



Managing Lifetime Customer Relationships

GoldMine Software Corporation

Fall 1999

TABLE OF CONTENTS

EXECUTIVE OVERVIEW	1
FOUR PERSPECTIVES ON CRM SOFTWARE	3
Marketing	3
Sales	4
Customer Service and Support	4
Management	4
The Need for a Unified Solution.....	5
A SINGLE SOURCE OF INFORMATION	6
GoldMine® Sales and Marketing™	6
GoldMine® Service and Support™	8
GoldMine® Management Intelligence™	10
PUTTING GOLDMINE® FRONTOFFICE 2000™ TO WORK	12
Enhancing Campaign Management, Lead Generation, and Qualification.....	12
Campaign Design and Measurement.....	12
Web and E-mail Support	12
Scripted Telemarketing	12
Literature Fulfillment.....	12
Streamlined Lead Qualification	13
One-to-One Marketing	13
Managing Sales Opportunities	14
Opportunity Management and Structured Selling.....	14
Time Savings Through Integrated Information	14
Leveraging Alerts from the Support Team	15
Synchronizing Data with Remote and Mobile Users	15
Better Tools for Sales Management	15
Delivering Superior Service and Support	16
Sharing Customer Information Throughout the Organization	16
Enhanced Call Center Productivity	17
Access to Backend System Data.....	18
Knowledge Management Tools for First Level Support®	18
Business Process Automation.....	18
Supporting Management Needs	19
Rapid Deployment	19
Increased Productivity.....	19
Higher Win Rates and Margins	20
A Technology Investment for the Long Term	20
A Better Handle on the Business	21
Supporting the CRM Vision.....	21

THE GOLDMINE PRODUCT FAMILY.....	22
GoldMine® FrontOffice 2000™.....	22
GoldSync® 5.0.....	22
GoldMine® 5.0.....	22
HEAT® 5.0.....	23
LEVERAGING THE INTERNET	24
SUSTAINING LIFETIME CUSTOMER RELATIONSHIPS	25

EXECUTIVE OVERVIEW

Businesses today are squeezed by forces on all sides, from the margin pressures of accelerating global competition to the revolutionary transformations of e-business. Buyers have more choice than ever. They're better informed, and more demanding. As a result, businesses are scrambling to raise productivity without compromising quality and, at the same time, stay in close touch with ever-changing buyer needs.

What will separate the winners from the losers in the new economy? Increasingly, a company's competitive advantage will be determined by its ability to manage an asset that it may have long taken for granted – its customers. Successful businesses will be those who can transform one-time product or service purchases into lifetime customer relationships.

According to the Harvard Business Review, a typical American business loses half of its customers within five years. Other studies have shown it costs seven to ten times as much to gain a new customer as to retain an existing one. The ability to retain customers, maximize the lifetime value of existing customers, and leverage those relationships to gain new customers, have now become business survival skills. Collectively, they are riveting executive attention on a new strategic concept – customer relationship management, or CRM.

CRM views customers not simply as mass markets or anonymous transaction partners, but as individuals with distinct needs, problems, and preferences. As it becomes harder to distinguish offerings on the basis of quality or price, customers will tend to return to suppliers who are able to listen to their needs, respond quickly with the right information, and provide excellent service and support.

But nurturing a lifetime customer relationship is easier said than done. It is more than just a new management philosophy – it requires a new approach to customer information systems. Because a relationship extends beyond a given sales transaction, CRM software must go beyond just contact management or sales force automation. CRM requires an integrated system that enables marketing, sales, and customer service and support to act as a single team, sharing a common view of customer information, with interlinked and mutually supporting business processes.

This is exactly what GoldMine® FrontOffice 2000™ can deliver. Marketing, sales, customer service, and support all share a common customer record. Account managers know in an instant about any new or pending service or support issues with the customer, or with any other contacts at the same company. Similarly, customer service reps can see not only prior support calls, but also the customer's entire history of sales contacts, including those related to pending opportunities. At the same time, customers feel like the company actually knows who they are, as the company's sales and service activities appear part of an integrated whole.

GoldMine FrontOffice 2000 also automates business processes across the entire organization. Business process automation allows front office professionals to spend more time cultivating customer relationships, while machines carry out routine tasks. For example, sending out product information and scheduling follow-up calls are automated functions, triggered by business rules. In addition, business rules continually monitor service levels and trigger reminders or escalation procedures if they are missed. New service and support contacts from key customers can automatically generate notification messages to the customer's account executive. The right hand knows what the left hand is doing, and nothing falls through the cracks.

GoldMine FrontOffice 2000 – integrating GoldMine® Sales and Marketing™ with GoldMine® Service and Support™ – is a rapidly-deployable technology for CRM needs across a wide range of small to medium-size companies. This white paper describes its key features, and shows how it meets the individual needs of Marketing, Sales, Customer Service, and Management in their common quest to build and nurture lifetime customer relationships.

FOUR PERSPECTIVES ON CRM SOFTWARE

Any customer relationship begins with a cycle of contacts. It starts with initial awareness and expression of interest in a company's products or services, progresses through a personalized sales process, and continues after the sale in an extended period of customer service and support. Organizationally, this contact cycle starts with Marketing, shifts to Sales, and ends with Customer Service and Support. While these points of interaction represent disparate organizations within the company, to the customer there is little distinction. All of the contacts, from the initial requests for information to the latest customer service inquiry, blend together in the customer's mind to create a single impression of the company.

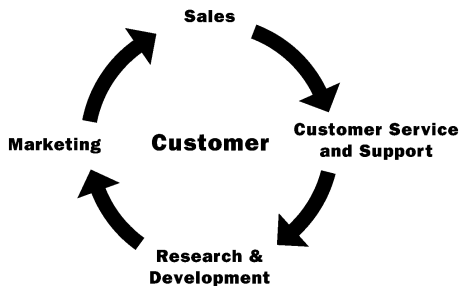


Figure 1.

This overall impression essentially defines the customer relationship. If the relationship is good, the customer is likely to return to buy additional goods and services from the company. Thus, maximizing the lifetime value of each customer relationship is the ultimate purpose of CRM. However, such a goal can only be achieved if each phase of the customer contact cycle is handled effectively and consistently. This means that true CRM software must meet the individual operational needs of Marketing, Sales, and Customer Service, as well as the broader objectives of Senior Management. While all strive for the common goal of customer satisfaction and loyalty, each of these groups in their everyday work has a separate role to play and its own requirements for customer information. Let's take a closer look at the customer contact cycle to see what this means for CRM software.

Marketing

Marketing's role is to generate demand. At one level, that means reaching potential customers to make them aware of the company's products and services, following up with requested information, and turning over qualified leads to the Sales organization. At another level, that means discovering subtle shifts in customer requirements, defining new products and services to meet the need, and positioning them to beat the competition.

To meet the needs of the Marketing department, CRM software must be able to capture leads easily and consistently from any source, whether it's the call center, a Web site, e-mail, trade shows, or a referral. It must support auto-dialing and order entry, schedule callbacks and other follow-up activities, and assure their timely completion. It must provide scripts that guide telemarketing reps through the lead qualifying process, sales configuration tools, and workflow tools to track progress from "suspect" to fully qualified lead. To maximize productivity, it must fully automate the distribution of customer information requests. It must also provide tools to analyze customer segments, design and execute marketing campaigns, and measure their effectiveness.

This demands a rich contact record. Far more than a simple electronic lead slip, the contact record must include a history of all the customer's prior contacts – regardless of channel – as well as past purchases and current account balances, and a wide variety of other information useful for market segmentation, campaign development, and opportunity management. Ideally, it should also include service and support history as well, and notes from any source that could point to new market requirements.

Sales

The job of Sales is to convert qualified leads into revenue. Selling successfully depends on detailed account management data captured in the CRM system. What is the contact's role in the buying decision? What has he or she bought before, and what is the current account status? Are there any pending or recently closed service or support issues with the customer? By capturing all of this information – along with prior communication, correspondence, and proposals – the contact database becomes a vital selling tool.

Effective selling methodologies rely on structured processes with multiple steps and milestones. To meet the needs of the Sales department, CRM software must provide an opportunity management system (OMS), capable of organizing and tracking the selling process. A good OMS should be able to handle even complex sales opportunities involving many different points of contact – including marketing and customer service – and relate all those contacts into a single coherent picture.

The scarcest resource in any sales organization is time. Process automation takes care of routine activities such as call scheduling or information fulfillment, and lets account reps focus on selling, making it a core CRM capability. Meeting customer commitments in the selling process means managing and monitoring schedules across the entire sales organization, in the home office, and in the field. Everyone working on a key opportunity wants to be alerted instantly to new developments.

