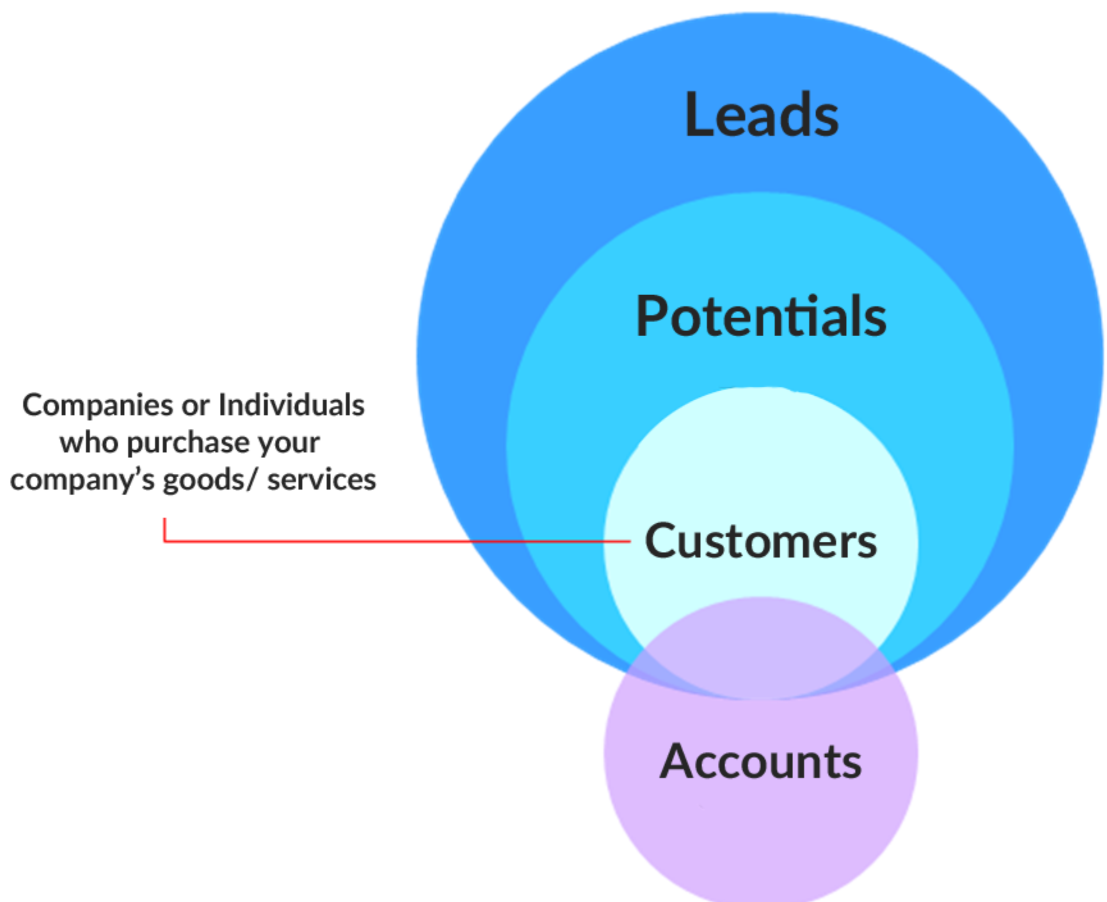
Moffice CRM Contact Management

Introduction

When running a business, you'll need to keep track of everyone that interacts with your business. In Moffice CRM, we divide everyone into four major types: Leads, Potentials, Customers, and Accounts.

