

Five Ways Acumatica CRM Maximizes Profitability

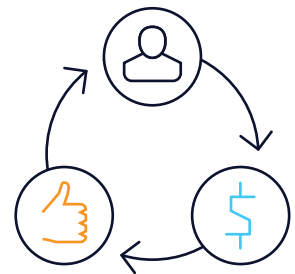
A SOLUTION BRIEF FOR ACCELERATING GROWTH IN FUTURE-ORIENTED ORGANIZATIONS

To meet evolving demands, rapidly growing organizations must juggle multiple priorities every day. They must fuel sales with targeted marketing campaigns while delivering top-notch customer service and keeping an eye on the future with strategic business planning.

Failing to meet today's customer needs jeopardizes tomorrow's success. Sales and Net Promoter Scores soar when customer-facing employees provide the targeted service organizations need to thrive.

Customer Relationship Management (CRM) takes the guesswork out of sales and marketing programs. With unified ERP and Customer Relationship Management, companies can visualize real-time campaign activity, align programs with revenue targets, and empower sales with the resources they need to close deals faster.

Acumatica's Modern ERP system with embedded CRM takes customer management to the next level. In addition to increasing profitability and customer satisfaction, Acumatica expedites return on investment by fueling innovation and lowering total cost of ownership.



INSIDE THIS SOLUTION BRIEF



This solution brief outlines the five ways Acumatica's CRM solution helps growing organizations increase profitability.

1

Boost Sales with More Quality Leads

Siloed marketing and sales programs may automate processes, but they cannot facilitate ongoing growth.

Acumatica accelerates growth in future-oriented companies by revolutionizing marketing and sales efforts. The unified solution automates everyday marketing and sales operations and empowers teams with the real-time insights they need to maximize their results.

Marketing knows what campaigns work best, so they can strategically focus their efforts, reduce costs, and leverage top lead generation

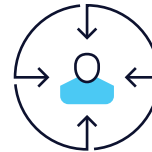
applications, like HubSpot and SendGrid, using Acumatica's open Application Programming Interfaces and low-code/no-code tools to build strategic integrations. Leads no longer fall through the cracks but are automatically entered and tracked.

Acumatica qualifies leads, alerts sales of new opportunities, assigns tasks, and provides 360 views of lead information. Sales has access to each lead's pain points and the tools to follow up effectively. Managers can also see the entire pipeline and status information at-a-glance and drill down to access records.

With Acumatica, companies can improve profitability and reduce risk with:



SHORTER SALES CYCLES due to more efficient processes, higher quality leads, and informed decision making



ONE SOURCE OF CUSTOMER DATA that provides all users with real-time access to the latest data to improve customer service and sales responsiveness

"With Acumatica, one of the big changes is that we can now track a lead to a customer with all the associated notes along the way so we can capture that information...With better information and improved reporting, we're expecting to see better sales results and improved customer retention."

– SCOTT MCCALLA, CHIEF STRATEGY OFFICER AT INTERNATIONAL PIPE & SUPPLY, LLC

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2

Streamline Processes to Spur Innovation

Employees often spend hours searching for the data they need to support customers and close deals. Tedious searches and data entry thwart progress by sapping employee creativity and straining interpersonal communication.

Acumatica spurs innovation and customer satisfaction by making all customer information available to authorized users anywhere, anytime. Users can quickly access real-time leads, opportunities, quotes, orders, shipments, invoices, payments, and service requests from any browser and device.

When a sales or support person uses Acumatica to contact a customer, they instantly see all open support cases and even open accounts receivable (AR) invoices to inform their decisions. Integrated workflows

and notifications keep employees on task deadlines on track.

Machine learning and artificial intelligence take integrated workflows to the next level of efficiency by automatically populating forms, updating account information, and pushing tasks through to completion. Acumatica enables employees to focus on value-added strategic work by eliminating error-prone manual processes. As a result, organizations shorten sales cycles and customer response times.

Since the CRM system operates seamlessly with core business applications, Acumatica also streamlines corresponding business processes. Closed deals trigger accounts payable and billing workflows and ensure the finance team has complete and accurate data.

Acumatica keeps sales, marketing, and support teams on track with:



INTEGRATED WORKFLOWS that alert users of new tasks and deadlines



REAL-TIME KPIS that keep business and end user priorities top of mind

3

Inform Decisions to Drive Business Goals

Businesses flourish when they set employees up for success. After all, people want to make a difference in the company's success and customer lives. They thrive when given the tools to track their progress against company goals, troubleshoot problems, and prepare for future demand.

Acumatica presents employees with the data, tasks, and KPIs crucial to their success every time they log onto the system and access their homepage. Personalized graphs, dashboards, bar charts, and pivot tables provide mission-critical information at-a-glance. Meanwhile, automatic alerts keep priorities on track.

The unified ERP and CRM system not only delivers real-time analytics to inform decisions but does so through intuitive, dynamic charts that let users drill down for details. Customizable dashboards and charts help set priorities and support split-second decisions.

