

Conferenceware

Integration with SalesLogix

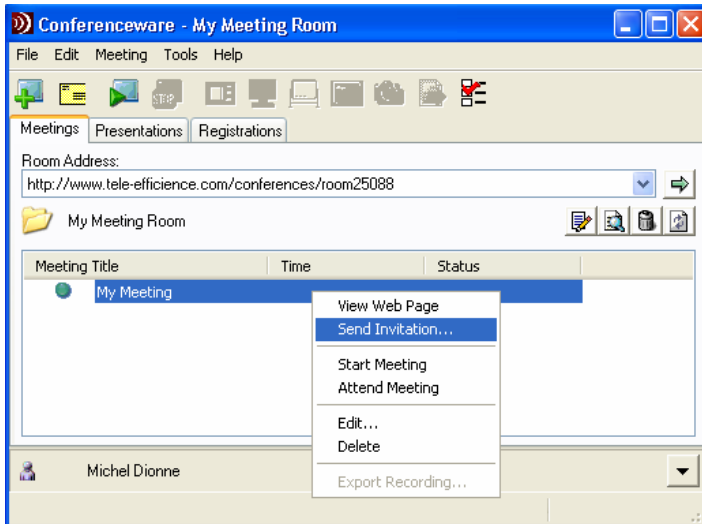


Tele-efficiency)))

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

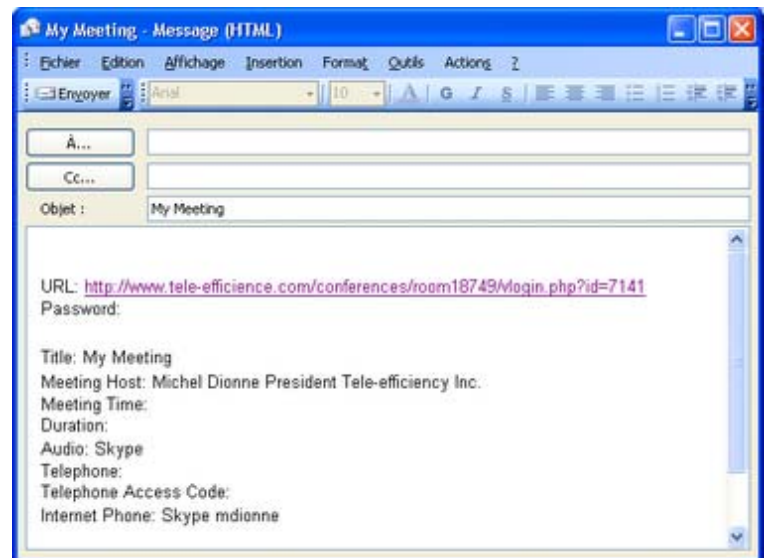
Conferenceware integrates with SalesLogix as your email client per default or via Outlook. In fact, it generates automatically the data for an invitation; description, agenda and voice broadcasting mode, in the template of a new email.



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 SalesLogix 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 SalesLogix.

To SalesLogix

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.

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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.

SAGE CRM SALESLOGIX

Customer Relationship Management (CRM)

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► Outlook Integration

We want Sage CRM SalesLogix to work the way you do. And Sage CRM SalesLogix Advanced Outlook® Integration makes that easier than ever! Now you can continue to use the Microsoft® Outlook application you know and love — and you can use it together with Sage CRM SalesLogix.

Sage CRM SalesLogix has long been known as the leader in helping companies manage their business relationships — effectively. With its [Advanced Outlook Integration](#), Sage CRM SalesLogix takes that reputation to a new level. Letting you decide which tools you want to use to manage your e-mail, calendar and contacts. Making it easy to create, update and transfer data from Outlook to Sage CRM SalesLogix (or vice-versa). Synchronizing automatically and painlessly.

