

A pencil is positioned diagonally from the top right towards the bottom center. A sheet of paper is partially visible at the top left, with its edge curving downwards. The background is a light, textured surface.

# *white* paper

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Strategic Business Solutions  
with GoldMine® FrontOffice 2000™

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## Table of Contents

1. Introduction	1
2. Lead Processing	3
Marketing	3
Inside Sales	5
3. Selling Cycle	7
Outside Sales	7
Sales Forecasts	8
Team Selling	10
Sales Management	11
4. Customer Acquisition	13
Order Entry and Accounting	13
5. Customer Management	14
Customer Service	14
Technical Support	14
Technical Support Management	17
6. Summary	20
A Customer for Life!	20

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## 1. Introduction

Customer Relationship Management (CRM), in and of itself, is not a solution, it is a means to an end — enhancing the sales process so you can better manage your relationships with your customers. In most companies, this involves multiple departments, such as Sales, Marketing, Customer Service, Technical Support, and even Accounting, to mention a few.

Wherever and whenever there is customer contact, you are affecting that relationship. And that relationship is a key success factor for your business. But it is most beneficial to realize this as a strategy, not just a set of tactical actions. CRM should be an inherent part of your business strategy to promote and simplify a successful and ongoing relationship with your customers. Therefore, CRM should be a core part of your Strategic Business Solutions.

**GoldMine® FrontOffice 2000™** offers a powerful suite of products to help facilitate CRM, thereby increasing your effectiveness and improving your customer satisfaction. FrontOffice 2000 is comprised of two major modules: **GoldMine® Sales and Marketing™** and **GoldMine® Service and Support™**. Sales and Marketing is targeted toward the selling and marketing functions within organizations that are focusing their efforts on pre-sales oriented activities. Service and Support is targeted toward the post-sales activities where a company is providing a help-desk function to support the customers they've acquired.

During the process of selling and supporting your customers, more than just sales representatives and support technicians are involved in working and communicating with the prospect or customer. Typically, a team of so-called “sales representatives” actually sells to the customer. That team could include a tele-marketing representative, a field representative, a systems engineer, a value-added reseller, a distributor, or a variety of other individuals within your organization. The traditional “sales representative” no longer manages nor controls the entire sales process. The sales process itself could have begun from another “sales agent”, namely your web site, where the prospect began their first interaction with your company. Today, an entire team of people and technologies, such as the Internet, can be involved in the selling process, and they all need to communicate and have access to vital client information.

This paper describes the process of finding opportunities and turning them into satisfied customers using FrontOffice 2000 Sales and Marketing and Service and Support amongst a variety of members of the sales team, thereby promoting a successful Strategic Business Solution for your company.

We'll begin this journey by following the day in the life of a prospective lead, whom we will call Bill Church. By analyzing the steps taken to find, qualify, sell and support this prospect, we will see which departments can be involved in each step. We will also see how FrontOffice 2000 can be used as the tool to help manage those steps, share information throughout the organization and successfully provide up-to-date and accurate information for, and about, your customers.

Today, the most successful companies are the ones that provide the best in customer support. To do so, they must have current information about their customers that is available and accessible from any department, organization or individual that has contact with that customer.

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After all, haven't we all been a little frustrated or annoyed when a large credit card company, in which you've been a member in good standing for many years, sends you a letter offering you their product? Doesn't that make you wonder if they actually know, or care, who you are?

Or how about when you call a company about the status of your order or for technical support and you have to give them every detail about yourself before they are able to assist you. Don't they already have all that information from when you originally purchased the product? Not a positive experience! These are all symptoms of companies that do not have an integrated database of customer information. When each department or function within a company uses their own data without sharing common data throughout the organization, you get the proverbial "left hand not knowing what the right hand is doing". In some cases it's even worse, where the left hand doesn't even know there is a right hand.

The solution to these resource-draining, revenue-impacting problems is to have an integrated system where everyone in the company who interacts with a customer has access to that information so that when the client calls, regardless of whom they call, they are recognized and handled as a valued client, not just a stranger. FrontOffice 2000 is the tool to help make that a positive experience for your customers while improving your ROI.

FrontOffice 2000 integrates account management, sales force automation and marketing automation with call center software for external service and support desks to deliver a single, complete view of organizations' customers. FrontOffice 2000's Management Intelligence™ allows small to medium-sized organizations to improve planning and create relevant "best practice" processes and models. FrontOffice 2000 addresses complete customer relationship needs by enabling sales, marketing, service and support teams to share account information and communicate in real time. Both the Sales and Marketing and the Service and Support components can be acquired and run separately to address specific needs or can be combined as one suite to provide a total CRM solution.

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## 2. Lead Processing

Let's begin with the process of finding a customer, which at this point we'll call a "suspect". This process may involve two key functional units including Marketing, who generates the leads, and Tele-Marketing and/or Inside Sales who qualifies the leads.

Marketing accomplishes its job through a variety of campaigns such as advertising, trade shows, events, direct mail, and the like. By targeting the right audience with the right message, they generate interest in the end-user community who in turn respond to the campaign. Once they express interest, they require further qualification.

Lead qualification can be accomplished through an inside sales team who "telemarkets" to these suspects to gather more information about their needs and requirements. Depending on the product or service, this group may even close the sale over the phone. Typically, the more commodity-oriented the product, the more likely the sale can be made over the phone. The more complex or sophisticated the product or sales process, the less likely that just a phone contact will result in an order or a sale and an outside sales team may be required. But that will be discussed in more detail in the next section.

### Marketing

As leads are acquired and processed, it's important that accurate information is gathered and maintained since this is where the whole process begins. Marketing may purchase mailing lists with names of suspects to be contacted. Or, they may obtain leads from an event, such as a trade show. FrontOffice 2000 Sales and Marketing allows easy yet powerful importing of lists regardless of their content or source. Lists can contain a variety of unique fields of information and FrontOffice 2000 Sales and Marketing can easily map them into its own fields while performing duplicate checking to help maintain a clean set of data. Of course, there are a variety of other methods used for entering data into FrontOffice 2000 Sales and Marketing, such as automatically inputting them as new records directly from your Web site. But let's continue with our lead processing.

