

SURADO® CRM

CUSTOMER RELATIONSHIP MANAGEMENT SOLUTIONS

What is CRM?

Customer Relationship Management (CRM) is a strategy and a corporate philosophy that puts the customer at the center of business operations so as to increase profits by improving customer acquisition and retention while automating processes to be more efficient and effective. In its complete form, CRM provides a 360-degree view, integrating customer information at every touch point.

Why CRM?

Like other technologies that have profoundly impacted our lives, such as computers, e-mail, and the Internet — CRM is here to stay. Organizations that seize the opportunity to implement an effective CRM strategy today will gain a true competitive advantage.

About Surado CRM

Surado CRM software is the vehicle that enables the 360-degree view by connecting all your customer touch points. Our integrated core product suite provides Account and Contact Management, Sales Automation, Marketing Automation, Customer Service, Support and Help Desk.

Surado CRM then acts as “glue,” pulling other important information from front and back-office applications, into one cohesive picture.

Regardless of industry, a key concern is not the *lack of* information collected, but rather *accessibility* to that information. Surado CRM helps cut through information silos within an organization, leveraging current technology investments to provide the right information to the right people at the right time.

**The secret of success is
to be ready for opportunity
when it comes.**

— Benjamin Disraeli

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KEY FEATURES

- Customizable Dashboards
- Workgroup Calendaring & Scheduling
- To-Do's List
- Integrated E-Mail and Fax
- Resource Scheduling
- Expense Tracking & Reporting
- Attach Documents
- Integration with Microsoft Office
- Synchronization with Palm™ and Pocket PC Devices
- Activity Timer
- Automated Business Triggers
- Project Management
- Knowledge Base
- Global Search
- Graphical Workflows
- Analytics & Reporting

Speed & Accuracy

Surado CRM captures all customer communications in detail, whether through phone e-mail, fax, Internet or personal contact. Empowering your representatives with relevant customer data enables them to provide a high level of customer service.

Comprehensive Customer Information

Users can easily review past communications and upcoming activities, sales opportunities, quotes and purchases, support issues, links to relevant documents and information from back-end systems with Surado CRM's comprehensive Main Contact Screen.

Customizable Dashboards

Empower users with instant access to real-time graphical analytics including activity lists, sale forecasting and statistics, marketing graphs and service gauges. Managers can see a snapshot of corporate metrics, spot potential problems, drill-down to individual records and "push" critical data to employees.

Business Process Manager

Surado CRM provides advanced Business Intelligence features that can be used to streamline labor-intensive processes, such as automated customer responses and follow-ups. Criteria can be easily modified in response to changing business requirements.

Scheduling & Task Management

Surado CRM includes fully-integrated workgroup scheduling and task management features to track activities, participants and resources, including pop-up reminders. Managing to-do lists is easy with sorting and filter options to help ensure that important activities are completed on time.

Integrated Project Management

Built-in project management features help users efficiently organize and track tasks and resources to keep projects on time and within budget. Synchronize with Microsoft Project for advanced analysis and report generation.

Knowledge Base

Surado CRM's centralized knowledge base allows employees to leverage knowledge of company policies, product information and Frequently Asked Questions, to standardize handling, improve response time and shorten ramp-up time.

Workflows

Managers can easily design graphical workflows to help ensure that processes are carried out consistently and efficiently. Representatives can then access these workflows to guide them through the process of handling customer inquiries and internal procedures.

Gain Insight

With Surado CRM's advanced analysis features, both managers and employees can access a range of tools to review and improve productivity. Modify over 200 included reports to fit your business needs, or utilize Crystal Reports® for ad-hoc requirements.

