

iCare for Distribution

powered by Microsoft Dynamics CRM



Why?

The wholesale & distribution industry is currently facing tough challenges. Being a relatively standardized though very complex sector, characterized by a fierce competition, low margins and high logistics costs, the way it is organized and managed is key for the players' performance.

Increased business velocity based on complete and accurate information about demand, inventories and customers, controlled costs and quick responses to customers and market trends are the key success factors of the sector.

Matricia has got the tools to help you succeed: iCare for Distribution.

What is it?

iCare for Distribution is a Customer Relationship Management application built on the Microsoft Dynamics CRM platform specifically for the wholesales and distribution sector.

The solution is designed for the use of Area Sales Managers, Regional Managers, National Sales Managers and Marketing people and can be extended to the Merchandising workforce.

It provides the comprehensive 360° degree management of the relationship with distributors and final customers, and ensures proper communication and management of the internal sales team.

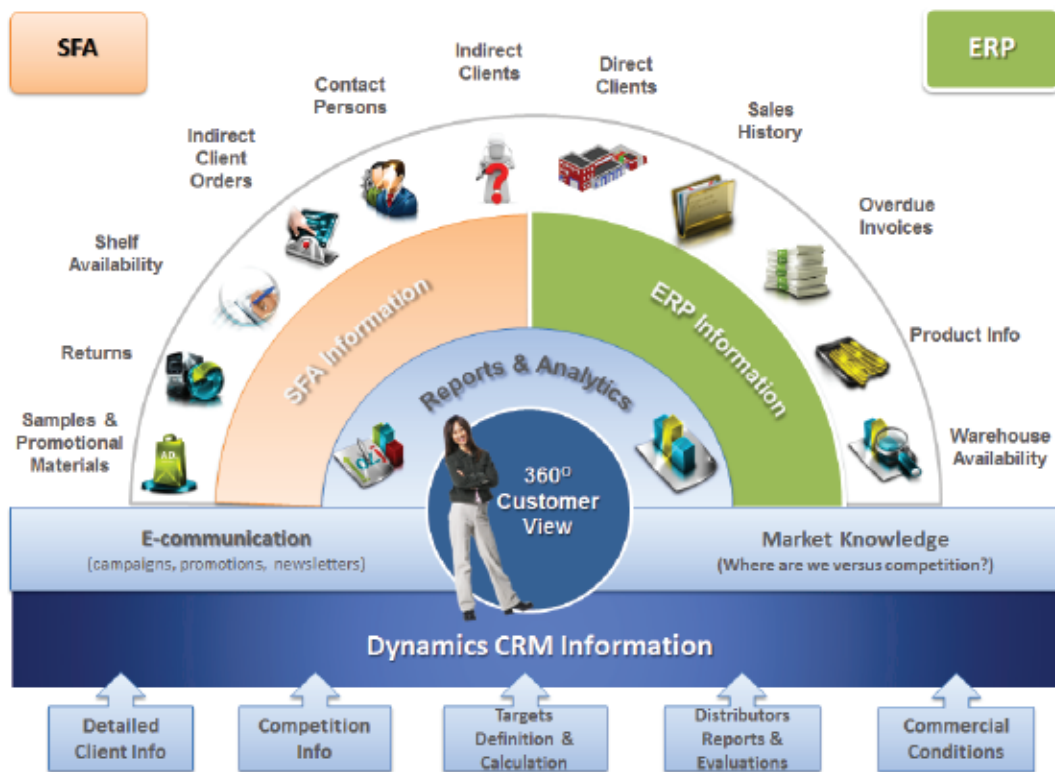
It responds to specific questions that usually find answers after searching for information in multiple systems (ERP, emails, reports, Excel, etc.) such as:

- Reporting from the ERP integrated data all the sales information needed;

- Activities reporting and management of the sales force (meetings, mails, telephone calls);
- Management of the relationship with distributors (activities, contracts, contract expiry dates, commercial terms);
- Transfer information from management to sales force by integrated task management and monitoring (promotions, focus on products, etc.);
- Targets input and comparative reporting with actual sales;
- Commission calculation for the sales people;
- Off invoice discounts calculation for the distributors;
- Integrating information from third party merchandising systems or own iCare merchandising module.

iCare for Distribution collects not only the quantitative information about sales from the company's ERP but also qualitative information about the market from the field sales force, market research providers and directly from distributors.

