Dear Customer

Thank you for downloading this preparation letter for basic settings. It contains a series of questions. Your answers will enable you set up your new CRM system in a way that fits your business. A system that is set up in a good way, will help your users to adopt to the new CRM system much faster.

1.1 Companies and contacts

Information that you register in the system can be used as search criteria when you want to find certain target groups, for example for sending newsletters or other mailings. Therefore, it is important to discuss and consider your need for segmentation, and based on what criteria.

- How should relevant target groups be classified? E.g. customer, prospect, supplier, partner.
- Which industries do your target groups relate to? Do your customers work in, for example, transport, IT, service, production etc.?
- What information would you like to register about your customers/prospects/partners etc.? Is there any other information you would like to include on the company card to enable searches and reports?
- What kind of marketing activities and customer campaigns do you perform and how would you like to tag the customers to find your target groups? E.g. tag customer with “newsletter”, “product information” and “reference customer”.
- What contact persons do you meet and which do you want to be able to target? E.g. General Manager, Purchase Manager, Project Manager etc.
- What properties would you like to assign to these contacts? E.g. newsletter recipient, driving force, ambassador, reference person.

1.2 Activities and documents

- What are your needs for activity registration and follow-up? What activities would you like to log and report on? Discuss and think about the level of detail (e.g. telephone or telephone out/in, meeting or 1st/2nd customer meeting).
- What documents/templates do you use and want to be able to write from SuperOffice CRM? E.g. offer templates, letters, and faxes.
- Do you have any input or thoughts about what steps the sales process should consist of? Also, what kind of hit rate these should be assigned?
- Do you have any current reports that you would like to retain in the CRM solution? Feel free to specify your reporting needs.
- Do you have a need for storing information linked to different projects, and if so what types?

1.3 Quote Management

- Will the incorporated information from the ERP System be used for creating quotes?
- Should ERP information be synchronized, imported or viewed?
- Should product information’s be configured in SuperOffice CRM or directly took out of the ERP system (Terms and Conditions, Prices)
- Do you want to create offers directly out of SuperOffice Quote Management
- Is there a need to handle different currencies and price lists
- Do you have special customer related discount models
- Do you want to offer different quote alternatives (different pricing, different sizing)

1.4 Users

- Which user groups/departments will be using SuperOffice CRM and which users belong to which groups/departments? Create a list in Excel perhaps.
- Which users should be superusers/administrators of the system?
- Is there a need to differentiate information between user groups? Should all groups be able to see the same activity types, documents, customer categories etc.? Or should some of them only be visible to certain groups?
- If yes, which users should see which information?

1.5 Privacy

- What kind of personal data do you have?
- What is your purpose and legal base for storing these persons in your database?
- Do you need different purposes and legal basis?
- What is your retention period for storing persons?
- How does a person "enter" your SuperOffice and what is the source?

For more information and tips about how to get started go to our Community site.