



# Active CRM

## Integrated telemarketing solution

10/04/2011

Alien Technology  
3E Locaux Professionnels  
Km 2.5 Route de Kénitra  
11005 SALÉ  
MOROCCO

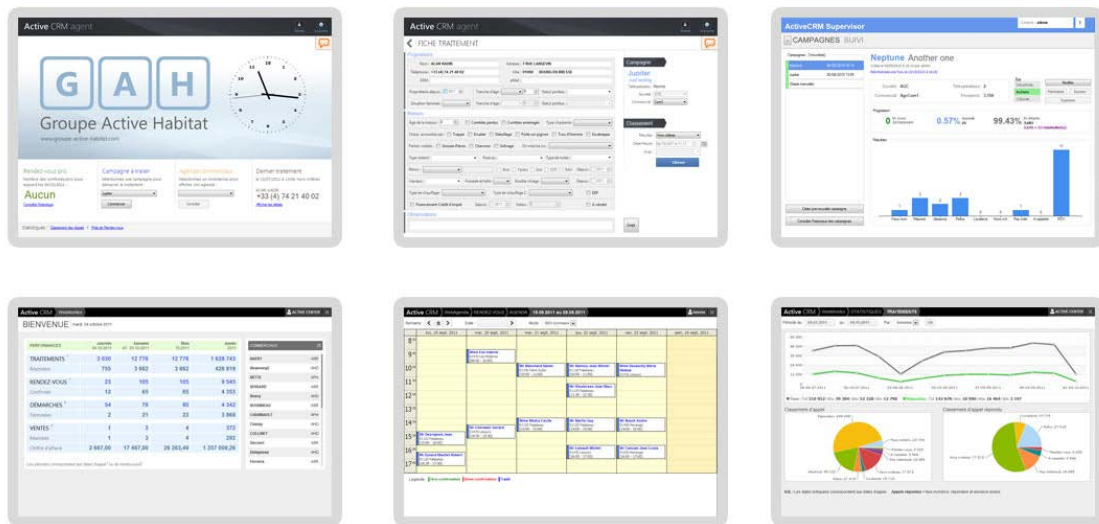
Phone: +212 537 84 38 82  
Fax: +212 537 88 05 49  
Email: [contact@activecrm.info](mailto:contact@activecrm.info)  
Website : [activecrm.aliendoit.com](http://activecrm.aliendoit.com)

## 1. Overview

To cope with competition and remain competitive, it's imperative to use appropriate tools to save maximum of time and get the best payback possible on investment. A CRM strategy is often associated with the development of software solutions to automate processes and make information exchange possible, as well as the establishment of a common database shared between several staff members.

This system aims to streamline information about an activity in order to increase commercial competitiveness of the company and improve profitability. Whether to increase sales, improve productivity, understand the needs of its customers, identify new opportunities or get a better organization of the activity, the CRM is the ideal solution.

Active CRM is a low cost, new generation, integrated management software platform for call centers, specifically the telemarketing (outbound calls). The turnkey solution includes the modules required for production such as campaign creation, telemarketing, appointments scheduling as well as administration and analysis tools. Active CRM is designed for businesses of all sizes who want to professionalize their telemarketing cell and improve profitability.