Sage CRM SalesLogix works seamlessly with Outlook for e-mail, calendar, contacts and synchronization. And, with your employees continuing to use Outlook, the transition to full-fledged CRM is easier than ever! They'll begin filling your new Sage CRM SalesLogix system with data without even knowing it. As they become more familiar with Sage CRM SalesLogix, they'll have tremendous flexibility to work the way they want, using both Outlook and Sage CRM SalesLogix.

E-mail Integration: Works Like You Do

Need help prioritizing your e-mail? Sage CRM SalesLogix checks unread e-mail messages against the Sage CRM SalesLogix database and “flags” e-mail from customers and prospects so you know which e-mail messages to answer first. But let's say one of those flagged messages is a literature request. No problem. You can insert the appropriate file from your Sage CRM SalesLogix Library into your e-mail response — in just two simple steps.



Take a **Features Tour**.



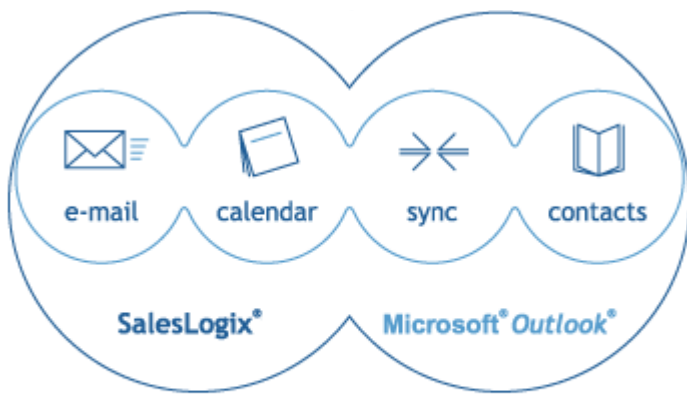
Download the Sage CRM SalesLogix **System Requirements**.

Products

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 - PDF Library**

Mouse over the icons below to view some benefits of SalesLogix®





And if you want to forward that e-mail or send a new e-mail to another Sage CRM SalesLogix contact? Just use the "Sage CRM SalesLogix Address Book for Outlook" to select contacts directly from your Sage CRM SalesLogix database — even if the Sage CRM SalesLogix application is closed!

Finally, when you're ready to send e-mail, you can choose whether or not to record it to your Sage CRM SalesLogix History. If you decide the e-mail is relevant, simply click the "Send SLX" button at the top of your Outlook screen to automatically send the e-mail AND generate a History record in Sage CRM SalesLogix.

Calendar Integration: Outlook "Inside" Sage CRM SalesLogix

With Outlook "Attendee Availability," you're basically just putting Outlook "inside" Sage CRM SalesLogix. Schedule appointments for Sage CRM SalesLogix and non-Sage CRM SalesLogix users alike by viewing any Outlook user's "free/busy" schedule right in Sage CRM SalesLogix!

Once you complete a meeting, an Outlook Meeting Request is e-mailed to all attendees, and Outlook keeps track of who accepts and declines your invitation. If you're a Sage CRM SalesLogix user, your calendar is replicated and synchronized with your Outlook calendar. This means that a non-Sage CRM SalesLogix user can schedule a meeting request for you through Outlook.

Contact Integration: Contacts When You Want Them

Moving contacts from Sage CRM SalesLogix into Outlook is now easier than ever before — there's no waiting for synchronization! Just click "Add Contact to Outlook" and Sage CRM SalesLogix will "scrape" the relevant contact information off the screen and pre-populate an Outlook Contact form with it. And it's just as easy to move contacts from Outlook into Sage CRM SalesLogix.

Outlook Synchronization: Silent and Automatic

Synchronization now can run automatically and silently so you never have to think about clicking a button or running a program — it just happens! Plus, you also can sync contacts, calendar items and tasks from Outlook to your PDA of choice.

Get More Info

Sage CRM SalesLogix and Outlook — together at last. Get a first look at this integration in our [Features Tour](#). Want to know more? Fill out our [Get Info](#) form, and we'll send you what you need. Or, place a free [Web Call](#) and we'll call you right back.