QAD CUSTOMER MANAGEMENT

Effective customer acquisition and retention is necessary for manufacturers to grow revenue and margin, but it is an ongoing challenge. Manufacturers must continuously address the following questions: Do we have the right products? Do we have the right prices? How do we ensure we run successful campaigns? Can we grow closer to our customers to better understand and service them? Do our customer-facing personnel have the right information to help customers make the best buying and servicing decisions — and to place accurate and timely orders? Do we handle customer-facing hand-offs seamlessly? Can we make it easier for customers to buy from us over the Internet or through whichever channel a customer prefers?

BENEFITS

The **QAD Customer Management** solution supports manufacturers in all phases of the customer lifecycle, from acquisition through customer service, including managing orders, pricing, customization and fulfillment. It includes marketing and sales automation, helps manage sales force activities and performance, includes tools to monitor adherence to sales processes and run effective campaigns, and provides analytics and simulations to determine the best next step with each customer.

- Improve customer experience and satisfaction by **ensuring sales and service personnel have accurate information for customer interactions**

- Increase visibility across all departments and channels with **360-degree insight into customers**

- **Drive revenue through effective and cost-efficient campaigns**, and through web-based storefronts for product introduction and self-service

- **Streamline configuration and order processes,** to shorten deliveries and respond to customer requirements for customization

- **Reduce scrap and rework by ensuring customer choose and define accurate product configurations**

- Meet the requirements of global customers with **multi-language capabilities** and localized ordering and transaction capabilities

- Improve ROI of campaigns through **analyzing campaign history, running what-if scenarios and optimizing pricing**

- Supports web-based and mobile users with optional **QAD Cloud deployment using an HTML5 and native mobile user experience** that includes advanced personalization, action centers and embedded analytics

- **Support buying groups** and related contract and best price management

SOLUTION

QAD Customer Management consists of a fully integrated solution that helps manufacturers move their customers along the sales/marketing/service value chain, from lead to trusted business partner. The objective is to provide an outstanding customer experience that builds the manufacturer's brand and helps them acquire, sell to, retain and deligh customers while controlling – supporting the objectives of managers of sales, marketing, service, field service and support.

- Includes sales communications and scheduling tools, pipeline and forecast management and customer service capabilities to **improve salesperson productivity**

- Provides an easy-to-develop and easy-to-user **web storefront which lowers the cost of goods sold by engaging customers digitally**

- Includes **two flexible pricing models that help automate sales quotations, improve pricing accuracy** and simplifying repricing

- Integration with MRP, inventory and accounts receivable ensure sales orders and invoices **reflect accurate availability, terms and conditions**

- QAD Customer Management core capabililties are part of the full-featured QAD Cloud ERP and/or QAD Enterprise Applications (on premise) solutions, **ensuring all information is synchronized real-time**

QAD Customer Management	Customer Relationship Management	
	Sales Analysis	Sales Orders
	Sales Quotations	Pricing
	QAD Configurator*	QAD Customer Self Service*
	QAD Trade Activity Management*	
		*Related Solutions

SOLUTION DETAIL

QAD Customer Management includes a comprehensive set of capabiities and offers several related solutions for manufacturers with unique requirements. Core capaabilities include:

Customer Relationship Management provides a 360-degree view of customers by providing customer data visible to all customer-facing personnel and corresponding management, plus operational and financial information.

- Provides a graphical view of **sales performance, funnel and past-due activities** in sales dashboards that include **predefined sales key performance indicators**

- **Maintains customer/prospect profiles i**ncluding business data, locations, financials and sales history

- **Shortens sales and marketing cycles** by automating daily activities and storing opportunity details and helping plan and executive campaigns

- Fully integrated with Sales Orders and Invoicing and QAD Service and Support Management, allowing **the field to process orders and update status of service and support issues**

Sales Analysis helps salespeople and managers make better decisions about sales strategy and tactics by measuring sales, margins, costs and quotas by item, site, product group, customer and channel.

- **Generate sales performance reports,** in tabular and/or graphical form and export to Microsoft Excel™ with a single click

- **View sales quotas, margins and rankings**

- **Analyze customer segments** to determine, for example, which segments exhibit the most traction

- **Filter data** by site, product line, item or specify ranges within the filters

Sales Orders and Invoicing provides comprehensive methods to create and confirm sales orders, verify credit, allocate inventory, pick and ship products, process invoices and handle returns.

- Create sales orders easily, either **directly from Sales Quotations or electronically via EDI**

- Save time and prevent errors by **verifying credit before shipping**

- **Automatically transfer invoices to QAD Financials Accounts Receivable** for aging, maintenance and General Ledger transactions

- **Determine Available-to-Promise** quantities by due date and allocate required inventory

Sales Quotations helps increase revenue through better quotation accuracy; standardized quote processes help manufacturers quickly adapt to shifting market conditions.

- **Respond effectively to customers' quote requests,** using advanced pricing techniques; monitor quote status and report on quote history

- **Generate one-time quotes for single sales** and release the quote upon customer approval

- Manage recurring quotes for repeat business, with the **ability to anticipate quantity**

- Specify settings that s**ynchronize quotes with QAD Financials** for information like tax

Pricing provides automated and flexible pricing during ordering including sales quotations, releasing quotes to orders and repricing items or orders as required.

- **Supports an unlimited number of price lists,** using 2 main models: Best pricing and list/discount table pricing; multiple discounts are considered and applicable

discounts combined to determine the best net price

- Price break categories support assigning of **volume price breaks for multiple items**

- **Easily calculate discounts** on the quantity or amount ordered on multiple lines

- **Create what-if reports to model pricing scenarios**

RELATED SOLUTIONS

In addition to the core capabilities of QAD Customer Management, QAD offers several closely related additional solutions that help manufactures meet specific requirements for customer engagement and management.

QAD Configurator streamlines and improves the customer sales experience by providing tools to simplify configuring complex products during order entry, ensuring manufacturers respond effectively to requirements for configured products.

- Reduces average order lead time by **helping Sales quickly configure orders and obtain customer sign-off**

- **Intuitive, multi-language questionnaire guides customers** to record specific product needs and simplifies reorders by saving previous configurations

- Frees engineers from the sales process by **capturing engineering knowledge in an easy-to-follow configuration questionnaire**

- Increase revenue and loyalty through product personalization; **helps manufacturers quickly introduce new features and cross-sell related products and features**

QAD Customer Self Service provides manufacturers a secure web storefront that reflects a manufacturer's brand(s) and simplifies online ordering and inquiries, reducing errors, cost, time to order and deliver.

- Exposes shipment, invoice, payment and credit information to customers **reducing call volume**

- Offers **multiple storefronts** depending on customer type and **supports multiple catalogs** tailored to specific customers

- **Prompt customers with up-sell and cross-sell offers** to increase revenue per order; directly integrates with QAD Configurator for product customization

- **Protected by Secure Socket Layer (SSL)** to prevent transfer of secure/confidential information and is **PCI-DSS compliant**

QAD Trade Activity Management supports buying groups, contract management and best price management and tracks ROI of promotions and rebates.

- Manage deals and promotions by customer and product groups; **accelerate contract-based ordering**

- **Tracks, monitors, analyzes and models promotional spend**

- Automated trade settlement and claim validation **reduces settlement lead-times**

- **Automatically verifies customer promotion eligibility** and validates claims, deductions and invoices

- **Documents deal activity,** for example, retrospective deals like lump sums, bill-backs and scan-based claims

For more information on how QAD Customer Management can help your company, please contact QAD at +1-805-566-6100 or email info@qad.com.