Enhancement tools for Infor CRM by Collier Pickard

Infor CRM is an award-winning CRM solution that delivers a complete view of customer interactions across your sales, marketing, customer service, and support teams. But your business is unique, so sometimes a little enhancement to the core product can help you with your tasks.

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Introduction

At Collier Pickard, we have designed a number of enhancement tools for Infor CRM that can easily be added to the core system. They are listed in this document along with a brief summary of what they do. For more in-depth information about each enhancement tool and how to integrate it with your Infor CRM system, please contact us!

Overview of enhancement tools for Infor CRM

Event Management	Helping you manage any type of event from start to finish.
Bid Grid	Helping you automate your assessment of sales opportunities.
Value Grid	Helping you profile customers easily, accurately and consistently.
Data Validation	Helping you achieve data integrity, one of the most important foundations in any CRM system.
Customer Satisfaction	Helping you monitor your customers' level of contentment and improve your processes.
Referrals	Helping you track referrals so you can track and nurture valuable relationships.
Anti-Money Laundering	Helping you create awareness of the requirement for compliance amongst your client-facing staff.
Wills	Helping you organise information on clients' wills, codicils and reviews.

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Event Management for Infor CRM

If your business regularly runs events such as seminars, training courses and meetings, then our Event Management enhancement tool for Infor CRM can help you run these events efficiently. It allows you to track everything you need – including accommodation, dietary requirements, outstanding payments, attendee lists and much, much more.

Event Management for Infor CRM is a seamless extension to the core Infor CRM capability. Manage any type of event from start to finish, all from within your Infor CRM system.

Bid Grid for Infor CRM

The Bid Grid for Infor CRM helps you achieve consistent and accurate forecasting through an automated assessment of your sales opportunity status.

A sales person will often rely on experience and gut feel to estimate the probability of closing a deal. We have developed a question-and-answer grid, based on years of experience and best practice, to help improve forecasting and act as a guide in long term account development. We call this tool the Bid Grid.
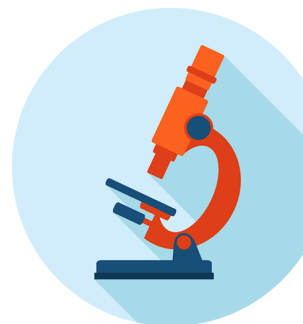
Value Grid for Infor CRM

The Value Grid for Infor CRM helps you evaluate the long term value of customers. By profiling the relationship you have with each organisation, you can target specific areas of every relationship and boost long term customer satisfaction, retention rates and revenue growth.

The Value Grid has been developed by us to help you profile customers easily, accurately and consistently. It enables the quantification of opinion as it translates elements of the account manager's "gut feel" into a measurement, which ranks customers against one another in order of value or worth.

Data Validation for Infor CRM

Data Validation for Infor CRM helps you achieve data integrity - one of the most important foundations in any CRM system.

Your CRM system will not work properly for your business if it contains inaccurate and incomplete data. The Data Validation enhancement tool is designed by us to encourage proactive data validation, thereby promoting good data quality.

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Customer Satisfaction for Infor CRM

Keeping your customers satisfied with exceptional products and services is key to retaining and developing them. Satisfied customers are also more likely to recommend you to other people, thereby generating more business. So understanding what makes them happy and what doesn't becomes key in building successful relationships. Our Customer Satisfaction enhancement tool for Infor CRM helps you track their level of contentment and improve your processes.

Referrals for Infor CRM

The Referrals enhancement tool for Infor CRM tracks the flow of referrals, both in and out of your firm, allowing you to focus and nurture valuable relationships that bring more business.

Drumming up brand new business requires more time and work than gaining clients through recommendations. Our Referrals enhancement tool is designed to make it easy to track, analyse and develop relationships which yield valuable business through referrals.

Anti-Money Laundering for Infor CRM

Compliance with money laundering obligations is a great challenge for any business that handles funds as an intermediary or holds client funds on account. So your Infor CRM system could make life easier for you.

Your CRM records of client activity could be used to track Anti-Money Laundering actions and to create awareness of compliance amongst your client-facing staff. Our AML enhancement tool is designed to make it quick and easy to store the required contact information and ensure the data is current and correct by prompting you to update the information when and where necessary.

Wills for Infor CRM

The Wills enhancement tool allows you to track which of your clients have a will, whether the will is stored with you or with another company, if they are due for a review of their wills, and whether or not they have a codicil. By allowing you to identify this information, this enhancement tool ensures that you maximise your chargeable time, increase the number of clients you have and increase the amount of service you provide to those clients.

Further information

How do these enhancement tools work? Get in touch today and we'd be happy to show you and discuss how they can meet your business requirements.

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