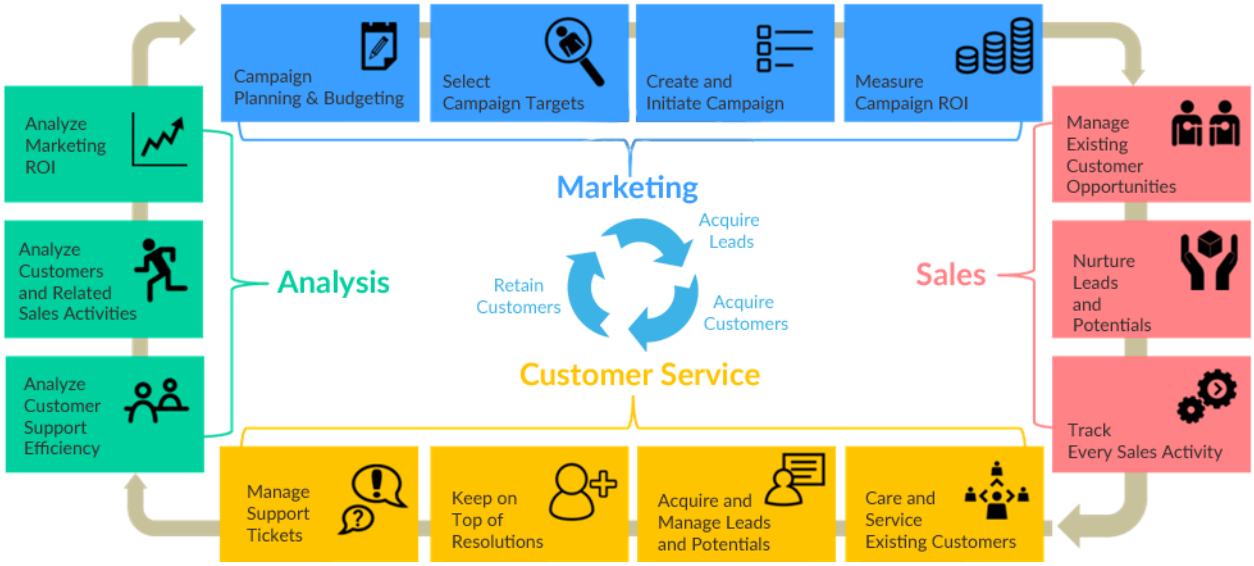
Leads, Potentials, and Customers are the three main parts of your sales funnel. Ultimately your goal should be to transform a Lead to a Potential, then finally to a paying Customer. Moffice CRM has specific definitions for each of these contact types. **Leads** are any possible client that has had some kind of interaction with your business such as someone you talked to briefly at a trade show, basically huge question marks for your company. **Potentials** are essentially qualified Leads, otherwise described as possible buyers that have a higher percentage of purchase and interest in your product or service. You should be actively working on nurturing these Potentials with sales Activities. Finally, **Customers** are anyone who has paid for your product or service offering.

Accounts, on the other hand, are any contacts that do other business with your firm or are related in some way. Examples of Accounts may be Resellers, Competitors, and Media contacts. Note that an Accounts' data can also be copied to Customers if they pay to use your service or product.



The CRM Process

So how does Moffice CRM work to acquire and manage your contacts?
Our all-in-one solution blends Marketing, Sales, Customer Service, and Analysis so you can acquire more business and make smarter decisions from past history. Just take a look at how Moffice CRM works:



Ultimately there are three purposes that Moffice CRM strives to help you with: Lead Acquisition, Customer Acquisition, and Customer Retention.

These processes all help build metrics and analysis about your business so you can support more effective and efficient acquisition, retention, and loyalty-building.

Adding Contacts

When adding new contacts, where exactly should you put them? Here's a handy reference to keep you on track.

	Leads	Potentials	Customers
Do you know only the company's or individual's name and some contact information?	O	X	X
Did the company or individual initiate any form of communication? (examples: email inquiries, contacted you at a trade show, etc.)	X	O	X
Does the company or individual seem interested in your type of product and service? (examples: bookmarked your Web site, started a free trial, etc.)	X	O	X
Did the company or individual pay for your product or service?	X	X	O

In addition, Moffice CRM offers a variety of ways to add your contacts to the system other than manual data entry. You can import CSV or Excel files as well as automate processes like email inquiries to a certain address, clicks on certain Web pages, phone calls, Live Chats, etc. so they automatically add to the Leads or Potentials menu for optimal contact data addition and processing.

The Sales Cycle

Leads, Potentials, and Customers are all parts of the conversion process from Lead to Customer.

