CRM Requirements

CRM – *Key Requirements*

1) General Info to be accessible

a. Customer Info

It can happen that the rental company's ERP system owns the customer data and that the CRM owns the prospect data before it becomes a customer. There is then a close connection between the ERP and the CRM system.
A connection to the ERP can exist through the unique customer number in the ERP. It enables to see any customer ERP information in the CRM system.

- i. Customer number
- ii. Company + group/mother/daughter hierarchies
- iii. Status
    1. Prospect
    2. Customer
    3. No Longer Trading
        a. Reason drop down (liquidation, etc.)
- iv. Type
    1. Strategic Account
    2. Development
    3. Local
    4. Cash
    5. Customer category (e.g. between consumers and strategic key accounts)
- v. Source
    1. Marketing Data
        a. If selected then description (i.e. Campaign, web, Bought in Data, etc.)
    2. Site Spotter
    3. Walk-in Trade
    4. Existing Customer
    5. Sales Rep
- vi. Type of Record
    1. Site
    2. Regional Office
    3. Head Office
- vii. Expiration Date
- viii. Ad1 – Ad3
- ix. Town
- x. County (if applicable)
- xi. Postcode
- xii. Standard Industrial Classification or NACE codes (can be integrated from ERP)
- xiii. Business Type (i.e. Electrical)

xiv. Business Category (i.e. Small Contractor)
xv. No of Employees
xvi. Key Financials
    1. Total Turnover
    2. Hire Turnover
    3. Sales Revenue
    4. Actual Spend on Each Product Range or service (include training, insurance, etc.)
    5. Estimated Spend on Each Product Range (For sales exec to complete at account opening stage then updated as necessary)
    6. Share of wallet=hire/total turnover,
    7. Invoiced volumes last year/YTD in total and by product group (to make sure that customers are fulfilling the volume details of frame agreements)

xvii. Customer rating (e.g. 1-100, red/yellow/green, etc)
xviii. Financial Status
    1. On Stop
        a. Reason drop down
    2. Active

xix. Credit Limit and usage (%)
xx. Payment Terms
    1. Cash
    2. 30 day
    3. 60 day
    4. Other (With value)
    5. Unpaid invoices
    6. Payment notices

xxi. Decision Making Location (Yes / No)
xxii. Territory Code
xxiii. Owner (Named person)
xxiv. Owner email (linked to active directory)
xxv. Linked Record (Parent, Child or Site Level Info)
xxvi. Tender Info
    1. Has quote
        a. Quote number (click to view option)
        b. Valid from
        c. Valid until
    2. Tender in Preparation (Logical field)
    3. Outline of tender (uploaded document, watered down as necessary)

xxvii. Price achievement = realized / base price
xxviii. Competitor Info
    1. Competitor 1
    2. Competitor 2
    3. Other (With option to specify)
    4. Current Trading Agreement and Length
    5. Tender Due Date (ability to split by product range)
        a. Plant tender
        b. Tools tender
        c. Etc.
    6. Notes

xxix. Web
xxx. Twitter

xxxi. Facebook
xxxii. YouTube
xxxiii. LinkedIn
xxxiv. Other Social Media
xxxv. General Notes
xxxvi. Job/Project codes linking ERP projects into CRM, could be multiple customers on one project and vice versa

a. Contact Info
- xxxvii. Title
- xxxviii. Forename
- xxxix. Surname
- xl. Decision Making Authority
  1. Financial Decision Maker
  2. Key Equipment Decision Maker
  3. Influencer
  4. No Decision Making Authority
- xli. Job Title
- xlii. Job Category
  1. Finance
  2. Procurement
  3. Site
- xliii. Status
  1. Active
  2. Left
  3. Deceased
  4. DO NOT CONTACT (Data Compliance)
     a. Reason Text
- xliv. Email
- xlv. Tel
- xlvi. Mobile
- xlvii. Birthday Info
- xlviii. Interests (Sports, horses, vintage vehicles, etc.)
- xlix. Entertainment Requirements
- l. Facebook
- li. Twitter
- lii. YouTube
- liii. LinkedIn
- liv. Other
- lv. General Notes
- lvi. Last Validated Field (When the info has last been verified)
- lvii. Contact Preference (i.e. Email, Phone, etc.)

b. Action History (Contact Specific)
- lviii. Action source (campaign specific, trade show, etc.)
- lix. Call
- lx. Diarised Call Back (With Calendar Input)
- lxi. Appointment (With Calendar Input)
- lxii. Info Request (With Calendar Input)
- lxiii. Other (Please Explain… text)

2) Field Based Staff (i.e. Sales and Operational Staff)

a. Add Actions against contact or company

b. Ability to assign actions to other sales staff (request assistance mechanism)
c. Add, View and Edit Customer and all linked accounts Information
d. Add, View and Edit Contacts and related information
e. Access the info remotely (without a live connection)
f. Email links to brochures
g. Enter weekly planning info
    i. Specify Visit Frequency (12 = every three months, 52 = every year)
h. See who else in the company has appointments with the customer
i. Save associated documents (i.e. quotes, letters, etc.)

3) Marketing

a. Telemarketing
    i. Set actions on behalf of sales and other team members
b. Be able to enter promotions (that can be seen by Sales)
c. Campaign Manager
    i. Create campaigns
    ii. Record how that campaign was targeted (Snail Mail, Email, etc.)
        1. Snail Mail
        2. Email
        3. Via Sales
        4. Social Media
    iii. Record the promotional offer and copy of literature
    iv. Start Date
    v. End Date
d. Use the system to email HTML files directly to a selected group as part of a campaign (option to forward data to sales rep?)

4) Finance

a. Credit Control
    i. Set credit limits
    ii. Enter status as above

5) Reports

a. No of customers per regional, district, or division by
    i. Postcode
    ii. Customer type
    iii. Hiring a certain product
    iv. Lapsed customers
b. Service Centres used with % at click of button
c. Products / services used with % at click of button (Training included)
d. Spend by Campaign (or other source)
e. Voucher redemption history
f. Live
g. Send to customer option (email, print)