

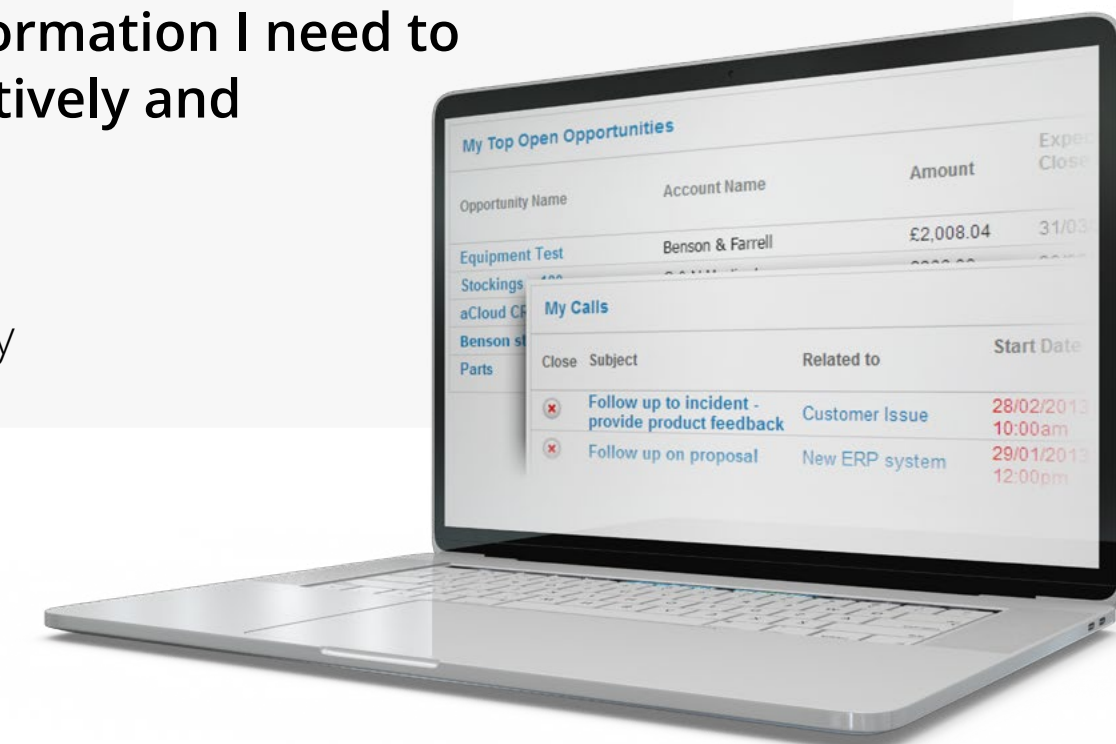
Access CRM for sales

Use a CRM system that works for you, not the other way around

Automate your manual tasks and focus your time and energy on your pipeline. Be informed and prepared, understand the value of your customers and prioritise which deals to work on first, know which need more work, and when to start prospecting, building your pipeline and ultimately winning more business.

“Implementing Access CRM was painless and integrating with our back office system means that we’re able to see product information, invoice status and information on emails and meetings between our sales team and customers. In other words, a complete overview of how my company is interacting with my customers, so I have all the information I need to communicate effectively and close business.”

Sales Director
Manufacturing Company



Key benefits



A true birds-eye view

Get a birds-eye view of all your accounts, contacts and opportunities from one place. See what communications you and your team have had with customers. Move contacts from opportunities to leads to customers, and get a complete overview of the sales lifecycle.



Keep updated while on the move

Access CRM is available on smartphones and tablets, giving you access to your leads, opportunities and tasks, and keep updated on your calendar, meetings and calls. Meaning you stay on top while on the move, allowing you to sell from anywhere.



Learn about your needs

Track conversations and save correspondence to build up a complete record of all communications with your leads. Find out what marketing messages they're most responsive to and how engaged they are. Leverage LinkedIn and social channels to monitor what your customers are saying and interact with your contacts directly.



Back office links

Access CRM links seamlessly to your back office system, enabling you to create quotes, drill down into your product catalogue and create one click-orders – all from one place. Delivered via Access Workspace, giving you a single sign on to all your Access products and integrated analytics.



Accurate reporting

Get a visual overview of your sales pipeline, track early indicators and changes allowing you to accurately forecast. Decide where to focus your team's energy and meet your sales targets on time. Find out which products and teams are performing better and what areas need help, allowing you to react to changes before they happen.



Management and communications

Manage teams and territories, assign leads automatically and create auto responders to let your customers know you've received their enquiries. Keep your sales teams up-to-date with alerts and reminders sent via email, notifying sales teams of new opportunities. Integration with Outlook also allows you to save correspondence, set tasks and sync calendars.

Top features

Key features that make Access CRM the best choice for your company:

Integration with your product catalogue: Access CRM includes extensive integration to the stock information held in your finance system. Simply drill down for detailed product data without leaving the CRM environment.

- ✔ Quote in multi-currency
- ✔ Validity periods
- ✔ View quantities, product descriptions & pricing
- ✔ Optional signoff / approval workflow
- ✔ Central quote history/library

Role and Team-based CRM: Access CRM knows exactly who you are, delivering a personalised user experience every time you log in.

- ✔ Pre-defined home page, supporting different roles for ease of use
- ✔ Dashboards straight-from the box including: sales pipeline, lead source, monthly pipeline by outcome, opportunities by lead source
- ✔ My Favourites allow easy monitoring of relevant accounts, contacts, opportunities or other CRM records that are important to track



Top features

Social CRM: Access CRM includes pre-built integrations to the most popular collaboration and social media applications. From Twitter, LinkedIn and Facebook connectivity to more advanced features such as GoToMeeting and Webex integrations.

Intuitive pipeline management: From quote to close, managing your pipeline is easy and intuitive using a range of inbuilt tools.

- ✔ Track multiple quotes against opportunities
- ✔ Manage your sales process, pipeline and forecast
- ✔ Add favourites and monitor in real time

Closed-loop reporting: Don't just look at leads, look at the bottom line. Access CRM allows teams to become truly effective by showing which activities add business value. For example, the success of a campaign can be measured by the amount of pipeline revenue an activity has generated, rather than simply how many leads.

Integration with Outlook email: MS Outlook is still the correspondence tool of choice for business, so Access CRM offers tight integration for convenience and ease of use.

- ✔ Track and share email communications in Access CRM
- ✔ Create CRM contacts, opportunities, leads and cases directly from email messages
- ✔ Build up a complete view of the correspondence with your customers and prospects to improve the customer experience



Take control of your customer and prospect data

Take control of your customer and prospect data

Access CRM empowers your sales, marketing and support staff to own and manage their pipeline, determine which marketing campaigns generate the best ROI, and put the customer back into CRM.

Intuitive and easy to use, staff can start using Access CRM straight away. Best of all, Access CRM is delivered through Access Workspace, easily integrating your existing Access products and giving you clear visibility of performance and insights from multiple areas all via a single sign on.



Watch a short video for more information on Access CRM for Sales

For further information about Access CRM