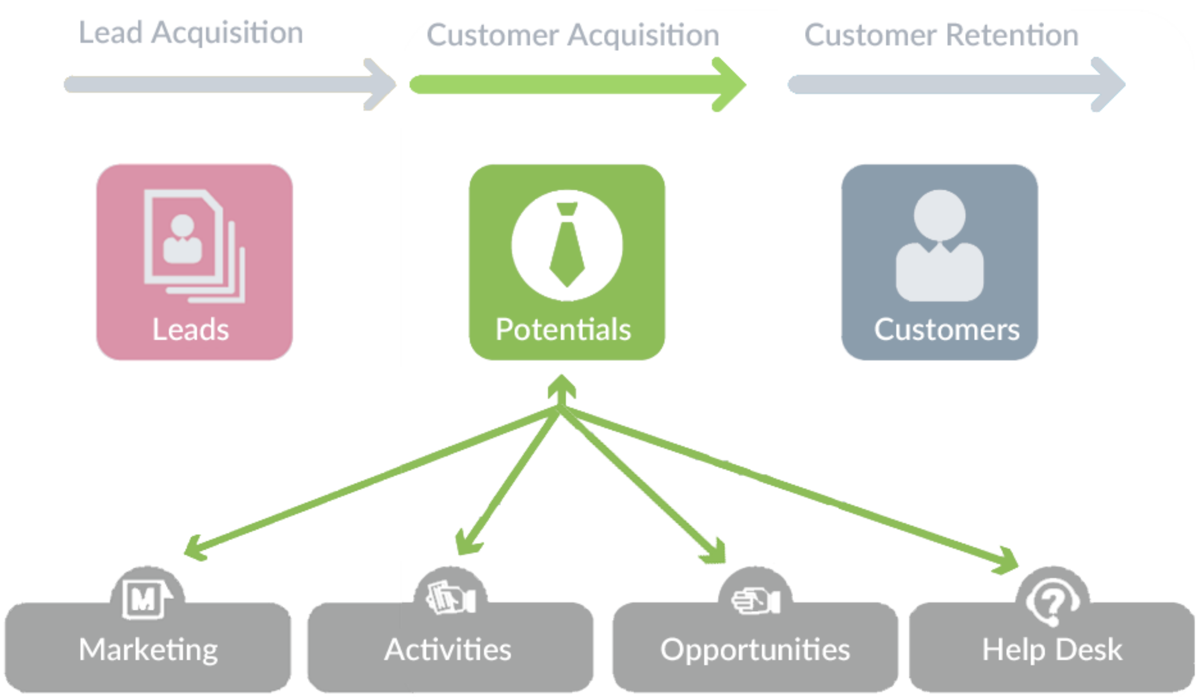
Step 1: Lead Acquisition

Acquiring new Leads is mainly the responsibility of Marketing. Through campaign creation, email marketing, surveys, search engine optimization (SEO) tactics, and more, reach out to and make your brand known. Optimize your marketing to get the Leads you need. Gather all these contacts in the Leads menu to hand them off to Sales. Organize Leads by campaign through the Marketing menu and Moffice CRM will sync it with the Leads menu so managers can assign Reps for follow-up immediately to streamline the Lead qualification process.

Step 2: Customer Acquisition

Customer Acquisition is powered through sales. Sales reps can take advantage of Moffice CRM to quickly manually or automatically add data, track Activities, setup alerts, and more so that the sales process can be as fluid as possible.

For a new Customer acquisition, sales Representatives will nurture Potentials to Customers and engage in various Activities such as meetings, emails, phone calls, and more to move the contact through the sales cycle. Since each sales cycle is different, businesses can customize "Conversion Stages" for Potentials to better visualize where each possible client is in the pipeline. Additionally, you can also add an Opportunity, or deal, to solidify the worth of the opportunity and its progress. And of course, customer service reps can help assist the Potentials with any inquiries or issues through the Help Desk and our smart Caller Recognition program.



Step 3: Customer Acquisition

Customer Retention implies a wide variety of purposes and actions. Perhaps you want to cross-sell or upsell a new product or service. Maybe your goal is to build loyalty or offer rewards for VIP clients. Utilize the appropriate menu to complete your respective goals.

Create new online or offline campaigns for existing Customers through the Marketing menu. Record further sales Activities for the campaign or other purposes through the Activities menu. Setup a new deal in the Opportunity menu and track how the nurturing Activities are progressing for the final sale. Customers may also receive care and build loyalty from fast and prompt support responses through the Help Desk menu.