With a list of targeted suspects in hand, Marketing is ready to reach out and contact them with their message or offering. FrontOffice 2000 Sales and Marketing supports this function, as well as marketing campaigns in general, through a variety of capabilities. First, filters can be established to pull out only the qualified candidates for the campaign, such as anyone with a title of VP and whose business has at least \$25M in revenue and is located in the New England territory.

Next, a mail merge with Microsoft® Word allows the filtered list of names to receive a customized letter. By automatically embedding the key information into the letter, Marketing can construct a very customized, targeted and specific mailing to each or any individual in the database. The same function can occur with e-mail, since FrontOffice 2000 Sales and Marketing has a powerful and feature-rich E-mail Center. So, customized direct mail campaigns can be mailed, e-mailed or faxed to the proper audience.

Often times it is advantageous to provide a continuous and timely flow of information to your suspects. This can include a variety of activities and material such as a weekly e-mail about your

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products, or monthly mailings of your company newsletter, or bi-weekly faxes with special offers, or even monthly phone calls from the Inside Sales team just to see how things are going. This is commonly referred to as “drip marketing”. With FrontOffice 2000 Sales and Marketing’s powerful Automated Processes™, an entire series of marketing campaigns can be automated.

Automated Processes can handle the administrative and repetitive steps necessary to stay in touch with your suspects, prospects and customers. Multiple and automatic “touches”, such as e-mails, faxes, phone calls, letters, and more, can be generated and sent at predefined intervals and without human intervention. Nothing gets forgotten and nothing takes up valuable resources and time.

Regardless of your campaign or follow up activities, one key piece of information to capture is the lead “Source” — where the lead came from. Whether importing leads from a mailing list or trade show attendees, or entering them one at a time from incoming phone calls that resulted from your recent direct mail campaign, it is imperative to capture the lead source. FrontOffice 2000 Sales and Marketing not only maintains this data, but it provides powerful reporting and leads analysis in order to best utilize this information.

For instance, FrontOffice 2000 Sales and Marketing can quickly display an analysis of how many leads came from each “source” (be it a trade show, marketing campaign, mailing list, web site, or whatever), how many closed (Won!), what the close ratio was and how much revenue was obtained versus expected (Figure 1). This built-in feature provides immediate and valuable marketing information with just the click of a button. For further analysis and details, the FrontOffice 2000 Sales and Marketing built-in Report Writer allows for tailoring one of its included reports or developing your own unique report to show even more information and analysis.

These facilities within FrontOffice 2000 Sales and Marketing enable Marketing to generate, track and analyze leads, which helps you to justify and account for your valuable marketing budget, as well as measure the effectiveness of your programs.

**Figure 1.**  
 With Leads Analysis, Marketing campaigns can be tracked and their results measured against sales.

Source	Leads	Closed	Ratio	Sales	Potential
***Not Captured***	63	6	0.1	13,970	0
Acquaintance Recomm	12	1	0.1	1,495	0
Acquaintance Recomm	33	10	0.3	26,410	0
AD Unknown	5	1	0.2	1,995	0
Ad week/LA times	3	1	0.3	1,050	7,000
AD-(R)wBBM 05/99	1	0	0.0	0	0
AD-(R)wCBS 04/99	1	0	0.0	0	0
AD-SELLING 96	1	1	1.0	300	0
AD-SMSN-wEB	2	1	0.5	1,495	0
Amy Zimmerman	10	5	0.5	15,280	0
Career Group	1	0	0.0	0	0
CD-BMDP737	1	0	0.0	0	0
CD-NC 04/97/Net	1	0	0.0	0	0
Client Request	1	1	1.0	23,695	0
Corporate Recomm	1	0	0.0	0	0
<b>Jan 1, 99 - Sep 21, 99</b>	<b>328</b>	<b>61</b>	<b>18.6</b>	<b>206,387</b>	<b>577,000</b>

### Inside Sales

Leads now must be qualified. If your Inside Sales team makes outbound calls to your leads, or receives incoming calls from interested suspects, then FrontOffice 2000 Sales and Marketing can help make them more efficient and effective.

With Scripts, FrontOffice 2000 Sales and Marketing can step the telemarketer through the proper dialogue with the suspect by presenting the appropriate questions based on the suspect's response to the previous questions. The entire dialogue can be stored in the Contact's History and an analysis of the script can be generated for management's review of the effectiveness of each question.

Since FrontOffice 2000 Sales and Marketing supports hundreds of user-defined fields, which can contain a variety of information that can be organized into forms or views, your Inside Sales team can now view and manage the diverse information gathered in the qualification process (Figure 2). This information can also be used as a trigger to update other fields. Say, for instance, you ask for information about the suspect's interest in your product and they indicate that they want a meeting right away. By simply checking the option in a specific field called, for example, "Interest", several other actions can be triggered simultaneously: a) another field can automatically be updated to include the name of the Account Manager for that territory; b) a "Priority" field can be changed to specify "High"; and, c) a follow-up call can automatically be scheduled for the Account Manager.

**Figure 2.**

In addition to the typical information captured for a company or contact (such as name, address, phone, etc.), user-defined fields can be created and organized into forms, or views, to collect additional information such as the account type, size of company, interests, and much more.

The screenshot shows a window titled "Bill Church" with a tabbed interface. The "Summary" tab is active, displaying the following information:

Company: Church Associates		Phone1: (732)555-8000	Ext: 100
Name: Bill Church		Phone2:	Ext:
Dept: Sales	Last: Church	Phone3:	Ext:
Title: VP Sales	Dear: Bill	FAX: (732)555-8001	Ext:
Source: Yellow Pages	Asst:	E-mail: bill_church@churchassoc.com	
		Web Site: www.churchassociates.com	
Address: 123 Main Street			
: Suite 200			
:			
City: Toms River			
State: NJ		Postal Code: 08753	
Country:		Mail Merge:	
Contact Type: Prospect			
Industry: Banking Services			
Interest: GM Ent			
Acct Mngr: R. Lombardo			
Support Plan: Annual			

Navigation tabs: Summary | Fields | Notes | Contacts | Details | Referrals | Pending | History | Links

End User:

Role: Decider	Account Type: Corporate	Key Interest: SFA
Status: 30-90 Days	Account Size: Corp-wide	Competitor: None
Referred: Yes	No. of Users: 100-499	Platform: Win 98
		Priority: High

All this information is not only stored within the suspect's record, but it is available to local and remote users of the system, thereby keeping them apprised of important information about your clients.

