



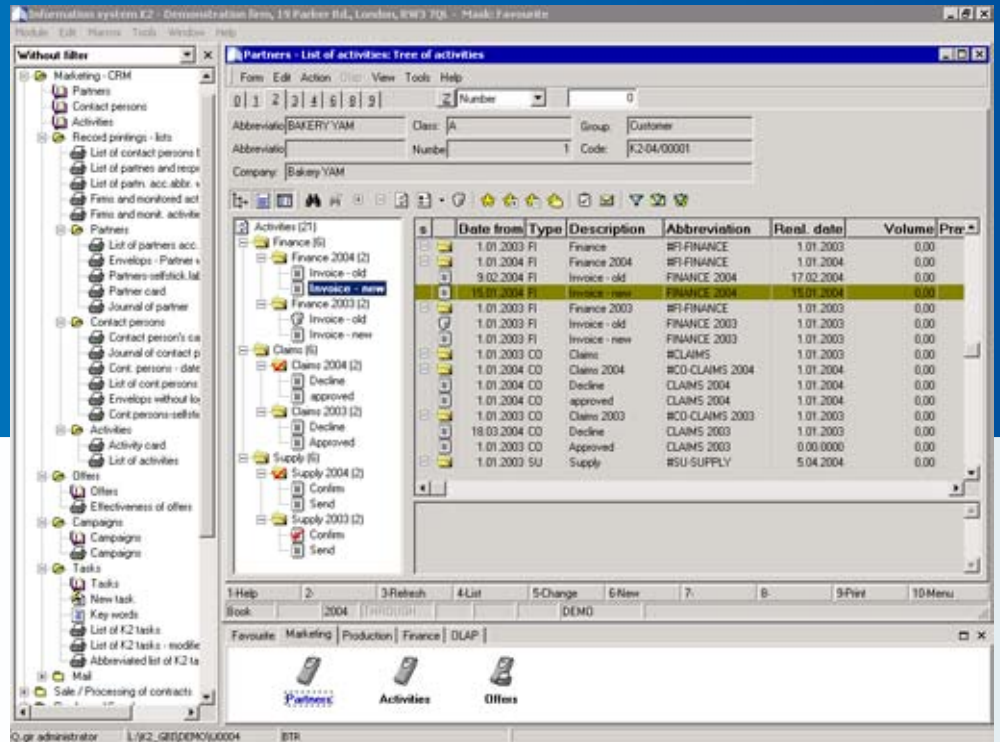
The module Marketing serves for using sales opportunities for conclusion of a sales contract.

#### FUNCTIONS OF PARTNERS

- > Activities with a partner
- > Branch of a partner
- > Class of a partner
- > Classification according to the areas
- > Classification according to the regions
- > Contact persons
- > Definable code lists for a partner
- > Determined care
- > Financial potential
- > Group of a partner
- > Link to the customer
- > Origin of the contact
- > Partner's line of business
- > Recording tasks from a partner
- > Responsible person
- > Satisfaction
- > Solvency
- > Transactions in progress

#### FUNCTIONS OF ACTIVITIES

- > Classification of activities according to the persons, dealers, types, time, folders
- > Communication concerning contracts
- > Date of expected sale
- > Events of the day
- > Expected transactions in next days
- > Keeping communication concerning concrete contract
- > Link to the IS documents
- > Linkage with tasks
- > Minutes
- > Monitoring correspondence
- > Perspectives of transactions being negotiated



### CRM access

It ensures continuous monitoring of the market potential. Monitoring of activities and work with information determines importance of all events (negotiations, correspondence, discussion...) according to their influence on closing a new joint contract. Key data for assessment of the reality of the sale are concentrated in one well-arranged agenda with informative value. They provide answers to the following questions: volume of next possible transaction, expected date of closing a contract, probability of his execution, and person responsible for the transaction. Detail and extent of the structure of monitored information is based on requirements and needs of the user concerned.

### Informative value concerning future transactions

Grouping of activities into one point enables to monitor trading, marketing, service as well as other activities across all contacts. An overview of events with a partner and his/her contact persons is created automatically in the card of the contact concerned. The result thereof are individual journals of partner and of each of his/her contact persons.

### Orientation on target

Main purpose of the whole system is displaying up-to-date summary of information about concrete volume of agreed transactions within certain period of time and the person responsible. This pivotal informative value is so user friendly that it is not necessary to examine history and steps of the monitored transaction in order to evaluate it. Utilization of the module Marketing enables to evaluate retroactively procedures leading to closing of a joint contract and obtaining an opportunity to sell goods in the quickest way.

