

Conferenceware

Integration with ACT!

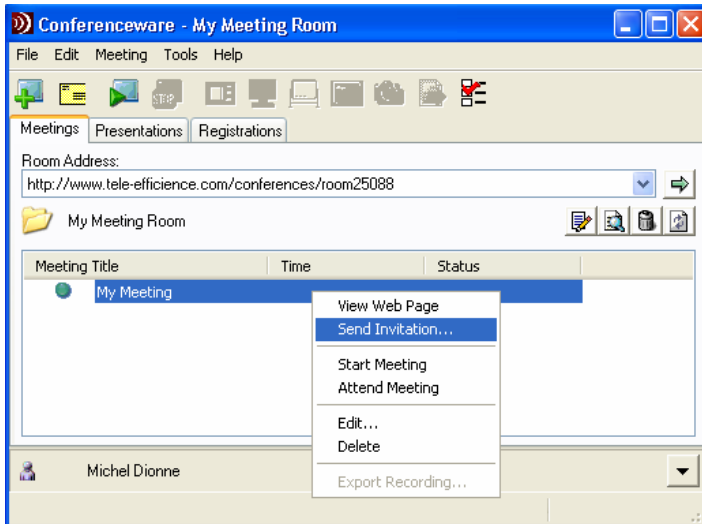


Tele-efficiency)))

Tele-efficiency is committed to helping our clients save their time, improve their synergy, and lower their traveling expenses. We offer superior WEBconference services at a fixed price under the trademark *Conferenceware*, integrated with most CRM applications and with Skype. Its interface is personalizable to the company. What's more, you can enjoy a free 30-day trial! Thereafter, you can continue enjoying the benefits of *Conferenceware* with a quarterly or an annual service contract.

From Conferenceware

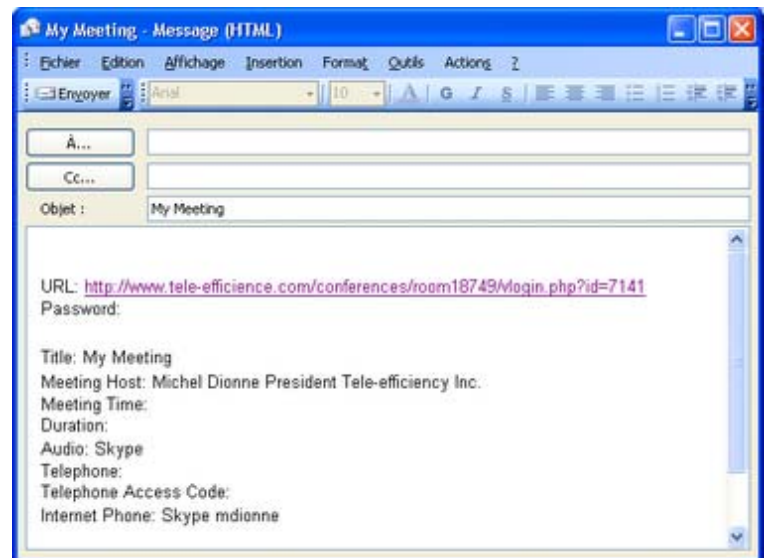
Conferenceware integrates with ACT! as your email client per default or via Outlook. In fact, it generates automatically the data for an invitation; description, agenda and voice broadcasting mode, in the template of a new email.



You invite the participants by sending an hyperlink to conduct them directly to the meeting. Click with the right button on the meeting's name, when selected the letters of the name will become grass and select *Send Invitation*.

Through your email client software

The information required by the participants, like the hyperlink to get to the meeting, the time and date, the necessary password, if that is the case, are already in the email information that opens within ACT! or Outlook.



Therefore, you only have to select people you want to invite amongst your contacts. Consequently, a copy of your invitation is saved with each contact file in ACT!.

To ACT!

eCRM



Tele-efficiency helps its clients to save time, improve their synergy and lower their travel expenses.

Offers WEBconference services at a fixed rate, under the trademark Conferenceware, integrated with CRM applications and with Skype. The greeting is customizable for each client's company image with their logo. Also offers a free 30-day trial period followed by a quarterly service contract or yearly.