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### 3. Selling Cycle

#### Outside Sales

As the inside sales team qualifies your suspect, FrontOffice 2000 Sales and Marketing's powerful synchronization capability will send all relevant information to the outside Sales team. Synchronization is an easy to use and fast method for sharing data and merging updated and new fields of information between remote, as well as mobile, users and the central database. Typically taking just a few minutes to run, the sales representative in the field would "sync" with the main office system to retrieve their updates, and at the same time send their updated and new information to the central system. With the security features included with FrontOffice 2000 Sales and Marketing, only the information that is permitted to be seen by each user will be shared, and nothing else.

With the new suspect information in hand, who in our scenario is Bill Church, the sales representative in the field is ready to make contact. Depending on the company's sales process, the individual sales representative's particular style, or a variety of other factors, this contact could take many forms and involve many steps. To FrontOffice 2000 Sales and Marketing, it really doesn't matter since it is flexible enough to be tailored to the company's needs as well as the individual's requirements.

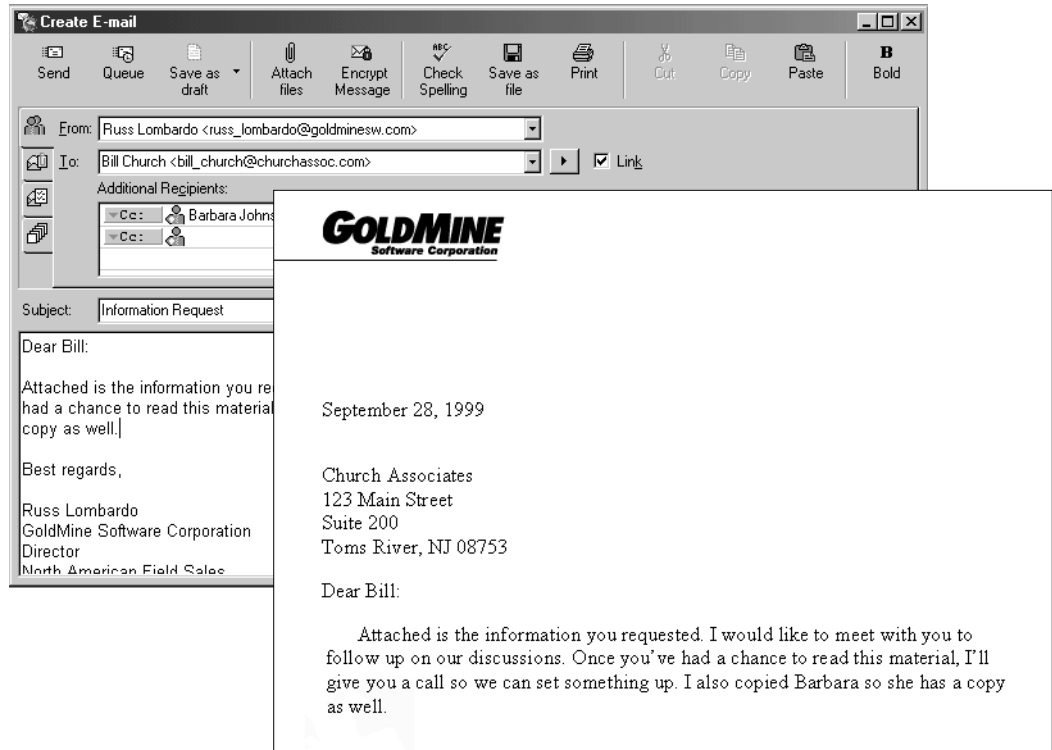
Let's say the first step would be to place a phone call to Bill to gather some additional information and perhaps schedule a meeting. By simply clicking an icon, a call can be scheduled in seconds and will be attached to Bill's record for easy access. It will also be visible and accessible on FrontOffice 2000 Sales and Marketing's Calendar and Activity List, which gives the sales representative a variety of choices to manipulate, view and access their data. This call may be alarmed so a "pop-up" window reminder message will appear.

Once the call is made and your suspect, Bill, is further qualified, a meeting needs to be scheduled. The outside sales representative can easily complete the call and create a follow-up activity by scheduling an appointment, which is also linked to Bill's record, as well as the sales representative's Calendar and Activity List.

While the representative is speaking with Bill, he is gathering additional valuable information about Bill's buying criteria, including issues, problems, time frames, budgets and decision-makers. Since FrontOffice 2000 Sales and Marketing supports multiple contacts, the sales representative can easily add new contacts within Bill Church's company record, each with their own phone number, address, e-mail and other unique information. By doing this, the sales representative can maintain an accurate database for that account regarding each person in the decision making process, such as economic buyer, decision maker, technical evaluator, and more.

With FrontOffice 2000 Sales and Marketing's built-in E-mail Center, your representative can easily send Bill an e-mail along with attachments without ever having to load or run another e-mail system. Using a pre-defined e-mail template, the representative can generate the e-mail, or create a new unique one, and have Bill's information embedded directly into the e-mail message. This capability is especially useful when creating mass e-mails to a selection of qualified prospects or any other group of recipients. FrontOffice 2000 Sales and Marketing's built-in links to MS Word allow virtually the same functionality for custom letter generation, letter templates and broadcast mail campaigns (Figure 3).

**Figure 3.**  
 Customized letters and emails  
 can be easily generated for one  
 or many recipients.



As with many sales cycles, this process of contacting, and interacting with, a suspect multiple times in a variety of ways is typical. FrontOffice 2000 Sales and Marketing is a simple to use and powerful tool to allow the sales representative to easily handle these important, yet often time consuming, activities. That power even extends to systems and devices external to FrontOffice 2000 Sales and Marketing itself.

With FrontOffice 2000 Sales and Marketing's link to Palm Pilots, Microsoft Outlook, and Windows CE devices, sales representatives can now share information with other systems and devices and carry this important data with them, literally in their pocket, for instant access without having to carry or boot up their laptop computers. All these features help a sales representative operate more efficiently and effectively while working with their clients and improving their relationships.