In addition, sales management requires the CRM system to provide a wealth of analysis and management tools, including opportunity funnel analysis, forecasts, and territory realignment. Software that can automatically roll up individual opportunity estimates into sales forecasts, quota comparisons, and incentive compensation reports delivers critical information to sales management while it saves the rep valuable time.

Customer Service and Support

Closing the sale is just the beginning of the customer relationship. Customer satisfaction and loyalty are largely determined by the responsiveness of customer service and support. A critical element of the customer's experience in a call is the sense that the company knows who the customer is – beginning the moment a customer service agent answers the phone. The agent should be able to see all the customer's account data, past and pending service and support contacts, and even sales opportunities involving the customer. Because it allows total visibility of the customer's history, CRM software can turn service calls into new revenue opportunities.

Ideally, excellent support also means that the agent can resolve the customer's issue on the first call. To do that consistently, CRM software must provide a comprehensive knowledgebase that enables first line support agents to resolve a wide variety of common requests quickly and effectively. For calls that go beyond first line support, CRM software must handle incident assignment, escalation, tracking and reporting, warranties or contracts, and service level management.

Management

Senior management is focused on the big picture: How effective is a new marketing campaign? Which product segments are resulting in excessive support expense? How satisfied are our customers? CRM software must translate marketing, sales, and customer service data into meaningful information that provides executives with decision support for the business segments that are working, and the ones that need immediate attention.

While senior managers and IS staff require CRM software that is open, integrated with ERP and legacy systems, and scalable, they are also concerned with the speed and ease of deployment.

Most businesses can't afford twelve-month implementation cycles costing half a million dollars or more. Instead, they need software that is easy to set up and roll out, and readily customized to meet the needs of their business.

The Need for a Unified Solution

In the past, supporting the individual needs of marketing, sales, customer service, and management required multiple products, each with a separate customer database. But without integrating information from marketing, sales, and support contacts, this approach could not effectively provide the customer knowledge needed to support a lifetime relationship. GoldMine FrontOffice 2000 is the right approach for small to medium-sized businesses.

By combining all these functions in a unified program, GoldMine gives visibility to customer relationships across the entire front office. Account managers can be alerted to new opportunities arising from support calls. Support managers can be aware of customers who should be given special priority. Senior management can see the impact support issues are having on sales performance and customer satisfaction. Customers can see a company that knows who they are, responds quickly to any issue – and even anticipates their needs.

The benefits of CRM go far beyond operational efficiency and lowered costs. By fostering increased customer satisfaction and retention, CRM means top-line growth: increased sales, higher win rates, better margins, and greater market share.

A SINGLE SOURCE OF INFORMATION

GoldMine® FrontOffice 2000™ integrates GoldMine® Sales and Marketing™ with GoldMine® Service and Support™. These two components can be thought of as separate front office applications sharing common customer information. For example, account reps in sales or marketing can see the support call history for any contact, while customer support reps using GoldMine Service and Support can view or update customer information regarding pending sales in GoldMine Sales and Marketing. By working with common customer data, sales and support function as one team rather than independent entities, a key to customer satisfaction.

GoldMine® Sales and Marketing™

Within GoldMine Sales and Marketing, the **Contact Record** provides a single source of customer information used by marketing, telesales, field sales, and management personnel. The upper portion of the contact record contains primary contact information; the lower portion contains additional information in a customizable tabbed format. The tabs contain information about opportunities involving the contact, pending and completed sales activities, links to documents or applications associated with the contact record, notes and comments added by users, as well as a wide variety of user-defined fields that can be used in queries and reports. In addition, the Tickets tab (Figure 2) allows sales people to see the entire history of service and support calls, even drill down to the details of each one.

To simplify rapid deployment, GoldMine also offers a variety of **industry templates** that include predefined fields, tabs, and reports based on specific industry applications. Figure 3 shows how the GoldMine Sales and Marketing Financial Services Template lets financial services professionals start using GoldMine immediately, without extensive application development.

The screenshot shows a window titled "Jed Knight" with the following information:

- Company:** Eisley Industries
- Contact:** Jed Knight
- Dept:** Technical Services
- Title:** Manager
- Source:**
- Last:** Knight
- Dear:** Mr.
- Asst:**
- Phone1:** (615)555-4321
- Phone2:**
- Phone3:**
- FAX:** (615)555-9900
- E-mail:** jed@eisley.com
- Web Site:** www.eisley.com
- Address:** 1999 Spaceport Road
- City:** Mostown
- State:** TN
- Country:** USA
- Zip:** 37201
- Merge:**
- Contact Type:** EU Customer
- Business:** Health Services
- Interest:** GoldMine FrontOffice 2000
- Accnt Mngr:** D. May
- Open:**

Below the contact details is a tabbed interface with the following tabs: Referrals, Pending, History, Links, Members, Tracks, Opptys, Projects, and Tickets (selected). The Tickets tab displays a table of support calls:

CONTACT	Priority	CallStatus	CallType	RecvdDate	ModDate	ClosedDate	CallDesc
Jed Knight	1	Open	Product ...	9/15/99	9/22/99		Power supply is "acting u.
Bob Nass	4	Closed	Feedback	9/23/99	9/23/99	9/29/99	User called to say Thank...
Bob Nass	4	Closed	Feedback	10/2/99	10/2/99	10/2/99	Suggests we incorporate...
Ben Kenobi	4	Closed	Feedback	10/4/99	10/4/99	10/4/99	User had general question.

Figure 2. GoldMine Sales and Marketing’s Contact Record includes support call information.

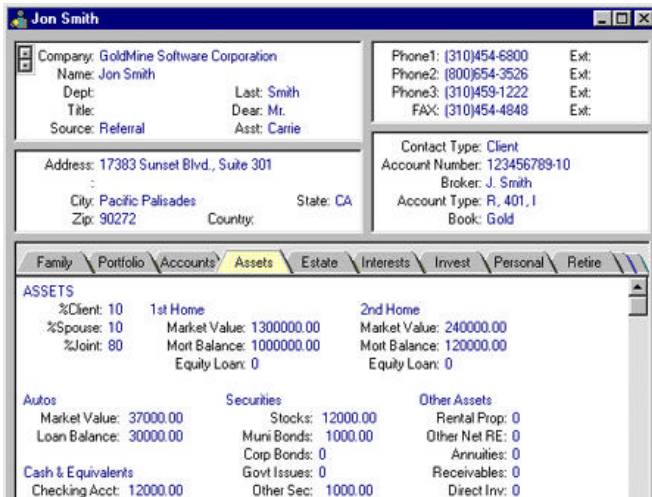


Figure 3. Industry templates provide prebuilt fields, tabs, and reports commonly used in selected vertical applications.

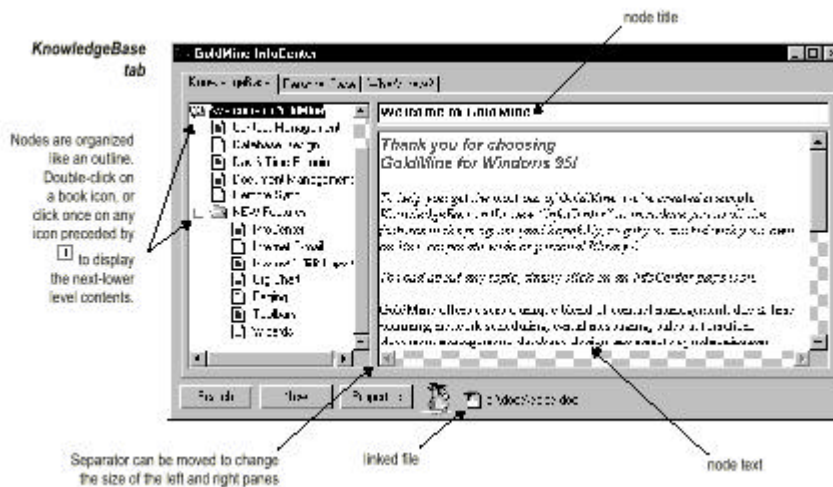


Figure 4. The InfoCenter™ allows both shared and private views of information across the entire front office.

To share internal information, GoldMine Sales and Marketing provides a Marketing Encyclopedia System called the **InfoCenter™** (Figure 4). The InfoCenter makes dynamic information such as marketing collateral, pricing documents, standard contracts, and sales forecasts instantly accessible to all users throughout the company, including distributed facilities and salespeople in the field.