**Deliver fast and accurate
information across your
entire enterprise.**

KEY FEATURES

- Opportunity Management
- Forecasting & Pipeline Analysis
- Sales Workflow Automation
- Lead Generation & Routing
- Team Selling & Management
- Dashboard Analytics
- Inventory & Quotes
- Competitor Intelligence
- Source Tracking
- Lookups & Groups
- Integrated E-Mail and Fax
- Automated Business Triggers
- Productivity Analysis
- Sales Stage Tracking
- Partner Opportunity Management
- Knowledge Base
- Win/Loss Analysis
- Literature Fulfillment
- Cross-sell and Up-sell Analysis
- Integrated Marketing and Customer Service
- Web Resources for Research
- Back-Office Integration
- Analytics & Reporting

Increase Profitability

To achieve peak performance, sales teams need easy-to-master tools which provide accurate and effective results that translate into increased revenues and profitability. Surado CRM includes the features salespeople need to provide a consistent approach that drives sales.

Manage Accounts

With Surado CRM, sales professionals can manage customer accounts throughout the sales cycle. Capitalize on a comprehensive view that includes contact information, correspondence, opportunity and forecasting data, literature and presentations, quotes, orders and post-sale service history, to build lasting relationships and profit from cross-sell and up-sell opportunities.

Surado CRM provides a true 360-degree view, allowing a contact's relevant back-office financial information to be viewed directly.

Capture & Qualify Leads

Profitable sales begin with qualified leads. Surado CRM allows you to import data from lists or capture leads from a web site through the eLeads module. Track inquiries and route leads to qualified representatives or partners. Then create automated processes to distribute literature and schedule follow-up activities.

To help ensure consistency and appropriate resource allocation, Surado CRM allows you to set conditions that must be met before opportunities advance to later sales stages.

Forecast, Plan & Strategize

Managers can rely on Surado CRM to get real-time answers about sales reps' activities and pipelines. Manage multiple product pipelines, each with their own sales stages, to better plan and position to meet company goals. With competitor intelligence features, identify strengths, weaknesses and past performance to gain a competitive edge.

Comprehensive Inventory & Quoting

Surado CRM includes a fully-featured inventory system with multiple part numbers, vendor information, kits and price levels. Create quotes with discounts and merge information into Microsoft Word or Excel. Surado CRM even allows you to turn quotes into sales orders and transfer them to back-office systems.

Customer Lifetime Value

Companies that track customers' purchasing habits are better equipped to maximize profitability. Surado CRM provides customer lifetime value tools to analyze a customer's actual and potential value over time, identifying the strongest accounts and allowing offerings to be adjusted to improve effectiveness.

Connect Mobile Staff

Your sales team needs "anytime, anywhere" access to critical account, opportunity and product information in order to be competitive and close sales. With Surado CRM Offline, mobile users can access complete customer information through a separate disconnected laptop solution. Armed with this data, sales professionals are always equipped to take advantage of unexpected opportunities. And with Always-In-Sync™, your mobile staff stays up-to-date with ease.

Surado CRM can also synchronize contact and schedule data with Palm™ and Pocket PC devices, including PDAs and mobile telephones, or salespeople can access critical information with any Internet connection, through web-enabled modules.

**Review customer leads
and target the most
profitable accounts.**



KEY FEATURES

- Campaign Management
- ROI Analysis
- Customizable Dashboards
- Marketing Workflow Automation
- Data Mining
- Opt-In and Opt-Out Campaigns
- Capture Leads from the Internet
- Traditional Leads Importing
- Customer Surveys
- Integrated E-Mail and Fax
- Contact Group Management
- Letter Management
- Integrated Sales and Customer Service
- Cross-Sell / Up-Sell Analysis
- Web Resources for Research
- Analytics & Reporting

Tools that Deliver Results

The world of marketing is ever-changing. In addition to tracking the results of advertisements, direct mail and telemarketing, organizations must build lasting and profitable customer relationships by executing effective and timely campaigns over both traditional and electronic channels. Surado CRM delivers a comprehensive means to design, execute, and manage personalized, permission-based campaigns.

Manage Campaigns Effectively

Surado CRM allows you to plan multi-channel marketing campaigns and execute them flawlessly. Assign tasks and responsibilities according to revenue projections, campaign periods, targeted audiences and channels. Identify potential deployment issues and re-allocate resources. Utilize contact grouping to optimize segmentation strategies, by mining comprehensive customer data.

