

## MYOB EXO Business CRM module

A customer relationship management (CRM) tool to better manage sales and customer interactions.

MYOB EXO Business CRM manages all prospect and customer information derived from activities, tasks, emails, quotes and sales, in one centralised system, then allows you to use this information to build your business.

Eliminate the costly need of double-handling, inconsistencies or re-keying that arises through the use of multiple systems. Plus, set varying levels of user access for higher security of data and information.

### Full integration with MYOB EXO Business

There are many benefits of EXO CRM being aligned with the EXO Business system:

- > It enables a complete view of each prospect or customer including invoice history, balances and service history\*.
- > Provides you with live stock levels, anywhere, anytime – accurately inform customers of stock availability.
- > Current pricing is available when creating quotes to ensure any pre-existing pricing agreements with customers are honoured.
- > Data is live and not duplicated to reduce error rate through the elimination of manual input or re-keying of data.

### Contact management

In MYOB EXO CRM you can view all interactions relating to each contact including activities, opportunities, orders and invoices. This information can also be shared across your business to provide a quality customer experience.

Plus, as EXO CRM is integrated with Outlook®, details of your contacts, tasks and appointments from EXO CRM are available in Outlook®.

Using the EXO CRM module, staff can create and maintain “lists” of contacts and use these to create bulk activities or communications such as reoccurring call programs for overdue debtors.

### Key features and benefits

- > Comprehensive view of all clients and their transaction history
- > Create re-usable contact lists for use in bulk communications and marketing campaigns
- > Manage marketing campaigns as a complete end to end process including tracking campaign costs and return on investment (ROI)
- > Social CRM features use networks such as Twitter, Facebook and LinkedIn to support marketing campaigns, influence sales, and increase stakeholder engagement
- > Access accurate customer information including opportunities, orders and pricing arrangements, from anywhere at anytime
- > My Day tool allows you to view all your daily activities including tasks, opportunities, pipeline, orders and sales performance
- > Fully configurable sales tracking with the ability to measure performance and compare to budget, company or sales representative, and review historical information
- > Real time stock management so you always access accurate information and allow for efficient, correct responses to customer queries
- > Set realistic and accurate sales budgets using historical sales data.

### Marketing campaign management

Users can manage their marketing campaigns from end to end including tracking campaign costs and ROI. Set up campaign waves, import data lists, and generate and send communications through multiple channels. The ROI can be tracked either using standard estimated cost tracking within EXO CRM, or by actual detailed costings by integrating with the EXO Job Costing module.

# MYOB EXO Business CRM module Fact Sheet

## MYOB EXO Business OnTheGo Application

This can further increase sales staff efficiency by enabling staff to securely connect to EXO Business to better and more efficiently manage the entire quote and order process-in the field, on the go.

## Social CRM capability

Organisations can leverage the power of social media sites via the campaign management functionality for competitive advantage.

Track brand names and user and company mentions through EXO CRM and display these on dashboards in EXO Business using the social media widgets. Twitter, Facebook and LinkedIn accounts may be set up for marketing campaigns in EXO CRM, and the campaign message can be viewed and posted to these social media networks to extend campaign reach.

Social CRM capabilities deliver a true 360-degree view of customers and prospects while enabling you to better engage with key stakeholders.

## My day tool to prioritise activities

My Day helps you plan your daily activities including tasks and opportunities, pipeline, orders and sales performance. With everything visible on a single screen your day becomes easier to manage.

## Sales opportunity management

Capture the details of sales opportunities, including key contacts, the source and value of the lead, the anticipated close date and probability of the sale with EXO CRM.

Using the EXO Job Costing module, once a sale has been confirmed, users can easily convert the opportunity to an order or job that can then be processed through to invoice within the EXO suite. This seamless process eliminates duplication and saves time on re-keying data resulting in faster, more accurate invoicing.

## Real-time stock information

As EXO CRM is integrated with EXO Finance any updates in stock levels are instantly visible. This means you will always be accessing accurate information, ensuring precise and timely responses to customer queries.

## Sales vs. budgets

Sales performance tracking against budget is easy with EXO CRM. Slice and dice data to fully understand what's affecting your results. You can also utilise historical sales data to set realistic achievable budgets.

## Extensive, established partner network

The EXO Suite of products are implemented and supported by our expert MYOB Partner Network across Australia and New Zealand. We provide educated advice regarding the entire range of MYOB EXO Business and Employer Services Solutions and work with you to design a solution that meets the unique needs of your business.

## An integrated business solution from MYOB

A range of additional modules are available and can be adopted and tailored to your business. With the assistance of an MYOB EXO Partner, we can build a comprehensive business management system tailored specifically for your business requirements.

For more information

If you want to discover how an integrated business management system can improve your business visit [myob.com.au/enterprise](http://myob.com.au/enterprise)  
[myob.co.nz/enterprise](http://myob.co.nz/enterprise)