The third type of information managed by GoldMine Sales and Marketing is activity information – detailed, time-specific data on contact events such as appointments, calls, and correspondence. **Activity Lists** are prioritized, automated, and tracked by GoldMine Sales and Marketing, organizing the daily schedules of sales and marketing personnel for maximum efficiency, effectiveness, and customer satisfaction. Users can see their own activities in either a tabular or **Calendar** view, or all the scheduled activities for a selected contact record (Figure 5).

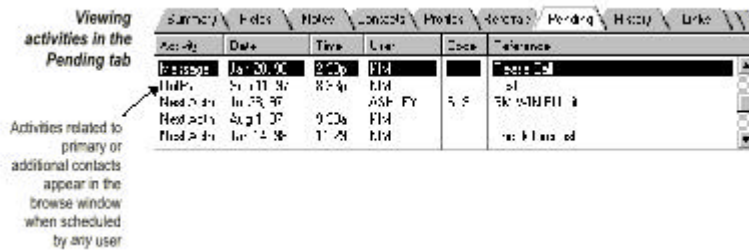


Figure 5. Activity lists organize and track all types of activities, by user or customer.

GoldMine Sales and Marketing includes a rich array of group scheduling tools, but its real power comes from **process automation**, the ability to execute unattended tasks automatically in a prescribed workflow **sequence**. Automated Processes™, referred to as **Tracks**, are triggered actions assigned to contact records. The trigger can be a time interval or a data condition, while actions can range from scheduling activities or modifying the contact record to launching executable programs and attaching new tracks to the contact record. This offloads sales and marketing resources from routine tasks such as call scheduling, literature fulfillment, prospect profiling or territory lead assignments, and lets them spend more time on higher-value activity, such as personal interaction with customers.

GoldMine® Service and Support™

GoldMine Service and Support provides a similarly unified information source for customer service representatives and technical support, integrating customer data, call information, an internal knowledgebase, and workflow automation. GoldMine Service and Support allows reps not only to manage service calls efficiently and effectively, but also to coordinate customer service information with sales history and pending opportunity data.

GoldMine Service and Support's **Call Logging** (Figure 6) provides all the tools needed to log, track, and resolve customer service and call center issues. Call Logging maintains the proper balance of ease of use, robust functionality, and customizability. The intuitive interface lets users quickly implement the system and enables the support staff to readily capture customers' issues. "Power" features, such as adding new fields to forms, are provided to meet the ever-changing needs of the support center – without any programming.

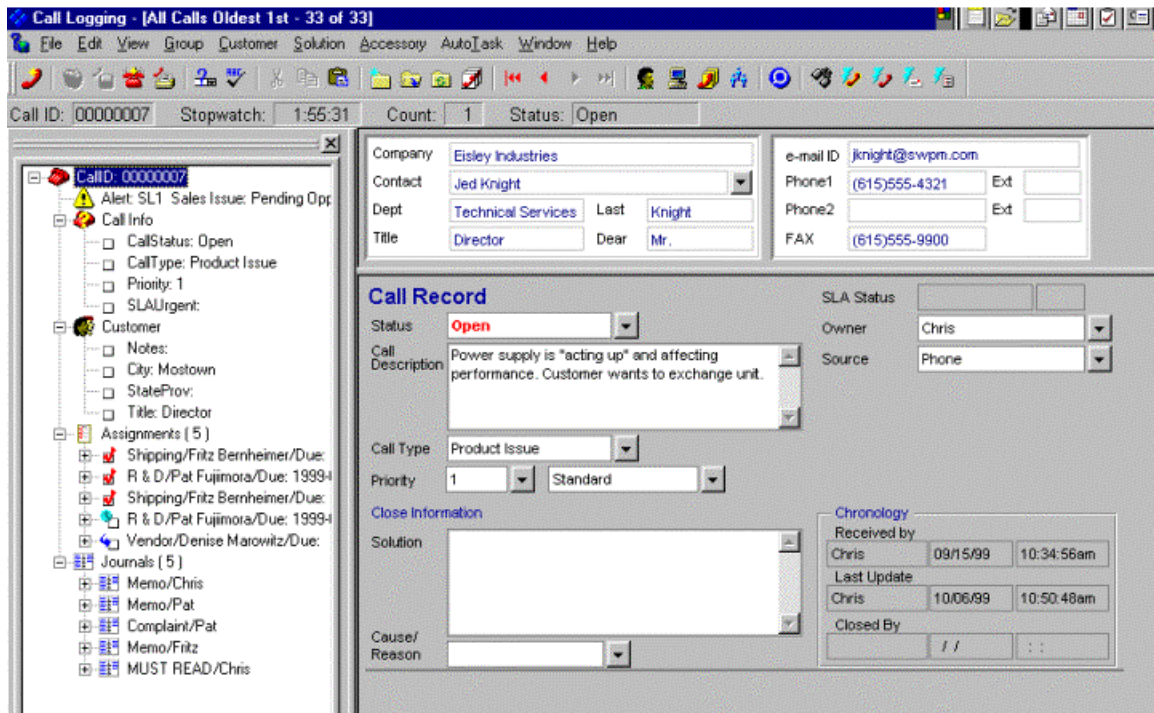


Figure 6. GoldMine Service and Support provides out-of-the-box functionality for capturing and giving visibility to customers' issues.

Typically, routine support calls do not get logged simply because they take longer to log than they do to answer. GoldMine's **Quick Calls** provide an easy way to quickly and consistently log common issues. In addition to providing more complete call information, the use of Quick Calls helps provide a more accurate reflection of the number and types of issues a call center actually handles.

The Call Logging **Call Map** window gives "at-a-glance" visibility to key call information. Its intuitive interface organizes all information related to the call, including the customer, task assignments, and journals, in a single tree-view display. Customer service reps get an instant overview of the call, including critical information, and can then quickly drill down to important details. Specialized icons highlight any overdue items that need immediate attention, such as a past due assignment.

From Call Logging's customer profile screen, service and support reps can also view information about pending and completed sales activity involving the customer (Figure 7), allowing them to play an important role in the company's overall selling process. They can see any commitments made to the customer outside of the support team, and assess the state of the customer relationship. Each service or support ticket is no longer an isolated transaction, but rather part of the overall customer relationship.

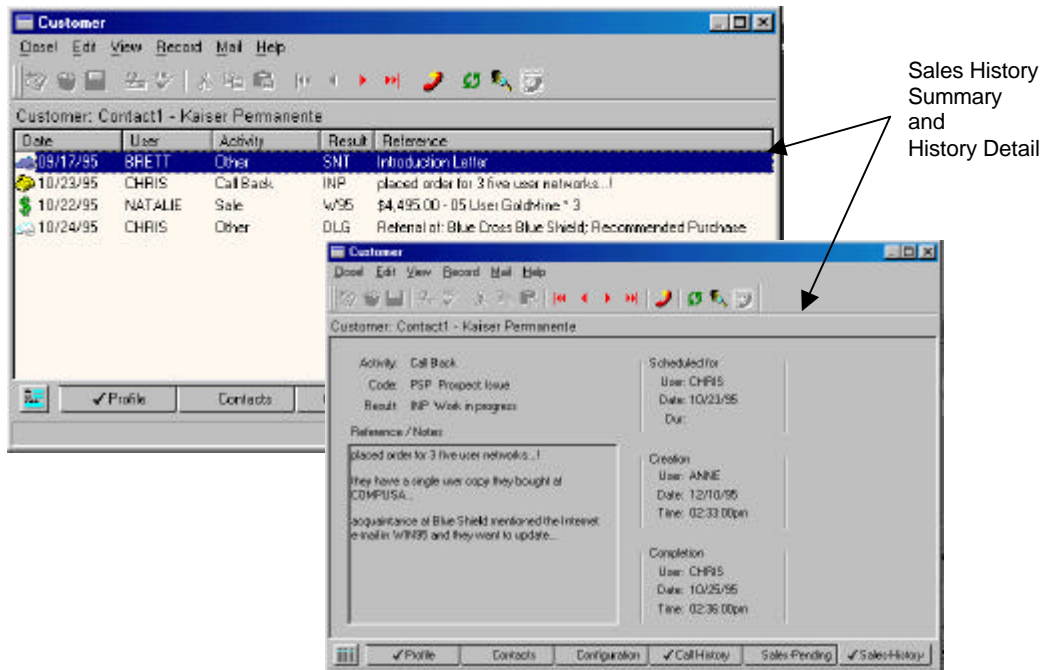


Figure 7. Support reps can view past or pending sales activity related to the contact.

