help reduce the risk of budget overruns by allowing your sales force to create detailed budgets as early as the sales phase.

Sales estimates and prices can be based on templates, providing your sales force with a tool for calculating a quote price which is soundly based on experience from similar projects and takes all deliverables into account. And because your quoting estimates and forecasts transfer directly to projects, they can form the basis of baseline budgets, avoiding double data entry and ensuring that deliverables and prices set in the quoting phase are applied throughout the project lifecycle.

Deltek  
Maconomy  
CRM allows  
you to  
manage  
appointments  
and tasks—  
ensuring a  
professional  
handling of  
sales cases.

### **Forecasting the Full Project Portfolio**

To manage the full project portfolio and know the exact revenue and resource requirements generated by the portfolio over the coming months, the CRM module provides the ability to forecast and distribute sales estimates across periods. You can also forecast and distribute the projects which you have not identified yet. Combined with distributed figures from actual projects, this provides a full periodic view on the resource situation and the revenue and cost situation of all project related aspects.

The pipeline report gives you a flexible overview of your pipeline, as you view the total pipeline by phase, by business unit or by any other dimension relevant to your organisation.

From the pipeline report, your sales managers can drill into the detail on each opportunity. This allows you to view all of the activities related to an opportunity, its progress and the estimated close date. For your sales staff, pipeline reporting becomes easier as they can automatically generate sales reports from the system.

They can also use the system to manage appointments and tasks ensuring a professional handling of sales cases. Once a prospect places an order, the prospect can be easily converted to a customer whilst still maintaining the full contact history.

### **Complete information, viewing attachments**

Document Handling in Maconomy allows you to attach documents to your customer and prospects, opportunities and activities. For example, you can scan signed orders and attach them to a customer or a job. In doing so, you provide on-line access to a scanned copy, whilst maintaining the originals centrally.

Scanned copies of answers to requests for proposals (RFP's), quotes, cost calculations, etc. can be attached to keep an easy access to the historic information relating to an opportunity. Similarly, presentations, account reviews, meeting minutes, etc. can be attached to both your customers and prospects

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