The system is a unique tool that enables the accurate analysis of the sales activity, demand and competition, the possibility of promptly taking the right strategic sales and marketing decisions and the opportunity to timely and efficiently communicate with direct and indirect customers (distributors, retailers and /or consumers).



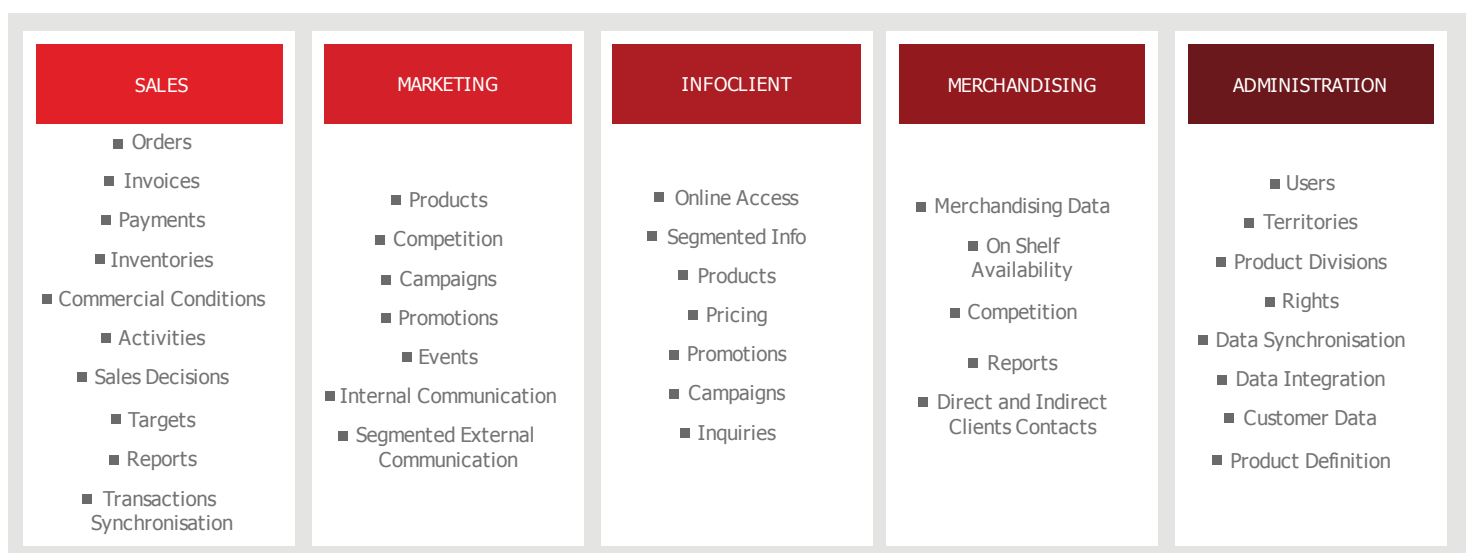
The principles applied when designing iCare for Distribution were simplicity, ease of use, fast implementation and industry tailored functionality, using the best available technology and vision about the future. In this respect some benchmarking numbers and ideas were used as the foundation:

- A user should be able to learn and use properly the system after 1 day of training;
- Normally a company should be able to adopt the new CRM strategy in less than 2 months;
- 75-80% of industry functionality and best practice is embedded in the product or based on prebuilt configurations;
- The Microsoft Dynamics CRM platform comes with extraordinary advantages in Outlook integration and mobility, in the sense that users can do their entire work in the familiar Outlook interface on their computers and get it deployed and synchronized with their mobile devices (laptops, smartphones, PDAs).