In addition to sales activity, agents and customer service managers can see **alerts** posted by salespeople to a customer record whenever they access that customer's profile or existing call record, or log a call ticket for the customer. In turn, they can post alerts to the GoldMine Sales and Marketing contact record, or e-mail the account manager to highlight new sales opportunities or flag customer satisfaction concerns discovered on customer service contacts.

Sometimes a single problem can generate support calls from many different customers, such as a problem on the company's Web site. By using GoldMine's **IssueBoard**, call centers can quickly provide visibility to critical issues and reduce the duplication of effort for improved efficiency.

Posting a multi-customer problem to the IssueBoard links all the related call tickets, and assures that they will all be updated and closed simultaneously once the issue is resolved. The IssueBoard can also notify each customer automatically – all with a single mouse click. Further efficiency gains are possible with GoldMine's **AutoTasks**. With user-defined call templates, AutoTasks reduce multi-step processes to a single mouse-click while still ensuring accurate and consistent data capture. To promote established best practices, GoldMine offers a business process automation editor to define and activate **business rules**. Rules can execute or escalate procedures *automatically* when targeted service levels are missed. For example, new support tickets for key customers can be set to generate notification messages to account managers. Mutual reinforcement of sales and support users with alerts and timely customer information delivers a competitive advantage in maximizing customers' lifetime value.

GoldMine® Management Intelligence™

Unlike dedicated Sales Force Automation (SFA) or Customer Service and Support (CSS) software, GoldMine FrontOffice 2000 provides an integrated Management Intelligence module that *cuts across* sales and support information. The **Manager's Console** provides a real-time graphical display of sales and support data, allowing call monitoring, service level evaluation, peak resource planning, campaign response measurement, critical customer tracking, and group performance analysis. It includes a wizard to customize metrics and alarm thresholds quickly and

easily, without programming. Manager's Console also captures historical information to automate proactive problem management, and facilitate future response to recurring problems.

Another management tool called the **Answer Wizard™** (Figure 8) provides managers and non-technical users with commonly used reports based on both sales and support information. The Answer Wizard not only provides immediate answers to the questions managers are asking, but also coaches them to understand the additional questions they should be asking.

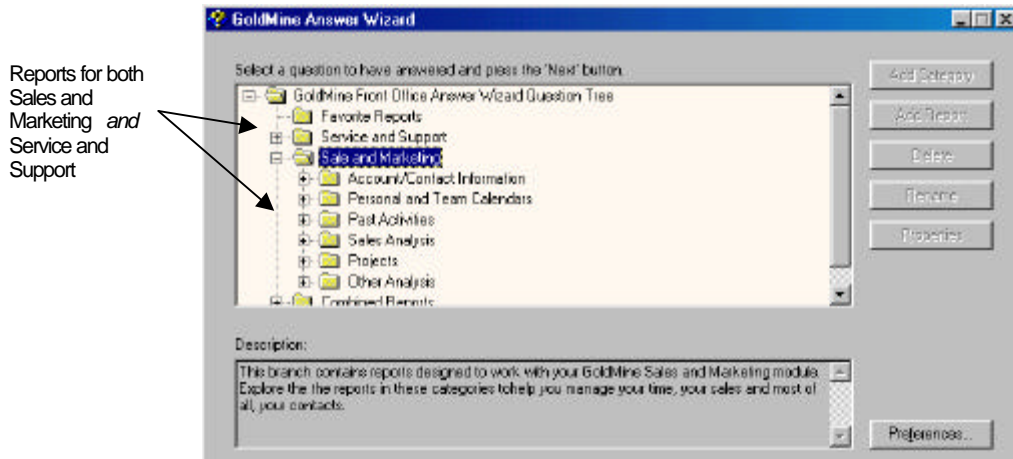


Figure 8. The Answer Wizard provides an easy-to-use report generator that cuts across sales and support data.

PUTTING GOLDMINE® FRONTOFFICE 2000™ TO WORK

The best way to appreciate the power of GoldMine FrontOffice 2000 is to see how it would be used across the entire front office.

Enhancing Campaign Management, Lead Generation, and Qualification

With the roll out of a new product line, companies typically target selected customers and prospects with a special offer. GoldMine provides tools to develop marketing campaigns, capture and qualify the leads developed, and continuously monitor campaign effectiveness.

Campaign Design and Measurement

Using GoldMine FrontOffice 2000, Marketing can quickly generate a group of customers who meet the prerequisites, and then send a mailer describing the new products. Other promotions in magazines, on the company's Web site, and at trade shows can also create awareness of the new product line. As potential buyers call or e-mail to request additional information, the source of the lead can be saved in their record.

Using GoldMine's **Leads Analysis**, Marketing managers can easily track the effectiveness of each of its promotional campaigns and make adjustments "on-the-fly." Using the Source field in the contact record, Leads Analysis can report on the number of leads generated from each campaign, the number that were closed, and the total value of the opportunities they represent. Managers can get statistics on the percentage of leads closed for each source, the cost per lead, sales per lead, and even profit per lead.

Web and E-mail Support

Prospects can also request information directly, using HTML forms posted on the company's Web site. GoldMine users can easily set up web pages to collect contact information and provide literature fulfillment. Using simple scripting on the web server, contact information is formatted into an e-mail message, from which GoldMine automatically extracts the data into a contact record. GoldMine also includes **E-mail Rules**, allowing companies to manage large volumes of incoming e-mail and filter out junk mail while organizing, distributing, and securing important messages. Because of the vital importance of e-mail communications in the front office, GoldMine's **E-mail Center** is a tightly integrated component. But, tightly integrated doesn't mean proprietary. Businesses that have adopted Microsoft® Outlook™ as their e-mail standard can view and update all of their Outlook Personal Folders within the E-mail Center.

Scripted Telemarketing

GoldMine FrontOffice 2000's advanced workflow features ensure consistent application of best practices in the lead qualification process, while automating many routine tasks. When prospects call in to request additional information, telemarketing reps use logical branching call **Scripts** developed in GoldMine to qualify the lead. These scripts log customer responses and update fields in the contact record automatically, generating statistics needed for campaign and call center management while saving the rep valuable time. At a glance, any rep can see the prospect's entire history on both the sales and support sides. This access enhances the rep's ability to cross-sell or up-sell the prospect on the phone, while reinforcing the sense of a personal relationship.

Literature Fulfillment

Marketing reps also use GoldMine's **Literature Fulfillment Center** to call up the latest version of data sheets, white papers, pricing sheets, success stories, or other marketing resources to send to prospects via mail, fax, or e-mail. GoldMine **Automated Processes**™ are ideal for literature

fulfillment, allowing a basic package to be sent automatically following all sales inquiries, or allowing the rep to select specific items to be sent. As always, any literature sent to the prospect is automatically logged in the GoldMine contact record. In addition, GoldMine's Literature Fulfillment Center provides mailroom and support staff with a powerful tool to set up batch printing, including labels and envelopes and to centrally manage the mailing process.

Streamlined Lead Qualification

In any campaign, follow-up contacts are a key part of the lead qualification process. For example, one week after sending out the requested information, an Automated Process in GoldMine could automatically schedule a follow-up call. The scheduled call will show up in both the prospect's contact record and on the telemarketing rep's **Calendar** (Figure 9). The Calendar provides the rep with an alarm reminder of the scheduled call, and can even autodial it and log it in the contact record automatically.

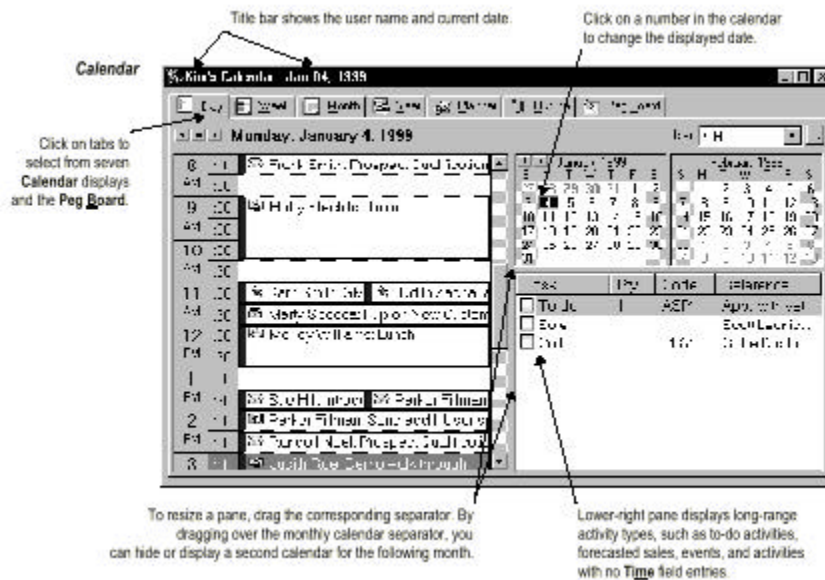


Figure 9. Integrated group calendars manage daily calls, appointments, and other scheduled activity across the front office.