Screenshots: Active CRM solution modules

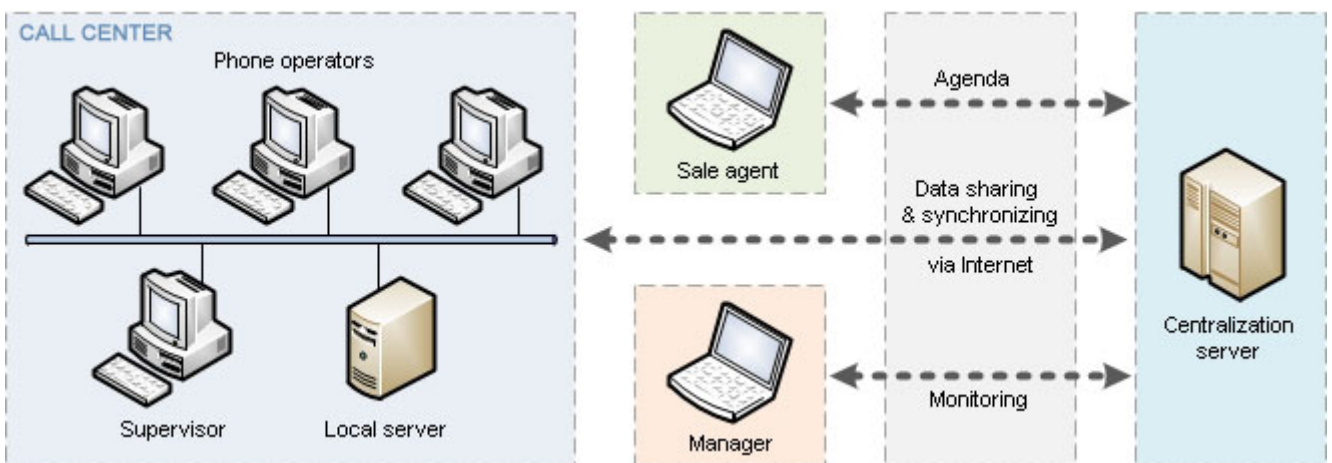


Diagram: Active CRM solution architecture

## 8 good reasons to choose Active CRM:

# 1



### Shared data

Data and production processes are synchronized with a remote server to make them accessible via the Web through a secure extranet exclusively used by the call center. The data centralizing platform allows sale agents to view and access their agendas and communicate the result of their business approaches; this gives supervisors the ability to overview the activity. The centralization platform gives also the managers the ability to monitor activity remotely via the Web and have access to different indicators and statistics.

# 2



### CTI support

The computer telephony integration aka CTI gives the ability to integrate phone systems (PBX, IPPBX etc...) to a software (CRM), and offers a great saving of time on two levels. The first is the automatic dialing (preview, progressive, predictive etc...) which speeds up the process, eliminates human intervention and avoid typing errors. The second level is the detection of non-answer, busy, answering-machine and fax, so only successful calls are routed.

# 3



### Custom solution

The solution's modules are completely customizable and can be tailored to the specific needs and the working methods of each call center, especially the questioning form, the scripting and the statistics.

# 4



### Customized GUI

The solution's theme is adapted to the call center's graphics, logos and color codes are used to customize the skin of the different user interfaces in order to preserve the identity of the center.

# 5



### Time saving

Active CRM enables call centers to focus on their core business in order to increase their revenue. The activity is fully automated, from the campaign creation to the result of the commercial approach.

# 6



### Performance & reliability

Developed from a real analysis of actual needs and based on the latest technologies in software development, the solution has been optimized to provide a better experience in terms of responsiveness, stability and scalability.

# 7



### Ergonomics & usability

Simple, intuitive and ergonomic, the solution is user friendly and simplifies the access to the different modules thanks to the navigation systems and the integrated dashboards.

# 8



### Quick start

Active CRM is a turnkey solution easy to deploy, updates are automatic. An extensive training is provided to users in order to ensure an effective use.

## 2. Features

Active CRM is a set of modules based on logical separation of tasks and responsibilities. The solution consists of four distinct and complementary client modules. To run these different modules, two servers are set up:

- **Production server (local):** Hub of the solution, it provides processing, data synchronization and updates. A console provides an overview of the status of the Server and allows its administration.
- **Centralization server (remote):** centralized data platform that enables sale agents to access their agendas and managers to monitor the activity.

Client applications are distributed on two levels: Win32 applications at the local level (Agent and Supervisor) and remotely accessible Web applications (WebAgenda and WebMonitor).

### 2.1. Agent

Intended for phone operators, the agent module provides campaign processing through a predefined telemarketing questioning form. It was designed to make life easier to the users and improve their productivity.

Interfacing with telephony solutions present in the market (Alcatel, Ericsson, Asterisk, etc...) enables automatic dialing from the contact form and simplifies the operator tasks.

#### Main roles:

- **Telemarketing:** This action provides an opportunity to build a qualified database, an important tool that can be used for specific marketing approaches thanks to the multi-criteria selection and the exporting feature.
- **Appointments making:** As part of a campaign to make appointments, phone operators have access to the sale agents' agendas and can make reservation through an easy to use integrated calendar.