Besides considering the critical needs of the distribution industry, we are aware that increased competitiveness needs visionary approaches. Therefore, iCare for Distribution comes with the following innovative functionalities:

- **InfoClient** – a portal embedded in the CRM system that enables efficient communication with the company's distributors, retailers and/or consumers, providing them with accurate products and promotions information always in due time.
- **Merchandising** - a functionality that allows merchandisers to input data gathered from the field (on-shelf info, competition - products, prices, promotions, contacts) directly into the CRM via any mobile devices they use (smart phones, PDAs, laptops etc.), through an interface that can be customized according to the users' needs. This feature allows the use of iCare for Distribution as a unique tool for the entire sales and marketing activity, consequently increasing the efficiency and correctness of data collection and analysis, all these leading to rapid and appropriate strategic sales and marketing decisions.

iCare for Distribution – Solution Overview



Sales Module

The Sales Module covers the sales department's activity, as follows:

- **Daily synchronization** of all transactions (orders, invoices, payments, inventory) related to the sales activity, providing the sales force with timely information;
- **Activities reporting and monitoring** - all the calls (meetings, phone calls etc.) and tasks are scheduled in the Outlook type calendar of iCare for Distribution or are synchronized with those input in Outlook. All the activity reports (call reports, e-mails, memos) are recorded in due time in the system, the full history of the interaction between the sales force and distributors or retailers/consumers being kept and tracked in the system;
- **Information** regarding the sales strategy (new products, pricing, promotions, changes of commercial conditions etc.) is input into the system as soon as decided and instantly made available to the entire sales and marketing workforce;
- **The targets per sales agents/ distributors/ regions** etc. are set into the sales module of iCare for Distribution;
- **Reports regarding the sales activity** (sales per distributor/ region/ product/ sales vs targets / collections, bad payments etc.) can be extracted by the sales people directly from the iCare system, without any input from other departments.

InfoClient

In our attempt to provide our customers with visionary functionalities that add value to their business, we have built the **InfoClient portal**, based on the **Microsoft Sharepoint platform**, directly into the iCare for Distribution CRM system. On this portal, the sales and marketing staff can post all the relevant information for distributors and their customers (retailers, consumers) regarding products features, new products to be launched, pricing, promotions. The information can be segmented for each category of customers. They can also have access for requesting specific data or for inquiries. This functionality provides the company and its customers timely and effective information that leads to increased competitiveness for all the business partners involved.

Merchandising Module

Another innovative feature of iCare for Distribution is the **Merchandising Module** that turns the system into a common tool for the entire sales and marketing forces. Its functionalities consist of the following:

- **Merchandising data** (on-shelf availability, competition data like products, prices, promotions) is input in the system by the merchandisers on the field;
- **Merchandising reports** concerning the data collected can be extracted directly from iCare for Distribution;
- **Contact collection** (contact details of distributors, retailers, etc.) is allowed for merchandisers.



Marketing Module

The Marketing module offers the marketing staff all the functionalities required for analyzing the sales and marketing data, take quick and appropriate marketing decisions and efficiently communicate them within and outside the company.

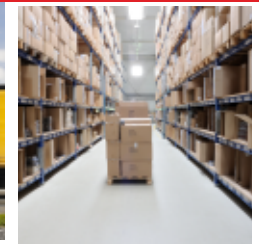
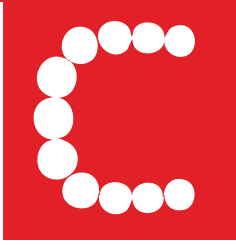
- Based on the information input by the sales department, marketing analysis regarding market trends, competition, market segment, product segment are provided through the reports generated by the system;
- Decisions regarding new products, promotional activities, pricing etc. are input by the marketing staff directly into the system;
- The embedded approval workflows allow quick distribution to the sales department and via the InfoClient portal, to distributors, retailers and/or consumers;
- Based on the contacts collected and input by merchandisers, the marketing department is enabled to distribute segmented communication to different categories of customers.

