

# IRIS Exchequer CRM – Sophisticated customer intelligence

IRIS Exchequer's range of CRM solutions provides a comprehensive suite of tools that combine and utilise all of your organisation's knowledge, information and expertise, saving you time and maximising selling opportunities.

## Manage your sales cycle from start to finish

From customer service, marketing, sales, support and finance, your teams will have instant access to powerful, accurate information on both your customers and prospects – giving you all the tools you need to effectively manage your campaigns, pipeline and sales opportunities.

Ideal for all types and size of business, IRIS Exchequer's range of CRM solutions have been intuitively designed to give you the power to map the whole sales process from initially capturing a prospect's details, running marketing campaigns and telesales activities to producing quotations and sales orders.

## Complete visibility

Ideal for office-based and remote users, our CRM solutions enable staff working out in the field to take orders and access all-important information whilst on the road.

Secure and accessible to users across multiple sites and remote locations, each record holds all the contact information your teams will ever need – from notes and contact details to quotes and opportunities – giving your staff a single, unified view of each customer.

## Information at your fingertips

Actions can be scheduled and automatically emailed to users who will be taken straight to the customer record to address any outstanding issues or opportunities – providing staff with instant access to key information at all times.

A wealth of information on customer purchase history is available and teams can produce, store and track letters, faxes, mail shots, spreadsheets, drawings, images and emails as well as link scanned hard copies and incoming electronic documents.

## Generate optimum return

IRIS Exchequer's CRM solutions enables your marketing budgets to work harder by providing insight into which of your marketing campaigns are delivering the greatest impact.

Interrogate campaigns on a cost-per-lead basis and ensure marketing activities are focused on those that generate the best return.

## Effective management of sales opportunities

Capture every detail of the sales process, recording specific product or service type, new or repeat business, sales value, timescale and marketing source.

Triggers and alerts can also be set to ensure no opportunities are overlooked.

## Generate quotes effortlessly

Our CRM solutions integrate with your Exchequer accounts data to produce configurable quotes, orders and invoices which can be formatted in Microsoft Word, Excel or Adobe PDF document templates.

Furthermore, users can access critical information on product stock levels, process and discounts as well as create quotes utilising the stock information held within IRIS Exchequer, even whilst working off-line.

For more information, please contact your Client Development Manager, call **0844 815 5594** or email **[exchequer@irisenterprise.co.uk](mailto:exchequer@irisenterprise.co.uk)**