In the follow-up call, the marketing rep's objective is to collect basic information about the opportunity and schedule a sales call. GoldMine's group scheduling allows the marketing rep to check the sales team's calendar and schedule the appointment. Again, call scripts ensure consistency and best practices in the qualification process, logging specified data in the contact record. Qualified contacts become new entries in GoldMine's **Opportunity Manager**, an essential tool used by both Sales and Marketing to quantify and track open opportunities.

One-to-One Marketing

Today, customers expect marketing to be "one-to-one," which can be expensive. However, GoldMine Sales and Marketing's Automated Processes enable personalized mass communication at a low cost. Using business rules to select the target customers, GoldMine combs the database for a particular marketing notice or promotion. An e-mail template then automatically sends each selected contact a personalized notification, extracting personal information from their customer record.

GoldMine FrontOffice thus provides a wealth of features that automate best practices throughout the Marketing process, from campaign design, execution, and tracking to lead collection and information fulfillment, scripted qualification, and cross-selling.

Managing Sales Opportunities

With a qualified lead and a scheduled sales appointment, GoldMine FrontOffice 2000 can now organize, automate, and manage the entire sales cycle.

Opportunity Management and Structured Selling

Because major opportunities span multiple contacts and even multiple sales orders, the **Opportunity Manager** (Figure 10) becomes a vital supplement to the contact record. For each opportunity, it contains a tabbed display of the tasks, detailed data and linked documents, influencers and key contacts, the sales team, competitors, issues, the forecasted value, opportunity status and close probability, as well as pending and completed activities. The Opportunity Manager record provides a digital dashboard for all opportunity information needed by both sales management and sales people in the field. By creating the opportunity *before* the start of the sales cycle, each team member can share information to track the progress of the sale.

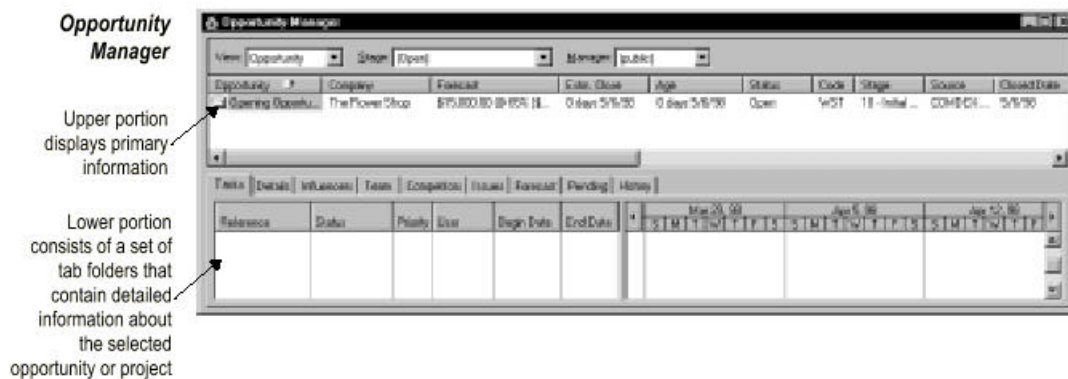


Figure 10. The Opportunity Manager facilitates structured selling, even when the opportunity involves multiple points of contact and sales transactions.

GoldMine's Opportunity Manager also provides an effective tool for establishing and managing a structured selling process. The Opportunity Management System can contain specific **stages** associated with the completion of designated tasks or milestones, and the Sales VP can assign default probabilities or status values associated with each of these stages.

Time Savings Through Integrated Information

Account managers and their support staff can also rely on GoldMine to organize and automate their everyday work. They use the Activity List or Calendar to drive appointments, phone calls, meetings, and other to-dos. The Forecast tab of the Activity List allows each salesperson to see their forecasted sales, and update probabilities and potential revenue, or record closed or lost sales. Salespeople use Automated Processes to offload routine tasks like callback scheduling for greater efficiency. They depend on the InfoCenter to share documents across the entire organization, including competitive analysis, win/loss reports, presentations and other selling tools, and contract boilerplate. And of course they rely on the GoldMine contact record to give deeper insight into the customer relationship via a complete contact history, including support contacts.

Leveraging Alerts from the Support Team

GoldMine FrontOffice 2000 also keeps sales people alerted to issues or opportunities raised by support calls. An alert posted to a particular contact from GoldMine Service and Support will be displayed to any user of GoldMine Sales and Marketing who accesses it (Figure 11). In addition, individual account managers or staff can be e-mailed with opportunity information directly from GoldMine Service and Support. For example, advancing the sale may depend on successful implementation of a pilot installation. With GoldMine FrontOffice 2000, the support team can give immediate feedback to the sales team about any problems the prospect is having with the pilot – as well as about opportunities for additional sales.

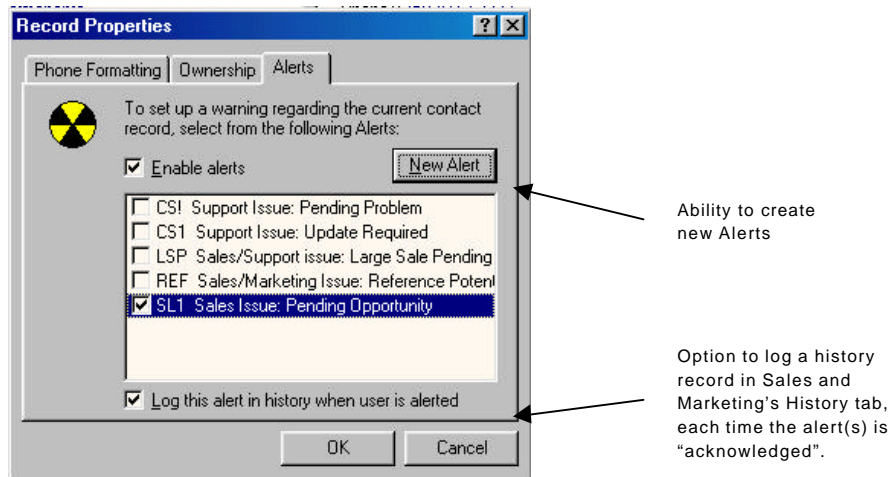


Figure 11. Customer service reps can post alerts to Sales and Marketing users with information affecting pending opportunities.

Synchronizing Data with Remote and Mobile Users

Sharing up-to-the-minute sales information with a sales team distributed across the country is not a trivial matter, but it is simple with GoldMine. GoldMine database information can be synchronized across a variety of remote sites, so that salespeople on the road, or field offices not connected to the home office LAN, work from a common data set. Mobile users "undocked" from the network can work with a local subset of the database on their laptops, and re-sync as needed.

Better Tools for Sales Management

While GoldMine brings order to the sales process, it offers even more benefits to sales management. Forecasts are rolled up in real time, and managers can drill down immediately to the details of any opportunity or contact, including pending or closed support tickets (Figure 1). The Opportunity Manager **Pipeline Funnel** (Figure 12) provides an up-to-the-minute graphical report on the number of opportunities at each stage in the funnel, and their total potential value. This brings predictability and consistency to monthly and quarterly estimates, without creating extra work for sales managers or individual sales teams.

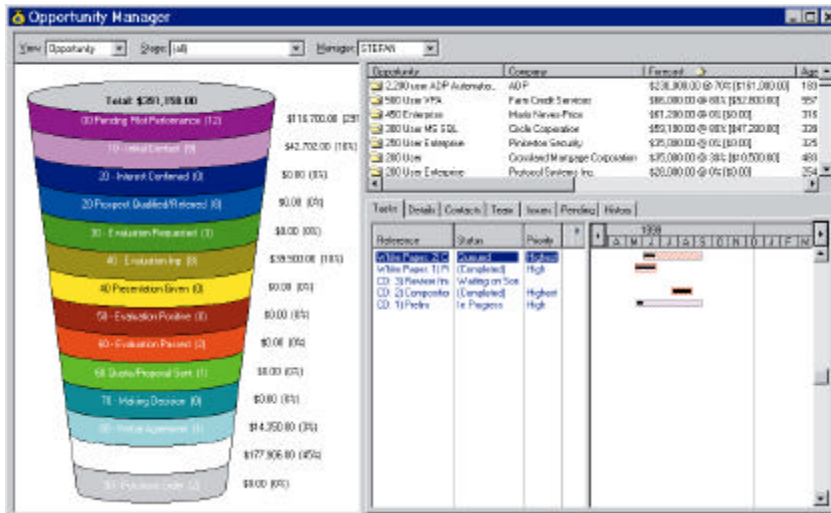


Figure 12. Opportunity Manager Pipeline Funnel

Using the **Answer Wizard**, sales managers can instantly call up tabular sales forecasts broken down by territory, user group, individual user, or time period. In addition they can track actual and forecast performance against quota, and track commissions and bonuses in real time. GoldMine also provides managers with the ability to realign territories as needed. All forecasts, calls and records are instantly remapped to the new territory alignments. Whether it's managing a structured selling process through an Opportunity Management System, automating and organizing daily tasks for the sales force, or providing real-time forecasts and sales reports, GoldMine FrontOffice 2000 is a life-saver for the sales organization.