Administration Module

The Administration Module allows a flexible out-of-the-box definition of the sale cycle components, as follows:

- **User definition** (members of the Sales & Marketing departments) with their roles and hierarchies. User profiles and rights can be set according to the user's responsibilities;
- **Territories management** – defining the territory units, as per company strategy (territory, region, area, Geographical Sales Units - GSUs);
- **Definition of synchronization processes** with other systems like ERP, SFA, BI, etc.;
- **Customer data and product definition** are synchronized from any ERP used by the company.

i care®



To whom iCare for Distribution is addressed? ■■

Sales Middle Management

- Recording daily activities
- Searching data (orders, sales per distributor/region, payments, bad debts, inventories)
- Scheduling and reporting calls to distributors and retailers
- Creating and accessing reports&analyses
- Synchronizing data

Sales Managers

- Validating proposed targets
- Analyzing the sales department's performance
- Get and analyze sales data
- Timely distribute sales strategy decisions and guidelines in the organization through iCare for Distribution

Marketing Department

- Get information and reports for the marketing analysis
- Timely distribute marketing decisions and guidelines in the organization through the system
- Provide detailed and timely marketing information via the InfoClient portal

Merchandisers

- Input data collected from the market is directly input in iCare for Distribution via their mobile devices
- Create and keep the contacts database up to date by inputting contacts gathered from the field in the iCare for Distribution system

Benefits ■■

iCare for Distribution offers companies acting in the wholesale & distribution sector all the benefits of a CRM specifically designed for them on the Microsoft Dynamics platform, which is considered by industry analysts as one of the market leaders in sales force management.

75-80% of the business requirements and best practices are already built in, leading to a **quick delivery** and an **attractive cost of ownership**. The system offers both the flexibility provided by a generic CRM and the specificity of the particularly addressed design.

- One single view of the customer with proper information from multiple systems in the company.
- Fluid communication inside the organization from sales force to management and backwards.
- The company is always able to track the history of communications and interactions with the customer regardless of the fluctuations in the workforce.
- Sales and marketing people have a unique place to work.

- Marketing people can use modern e-communication methods for different categories of customers, properly segmented and personalized.

- Marketing people can feed relevant information through the CRM into the InfoClient Portal so the client is properly informed.

- Being natively integrated with Microsoft Office, iCare for Distribution has the familiar look and feel of the tools users usually work with, eliminating therefore the adoption concerns usually raised by new systems - **users will continue to work the way they are used to.**

- We know how difficult it is to put together and analyze data provided by different sources and departments. Therefore we provide the sales and marketing departments a unique tool to collect all the necessary information, integrating in iCare for Distribution sales and marketing data from the company's ERP, distributors and merchandisers. Field sales staff have the possibility to **work online-offline** being able to input data directly in the iCare for Distribution system through their **mobile devices**.

- **Increased business velocity** through easier and more accurate analysis of all sales and market data, an efficient communication within the company, full traceability of all interactions with the company's distributors and their customers, which lead to quicker responses to the customers' needs and market trends.

- The **innovative InfoClient Portal** embedded in the system offers a platform for **rapid and targeted communication** between the company and its customers (direct and indirect), increasing the effectiveness of marketing activity (campaigns, promotions, etc.), contributing as well to the increased speed of responses to the market.

- To customers who want to avoid infrastructure related inconveniences, we offer iCare for Distribution as **Software as a Service (SaaS)**.

About Matricia Solutions ■■

Matricia Solutions is a business and technology consulting organization whose core capabilities are mainly in implementing, supporting and troubleshooting enterprise software in the Customer Relationship Management, Enterprise Content Management, Enterprise Resource Planning and Business Intelligence areas. Our Senior Project Managers have worked with various enterprise applications for more than 10 years and have successfully run tens of projects in the most diverse business sectors, including many in distribution.

www.matricia.ro

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