#### Sales Forecasts

In this process of continually trying to move the suspect to a commitment, the suspect eventually becomes a "Prospect". This is a function of how well qualified they are based on interest, timing, product fit to their requirements, budget, and other variables. At some point during this process, it might be important to identify potential revenue and develop a forecast for the sale. A forecast is simply a recorded event that has a description of what the prospect might buy, when they'll buy, the probability of getting the order and the potential revenue your company will receive as a result of this purchase.

With FrontOffice 2000 Sales and Marketing's forecasting capability, the sales representative can create a forecasted sale (Figure 4), which will be linked to the prospect's record and tracked as a scheduled event on their calendar. Multiple forecasts can be created for the same prospect or for other prospects.

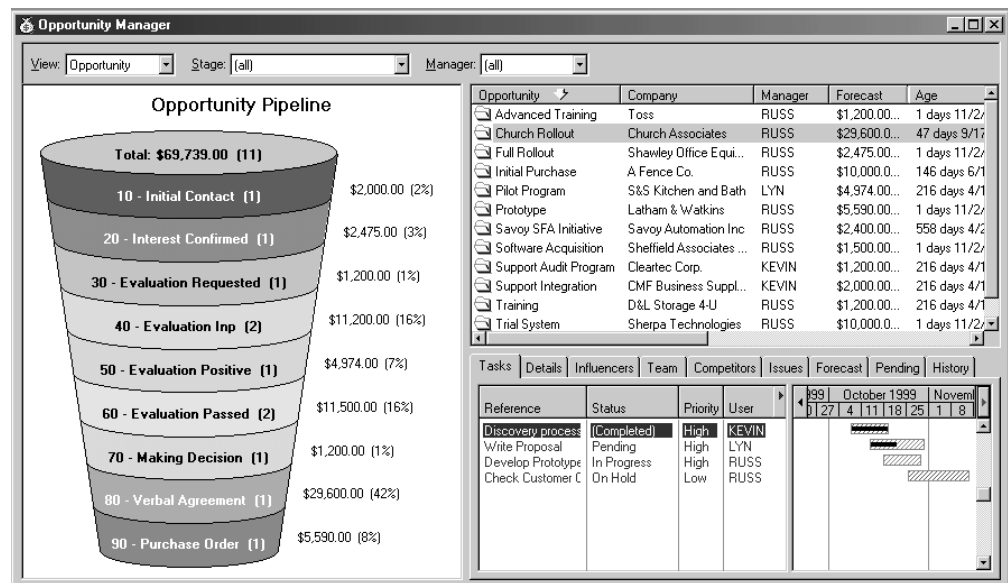
**Figure 4.**  
Forecasted sales are linked to contact/company.

The screenshot shows a dialog box titled "Schedule a Forecasted Sale". At the top, there is a small icon of a dollar sign and a brief description: "GoldMine allows you to strategically manage your revenue 'pipeline' with the ability to forecast sales instead of scheduling another call to remind yourself of a potential order." Below this, there are two dropdown menus: "Contact" (set to "Church Associates") and "Opportunity / Project" (set to "Software Acquisition"). A "New" button is next to the second dropdown. The "Product" field is set to "Software Acquisition". To its right are "Code" (EUO) and "User" (RUSS) dropdowns. Below these are several input fields: "Units" (50), "Price" (100.00), "Amount" (5,000), "Probability" (60%), and "Sale Date" (9/9/99). A "Notes" text area contains the text "Purchase is the beginning of a multi-phased rollout." To the right of the notes is an "Options" section with checkboxes for "Link" (checked), "RSYP" (unchecked), and "Alarm" (unchecked). At the bottom of the dialog are "OK" and "Cancel" buttons.

If you need to track the entire opportunity, FrontOffice 2000 Sales and Marketing's built-in Opportunity Manager allows the sales representative to maintain this information as well (Figure 5). The Opportunity Manager can contain one or many forecasted sales and will roll up the total opportunity, or revenue, amount into one figure. It also tracks valuable information about the opportunity such as competitors, influencers, team members, and other important details helpful in closing the sale.

If you use a sales methodology, you can define specific "stages" of the sales cycle depending on what activities and events have occurred. By doing so, you can generate reports on how many leads and how much revenue is expected within each stage, or even within each probability of sale. FrontOffice 2000 Sales and Marketing's forecasting capabilities and Opportunity Manager allow a sales representative to manage their pipeline, prioritize their opportunities and plan for success. With graphical displays, the sales representatives and their managers can get a quick view of their pipeline without wasting valuable time analyzing, consolidating and presenting their data.

**Figure 5.**  
The Opportunity Manager tracks any and all information about forecasted sales and the information relevant to the overall sales opportunity, including a Pipeline funnel for a quick analysis.



FrontOffice 2000 Sales and Marketing can also handle proposal generation and quotes for the prospect by interfacing with best-of-breed products that have seamless links, such as Sant's Proposal Master and Electronic Business Universe's QwikQuote. These documents can be linked to the prospect's record and easily accessed with the click of the mouse. Using FrontOffice 2000 Sales and Marketing's link to Microsoft Word, correspondence can be easily generated and mailed or faxed to the prospect. The same can be accomplished by using the FrontOffice 2000 Sales and Marketing built-in E-mail Center.

#### Team Selling

Since many companies sell as a team, multiple individuals may be contacting the prospect. FrontOffice 2000 Sales and Marketing tracks every interaction made including phone calls, meetings, correspondence, incoming and outgoing e-mail, and much more. Whenever the sales representative sync's back to the central system, all their activities and information are sent to the central database so the rest of the team members can see what has transpired with that prospect. Likewise, the outside sales representative receives changes made to those records and can see who has been in contact with his prospect. Since FrontOffice 2000 Sales and Marketing's sync process sends field-level changes only, the resulting transfer files are small and the sync time is therefore minimized.

FrontOffice 2000 reinforces team selling since all members are in complete unison with what has been going on with every prospect, or customer. Imagine how much time and embarrassment would be saved if, before a call is made, the sales representative knew that a prospect was contacted by the inside sales team a day earlier. It is also a time saver to see the notes entered about the previous call from the inside team, prior to making the next call or visit.

Sales Management

So far, we've taken a lead generated by Marketing, Bill Church, qualified him by the inside sales team, and sent all this information to the field sales representative via the synchronization process. The sales representative has made numerous contacts with Bill including phone calls, visits, letters and e-mail. The sales representative also created a forecast for this opportunity and synchronized everything back to his inside team. Now, somewhere along the line, the sales representative's manager is going to want to know what the representative believes he will be closing this month, or quarter or year. She may also want to see where and how the representatives are spending their time and therefore would like to generate activity reports.