### Keeping particular transactions

Monitoring of all events and activities concerning a transaction in progress contributes to its targeted closing. An advantage lies in universal structure of the module Marketing based on the code lists. By filling thereof, it is possible to define, for every firm, different evaluation criteria and by continuous evaluation to determine steps remaining to closing of the transaction in question. For partners being simultaneously clients for the firm, a linkage with the card of the customer has been created (displaying economic aspect and analysis). For new clients, the card of the customer is generated automatically from existing card of partner.

### Abolishing boundary between the market opportunities and clients

By integration of the module Marketing into the standard system K2, information boundary has been abolished between evaluation in the marketing and economy. In one system, one can evaluate directly for example success of a campaign with regard to its cost, response, profit, interest, region etc. This evaluation comprises facts concerning history (paid cost and existing documents) as well as ongoing actions which need not be recorded in the accounting by means of documents so far. All new events are displayed automatically in the evaluation.



## FUNCTIONS OF ACTIVITIES

- > Plan for further activity
- > Probability of realization of a transaction
- > Responsible person
- > Stage of transactions in progress

## FUNCTIONS OF CONTACT PERSONS

- > Assistants and substitutes
- > Classification according to functions and positions
- > Creating campaigns and offers
- > Filtering groups with the same classification
- > Hobbies, education, languages, qualities
- > Journal of activities of commercial representatives
- > Marketing classification
- > Mass correspondence
- > Mass creation of activities
- > Mass print of address labels
- > Plans for courses, qualification, and training
- > Preferred days for contacting
- > Recording gifts and advertising articles
- > Sorting according to the date of birth

## FUNCT. OF CAMPAIGNS AND OFFERS

- > Addressed persons
- > Contacted partners
- > Demand procedure
- > Evaluation of campaigns
- > Evaluation of dealer activities
- > Evaluation of economic profitability
- > Evaluation of effectiveness
- > Evaluation of offers
- > Evaluation of success
- > Mailing lists
- > Offering procedure
- > Recording response

## Control

The method of records using more pages offering another types of data is used also in the module Marketing. Stress is being put to quickness and uniform control of the whole Information System K2, whereby rapid orientation of all users is ensured. Flexible possibility to integrate marketing activities and commercial information into firm's information system brings the same functional habits for the companies.

## Book of partners

Partners constitute the biggest set of entities for which particular activities are monitored. The book is divided into interested persons, possible, new, unclassified partners, rivals, cooperants etc. By creating activities continuously, the whole process of the partner contact is recorded. All other statistical data and contact persons are listed in the card of the partner.

## Book of contact persons

Contact persons constitute a set of all persons listed for all partners extended by separately introduced business cards. As concerns natural persons, it is appropriate to create a card of the partner in order to get a possibility of filling all fields being evaluated. The card of the contact person has a link to the data from the card of the partner and vice versa.

## Book of activities

This book summarizes all events regardless of the fact whether they have been directed to a partner or to a contact person. According to their type, activities are sorted to line of activity or manner of activity (phone calls, fax messages, e-mails, meetings, offers etc.) Every activity includes result in the form of subjective evaluation of the probability of realization of the transaction concerned, expected financial volume, state and date of realization of the transaction. Another criterion for classification of activities is their incorporation into campaigns, offers, partners, contact persons, periods, or folders created by the user.

## Book of campaigns

All mass actions are listed in this book, where every campaign constitutes a set of activities with partners and persons included in the campaign concerned. Main purpose of this book is to get an immediate overview of participants in this campaign and of their response. Furthermore, it is possible to evaluate directly economic benefit of the concrete campaign and success thereof.

## Book of offers

In the offers, a set of all activities connected with one transaction is grouped. Every offer can be bound with a contract in the book of sales using existing code list of articles. The realized activity connects monitored offer (representing technical configuration and configuration by items) with a concrete partner and, thereby, with possible customer. The business department can use the book of offers also for monitoring activities of rival firms for monitored transactions.

## Future of the firm

Prosperity of a company depends primarily on its capacity to sell the offered (produced) product. With evaluation by means of the module Marketing, it is possible to estimate expected consumption with regard to the market situation in qualified manner. Views of customers as recorded by means of activities help to modify properties of the offer (product) in question. Intensity of the evaluation as well as quality of inserted criteria depend on requirements and selection of the individual user. All results can be exported, printed, or evaluated remotely.

## Mass creation of activities

By means of the programme it is possible to create, at the same time, set of similar activities for defined group of partners or persons. This can be used in advantage when realizing campaigns, business actions, or distributing general notifications. List of contacts suitable for addressing can be created e.g. by means of the filter of commercial documents containing the selected item or assortment directly from the system. In this manner, accessories and services for certain articles can be offered to existing customers.

## Communication

External and internal mail forms part of the Information System K2. By combination of tasks, sent documents and mailing lists, it is possible to create workflow processes. Work with similar data and common application eliminate users' errors arising when copying documents. Many routine operations can be automated markedly also by the programme script.