

GUS-OS CRM – Customer ties that are steady



CRM always on the agenda

Why is developing and managing customer loyalty, i.e. Customer Relationship Management (CRM), constantly being discussed? The answer: Customer behaviour is changing, customers are more demanding, better informed and change their preferences more quickly nowadays – brand loyalty is no longer a matter of fact. Yet it is still a fact that it is more economical and cost-effective to maintain a repeat customer base than to constantly acquire new customers.

Active for customer orders

With this in mind, the GUS Group has complemented their ERP-solution GUS-OS ERP with CRM-components. GUS-OS CRM integrates all of the customer and product functions, including efficient management and comprehensive provision of the relevant data. The solution is optimised for companies in pharmaceutical, food, chemical, cosmetic, biotechnology and medical engineering fields.

One solution for the office and the field

GUS-OS CRM supports the sales force and key account marketing through order entry, various accounting functions (expenses, travel, commissions, etc.) and analyses. Upon request, customer visit planning as well as pre- and post-processing visit preparation can be included. Since the solution design is identical to the GUS-OS ERP architecture, the sales force has complete access via notebooks to their relevant information – anywhere, anytime

and with the same performance features. This homogeneity between central IT and sales force solution ensures not only the highest system stability and integrated data management, but also optimal support for the sales force by the office team: All employees work with the same system and can complement each other.

Easy Order Entry

With GUS-OS CRM, the sales force can enter customer orders in detail. The entire GUS-OS ERP infrastructure is available for this. This means for example that the prices and conditions as well as the master data are shown. The dialogue for the order entry responds to ergonomically optimised user prompts and reports availability checks based on article immobilisation. For stock reservations with lot selection, written comments for the office team can be recorded. In addition, there is the recording of normal, special and return shipments, listings, price and condition determination as well as the possibility to differentiate between ordering customer, delivery address and invoice recipient.

In addition to conventional order types, two additional versions are defined for the sales force:

- „Failed visit“ identifies a visit without a customer order.
- „Sales stockpiling“ records the requisition of samples promotional material and sale articles for „visit sales“.

The order confirmation – as finalisation of the order entry – can be sent as a PDF-file per E-Mail or printed on site.

In GUS-OS CRM, the workflow control is integrated into the application and ensures a secure connection at all times between the sales force and the office. This includes data transfer in both directions and data processing on the server.

All customer information at once

GUS-OS CRM has a comprehensive customer information system that provides – at a glance – all important data such as customer master data, article conditions, orders (active and processed), customer conditions, sales statistics, ORGA-structure, etc. Furthermore, employees in sales also receive lists of failed visits and a filter function for selecting orders.

Practical visit planning

To facilitate successful customer visit tours, GUS-OS CRM provides complete visit planning. This includes pre-selection (prompt-panel) according to dates, regions and customer potentials. Then, using the results from the selection, the solution creates a suggestion list. With a click, employees in sales have a quick compilation of the customers who should be visited next. In addition, further customers can be added to the visit planning.

The visit reports can be categorised according to topics, search criteria and key words. An option that can link various documents to a report, is included in the solution's comfort functions. Furthermore, it is possible to attach a documenting workflow to a visit report. The workflow alerts an employee in the office to the visit report and sets it in the To-Do-list. To provide necessary documents quickly, the CRM tool also provides tour control lists and information sheets with the respective customer data as printable documents.

Keep expense accounts on the move

To ascertain expenses and travel costs, GUS-OS CRM offers a simple and transparent approach: An expense report is recorded on a daily basis. The data are available on the notebook and the information can be seen. A "manual" recording of the original receipts is only needed once a month. It is also very practical that the data entry is simplified in that the previous values are transferred automatically and control notices allow easy corrections of the entries.

Figures with a statement

The analysis functions in GUS-OS CRM provide the sales team with central information that is easy to retrieve and support the sales activity.



These include:

- total sales reviews,
- sales lists according to customers, products, sales team (other employees are hidden),
- increase in overall sales,
- special article overview.

This information is available in tabular and graphic views as well as an Excel download. Via hyperlinks, detail views of the order positions can be branched into.

The commission calculation allows sales employees to receive additional information to the order positions that are eligible for commission – with selection possibilities – as well as information on the commission accounting records.

Statistics that provide impulse

GUS-OS CRM supports the current development, in which employees in the sales support and marketing teams receive the most comprehensive analyses possible. The solution has all relevant data and its integrated tools can be used for data interpretation.

Master data that are close-by

The solution is open for separately available address lists such as doctors, clinics or commerce. The GUS Group sets up interfaces so that these data can be integrated, maintained and provided to the sales team.

GUS-OS CRM makes the most of your contacts.