Because this information has been sync'd to the central database, any amount of it can be sent to other individuals, depending on their authorization rights and their particular needs. In this case, the Sales Manager needs to know what her team of field sales representatives has forecasted for the month, by representative. It would not be beneficial for each sales representative to enter their forecasts on spreadsheets, certainly not when all that data is already contained in FrontOffice 2000 Sales and Marketing. Also, writing weekly status reports with all your activities is time consuming, as well, and takes the sales representative away from their primary task of selling.

Therefore, FrontOffice 2000 Sales and Marketing's built-in Report Writer allows for easy report generation to present management with forecast information as well as activity lists, call reports, and virtually any amount of information that has been recorded within FrontOffice 2000 Sales and Marketing (Figure 6). This alleviates the necessity for sales representatives to spend valuable selling time reentering their forecasts into a spreadsheet or writing down their activities for the week.

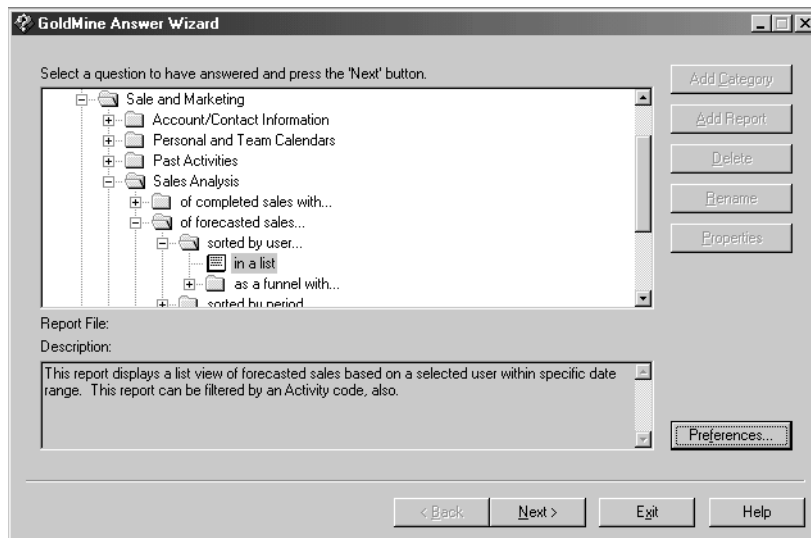
Figure 6. The built-in Report Writer allows for comprehensive reporting within FrontOffice 2000.

Forecasted Sales Funnel by User (Detailed)													01/01/99---->12/31/99	
<b>Sales Person: KEVIN</b>														
Date	Forecasted	%Pot	Potential	ACTV	Phone	Company/Contact				Reference				
09/27/99	\$1,200.00	40	\$490		(215)947-5392	Cleartec Corp.;				Support/Audit Program				
09/29/99	\$2,000.00	20	\$400		(908)753-0900	CMF Business Supplies; DJ Hunsinger				Support/Integration				
% Possibility	10%	20%	30%	40%	50%	60%	70%	80%	90%	99%	AVG%	Total	Potential	Forecasted
# of Pending Sales	0	1	0	1	0	0	0	0	0	0	0	30	2	
Potential Amount	\$0	\$400	\$0	\$490	\$0	\$0	\$0	\$0	\$0	\$0			\$990	\$2,200
<b>Sales Person: LYN</b>														
Date	Forecasted	%Pot	Potential	ACTV	Phone	Company/Contact				Reference				
09/16/99	\$2,475.00	50	\$1,237		(610)594-0209	S&S Kitchen and Bath;				Software/Acquisition				
% Possibility	10%	20%	30%	40%	50%	60%	70%	80%	90%	99%	AVG%	Total	Potential	Forecasted
# of Pending Sales	0	0	0	0	1	0	0	0	0	0	0	50	1	
Potential Amount	\$0	\$0	\$0	\$0	\$1,237	\$0	\$0	\$0	\$0	\$0			\$1,237	\$2,475
<b>Sales Person: RUSS</b>														
Date	Forecasted	%Pot	Potential	ACTV	Phone	Company/Contact				Reference				
09/09/99	\$5,000.00	60	\$3,000		(732)555-9000	Church Associates; Bill Church				Software/Acquisition				
09/26/99	\$38,000.00	70	\$19,200		(732)555-9000	Church Associates; Bill Church				100+ Site GoldSync				
09/29/99	\$1,000.00	85	\$950		(908)444-1234	Dean Writer; Randall Noel				05 User GoldMine + Single User GoldMine				
09/29/99	\$2,400.00	70	\$1,680		(308)366-1144	Savoy Automation Inc; Bill Frank				Training				
09/29/99	\$1,085.00	30	\$325		(218)294-4994	Heather Hill; Scott Leonidsky				02 User GoldMine + 2 single users				
09/29/99	\$3,600.00	60	\$2,160		(732)555-9000	Church Associates; Bill Church				Training				
09/29/99	\$1,200.00	40	\$480		(610)495-7005	D&L Storage 4-U;				Training				
09/29/99	\$8,400.00	60	\$5,040		(215)947-5392	Cleartec Corp.;				Integration				
09/29/99	\$5,000.00	40	\$2,000		(215)679-4300	A Fence Co.;				Big Purchase				
09/29/99	\$5,000.00	40	\$2,000		(215)679-4300	A Fence Co.;				Training				
% Possibility	10%	20%	30%	40%	50%	60%	70%	80%	90%	99%	AVG%	Total	Potential	Forecasted
# of Pending Sales	0	0	1	3	0	3	2	0	1	0	55	10		
Potential Amount	\$0	\$0	\$225	\$4,480	\$0	\$10,200	\$19,680	\$0	\$930	\$0			\$35,735	\$59,685

Management now has the ability to understand forecasts, automatically generate pipeline and activity reports, and roll any of that information up to management or peers within the organization.

Another management tool, called the Answer Wizard™, provides managers with commonly used reports based on both sales and support information (Figure 7). The Answer Wizard not only provides immediate answers to the questions managers are asking, but also coaches them to understand the additional questions they should be asking.