Sales teams can see pipeline status for all leads, check the probability of closure for each, and drill down for specific account information. Meter tiles compare actual results versus goals and enable managers to click through for account details. Bar charts contrast bookings for current and previous quarters or years.

Acumatica automatically updates the potential revenue and success rate as the opportunity moves through the sales funnel.

Employees can customize their Acumatica experience to maximize their efforts with:



PERSONALIZED DASHBOARDS

that present KPIs and individual objectives on each user's homepage



QUICK ACCESS TO KEY TASKS and

Alerts automatically pushed to users

“Having opportunities in CRM gives us visibility into the sales project pipeline where we can see in real-time what's close to closing as well as what's in the pipeline.”

– JAMIE VOS, OWNER/GENERAL MANAGER OF SECURITY SOLUTIONS

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4

Increase Customer Satisfaction

Service delays frustrate customers who expect immediate action when problems arise. Customer churn increases as previously happy customers seek other options.

Acumatica alleviates customer concerns by enabling them to immediately find solutions to their problems on the Customer Self-Service portal. They can view their account history, get fixes to common issues, and report problems they cannot solve 24 hours a day, seven days a week, using any web-enabled device.

As soon as a service request happens, Acumatica case management goes to work to resolve customer issues immediately. It automatically assigns support tasks to appropriate personnel, complete with all

relevant customer data. The CRM system tracks the case history, moves projects along to completion, and reminds employees of pending tasks.

Customer information is always up to date and available at-a-glance. Support teams can easily trace the customer journey and understand connections between their current issues, account history, and unique business variables.

When a salesperson calls a customer via Acumatica, they instantly see all open support cases, notes, and even open AR (Accounts Receivable) invoices, which informs their decisions and helps them resolve issues faster.

Acumatica increases customer convenience and response time with:



SELF-SERVICE PORTAL that lets customers find immediate answers to their questions and submit support requests



ON THE GO MOBILITY that enables employees to respond to customer needs anytime, anywhere

5

Maximize Value and Lower Total Cost of Ownership with Unified ERP and CRM

Companies can spend hundreds of thousands to deploy a full-featured CRM solution and thousands more to integrate it with core business applications before they can start reaping benefits. Without a clear view of real-time customer data, they cannot quickly address customer problems or seize sales opportunities.

Since Acumatica embeds CRM in its core ERP system, companies get two mission-critical applications for the price of one. Businesses do not need to install and maintain complex

interfaces between ERP and CRM systems because the systems operate as one unified solution, using the same interface for all functions and a centralized database to ensure everyone accesses up-to-date data.

Acumatica's 360 view of real-time sales, marketing, and customer data delivers the agility SMBs need to address customer and prospect needs immediately. Unique, consumption-based licensing promotes cost-efficient growth with no hidden fees.

With Acumatica, companies can grow their business without escalating technology fees thanks to:



UNLIMITED USER LICENSES that let organizations give access to additional employees and partners without added costs



FREE ONLINE TRAINING helps users accelerate their ERP implementation and the execution of CRM capabilities tailored to their unique needs

"We searched for a provider that was built for the cloud and selected Acumatica TRUE Cloud ERP. Now we can be seamless by using CRM and the Mobile App; all departments in Security Solutions — sales, retail, service, inspections, testing — have instant access to information, helping to speed business and lets us focus on what we do best, which is to design, implement, execute security solutions that provide peace of mind."

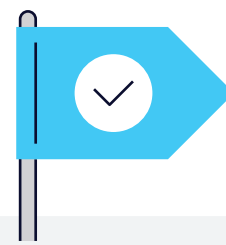
– JAMIE VOS, OWNER/GENERAL MANAGER OF SECURITY SOLUTIONS

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Summary

Acumatica ERP with CRM accelerates growth in future-oriented companies by revolutionizing marketing, sales, and support functions on one unified platform. Metrics-based marketing and targeted sales enable organizations to make a great first impression while responsive support services and self-service technology promote a positive lifelong experience.

In addition to streamlining marketing, sales, and support activities, the unified system connects CRM and core business applications to maximize efficiency and deliver one source of organizational truth. Productivity soars as employees spend their time on strategic and customer-facing activities while real-time analytics, dashboards, and KPI keep priorities on track.



“We looked at Salesforce, but it was a short conversation. The big question for us was, 'Why go piecemeal?' If you're going to upgrade, make it all the same package.”

SCOTT MCCALLA, CHIEF STRATEGY
OFFICER AT INTERNATIONAL PIPE &
SUPPLY, LLC

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ABOUT ACUMATICA

Acumatica Cloud ERP provides the best business management solution for digitally resilient companies. Built for mobile and telework scenarios and easily integrated with the collaboration tools of your choice, Acumatica delivers flexibility, efficiency, and continuity of operations to growing small and midmarket organizations.

Business Resilience. Delivered.

Learn more about how Acumatica can work in your business by visiting us online at www.acumatica.com.