Conferenceware is a trademark of Tele-efficiency Inc. The trademarks mentioned are property of their respective manufacturers. For more information, visit our WEB site under Contacts.
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Introduction

The Customer Relationship Management is first of all and before anything else, a business strategy technologically supported and not the other way around. It consists on identifying the value of the clients, to keep them, develop them and get new ones. In this perspective, the prospecting of acquiring new clients begins with [WEBinar](#) while sales in itself, especially the presentation to prospects, is done in [eSales](#).

Preparation

Make the difference between the development of current clientele and market prospecting. In the first case, contacts are identified and are established in the client's account. Therefore, is convenient to organize a presentation since Conferenceware automatically generates the information required for an invitation, the description, schedule and the mode for voice broadcasting within the format of a new message. From there, you just have to select the persons you want to invite among your contacts. Consequently, a copy of the invitation is saved in each of your contact's file, in your CRM software. In the case of prospecting by [WEBinar](#), the list of registered persons is imported in CSV format in order to automatically build contact information in your CRM software.

Progress

The objective of commercial presentations is usually to get information regarding the prospect's business problematic and to identify the persons with power among the organization that have the weight to make the buying decision making. Is through the interactive questionnaire that is possible to evaluate the preoccupations in terms of problems along with the buying criteria of each of the persons influencing the process. While meeting with them, you are able to identify each person's role within the acquisition, user, evaluator, and their level of knowledge, beginner or expert as well as their attitude: ally, neutral or hostile. In the case of acquired clients, the interactive questionnaire is precious to evaluate their loyalty particularly their disposition to make referrals.

Follow up

The report of a reunion indicates not only the participants but also the answers they have provided to the questions submitted: problems, retained buying criteria, loyalty index. From there, you should be able to prepare a differential proposal, showing by the grade of pertinence, your understanding of the client's needs. Moreover, by recording a meeting, in which voice and image are synchronized, it can be replayed to check the fine tuning and be kept in the file as an attachment to opportunity.

Seamlessly integrate with Outlook e-mail, saving you time while allowing you to track vital information on the ACT! Contact Record¹.

Whether you click on a hyperlink or choose to write an e-mail message from within ACT!, ACT! opens the Outlook new e-mail message form when you want to send an e-mail.

Create a history in ACT! from within an Outlook e-mail. Choose from three default history types including subject line, subject line and message, and e-mail attachment.

From within Outlook, attach Outlook e-mail to an ACT! Contact Record for a complete view of all customer communications.

Easily create an ACT! contact from an Outlook e-mail. The Contact Name and E-mail Address are automatically filled in.

¹ During setup, users must select if they want to access Outlook e-mail through the ACT! E-mail Client or direct integration with Outlook. Requires Microsoft Outlook 2000, 2002, or 2003. ACT! must be added as an address book to use this feature.

Stay in Touch

Track all of your critical contact and customer communications on the Contact Record for quick and easy referencing. Utilize the ACT! E-mail Client integrated with Lotus Notes® or Microsoft Outlook Express®, or integrated directly with Outlook to send outbound e-mails to contacts and create contact history on the Contact Record. ACT! Mail Merge allows you to correspond with multiple contacts, either via e-mail or paper correspondence, and automatically track a history on each Contact Record. ⁴

- Track customer correspondence on the relevant Contact Record for a history of all communications with that contact and organization.
- Quickly identify the last communication with a contact from the Contact Detail View with the Last Reach, Last Attempt, Last Meeting, Last Letter, and Last E-mail fields.
- Write letters in ACT! using Microsoft Word[®] or the ACT! built-in Word Processor which supports tables, graphics, HTML, and spell checking.
- Select a group of contacts and perform a mail merge to a letter or e-mail. A history is automatically generated on each Contact Record.
- Use pre-formatted templates to save time on e-mails, letters, and memos. Easily customize the HTML graphical templates to e-mail customers.
- Create, send, and track e-mail to/from contacts using ACT! E-mail Client integrated with Microsoft Outlook Express or Lotus Notes or integrated directly with Outlook and create a history for all e-mails sent. ⁵
- Utilize direct Outlook e-mail integration from within ACT! to send messages. ⁷