**Figure 7.**  
The Answer Wizard provides managers with insightful information about their sales and support environments.



Using the Answer Wizard, sales managers can instantly call up tabular sales forecasts broken down by territory, user group, individual user, or time period. In addition, they can track actual and forecast performance against quota, and track commissions and bonuses in real time.

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## 4. Customer Acquisition

### Order Entry and Accounting

Congratulations! Finally, after all the time and effort expended, you closed the deal. Your suspect, Mr. Bill Church, who turned into a prospect, is now a customer whom you've acquired. It would be nice at this time to actually book the order and invoice the customer. But you don't personally take the order nor collect the revenue. That's where Order Entry and Accounting come into play.

We now have to introduce another department into the equation. Using the old fashion method, the appropriate customer information would make its way to the Accounting department where someone would re-enter all the basic details, such as the customer's name, address, phone, etc., along with the details about their order. All this data entry is not only time consuming and redundant, but it is also subject to errors, which can lead to a multitude of other problems.

But you don't have to worry about this. You have FrontOffice 2000 Sales and Marketing and can use the integration with your accounting system. Since there are several powerful yet seamless links available through third party companies, FrontOffice 2000 Sales and Marketing can share important information with popular accounting systems such as Great Plains Dynamics, Sage MAS90, Solomon, ACCPAC, Peachtree and others. The customer's order can now be processed, fulfilled and shipped without having to re-enter the data. And, since selected customer information can be shared with FrontOffice 2000 Sales and Marketing, the sales representative can see if the order has been placed, the product shipped or even if the customer paid yet.

Why is this important? Well, let's say you are the sales representative and you closed this deal with a customer. Several months later your company comes out with a new version of the product or a new service that your customer may be interested in. You realize you may be able to increase sales by contacting this customer to see if they'd be interested. So they invite you in, have a long meeting, express interest and you write up another order. Great! Right? Wrong!

What you didn't realize is that this customer hasn't paid their bill from their initial order and you just wasted a day, or longer, selling them more products that they probably won't pay for either. Chances are your company will refuse this second order anyway. But why waste time selling to someone whom you shouldn't. If you had known their payment status, then you would have known not to take the time to sell them additional product.

By sharing this important information between FrontOffice 2000 Sales and Marketing and your accounting system and sync'ing this information to remote sales representatives, you would be able to see critical information which would save you time. Using FrontOffice 2000 Sales and Marketing's security features, those fields could be set as "read only" so that no one can update them, except the accounting system or the Accounting department.

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## 5. Customer Management

### Customer Service

Let's look at another department that can benefit from FrontOffice 2000 Sales and Marketing's capability and see how synchronization can help the sales cycle. While your new customer, Bill Church, is awaiting his order, you call him to schedule a meeting to discuss the new service program your company now offers. In the meantime, Bill calls your company's Customer Service department to see if his order has shipped and when it should arrive. The customer service representative looks in their file and notices that you have a meeting scheduled with Bill in two days to discuss your service contract.

After answering Bill's question about his order status, the representative says, "I notice our account representative is coming in to speak with you about our new service contract. Is there anything I can provide you with in the meantime to help you understand our offering?" Bill enthusiastically says "yes" and, using FrontOffice 2000 Sales and Marketing, the representative faxes him a data sheet about your service. He then has a lengthy discussion with Bill about the new program and answers several questions Bill has about its benefits.

You notice later that evening, after you synchronize with the home office, that the Customer Service representative has sent you a notification through FrontOffice 2000 Sales and Marketing that they had an interaction with Bill Church and explained how the conversation went. Now, instead of you spending a lot of time in your meeting explaining the basics about your new service to Bill, he is already well informed and educated and you can now spend more time addressing any of his concerns, answering any final questions he may have and possibly taking his order.

FrontOffice 2000 Sales and Marketing facilitates team selling and cross selling since it easily shares information with multiple groups, departments and individuals throughout your company. In this scenario, the Customer Service department was well informed about Bill Church's order as well as the status with the field sales representative. Because of this, they were able to assist in the selling cycle, even though that wasn't their primary charter or intent.

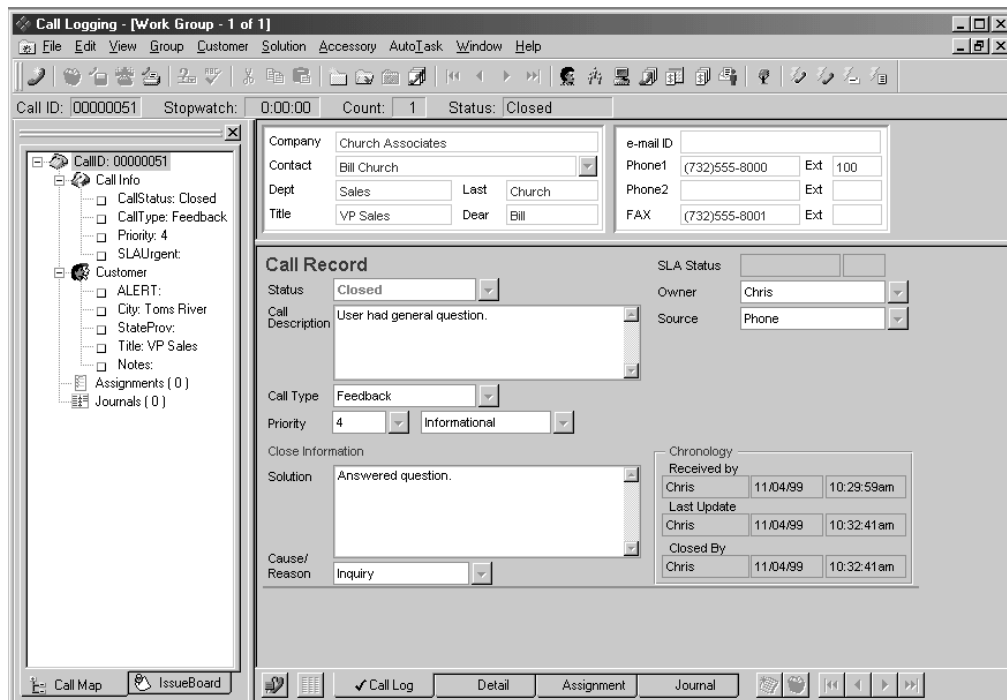
### Technical Support

Now it's time for the ultimate test. Bill has found a problem with your product and he calls Technical Support. This can be your "Achilles Heel". This is where the real test comes as to whether you can truly support your product and stand behind your claims as a customer-focused company. If you don't have the proper tools to log, track and resolve problems, then you can put yourself into a very delicate situation with your customers. FrontOffice 2000 Service and Support is the tool to help you excel in supporting your customers. FrontOffice 2000 Service and Support is a powerful and user-friendly system for Support Desks and customer Call Centers, which automates the time and labor-intensive, error-prone process of logging and tracking calls.

