MAZARS CUSTOMER RELATIONSHIP MANAGEMENT

SOLUTION OVERVIEW

Mazars CRM Solution brings modular approach to complete customer cycle from pre-sales to post-sales by defining, Inbound and Outbound opportunities, features of internet and phone, tracking sales follow-ups to prospecting clients and finally retaining through better service. It focuses on developing a comprehensive perspective about what your customers— whether individuals or institutions—want or need and matching those requirements with services to provide quick and responsive action on their requests.

SOLUTION IS FOR YOU

INCREASE SALES SUCCESS
Shorten the sales cycle and improve close rates with leads and potential management, customizable workflow rules for automated sales processes, quote creation, and order management.

UNDERSTAND CUSTOMER NEEDS
Comprehensive reports let you forecast sales, measure business activity and performance, track sales and service success, and identify trends, problems, and opportunities.

VIEW COMPLETE CUSTOMER INFORMATION
Our CRM offers a centralized, customizable view Customer Information, sales and support activity and customer history.

INVENTORY AND PRODUCT MANAGEMENT
Manage organization-wide products and associates products with other modules for a better 360 degrees view.

Work with Microsoft Outlook / Thunderbird or the Web
Access full functionality of webmail and work from any location using a Web browser.

SHARE INFORMATION
View, update, and share sales and customer service information across teams and departments.

INTEGRATE POWERFULLY
Integrate with Office, Business Solutions for Financial Management, and other business systems.

FEATURES

- User friendly
- Hassle free product
- Mazars offers CRM Solution under the following delivery models:
  - On Premise Deployment
  - Availability of CRM on Cloud
- Open Source add-ons for Microsoft® Outlook®, Mozilla/Thunderbird, and Microsoft® Word®
- No additional software licence cost involved, build on open source technologies
- Rich user-experience with product customization
- Excellent customer support backed by committed experienced technical team

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KEY MODULES

SALES FORCE AUTOMATION

- Manage leads, accounts, contacts, and opportunities
- Import data from external sources, such as Web downloads, tradeshows, seminars, and direct mail
- Export data to spreadsheet software, such as Microsoft® Excel®, OpenOffice®, and others to analyze the sales pipeline and quickly identify the bottlenecks if any
- Associate customer records with other records in the system for a better 360 degrees view of the customer record
- Attach customer-specific documents to the customer details for a quick reference in future

HELP DESK

- Manage trouble tickets end-to-end
- Notify status of the trouble tickets to the customer
- Track complete history of the trouble tickets
- Create frequently asked questions
- Statistics of the trouble tickets for a better ticket management

INVENTORY MANAGEMENT

- Manage organization-wide product life cycle end-to-end
- Create different price books for products based on customer segments
- Procure products from the selected list of vendors
- Complete the sales management cycle with an integrated Quotations, Order processing, and
- Invoicing system

SECURITY MANAGEMENT

- Manage user profiles and field-level access to the users
- Create team roles as per your organization structure
- Control the access to modules according to the user's roles
- Archive the login history of each user for better auditing

E-MAIL INTEGRATION

- Fetch inbound E-mails and associate to the existing contacts
- Manage mailing lists and execute HTML based mass E-mail campaigns
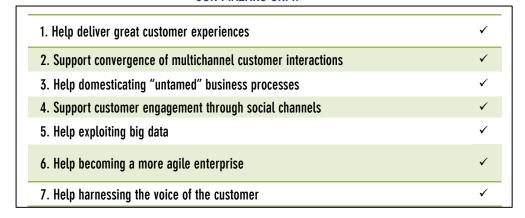- Send mass E-mails to the contacts and other users Reports & Dashboards

REPORTS & DASHBOARDS

- Sales pipeline analysis by sales stage
- Sales opportunities by lead source
- Drill-down the dashboards by time and opportunity stage

PRODUCT FLEXIBILITY

- Add custom fields in all the modules, such as text, number, currency, pick lists, and others as per your business requirements
- Customize tabs using drag & drop so that modules that are not relevant to sales process can be hidden
- Change the look and feel of the user interface

OUR MAZARS CRM:

1. Help deliver great customer experiences	✓
2. Support convergence of multichannel customer interactions	✓
3. Help domesticating "untamed" business processes	✓
4. Support customer engagement through social channels	✓
5. Help exploiting big data	✓
6. Help becoming a more agile enterprise	✓
7. Help harnessing the voice of the customer	✓

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SUCCESS STORIES

AL MEEZAN INVESTMENT MANAGEMENT LIMITED

A group company of Meezan Bank Limited and Pakistan Kuwait Investment Company Private Limited, Al Meezan Investment Management Limited is the largest Shariah compliant asset management company in Pakistan with a solid track record of over 18 years of fund management.

Mazars successfully implemented its CRM solution at Al Meezan and integrated it with their legacy financial and data warehouse system. After our implementation, response time to their customer related queries has drastically been improved, our solution enabled them to see 360° view of customer with help of capturing data from different customer touch points i.e. Phone, email, SMS, web request forms, physical request forms. Our client is satisfied and experiencing the enhanced service level which result in lessor turnout and increase in customer satisfaction as well as better tracking of sales pipeline with proper workflow and activities management using our CRM solution.

UBL FUND MANAGERS

A wholly owned subsidiary of United Bank Limited (UBL) one of the largest private banks in Pakistan, UBL Fund Manager provides companies, institutional clients and individual clients with advisory services, comprehensive investment solutions, and excellent products.

They conducted a program to improve and standardize all external technology connectivity. One aspect of this program related to better customer relationship to enable the services provided to be more efficient and customer focused to bring growth in customer satisfaction and loyalty.

Our Mazars team reviewed the "CRM – Business Requirements Document" of UBL Funds and assessed information against our experience in implementing CRM and Contact Center Solution. We customized our CRM solution according to their Business Requirement Document and also covered Telemarketing, Sales, and Service and Complaint Handling. Our implemented CRM solution brought in operational efficiency and helped to adopt more customer centric approach of doing business.

Mazars is present in 5 continents.

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Praxity
MEMBER
GLOBAL ALLIANCE OF
INDEPENDENT FIRMS

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