#### Key functionalities:

- Prospect information sheet
- Questionnaire's script view
- Manual or automatic call process(CTI)
- Prospect information gathering via questionnaire
- Call classification
- Automatic classification of unanswered calls (CTI)
- Recall scheduling
- Appointments reservation with calendar
- Appointments history
- Access to the sale agents agendas
- Supervisor's messages view

## 2.2. Supervisor

This module allows the management of the call center like campaigns creation and activity reporting, easily and with a remarkable efficiency.

With its intuitive user interface, the Supervisor module makes life easier for the user and allows it to perform its tasks under the best conditions. The dashboard and the various available analysis tools allow real-time monitoring of campaigns' progress and team performance.

### Main roles:

- **Campaigns building:** Telemarketing campaigns creation from imported files with the ability to reuse existing campaigns.
- **Appointments supervising:** Confirmation of appointments made by phone operators and monitoring the outcome of commercial approaches as well as the realized revenue.
- **Analysis and Reporting:** Generating detailed statistics with graphics, in order to get a global overview of the activity, making possible to take the necessary decisions to improve productivity.

### Key functionalities:

- Dashboard (telemarketing, appointments, sales etc...)
- Campaign management (creation, monitoring, history etc...)
- Import files from contacts flat file (text)
- Associate Campaigns to phone operators
- Campaign recycling (reset, reuse)
- Appointments supervising (confirmation, history, commercial approach etc...)
- Access to the sale agents' agendas
- Booking and availability slots marking on the agenda
- Call processing history
- Financial management (revenue and sales details)
- Detailed statistics of the activity and performance
- Message broadcasting to phone operators
- Accounts management (supervisors, phone operators and sale agents)
- Advanced search and statistics exportable to Excel
- Use of the qualified prospects database
- Interfacing with phone systems via the CTI

### 2.3. WebAgenda

This Web application consists of an extranet that can be used by the sale agents to check their appointments agendas wherever they are in order to organize their days and plan their route.

The appointments sheets have all the necessary information such as the prospect coordinates, the data collected by the phone operator and the supervisor's remarks.

The sale agent can also enter the result of his approach (sale or otherwise) and eventually a quality report.

#### Key functionalities:

- View appointments agenda
- View appointments details
- Report commercial approach result
- View personal statistics

### 2.4. WebMonitor

The WebMonitor module (extranet) give the call center managers the possibility to monitor the activity remotely, they can view the agenda of each sale agent, view appointments sheets, check the sales or view production statistics in order to get a real and comprehensive analysis of the activity.

#### Key functionalities:

- View sale agents' agendas
- Track commercial approaches
- Monitor sales & revenues
- View detailed statistics

### 3. System requirements

In order to run Active CRM different modules in the best conditions, we recommend the following configurations:

Module	Type	User	System requirements
<b>Agent</b>	Win32	Phone operator	<ul style="list-style-type: none"> <li>▪ PC Pentium 4 ~ 3 GHz / 512 Mb RAM / 40 Gb HDD</li> <li>▪ Microsoft Windows XP SP3 / Vista SP2 / 7 SP1</li> </ul>
<b>Supervisor</b>	Win32	Supervisor	<ul style="list-style-type: none"> <li>▪ PC Pentium 4 ~ 3 GHz / 512 Mb RAM / 40 Gb HDD</li> <li>▪ Microsoft Windows XP SP3 / Vista SP2 / 7 SP1</li> </ul>
<b>Server</b>	Win32	(system)	<ul style="list-style-type: none"> <li>▪ Server Xeon ~ 3 GHz / 8 Gb RAM / 500 Gb HDD</li> <li>▪ Microsoft Windows Server 2008 R2</li> <li>▪ Microsoft SQL Server 2008 R2</li> <li>▪ Permanent Internet connection</li> </ul>
<b>WebAgenda</b>	Web	Sale agent	<ul style="list-style-type: none"> <li>▪ Computer connected to the Internet</li> <li>▪ Web browser (Chrome, Firefox, IE etc....)</li> </ul>
<b>WebMonitor</b>	Web	Manager	<ul style="list-style-type: none"> <li>▪ Computer connected to the Internet</li> <li>▪ Web browser (Chrome, Firefox, IE etc....)</li> </ul>