



## Document Management Solutions (DMS) in Sales and Marketing

**Effective sales and marketing relies on comprehensive, up-to-date information about individual customer requirements, transactions and behaviour over time.**

Document Management Solutions (DMS) provides this long-term customer history, fully integrated within your existing CRM package. Content from financial documentation, transaction reports, correspondence and more can be interrogated online to support effective one-to-one customer interaction, or analysed and extracted into marketing campaigns.

The results:

- More sales to existing customers, based on better customer knowledge
- Higher return on sales and marketing investment as efforts are targeted, rather than 'scattergun'
- Satisfied, loyal customers whose individual background and needs are understood
- Better use of salespeople's time, as less time is spent chasing information

### **Critical issues: how DMS can help**

**"We miss sales opportunities when dealing with customers over the phone."**

DMS enables telesales staff to achieve higher closure rates by 'mining' transaction information to target offers appropriately e.g. "Shall I analyse your usage from last quarter to find you the best tariff?"

**"Salespeople waste valuable sales time on administration."**

Sales personnel can view information generated outside the CRM system, such as invoices and credit notes from your ERP system, or scanned orders and contracts, simply by clicking a button from their familiar user interface. So they spend less time referring problems and chasing paper and more time selling.

**"Customers are leaving us for the competition."**

By providing access to the 80% of enterprise information not held on databases, a more accurate profile of the customer can be built up, which can be extracted for use in marketing campaigns, to increase cross-selling and retention rates.