Create targeted e-mail and fax campaigns for automated execution and follow-up. Use integrated data mining to find the optimal approach for targeting prospects, so your customers receive the right offers at the right time.

With the eLeads module, you can capture leads from your web site and then automatically distribute them across sales teams or channel partners for follow-up.

Customer Surveys

Surado CRM enables you to conduct customer surveys in a cost-effective, targeted manner. Your customers and prospects will be more receptive to providing you with valuable feedback as you allow them to respond at their convenience, via e-mail and/or through Web Self-Service. And by using Surado CRM, you will be able to track, tally and analyze survey results with ease.

Opt-In and Opt-Out Campaigns

Surado CRM provides a comprehensive permission-based campaign module. With opt-in and opt-out facilities, marketers can make sure that qualified prospects are reached through their preferred method of communication.

Permission-based campaigns also ensure that the privacy of customers is always maintained, including those who have requested not to receive certain materials. By targeting the most receptive customers, you use marketing dollars more efficiently, reducing costs.

Track Responses & ROI

Realize significant value and gain lasting competitive advantage through campaign ROI analysis. Surado CRM marketing analytics provide a means to easily track the effectiveness of your marketing campaigns, comparing potential and actual responses and sales. By identifying the most profitable campaigns, so you can invest marketing dollars more effectively.

Advanced analytics help you gain valuable insight. Match your most profitable customers and products with the most effective campaign channels, to dramatically increase Return On Investment.

**Realize significant value
and gain lasting
competitive advantage.**

KEY FEATURES

- Open, Track & Resolve Support Incidents
- Unlimited Support Tickets Per Contact
- Quick View of Support Cycle
- Track Resolution Time & Costs
- Service Level Agreements (SLAs)
- Track Billing Information
- Complete Customer History
- Automatically Convert E-Mail into Tickets
- Return Merchandise Authorizations (RMAs)
- Knowledge Base
- Support Process Automation
- Track Activities
- Attach Documents
- Web-based Customer Self-Service
- Track Support Productivity
- Graphical Support Flashboard
- Analytics & Reporting

Empower Your Support Staff

By managing, synchronizing, and coordinating customer interactions across all channels, including telephone, e-mail, fax and Internet, your company has the information required to deliver world-class service and generate additional sales. Surado CRM provides an integrated system that not only allows representatives to track service communications, but empowers your entire team with the comprehensive overview needed to improve customer satisfaction, reduce churn and maximize revenue and profitability.

Reduce Time and Costs

The key to providing outstanding customer support is resolving customer inquiries quickly and accurately. Surado CRM enables your support personnel to work efficiently by providing a complete help desk system that tracks inquiries and issues, as well as an integrated support knowledge base with keyword searches.

Complete tracking of customer history, likes and dislikes as well as case lifecycle provide a full picture of each customer, resulting in your ability to provide better support in less time. Track contracts and Service Level Agreements (SLAs) and create Return Merchandise Authorizations (RMAs) directly in Surado CRM.

The Surado Web Self-Service module provides clients with Internet knowledge base search as well as ticket submission and review for self-service support resolutions. Anytime access improves customer satisfaction while reducing support costs.

Business Process Automation

Surado CRM provides advanced Business Intelligence features with a Support Process Manager to handle routing, load balancing, escalation, automated response, and even ticket updates and deletions automatically.

By automating labor-intensive processes, such as routing and responding to support tickets and notifying customers of soon-to-expire SLAs, support representatives can focus on providing faster responses and more personalized service, improving customer experiences and profitability.

Automatically convert incoming e-mail messages into support tickets, including attachments. Surado CRM support rules can then search the tickets for keywords and automatically respond and/or load balance them amongst qualified representatives.

Management Tools

Surado CRM provides managers with the tools necessary to review and analyze every aspect of the service cycle. Managers can access reports analyzing appropriate use of staff and resources, including the costs associated with each support incident.