Delivering Superior Service and Support

Typically, it's the interactions *after* the sales that turn one-time transactions into lasting customer relationships. By integrating maintenance and service with the sales process, GoldMine FrontOffice 2000 makes support staff valuable members of the CRM team. GoldMine Service and Support is optimized to streamline call centers for service and technical support, yet leverage a common customer database with the sales and marketing teams.

Sharing Customer Information Throughout the Organization

When a customer service agent creates a new call record or "ticket," the system searches against the GoldMine FrontOffice contact set – the same contact database used by GoldMine Sales and Marketing – to locate the customer. Once a ticket is opened, GoldMine's Call Map integrates all of the information about it, allowing customer service reps to get an instant overview of the call, highlight critical information, and quickly drill down to important details.

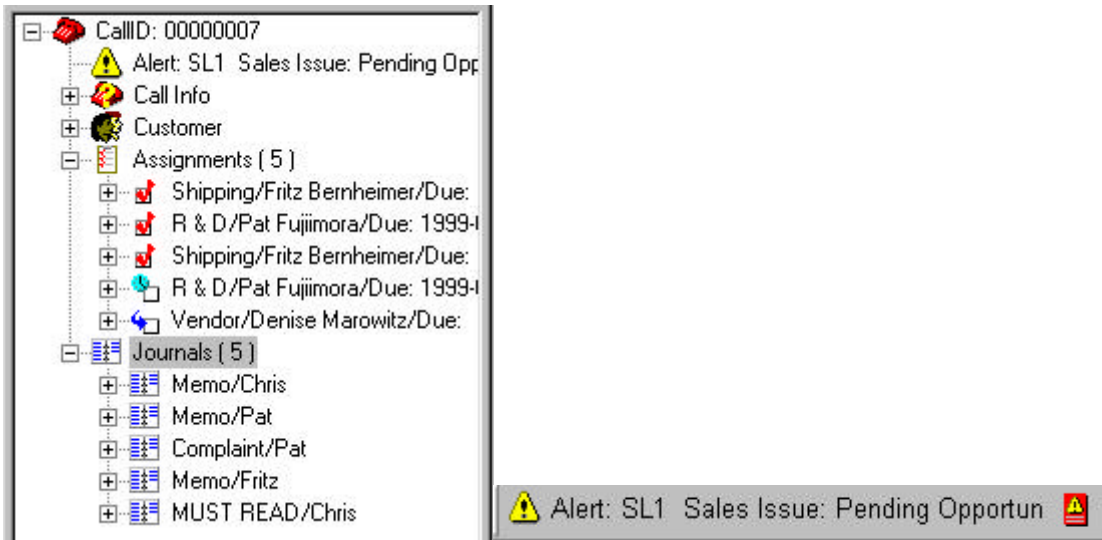


Figure 13. Alerts posted by Sales and Marketing users appear in the Service and Support Call Map and Alert Bar.

Intuitive icons within the Call Map can indicate alarm conditions, such as unacknowledged assignments or missed service levels, allowing support staff to prioritize their activity. It can also show alerts posted by an account manager from GoldMine Sales and Marketing (Figure 13). In addition, the Manager’s Console (Figure 14) provides customer service manager’s real-time graphical monitoring of key service metrics – along with real-time sales data – in a dashboard display.

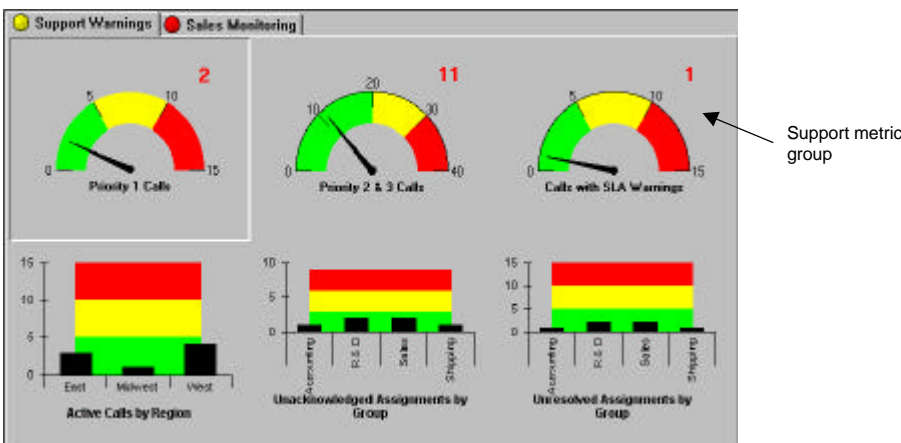


Figure 14. The Manager’s Console monitors sales and support data in real time and flags impending trouble spots.

Enhanced Call Center Productivity

GoldMine Service and Support includes integrated computer telephony (CTI) support, allowing agents to identify incoming callers automatically and display the Call Map of pending cases immediately upon answering the phone. CTI allows support reps to handle more customers in less time by automatically routing caller information to the screen. In addition, GoldMine’s **Quick Call** feature makes it easy to log common calls in seconds using just a few mouse clicks. Efficient call logging is another critical step in optimizing productivity in the call center. Like GoldMine Sales and Marketing, GoldMine Service and Support can also process support contacts from **web forms** and **e-mail**, and route them automatically to customer service agents.

Access to Backend System Data

Many customer service calls, such as billing or shipping inquiries, require the agent to view and update customer account information in backend legacy systems. Through its extensive ISV partner network, GoldMine includes tools to **view or update accounting, ERP applications, and other legacy data**, enabling quick one-and-done resolution with customers on the phone.

Knowledge Management Tools for First Level Support®

Handling technical support calls efficiently and effectively demands both knowledgeable first level support and the ability to meet service level expectations and commitments when the problem cannot be resolved promptly. GoldMine Service and Support includes the **First Level Support®** decision tree for storing and retrieving known solutions, and allows full integration with the industry-leading knowledge engine from Knowlix, as well as ServiceWare's knowledge content packs for computer help desks.

Knowledge management tools, such as those in GoldMine, are critical to creating superior customer service and support. Knowledge management requires more than just prepackaged scripts. It means the ability to leverage knowledge developed within the customer service center so that it can be shared effectively with other representatives. In this way, the time invested in solving an issue the first time can be leveraged for future use across the entire organization. GoldMine's knowledge management capabilities allow these solutions to be stored and reused easily, prioritized by frequency of use, and easily accessed by natural language queries. This lets customer service reps respond more quickly and effectively to future calls.

Business Process Automation

Making sure the service desk is meeting customer commitments and service level expectations is a challenging management issue. GoldMine provides customizable out-of-the-box business rule templates that bring critical issues to users' attention even when away from their desks. The **Business Process Automation Module** assures that all customer commitments and service level expectations are met, through a combination of automation and escalation.

Examples of automation include the following:

- Automatically assign all tickets of a particular type to a specified support or engineering group.
- Automatically notify technicians of support case assignments.

Examples of escalation include:

- Notify the support manager if an assignment is not resolved before its target time.
- Notify the sales manager if a Priority 1 call from a key account is not closed after one day.

Managers and non-technical users can use a wizard to define new business rules, which are then continuously monitored on a GoldMine server. This allows support managers to manage by exception, assured that no customer commitments fall through the cracks, and bringing attention to any missed service levels – to the entire CRM team, if necessary – through e-mail notifications and posted alerts

GoldMine Service and Support thus offers customer service organizations a broad array of tools to manage call centers efficiently, provide one-and-done support for many calls, and automate the business process for calls that are assigned for resolution. In addition, it allows them to play an integral role in the sales process, maximizing the lifetime value of each customer.