Let's say Bill Church calls you with a problem. And let's say that the Frammstat you sold him is not measuring the correct articulations. Once Bill calls in and a Call Ticket is generated easily by the Call Center technician, the FrontOffice 2000 Service and Support Call Map facility can give

the technician an overview of key information for that Call Ticket (Figure 8). This allows the technician to quickly determine if the call requires immediate attention. Once the technician has identified the problem, he can try to find a solution to the problem, or assign the call to another appropriate specialist, or dispatch a field technician to handle the problem.

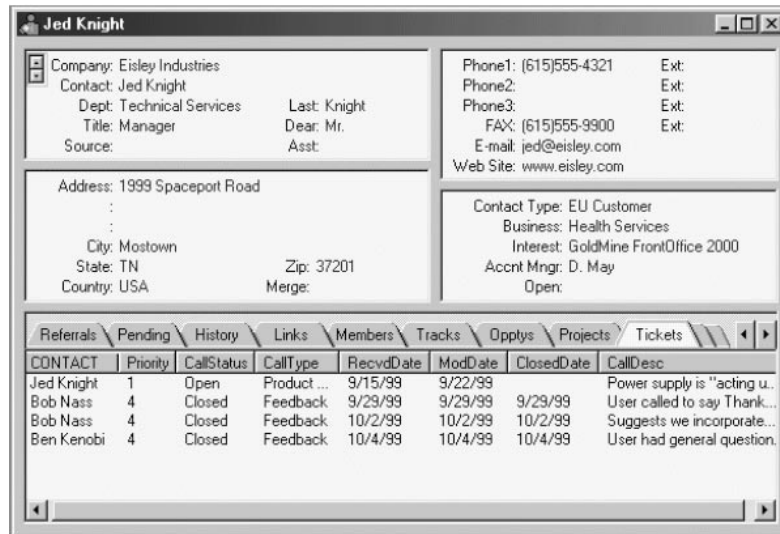
**Figure 8.**  
Calls can be logged and Trouble Tickets generated allowing the Call Center Technician to quickly assist the customer.



If the field technician is dispatched, FrontOffice 2000 Service and Support can alert him several ways. A Call Ticket can be printed to be hand delivered or faxed to the assignee, or an e-mail or page can be sent to the technician. And, because FrontOffice 2000 Sales and Marketing is integrated with FrontOffice 2000 Service and Support, the Trouble Ticket summary is readily available from within the Sales and Marketing Contact record under its own tab (Figure 9). This lets the sales representative know if there are any pending issues with his customers.

**Figure 9.**

From FrontOffice 2000 Sales and Marketing, a sales representative can immediately see the status of Trouble Tickets for their customer.

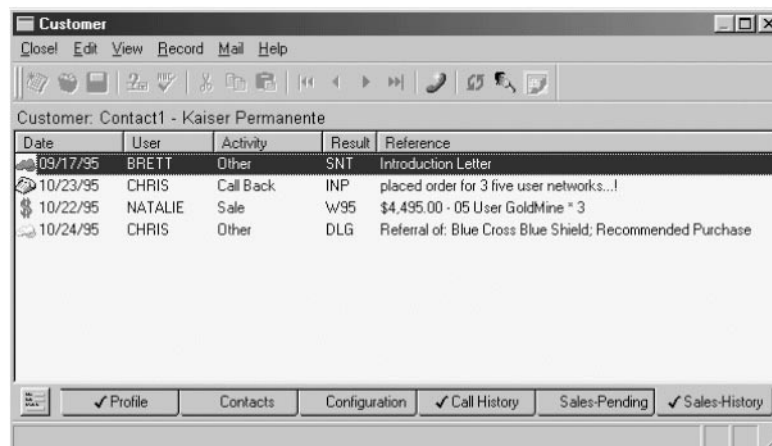


Likewise, in addition to seeing a summary of pending and completed sales and marketing interactions, support users can also review the specifics of a particular activity (Figure 10). With this data they can determine what, if any, commitments have been made by non-support team members, as well as gain insight into the current stage of the organization's relationship with the customer.

Support personnel will have immediate access to sales related information, which can inform them of potential revenue-impacting activities. And, they can automatically be alerted about key accounts or have alerts automatically sent to the sales organization about a key account's problem.

**Figure 10.**

Call Center Technicians can see Sales and Call History as well as Pending Sales for the customers they are working with.



Often times, when calls come into your Call Center, the issues are not unique and are simple in nature. With the FrontOffice 2000 Service and Support Quick Call feature, you are provided with the ability to define simple, repetitive calls, assignments, and journals that can be accessed through the click of a button. This helps the customer by reducing their time on the phone while the

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problem is logged. And, with the FrontOffice 2000 Service and Support knowledge base, the technician can easily search your database of solutions to quickly find similar problems that were previously resolved, perhaps by more senior and more experienced technicians. Again, this reduces the time on the phone for your customer and minimizes your staff's time solving problems.

If Bill's problem is important, and what customer's problem isn't, the Auto Escalation feature lets you automate many of your business processes as well as monitor your system for items that are not being handled quickly enough. You can ensure that Bill is given the level of service you have committed to provide him. His Call Ticket will not fall through the cracks because your staff is alerted when time limits are approached.