To ensure timely resolution of all open issues, managers can customize automated alerts, redirecting and escalating follow-up with the appropriate support personnel. Managers can also update the support knowledge base as a result of past calls and resolutions.

The Surado CRM Support Flashboard is a fully customizable module that provides real-time graphical views of support ticket information. The Flashboard provides valuable workload information and can alert decision makers about potential problems and operability trends within an organization.

**Review and analyze
every aspect of the
support cycle.**

KEY FEATURES

- Enable 360° View of Customers
- Drive Faster Business Decisions
- Eliminate Knowledge Silos
- Reduce Data Redundancy
- Increase Data Integrity
- Real-Time Access to Back-Office
- Minimize Development Costs
- Utilize Industry Standard Technologies
- Increase Efficiency to Maximize ROI
- Seamless Links to Department Workflows
- Data Mining Across Enterprise Apps
- Integration Touch Points:
 - 3rd Party Front-Office Apps
 - 3rd Party Back-Office Apps
 - Custom Business/E-Business Apps
 - Industry-Specific Apps
 - Computer Telephony (CTI)

CRM Integration

Regardless of industry, a key concern is not the *lack* of information collected, but rather *accessibility* to that information. Most businesses have information scattered throughout the enterprise on paper, in database silos, and in e-mails — making real-time operations difficult to achieve.

In fact, many would argue that CRM is not really CRM without 3rd party software integration. Disparate systems must be integrated to enable real-time enterprise operations, leveraging current systems, creating new operational efficiencies, improving customer relationships, and enabling better business decisions faster.

Surado's Integration Solution

Unlike traditional integration implementations that are complex, costly and often fail, Surado's methodology is sensibly constructed to reduce risk, balance technology and best practices, delivering high quality, cost effective solutions for your integration initiative.

We consider your business's technical parameters, including current and future needs, and provide tools and products that minimize the cost of internal development and customization, saving time and money.

Front-Office Integration Points

In order to provide the highest quality information, your CRM system must integrate with front-office as well as back-office systems. Surado CRM seamlessly integrates with other front office applications such as Word Processors, Spreadsheets, E-Mail Applications, Project Management Tools, Report Writers, Mapping Tools, PDAs, Offline and Mobile Solutions, Card Scanning Tools, Business Intelligence Applications and much more!

Back-Office Integration Points

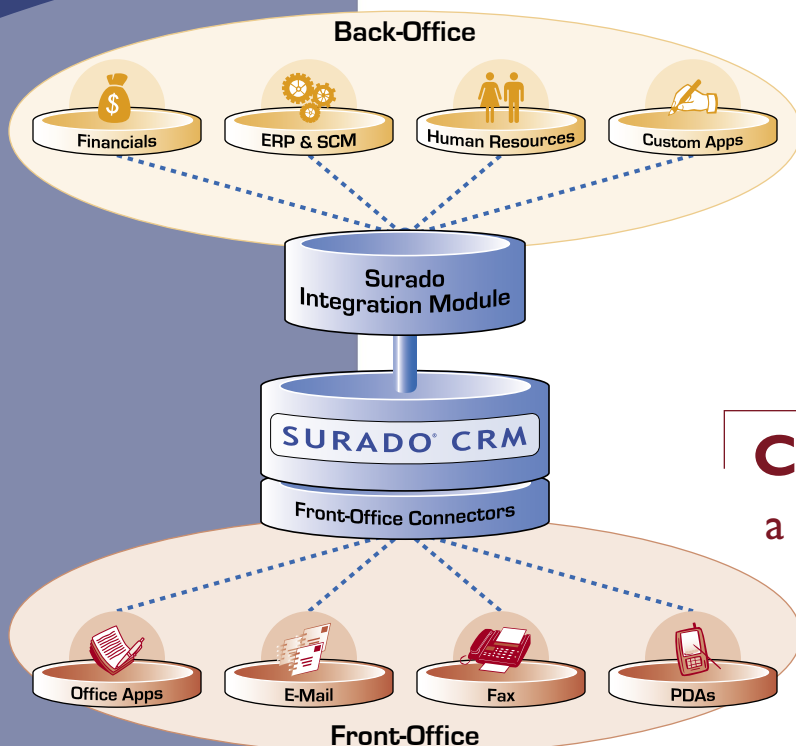
Integrating with back-office applications can be difficult due to hardware issues, as well as the way data is stored and represented. With Surado's powerful Integration Module, back-office applications such as financials, enterprise resource planning, supply chain management, logistics, manufacturing, shipping and delivery, human resources, e-business and industry specific applications can be integrated for one complete view.