Supporting Management Needs

When senior management looks at CRM software, it is primarily interested in four things:

- Can we achieve a rapid return on our investment?
- Is this the right technology for the long term?
- How will this give us a better handle on our business?
- How will this support our strategic objectives for revenue growth and customer retention?

GoldMine FrontOffice 2000 delivers on all four counts.

Rapid Deployment

One key to rapid return on investment is the ability to deploy a CRM solution quickly and effectively. While implementation of so-called “enterprise” CRM systems can take 6 to 24 months and cost many times the software price, most businesses under \$500 Million in revenue or 1000 employees require a solution that can be cost-effectively deployed in around 3 months. GoldMine FrontOffice 2000 fits that profile perfectly.

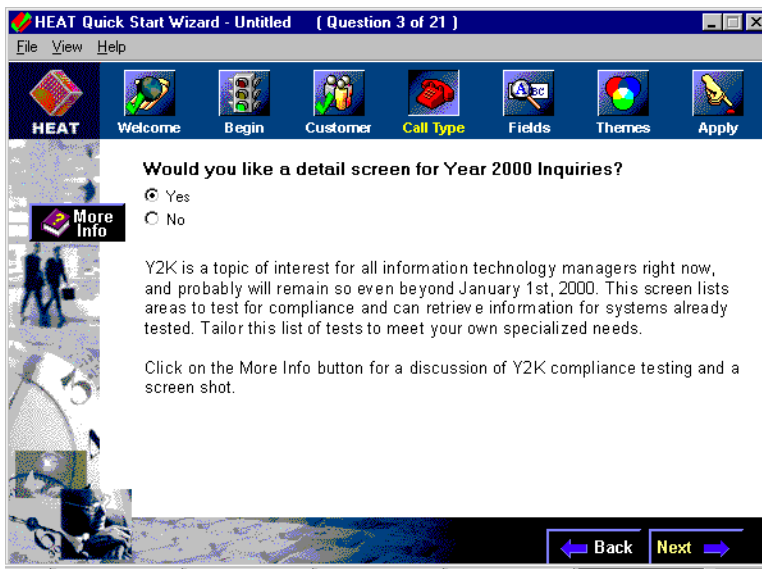


Figure 15. GoldMine’s Quick Start Wizard™ enables rapid deployment and customization.

Designed for implementations ranging from 5 to 200 seats, GoldMine includes a **Quick Start Wizard™** (Figure 15) that lets businesses quickly install and customize the software to fit their unique requirements and terminology. It uses a “consultant-in-a-box” approach to explain concepts and recommend the forms, features, and settings best suited to optimize the CRM system, based on industry best practices combined with a systematic step-by-step process that helps businesses customize GoldMine Service and Support to fit their unique requirements.

It also includes **Industry Templates** prebuilt to support the customer data and reports needed in specific verticals, as well as a new **Screen Designer** that provides fast and simple customization of user screens without programming. As business needs change or further refinements are needed to the system, the **Administrator** supports even more robust customizations.

Increased Productivity

The second key to return on investment is increased user productivity. GoldMine includes extensive calendar and time management tools for both the sales and support teams, as well as

task and business process automation that executes common functions from a single mouse click – or without any user interaction at all. Better campaign management means lower marketing costs. Sales force automation means lower selling costs. Telephony integration and knowledge tools for first level analysts mean lower support costs. Organizing, prioritizing, and automating tasks and processes across the marketing, sales, and customer service organizations mean employees spend less time on work that machines can do, and more time on closing deals and supporting customers. Productivity gains on the order of 30-50% are not uncommon. The bottom line is that GoldMine FrontOffice 2000 lets the company handle more customers with fewer staff.

Higher Win Rates and Margins

The third key to ROI is growing the top line. GoldMine puts more information at the sales team's disposal, including a complete history of all prior contacts with marketing, sales, service, and support, and a wealth of sales support documents via the InfoCenter. Marketing, sales, and support all contribute to a unified selling effort. The result: higher win rates. By establishing superior customer service and support, the company has an alternative to competing on price. That means higher margins. The real payback from GoldMine is accelerated revenue growth.

A Technology Investment for the Long Term

Executives worry about making the right technology choice for the long term. A small workgroup system might be an inexpensive way to start, but can it scale to accommodate the company's planned growth? Can separate systems for sales and customer service achieve the company's CRM vision? Is the underlying data management infrastructure robust and open enough to manage our customer information over the next five years, and consistent with our Microsoft-oriented IT standards?

GoldMine FrontOffice 2000 puts those technology worries to rest. Built on a powerful **Microsoft SQL Server** engine, GoldMine allows companies to start small and grow cost-effectively, without fear of topping out or being locked in to a proprietary platform. PC Magazine recently recommended SQL Server 7.0 as its Editor's Choice for small to medium-sized businesses, offering "the best value with the least administrative hassle." Based on ease of administration, speed, branch-office and mobile user support, replication, and analytical features, SQL Server is the ideal platform for customer relationship management. It scales easily on a common code base from a single PC to multiprocessor server clusters with 100 percent application compatibility – at a fraction of the cost of other client/server databases. This supports the need for extensibility so important to growing small-to-medium sized companies.

GoldMine is committed to extensibility. It even allows companies to implement Sales and Marketing first, then add Service and Support later on – or vice versa – and build incrementally toward the long-term CRM vision. Because they are designed to work together, GoldMine Sales and Marketing and GoldMine Service and Support create a single 360-degree view of the customer relationship – a benefit that separate sales and support management solutions cannot offer.

GoldMine FrontOffice 2000 also recognizes that the channels of customer interaction continue to evolve. While telephone, fax, and paper mail remain important, e-mail and the web are playing an ever-larger role in customer communications. GoldMine allows both sales and support reps to implement **channel blending**, applying consistent business processes to the customer interaction regardless of communications channel, and capturing all the interactions in a unified contact history.

Finally, GoldMine has a proven track record of implementation success. While many sales force automation and CRM initiatives fail in practice, GoldMine's return rate is an exceptional 7%.

A Better Handle on the Business

A manager's success depends on getting a clear picture of the overall business, accurate feedback on the effectiveness of management decisions, and early warning signs of impending trouble. GoldMine's rich reporting capabilities offer all of that – without custom programming. Sales forecasts can be rolled up instantaneously, and custom sales reports can be easily generated using the Answer Wizard and Opportunity Management System. From GoldMine reports, executives can see at a glance the effectiveness of a recent marketing campaign, trends in the service level performance for key accounts, or the total value of pending opportunities. In addition, the Manager's Console provides a graphical dashboard of real-time metrics spanning the sales and support sides of the business, giving an early warning if those metrics begin to deviate from targeted norms.

Supporting the CRM Vision

Finally, executives are looking for any significant investment in the front office to go beyond tactical savings. It must also support the company's strategic goals of increasing customer satisfaction, retention, and lifetime revenue value – the CRM vision. GoldMine FrontOffice 2000 acts as a catalyst to bring the sales and support sides of the company together via a unified view of the customer, and business processes that allow them to reinforce each other with information and a sense of common purpose. By allowing the company to “know” the customer and respond quickly and effectively in each customer interaction, GoldMine creates an environment customers want to return to. The result is increased loyalty, repeat business, and a solid foundation for long-term growth.

THE GOLDMINE PRODUCT FAMILY

GoldMine® FrontOffice 2000™

GoldMine FrontOffice 2000, an integrated CRM solution for small to medium-sized businesses, is one of a family of customer interaction products from GoldMine Software Corporation. It combines GoldMine Sales and Marketing with GoldMine Service and Support, two separate applications sharing a common customer record and mutually supporting alerts and business processes. GoldMine FrontOffice's Management Intelligence module, including Answer Wizard and Manager's Console, supports common management reporting across GoldMine Sales and Marketing and GoldMine Service and Support data. Optimized for a total of 10 to 200 seats, GoldMine FrontOffice 2000 allows companies to implement any combination of Sales and Marketing seats and Service and Support seats to meet evolving business needs.

GoldMine FrontOffice 2000 represents an extensible approach to CRM. Both GoldMine Sales and Marketing and GoldMine Service and Support are each complete, integrated packages that deliver significant productivity gains on their own. By using the two together, GoldMine FrontOffice 2000 allows sales and support information to reinforce each other in converting isolated sales or support transactions into a lifetime customer relationship.

GoldMine FrontOffice 2000 is a client/server system built on Microsoft's flagship SQL Server 7.0, and Windows NT 32-bit multithreaded multiprocessor operating system. Like other members of the GoldMine family, it leverages the Windows 95/98/NT graphical user interface, and includes built-in integration with popular Microsoft desktop applications, including Word, Excel, and Outlook.