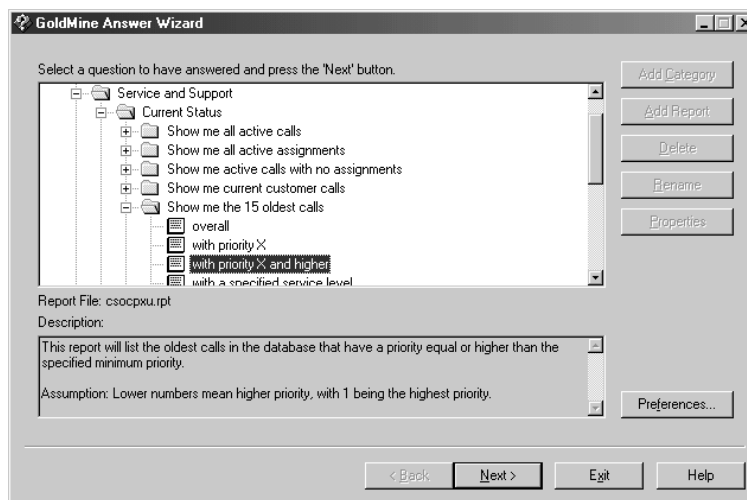
And speaking of automating processes, the FrontOffice 2000 Service and Support AutoTask feature lets you create templates that will run reports, page a technician, write files to a disk, or combinations of such actions, all with one easy step. This feature gives you a quick and easy way to set up support activities that can be launched from your toolbar or menu. FrontOffice 2000 Service and Support even lets Bill e-mail his request to your Call Center in addition to calling. Bill will receive a return notification in his e-mail system with the Call ID number to acknowledge that his message was received by your Call Center.

#### Technical Support Management

Call Center managers can get help in gathering important information from their support data to make informed business decisions. The Answer Wizard, a powerful management tool, gives anyone in an organization a tool to quickly and easily access the information needed. The Answer Wizard contains dozens of reports that provide summary and detailed listings of information specific to either sales or support call centers and operations. There are categories for FrontOffice 2000 Service and Support, Sales and Marketing, Combined Reports and a special category, for Favorites — which allows users to keep the most frequently accessed reports ready at hand.

Unlike traditional report writers or report engines, the Answer Wizard delivers powerful intelligence without requiring users to have any working knowledge of how to write or even select a particular report (Figure 11). More than simply querying, sorting and publishing data — the Answer Wizard actually coaches users with an easy-to-use “question-tree” by asking questions to quickly guide them through the report creation process. Tactical questions such as “what is the current status of our calls” and “how many calls did we receive last month” can now be answered quickly. Strategic reports include answers to questions such as “what are the top five causes for calls” and “what customers call the most often.”

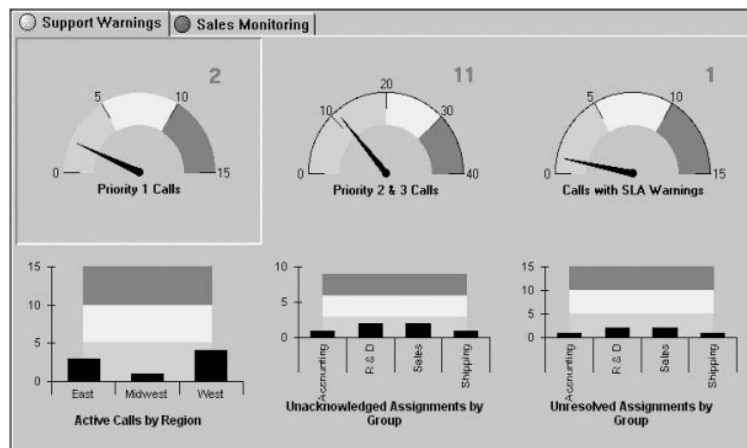
**Figure 11.**  
The Answer Wizard provides valuable management information and intelligence without requiring users to have any working knowledge of how to create reports.



Each report can be customized with selected criteria including date range, user or team, as well as any of a number of customer or activity specifications. For sales and support teams and for executive management, the Answer Wizard takes the volumes of data in FrontOffice 2000 and turns it into knowledge that's relevant and useful.

With the FrontOffice 2000 Manager's Console, your managers can see, at a glance, the overall status of your Call Center or sales activities (Figure 12). They can also use this information to implement proactive problem management, automate the delegation of problem resolution, and facilitate future responses to problems previously encountered.

**Figure 12.**  
The Manager's Console quickly displays the status of the Call Center or sales activities, giving managers the ability to plan better and operate more efficiently.



The Manager's Console gives teams and organizations the ability to plan for peak call periods, measure marketing program responses, track priority support issues and see exactly how the sales and support groups or individual staff are doing. Manager's can select from predefined metrics, which include gauges and bar charts, to measure and understand call center activity for either sales or support organizations.

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In addition, sales managers can use the Manager's Console to compare current forecasts against quotas, the ratio of sales won and lost or the amount of follow up activity in any given territory. Then, they can set thresholds as needed to quickly inform them of shortfalls or problems before they become critical. This same interactive decision support system can be applied for a number of uses in the service and support teams.

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## 6. Summary

Well, there you have it. You've taken a perfect stranger, Bill Church, and by nurturing him and developing his needs and requirements, you moved him from Suspect to Prospect to Customer. He is now considered a very happy customer, sort of a "Poster Boy" for your company and products.

A Customer For Life!

You approached and pursued him in a well-timed and non-intrusive style. You took the time to understand his needs, requirements and "pains". And, you successfully addressed his problems with an effective solution. You did all this with a well orchestrated sales process that was executed using an easy-to-use and powerful system, GoldMine FrontOffice 2000. A good sales process and the right tool can help your company successfully manage your customer relationships.

Managing the relationship you have with your customers, who without you would have no business to begin with, that's what it's all about. If you don't take care of your most valuable asset, your customers, by treating them as an important part of your business and handling their needs and requirements quickly and effectively, then you'll lose them, and probably to one of your competitors.

You need both the proper mind set and the right tools to do this successfully. Your mind set is your business. It is the corporate culture that permeates throughout your organization and to each individual employee who has contact with your clients. Without this first, it matters not what tools you use since they won't help you. It must be a committed desire, a passion, to want to care for your customers.

The tools, however, are GoldMine's business. GoldMine Software Corporation offers the leading software for mid-market customer relationship management. GoldMine has won more awards and industry accolades than all its' competitors combined, and there's a good reason for that. It's because over 670,000 users worldwide, large and small, have successfully deployed GoldMine solutions, for more than ten years.

Consider the power of combining your commitment to providing excellent customer relationships with the power of GoldMine FrontOffice 2000. You'll have a solution that will increase customer satisfaction, expand your business, and provide an overall successful strategic business solution for your organization.