Surado SIM – The Ultimate Benefit

The Surado Integration Module (SIM) layer reduces integration time and costs by as much as 80 percent by providing a bridge between disparate systems, allowing the transfer of data sets seamlessly between front and back-office applications without costly programming. SIM provides a unique architecture to resolve the long-standing issues with old standards, designs and structures that often occur with legacy systems.

With Surado Integration Module (SIM), system administrators can create unlimited custom folder tabs to display information from back-office applications. The tight integration and real-time access to information helps reduce data redundancy, increases data integrity and efficiency and reduces user account management and end-user training and licensing costs needed to support multiple applications.

With SIM, you can tie your entire enterprise information system into a single unified business view!



**CRM Integration —
a single, unified, business view.**

ANALYTICS AND REPORTING

KEY FEATURES

- Customizable Dashboards
- Over 200 Prebuilt Reports
- Custom Fields & Views
- Management Analytics
- Statistical Analysis
- Configurable Graphs
- Ad-Hoc Reporting
- Automated Reporting Module:
 - Schedule Weekly, Monthly or Quarterly Performance Reports
 - Route Scheduled Reports to Designated Users
 - Print and Route other Windows Documents

Measure Performance

Empower your employees with tools that enable them to analyze their own performance on a real-time basis, resulting in improved customer service across all touch points. The power to measure performance, not just for a selected few but for all employees, allows them to be more responsive.

Surado CRM provides powerful next-generation business analytics and reporting tools necessary to provide a comprehensive view of your customers. The benefits are faster generation and distribution of reports, more informed decision-making, rapid deployment of changes, increased efficiency and ROI resulting in a reduction in total cost of ownership.

CRM Dashboards

When customers call, your employees need an intuitive system that gives them instant access to the information they need. Surado CRM Dashboards provide graphical analytics including activity lists, sale forecasting and statistics, marketing graphs and service gauges. Instead of having to run a multitude of reports, dashboards provide each member of your team with a comprehensive single view of their responsibilities on one screen.

Managers can see a snapshot of corporate metrics, spot potential problems, drill-down to individual records and “push” critical data to employees.

Comprehensive Prebuilt Reports

With over 200 prebuilt reports offering hundreds of querying and sorting combinations, employees from the CEO to the service agents will be able to quickly identify, execute and review performance across the entire enterprise. Managers will be able to run reports for individuals as well as teams in order to gain insight into business operations.

Powerful Ad-Hoc Reporting

For more advanced users, Surado CRM comes completely integrated with Crystal Reports®, the industry's leading reporting tool. Ad-hoc reporting tools deliver fully customizable and configurable solutions that allow creation of an unlimited number of reports throughout the entire organization.

Management Analytics

In addition to the hundreds of reporting tools available to management, Surado CRM provides a powerful set of features designed exclusively for executives to monitor the health of their business. These tools provide executives real-time global access to contact, account, service, sales and marketing information. With the ever-changing business climate, executives will be able to review consolidated analysis of key metrics in order to better manage the direction of an organizational unit as well as the entire enterprise.

With Surado CRM, both executives and management will be less reliant on IT departments to monitor the state of the business.

Advanced Security

With Surado CRM's advanced security features, administrators define who has access to analytics and reporting tools. This helps ensure that the appropriate person has access to the right set of reporting tools to get the job done efficiently.

**Quickly identify, execute,
and review performance across
the entire enterprise.**