GoldSync® 5.0

GoldSync® 5.0 Synchronization Server provides a flexible solution for synchronizing data between GoldMine systems over a wide variety of communications links including T1, Frame Relay, modem pools, and IP to IP. To minimize communication charges, GoldSync updates only changed information on a per-site basis. With GoldSync 5.0, users in various departments across the company can access GoldMine information from their own native databases. For organizations with multiple SQL databases, administrators can configure GoldSync to synchronize data at scheduled times to ensure that users always access current information.

GoldMine® 5.0

GoldMine provides the tools businesses need to gather, store and analyze customer information in order to win - and more importantly - retain customers. Designed for the workgroup, GoldMine collects and centralizes all information flowing through an organization, the result is an internal organizational structure that has every employee working at maximum effectiveness and efficiency. With GoldMine's unique solution to managing prospect and client information, teams can spend less time on administrative tasks and more time realizing results. GoldMine bridges the gap between complex, expensive Sales Force Automation software and lower-end Contact Managers to give you high-end results at an affordable price.

It contains all of basic GoldMine Sales and Marketing features except Management Intelligence, Service and Support integration and MS-SQL support. Unlike other contact managers that require users to sacrifice data when upgrading to a new version, GoldMine 5.0 provides wizards that make upgrading easy and fast, without loss of data. An organization can start out with GoldMine 5.0 and later move up easily to GoldMine FrontOffice 2000.

HEAT® 5.0

Closely related to GoldMine Service and Support, HEAT® 5.0 is GoldMine's award-winning internal help desk solution. HEAT features an open architecture and ODBC compliance to allow compatibility with both client/server and file server databases, including SQL Server, Oracle, Sybase SQL Anywhere, or Microsoft Access. In addition to the capabilities described in GoldMine Service and Support, HEAT 5.0 features Workgroup Asset Management and integrates with several Desktop Management tools such as Microsoft SMS®, Intel® LANDesk®, and NetCensus® from Tally Systems®.

Leveraging the Internet

GoldMine recognizes the increasingly important role of the Internet in managing an increasingly mobile – even virtual – sales and support team in support of customer relationships. For that reason, GoldMine FrontOffice 2000 offers a web client that provides full access to both sales and support information. Salespeople or field service personnel in branch offices or on the road can access contact records, personal or group calendars, or the InfoCenter. This means they can schedule appointments, update forecasts, or download the latest competitive updates quickly and easily from their laptops.

In addition, customers can log service and support calls through the web, and track status on them later on. This provides customers with 7x24 access to report service or support requests, and automatically applies the same business rules, service level tracking, and personalized response that GoldMine provides for requests logged through the call center – while saving time and effort within the support organization itself.

GoldMine Front Office provides a complete intranet solution for distributed sales and support organizations today. In the future, GoldMine will be rolling out additional extranet capability that extends customer information to business partners and networked “communities.” For example, manufacturers’ reps will be able to look up leads in GoldMine. In some cases, access can be extended directly to customers themselves, for example, scheduling their own appointments. GoldMine’s flexible web architecture, based on Microsoft Internet Information Server and dynamic HTML, allows it to be deployed in a wide variety of intranet and extranet environments.

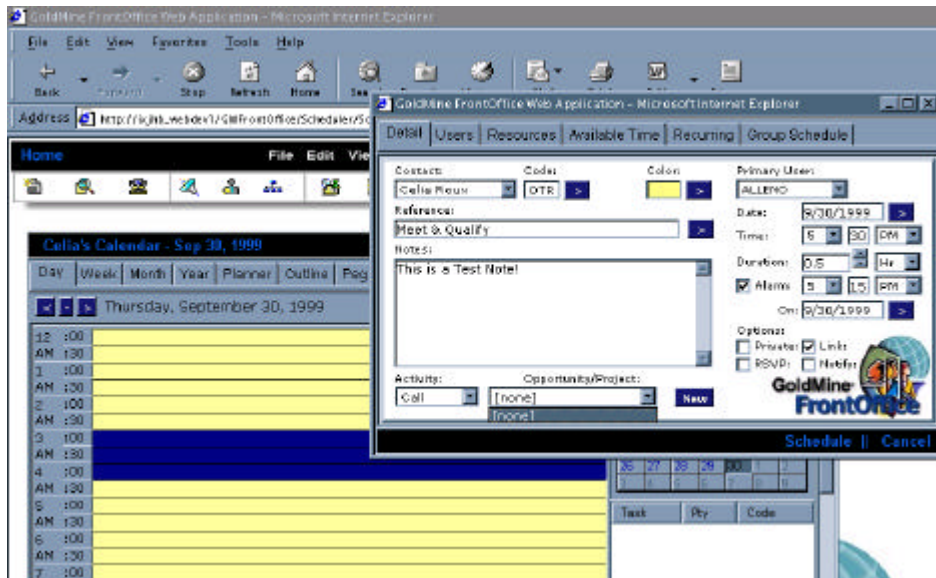


Figure 16. GoldMine Sales and Marketing web client allows salespeople to schedule appointments or update customer contact records on the road.

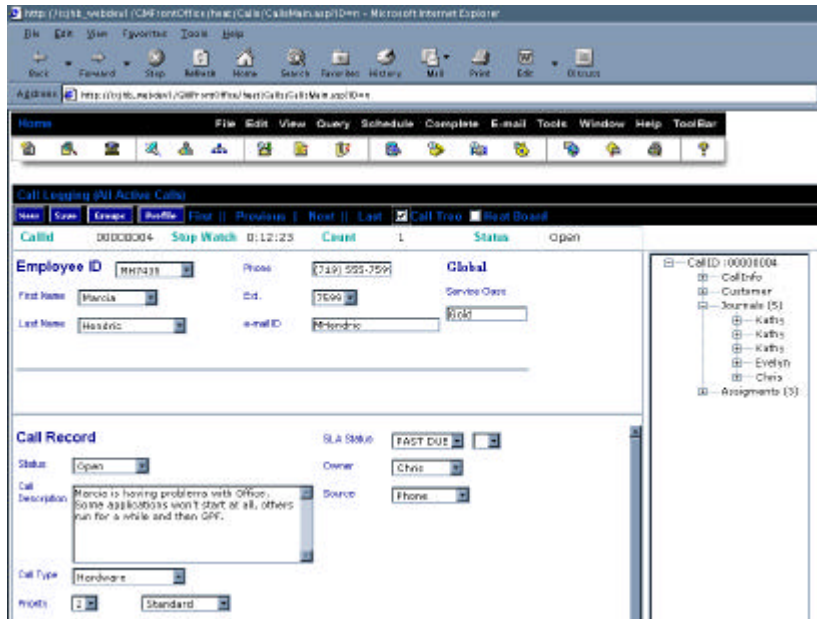


Figure 17. GoldMine Service and Support web client allows distributed or virtual support organizations to act as a tightly integrated unit.

Sustaining Lifetime Customer Relationships

In the twenty-first century, cost cutting won't be enough to assure success in business. Global competition and the Internet will only continue to widen buyer choices. The only reliable way for businesses to thrive will be through attentiveness to each customer – in marketing, in the sales process, in post-sales customer care. Customers will return to suppliers who are listening, who are supporting them effectively, and meeting commitments. Customer relationship management becomes not a luxury, but a survival skill.

GoldMine FrontOffice 2000 gives small to midsize companies the opportunity to compete and win in the new economy by offering a flexible low-risk approach to CRM. It allows companies to start small and grow, with the confidence that their customer information can continue to scale along with the company's business. It provides templates, tools, and wizards that enable quick deployment and rapid return on investment. Most importantly, it provides an extensible common foundation for both sales and customer service, allowing them to support each other in building customer loyalty and repeat business.

Certainly, GoldMine FrontOffice enhances productivity for telemarketers, field sales, and support analysts, reducing the costs of those operations. But that's not the ultimate payback. The real reward from integrating the entire front office to serve the customer is enhanced top-line growth. That growth comes from increased customer retention, from cross-selling and up-selling, and from developing new products and services in tune with subtle shifts in the marketplace. Beating the competition in customer retention means growing market share, and that in itself attracts new customers.

CRM demands a new approach to customer information. It can't simply be transaction-oriented; it must also support a lifelong relationship that spans marketing, sales, and service in a repeating cycle. That means a common contact-customer history, viewed and updated by the entire CRM team. GoldMine FrontOffice 2000 embraces that CRM vision, and now makes it accessible to small and midsize businesses.